11i Implement and Use Shipping Execution

Student Guide

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Preface

Profile

Before You Begin This Course

Prerequisites

- There are no prerequisites for this course.

How This Course Is Organized

11I Implement and Use Shipping Execution is an instructor-led course featuring lecture and hands-on exercises. Online demonstrations and written practice sessions reinforce the concepts and skills introduced.

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Related Publications

Oracle Publications

Additional Publications

- System release bulletins
- Installation and user's guides
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Typographic Conventions

Typographic Conventions in Text

Convention	Element	Example
Bold italic	Glossary term (if there is a glossary)	The ***algorithm*** inserts the new key.
Caps and lowercase	Buttons, check boxes, triggers, windows	Click the Executable button. Select the Can't Delete Card check box. Assign a When-Validate-Item trigger to the ORD block. Open the Master Schedule window.
Courier new, case sensitive (default is lowercase)	Code output, directory names, filenames, passwords, pathnames, URLs, user input, usernames	Code output: `debug.set ('I", 300);` Directory: `bin` (DOS), `$FMHOME` (UNIX) Filename: Locate the `init.ora` file. Password: User `tiger` as your password. Pathname: Open `c:\my_docs\projects` URL: Go to `http://www.oracle.com` User input: Enter `300` Username: Log on as `scott`
Initial cap	Graphics labels (unless the term is a proper noun)	Customer address (*but* Oracle Payables)
Italic	Emphasized words and phrases, titles of books and courses, variables	Do *not* save changes to the database. For further information, see *Oracle7 Server SQL Language Reference Manual.* Enter `user_id@us.oracle.com`, where *user_id* is the name of the user.
Quotation marks	Interface elements with long names that have only initial caps; lesson and chapter titles in cross-references	Select "Include a reusable module component" and click Finish. This subject is covered in Unit II, Lesson 3, "Working with Objects."
Uppercase	SQL column names, commands, functions, schemas, table names	Use the SELECT command to view information stored in the LAST_NAME column of the EMP table.

Convention	Element	Example
Arrow	Menu paths	Select File–> Save.

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Brackets	Key names	Press [Enter].
Commas	Key sequences	Press and release keys one at a time: [Alternate], [F], [D]
Plus signs	Key combinations	Press and hold these keys simultaneously: [Ctrl]+[Alt]+[Del]

Typographic Conventions in Code

Convention	Element	Example
Caps and lowercase	Oracle Forms triggers	`When-Validate-Item`
Lowercase	Column names, table names	`SELECT last_name FROM s_emp;`
	Passwords	`DROP USER scott IDENTIFIED BY tiger;`
	PL/SQL objects	`OG_ACTIVATE_LAYER (OG_GET_LAYER ('prod_pie_layer'))`
Lowercase italic	Syntax variables	`CREATE ROLE role`
Uppercase	SQL commands and functions	`SELECT userid FROM emp;`

Typographic Conventions in Navigation Paths

This course uses simplified navigation paths, such as the following example, to direct you through Oracle Applications.

(N) Invoice > Entry > Invoice Batches Summary (M) Query > Find (B) Approve

This simplified path translates to the following:

1. (N) From the Navigator window, select Invoice > Entry > Invoice Batches Summary.
2. (M) From the menu, select Query > Find.
3. (B) Click the Approve button.

Notations :

(N) = Navigator

(M) = Menu

(T) = Tab

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(I) = Icon

(H) = Hyperlink

(B) = Button

Typographical Conventions in Help System Paths

This course uses a “navigation path” convention to represent actions you perform to find pertinent information in the Oracle Applications Help System.

The following help navigation path, for example—

(Help) General Ledger > Journals > Enter Journals

—represents the following sequence of actions:

1. In the navigation frame of the help system window, expand the General Ledger entry.

2. Under the General Ledger entry, expand Journals.

3. Under Journals, select Enter Journals.

4. Review the Enter Journals topic that appears in the document frame of the help system window.

Getting Help

Oracle Applications provides you with a complete online help facility.

Whenever you need assistance, simply choose an item from the Help menu to pinpoint the type of information you want.

To display help for a current window:

1. Choose Window Help from the Help menu, click the Help button on the toolbar, or hold down the Control key and type 'h'.

   A web browser window appears, containing search and navigation frames on the left, and a frame that displays help documents on the right.

   The document frame provides information on the window containing the cursor. The navigation frame displays the top-level topics for your responsibility, arranged in a tree control.

2. If the document frame contains a list of topics associated with the window, click on a topic of interest to display more detailed information.

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3. You can navigate to other topics of interest in the help system, or choose Close from your web browser's File menu to close help.

Searching for Help

You can perform a search to find the Oracle Applications help information you want. Simply enter your query in the text field located in the top-left frame of the browser window when viewing help, then click the adjacent Find button.

A list of titles, ranked by relevance and linked to the documents in question, is returned from your search in the right-hand document frame. Click on whichever title seems to best answer your needs to display the complete document in this frame. If the document doesn't fully answer your questions, use your browser's Back button to return to the list of titles and try another.

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R11i Oracle Shipping Execution: Overview of Picking and Staging

Chapter 1

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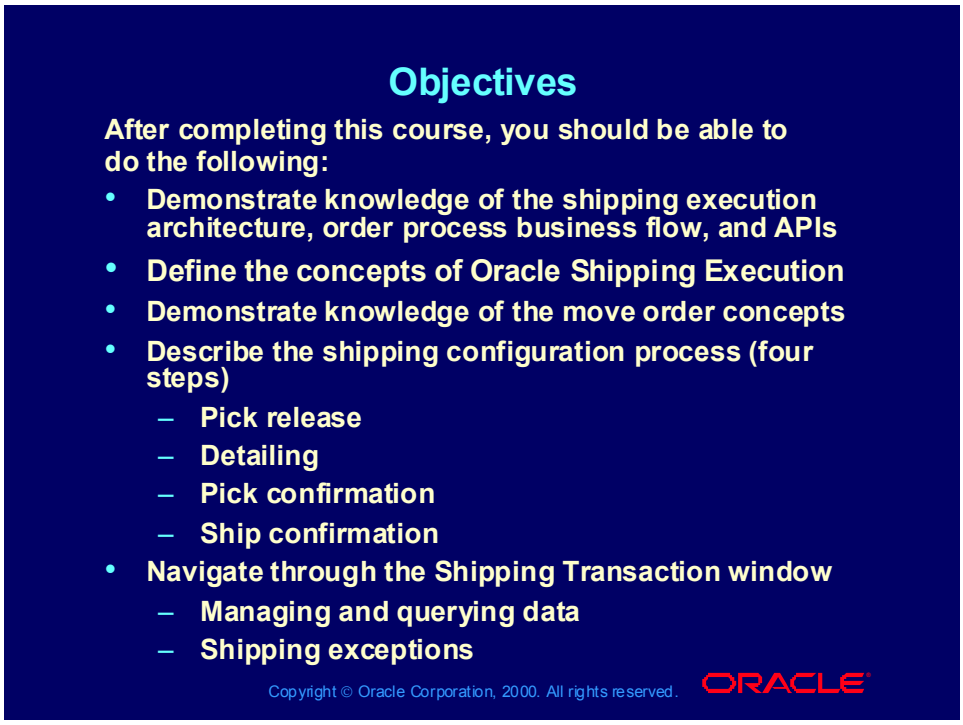

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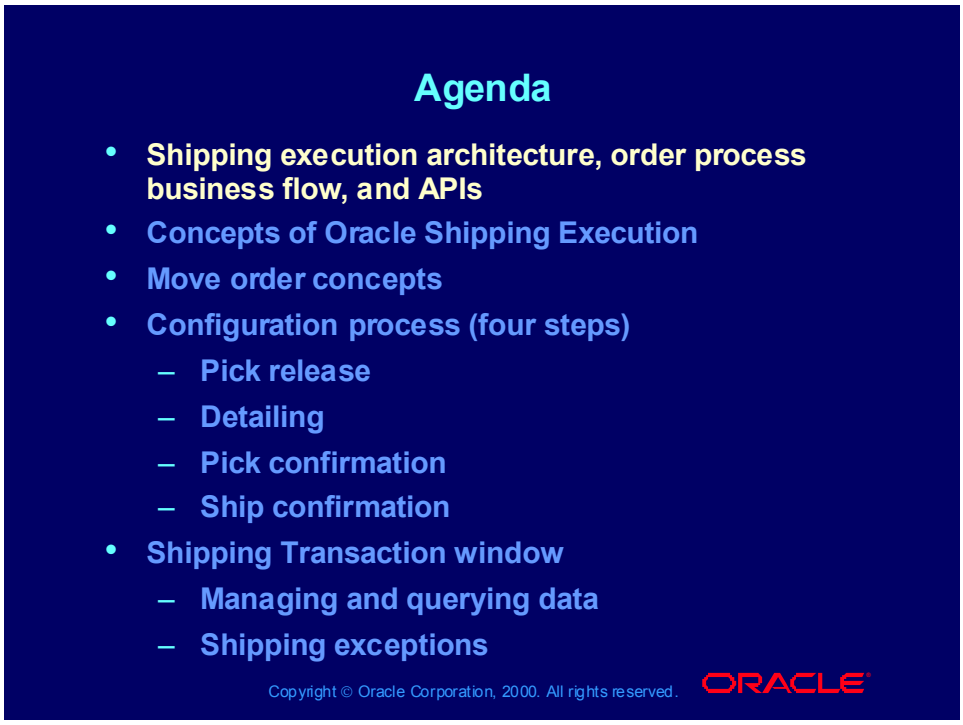

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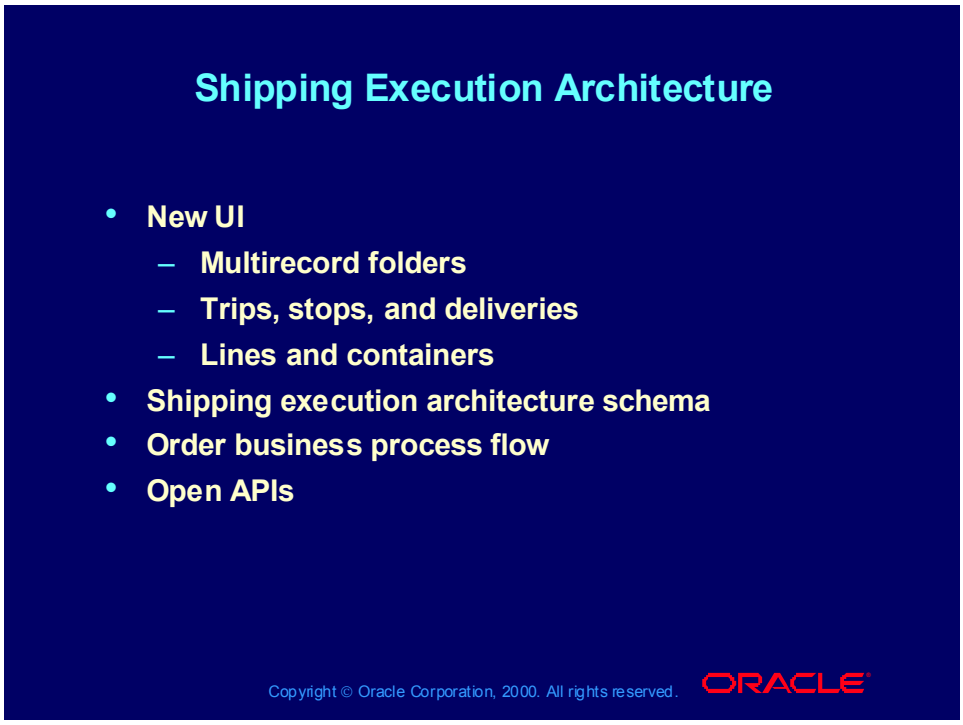

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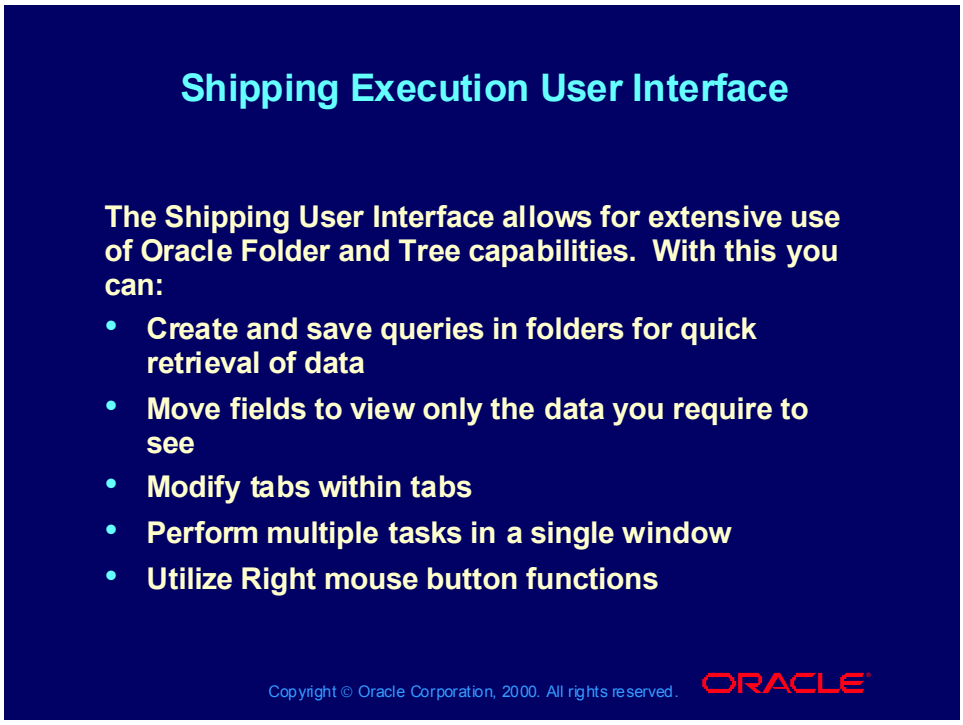

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Shipping Execution User Interface

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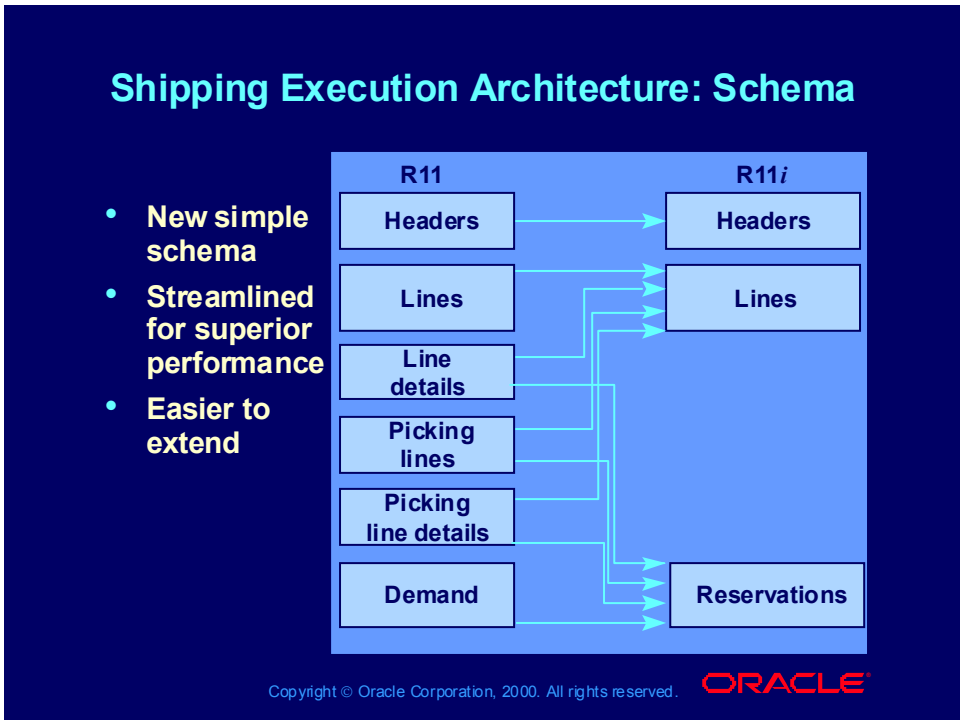
Shipping Execution Architecture: Schema



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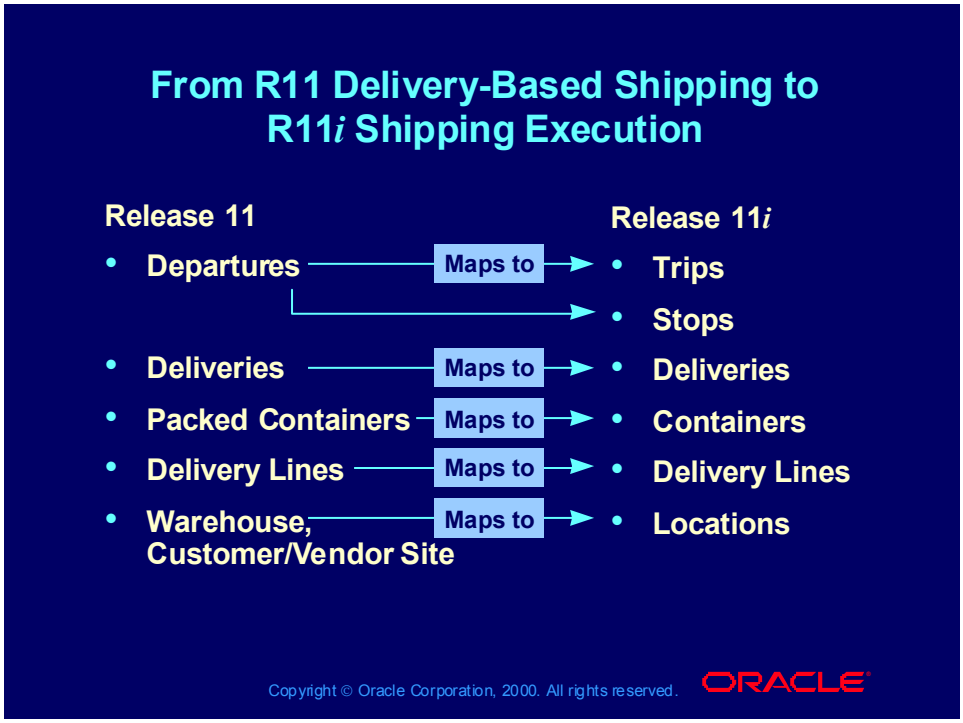
From R11 Delivery-Based Shipping to R11i Shipping Execution



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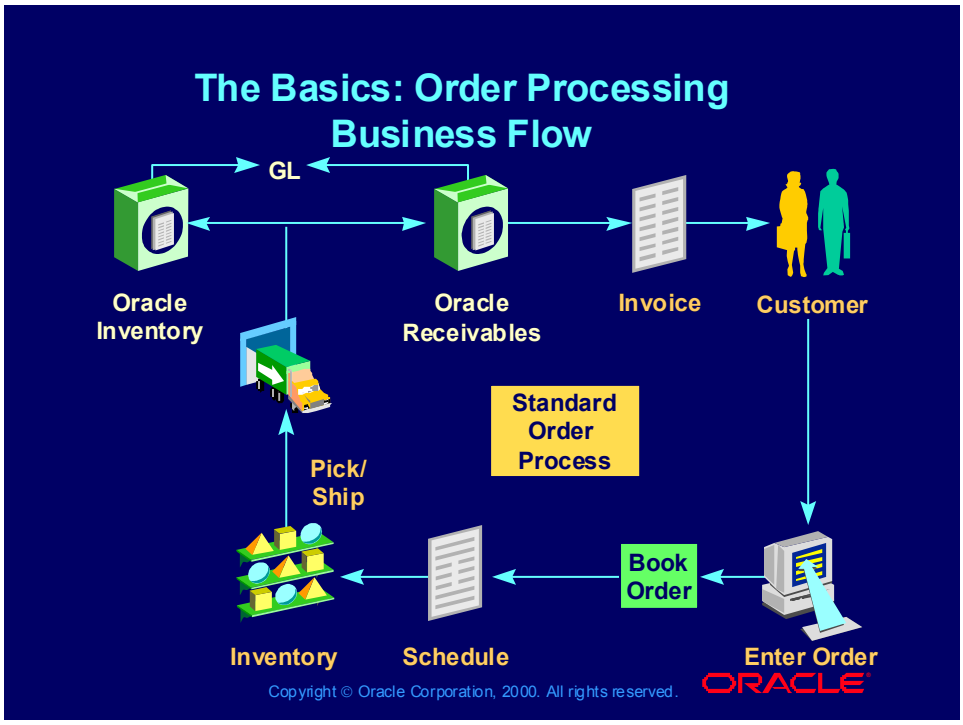
The Basics: Order Processing Business Flow



The process begins in the upper right corner of the slide: A customer's order is entered either manually or through an automated process. When the order has been booked, (the signal that the order contains all necessary information to be a firm order and can be processed through its order cycle), you move to the next step.

Depending upon the items listed on the order, the next steps could be a subset or combination of scheduling the items, building the items and finally picking and shipping these items to customer. Once the items are shipped, information is forwarded to Oracle Inventory and Oracle Receivables. Oracle Inventory and Oracle Receivables sends the accounting information to the Oracle General Ledger.

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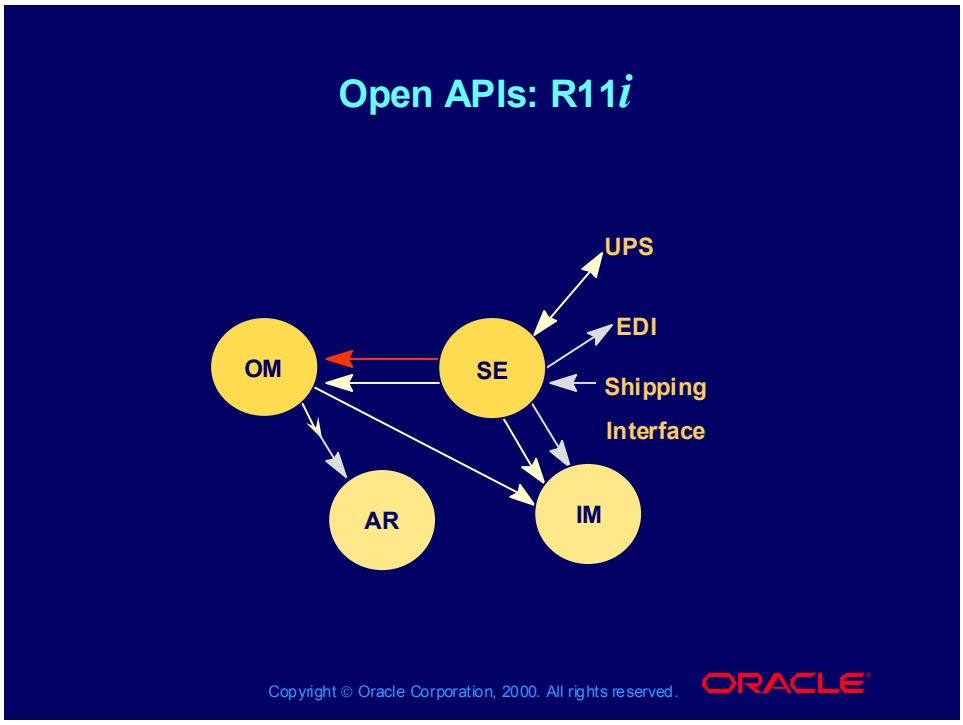
Open APIs: R11i



R11i Order Management Suite Graph

Order Management Suite

- Reduces the number of interfaces
- Increases modularity with APIs
- Order Management (OM) contains the base pricing features and more. Pricing (QP) is now a separate applications for more complex pricing requirements.
- Shipping Execution, considered part of OM for licensing, now communicates with OM though a series of APIs.

Details

- A. Key API: Process Order API between OM and:
  - Shipping Execution (SE) communicates sales order line information.
  - SE sends freight cost, quantities, ship method, and more.
  - E-Commerce Gateway (EDI) accepts order information from Process Order API via the Order Import. Sends order information through order import to the process order API.

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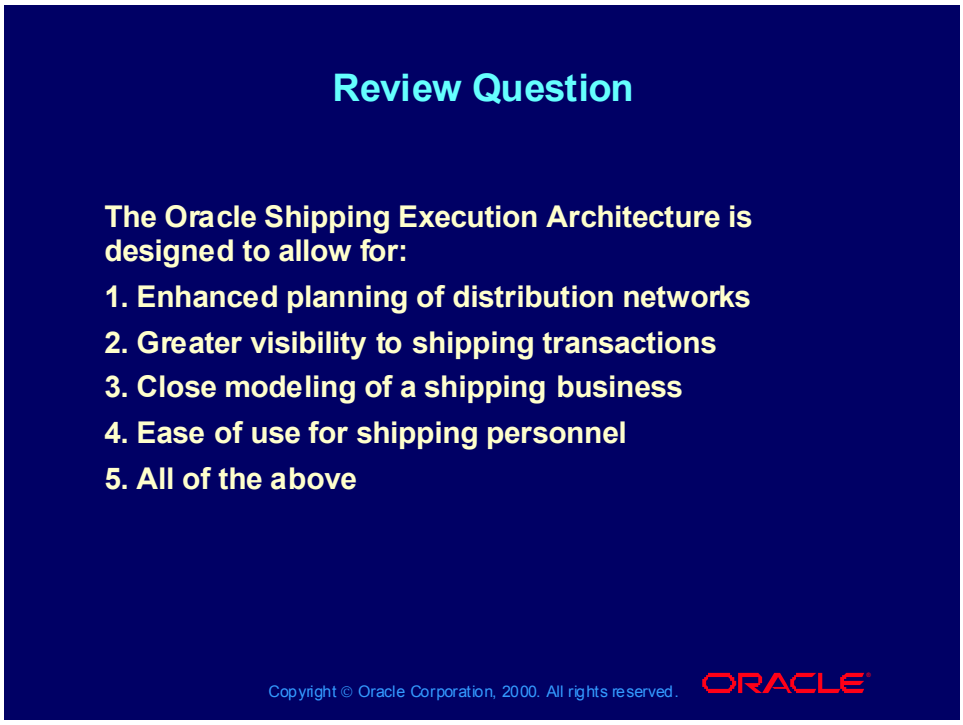

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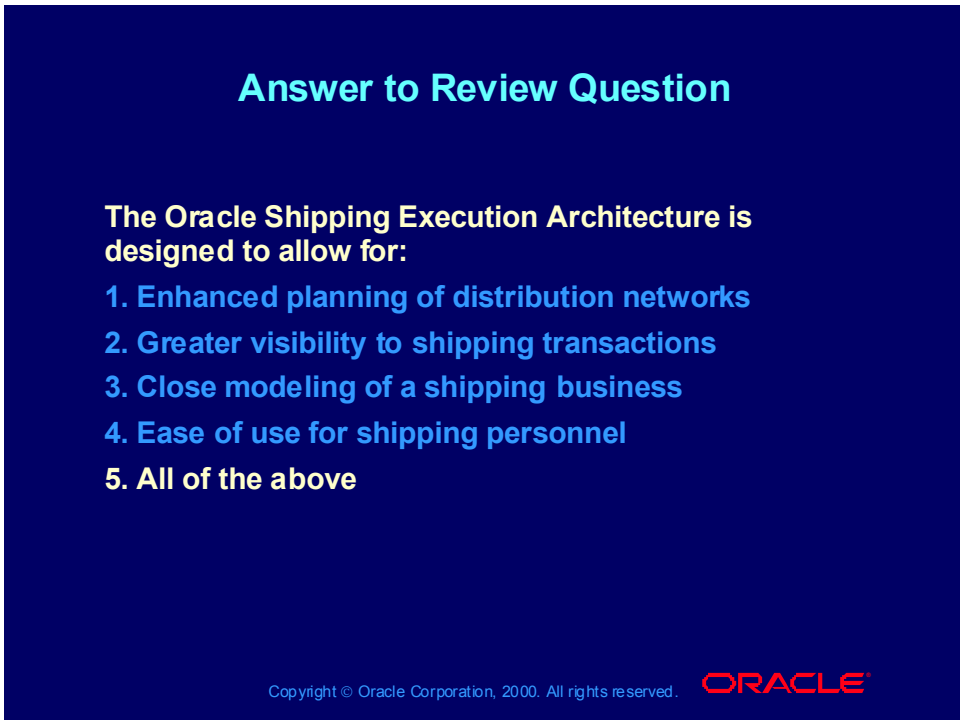

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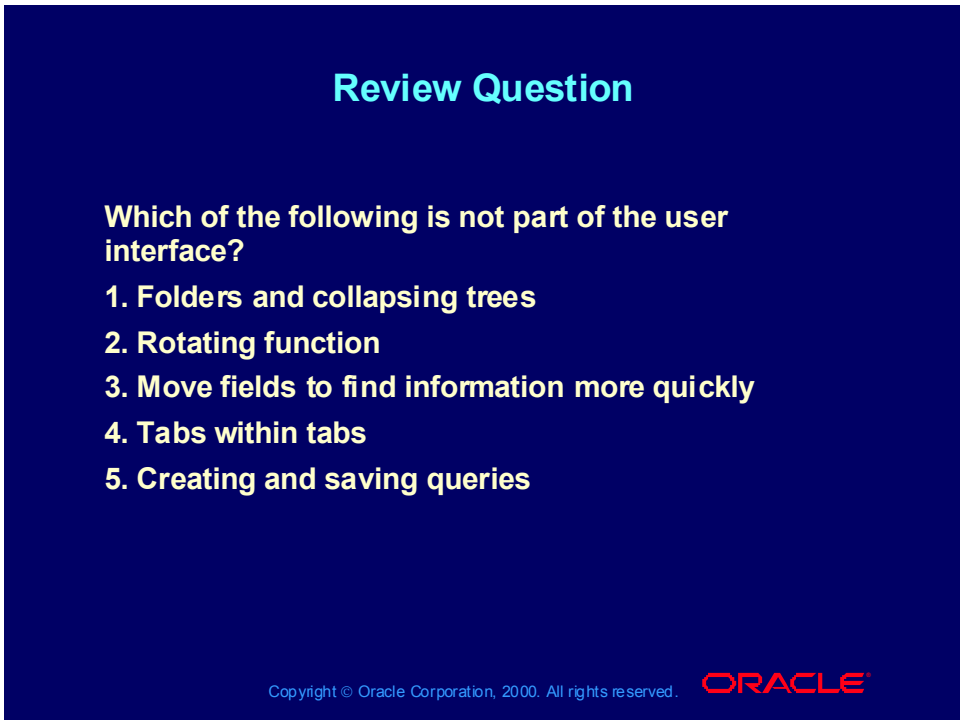

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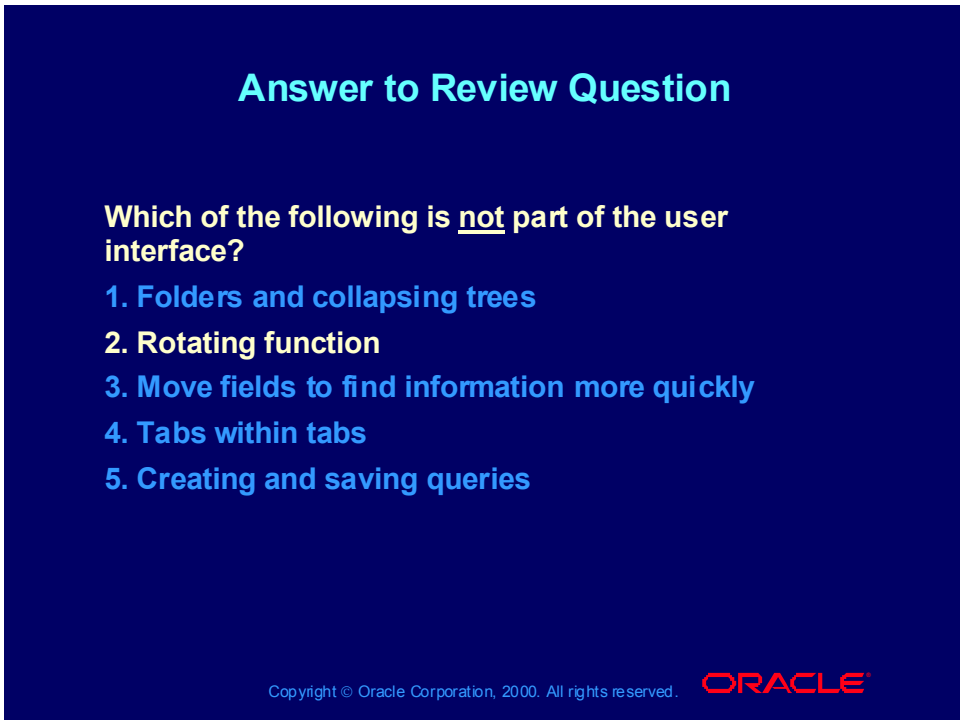

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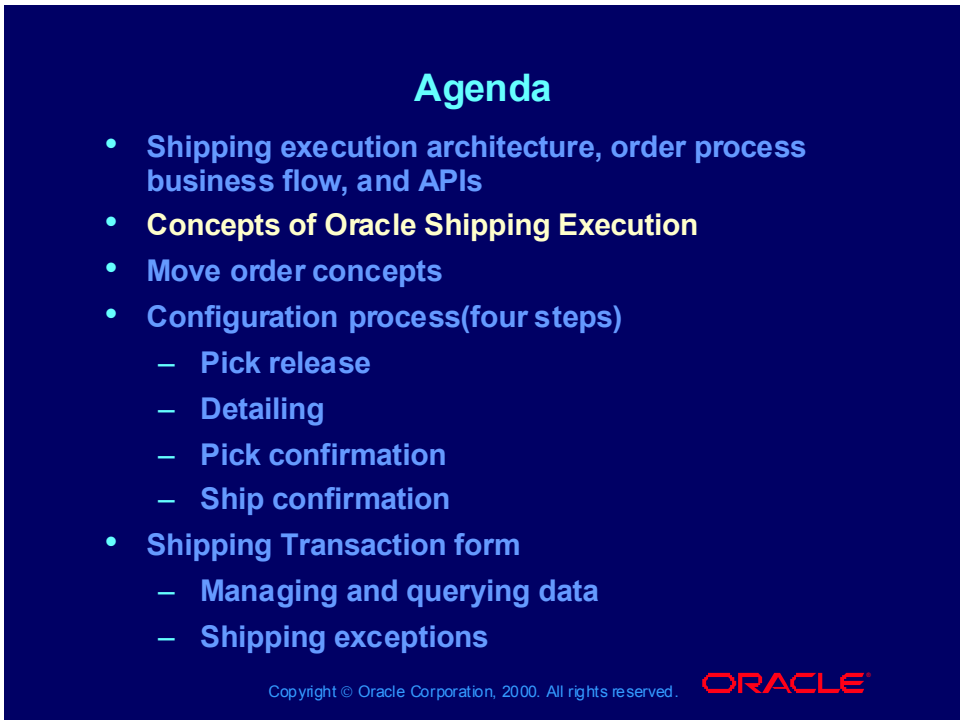
Agenda



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These are the key concepts behind the application. Becoming familiar with these concepts will make learning the application much easier.

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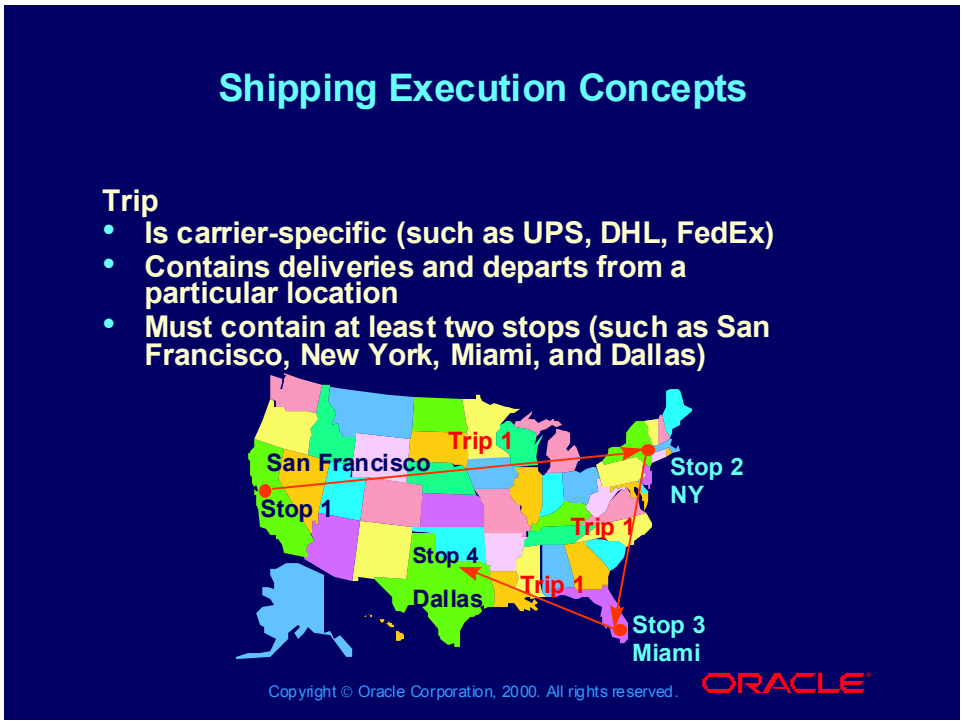

Trips

Trip 1

San Francisco to New York, New York to Miami, and Miami to Dallas.

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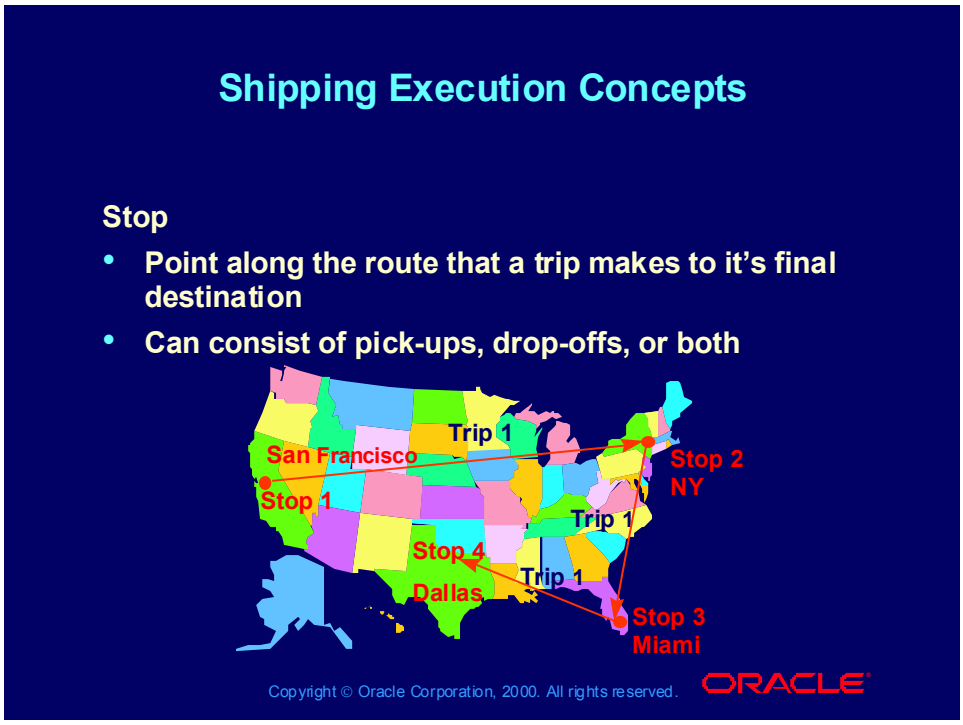

Stops

A Stop represents a point along the route that a trip makes to it's final destination e.g,. New York. This point may also have some activity associated with it. The activity might include picking up a new delivery, dropping off a delivery, or both.

Trip 1

San Francisco (stop 1) to New York (stop 2), New York to Miami (stop 3), and Miami to Dallas (stop 4).

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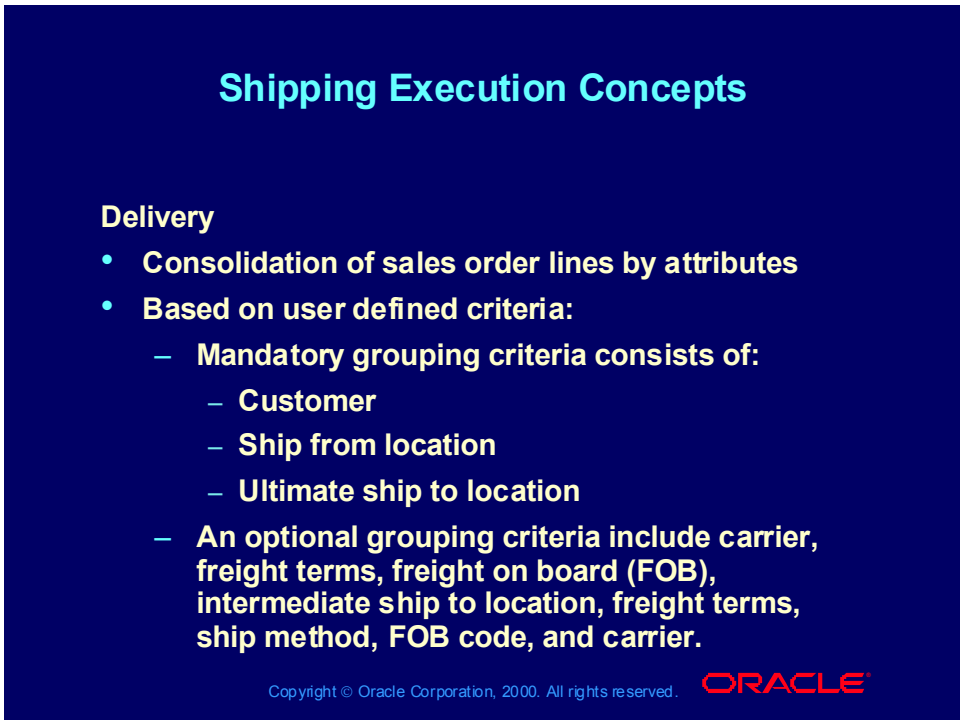

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Delivery Leg

A delivery leg consists of two stops where the delivery is picked up and dropped off respectively on the same trip. The delivery may travel through several legs to get to its final destination. A delivery leg is synonymous with the bill of lading.

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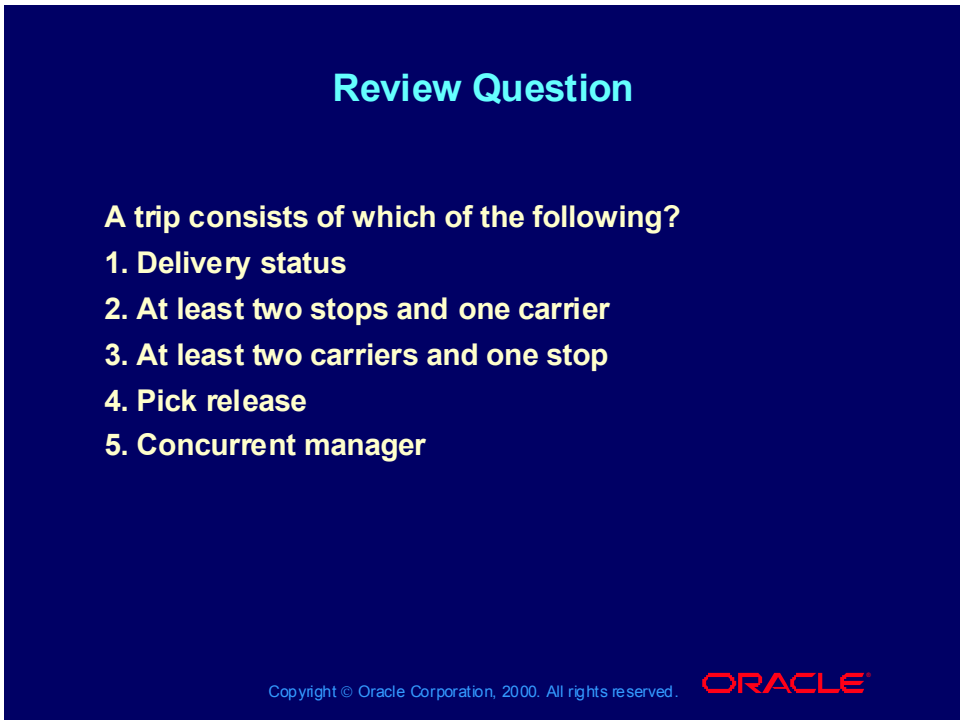

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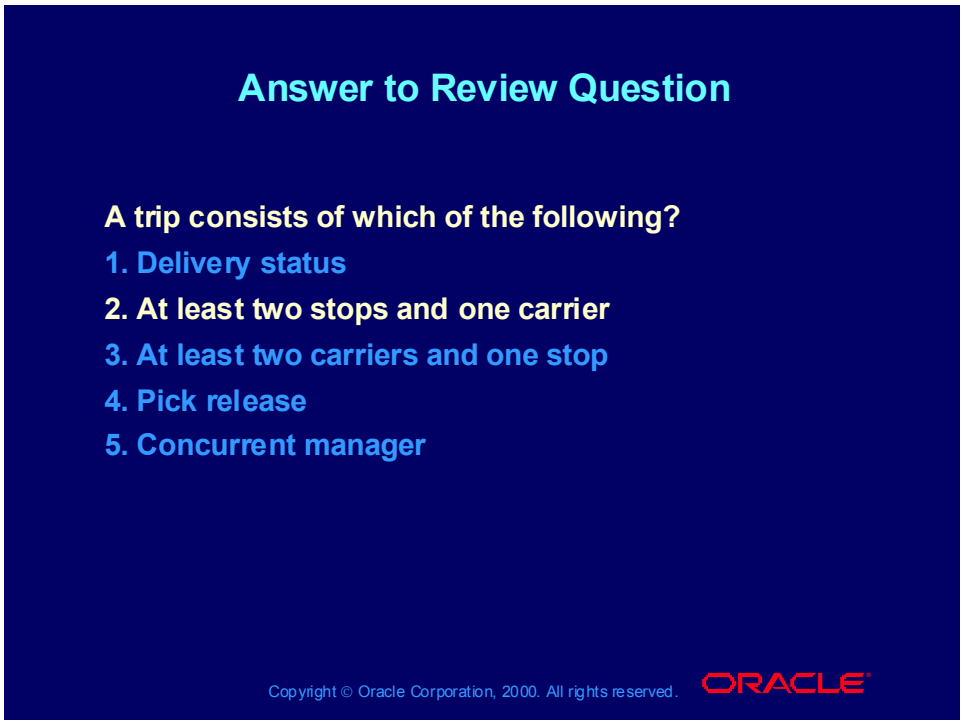

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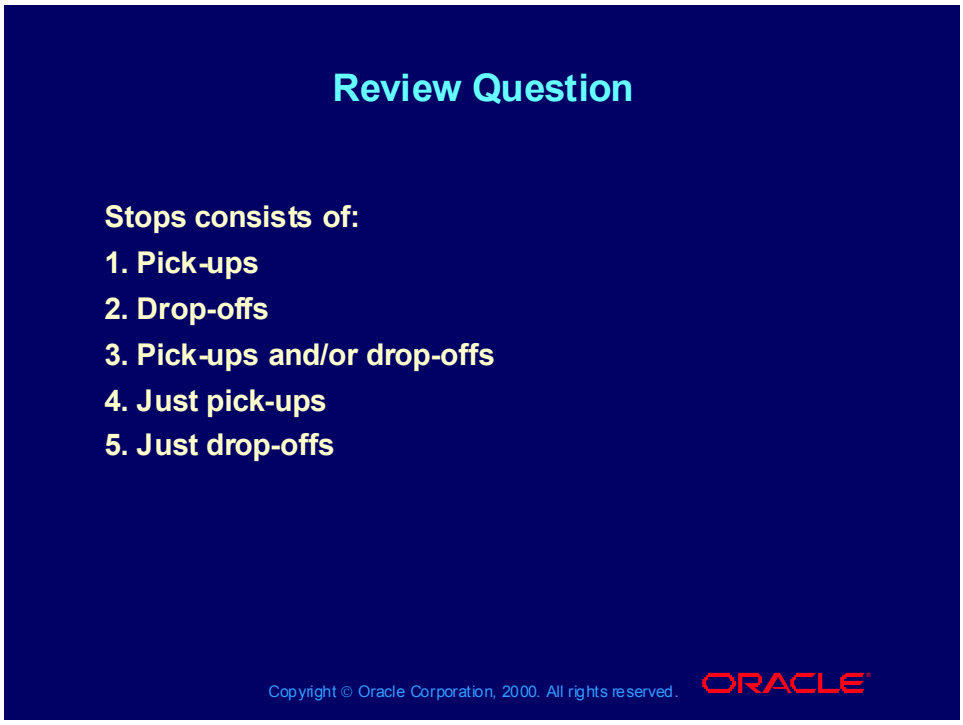

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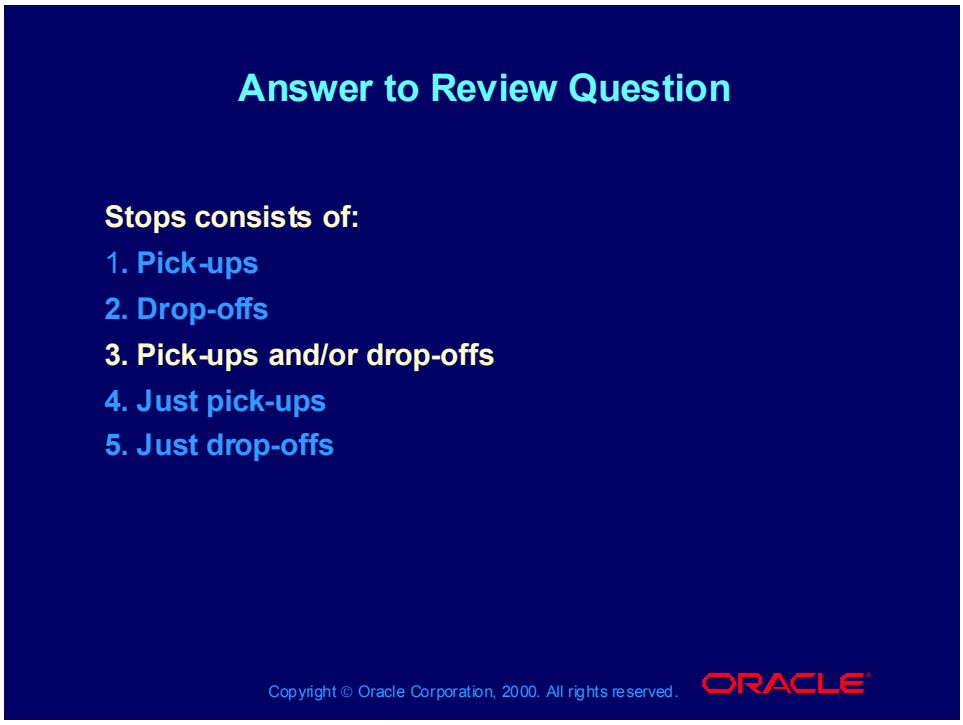

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Agenda

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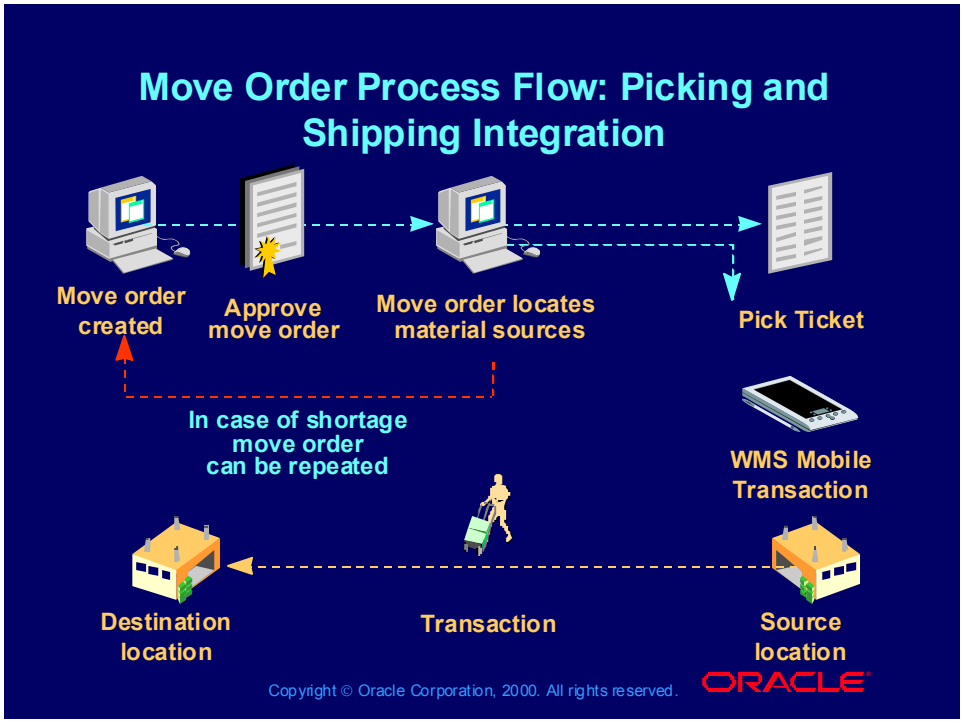
Move Order Process Flow: Picking and Shipping Integration



Procedural Flow for Material Picking Move Orders.

1. The move order is created by the pick release engine.
2. Next, the move order must be "detailed."
   - Detailing is the process by which Oracle Order Picking and Shipping uses the picking rules to determine where to source the material to fulfill a request line (move order line). The detailing process fills in the move order line details with the actual transactions to be performed. If adequate quantity is not available to detail the move order, this process can be repeated later. If no reservation exists before the detailing process, it also creates the reservation for the material.
   - Before transaction, users may print a pick slip or push the move order line details to mobile devices for transaction through the move order APIs.
3. The user now transacts the move order to confirm the pick.

The order line can be transacted all at once, or users can transact one detail line at a time as the items are moved. If the user transacts less than the requested quantity, the order remains open until the full quantity is transacted or the order is closed or canceled.

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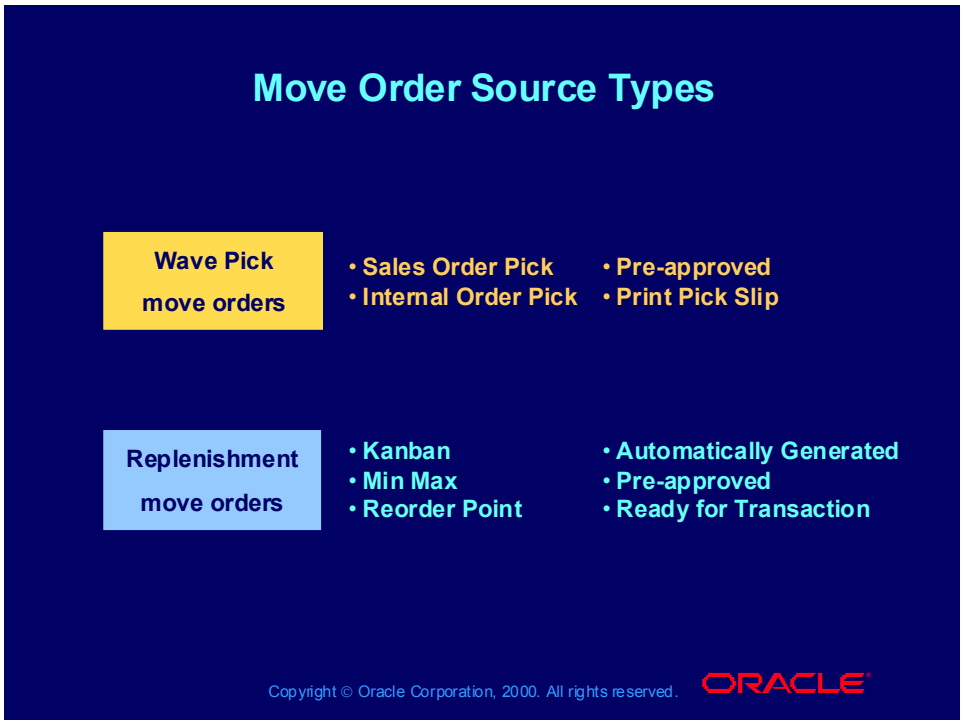
Move Order Source Types



Move Orders

With the release of Oracle Order Management, the pick release process will now generate move orders to bring the material from its source location in stores to a staging location. This will be modeled as a subinventory transfer (the staging location is a subinventory that you set up in Oracle Inventory). These orders will be pre-approved and ready to transact. Pick slips and other shipping and inventory reports will also be available.

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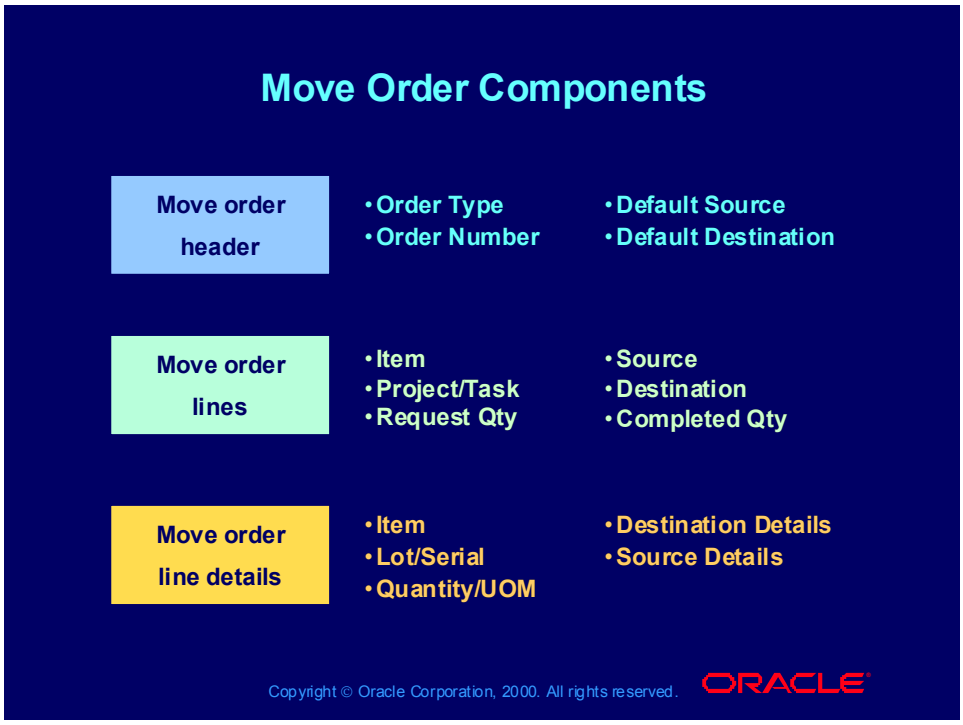
Move Order Components



Anatomy of a Move Order

Oracle Order Picking and Shipping stores the move order source type in the header. This refers to the entity that created the move order. An order could be a pick wave (for sales order picks) a replenishment type, a requisition for subinventory transfer and so on. Order Picking and Shipping also stores the default source and destination if available, the order number, and the requested date.

The lines are the requests on that move order. They store the item, requested quantity, completed quantity (if the move order has been partially fulfilled), a source and destination if known, and any project and task references if the organization is Project Manufacturing enabled. The user can also request specific serial or lot numbers if know, on the move order line.

The line details are the Inventory transactions that occur to fulfill a particular request line (move order line). If the material is locator, lot, or serial controlled, this information is filled in at the line detail level. These details are automatically filled in by Oracle Inventory using the Inventory Picking Rules and the Item - Transaction defaults (for destination locators), or the user can manually fill in the details. These details can be edited prior to transaction by a user.

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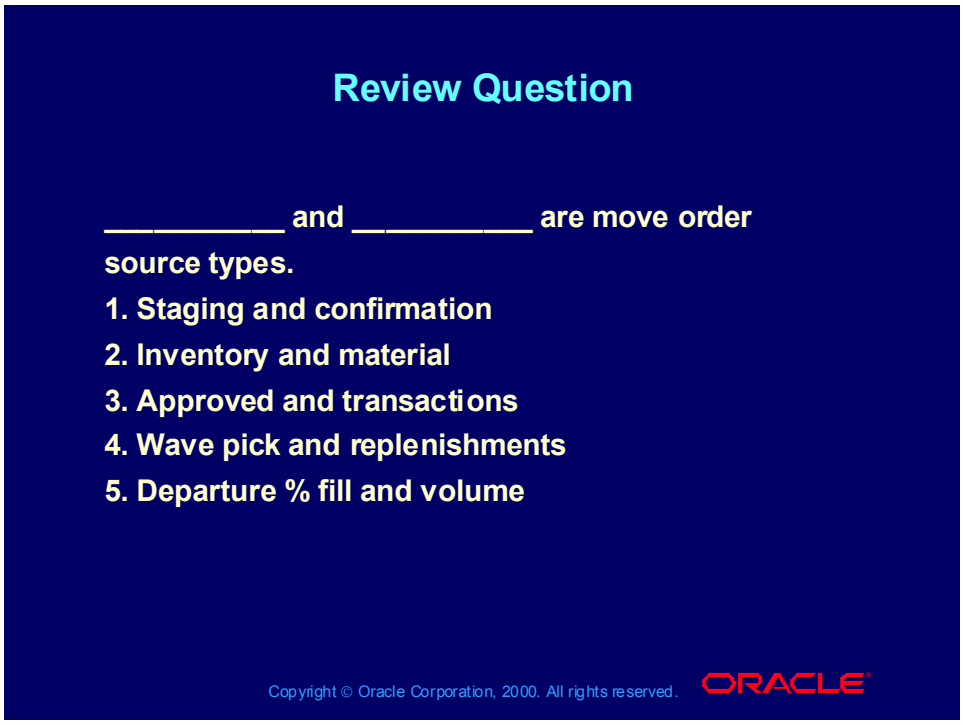

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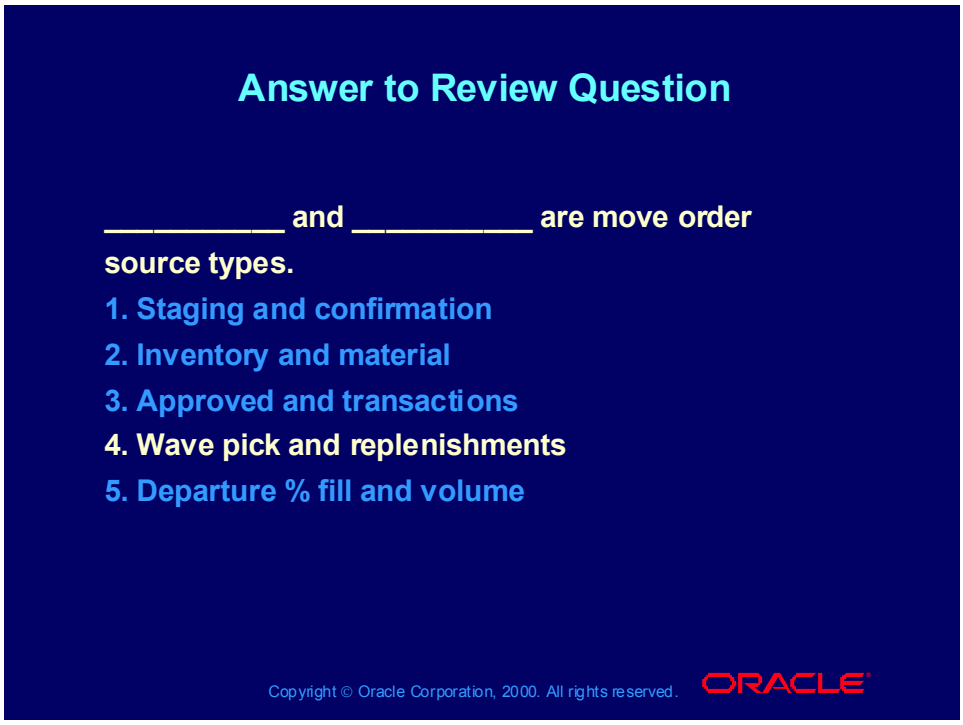

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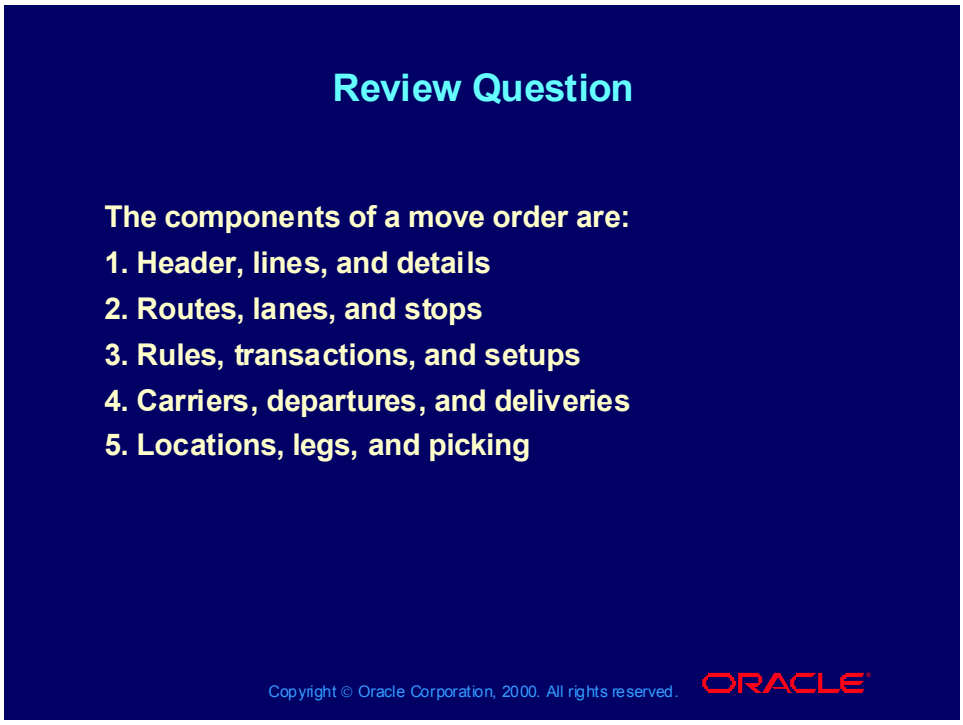

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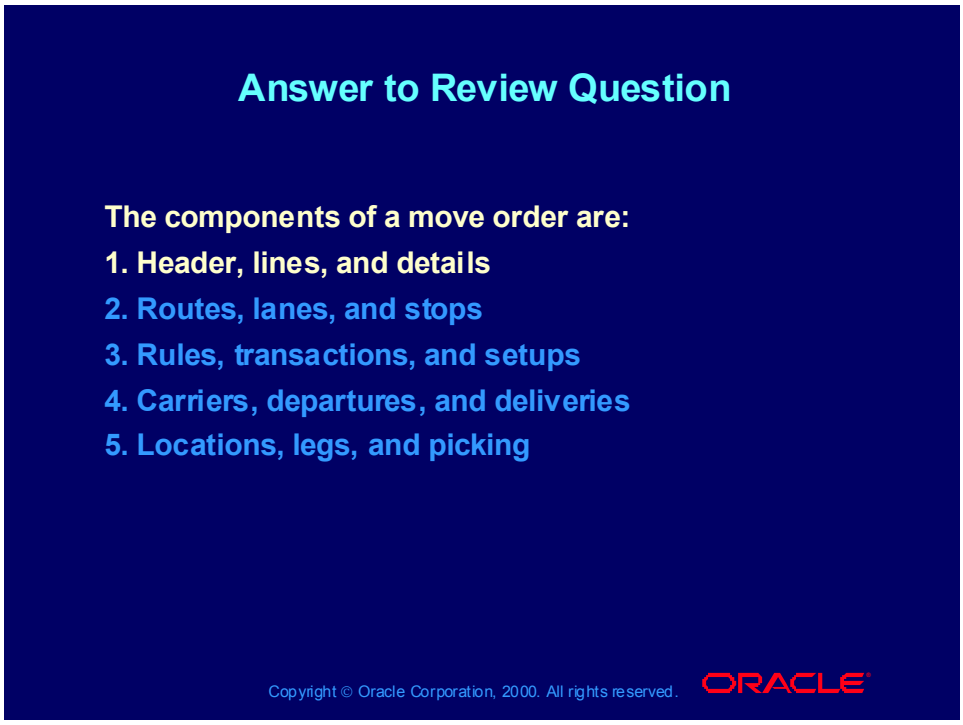

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Material Picking (Pick Release)

Oracle Shipping Execution enables you to use move orders transactions for generating pick requests and reservations in Oracle Inventory.

With the new pick release engine, you can pick release all items together on a trip or stop. You can also pick release items together on a delivery.

Using the new engine, pick release can be performed using a one-two-or three-step process.

The one-step process consists of select both the auto detail and auto pick confirm check boxes on the Inventory tab when you run pick release, which means that the pick recommendation is automatically created and pick confirmed without any manual intervention.

The two-step process consists of selecting auto detail, but not auto pick confirm, which creates a move order that is automatically detailed but enables you to view the pick recommendation and provides the opportunity to change quantity, location, and subinventory, and to report a missing quantity at the pick confirmation step in the transact move orders window. Once you have made your changes, you can transact the move order to pick confirm the inventory.

The three-step process consists of selecting neither the auto detail or auto pick confirm check boxes, which creates a move order that you can manually or automatically detail in the transact move orders window. Once detailed, you can transact the move order to pick confirm the transaction.

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Pick Release

- Pick release finds and releases eligible order lines that meet the release criteria; creates move orders that move the inventory to staging areas; and optionally, calls inventory pick release to reserve items and print the pick slips.
- Three methods for pick release are:
  - Online
  - Concurrent
  - Standard Report Submission (SRS)

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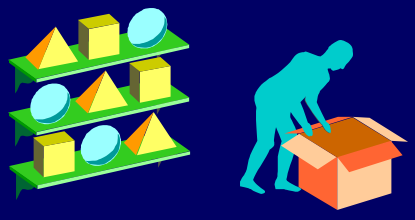
Online Pick Release

- You can pick release one order immediately, thereby eliminating time spent waiting for the order to process through the Concurrent Manager queue.
- From the Release Sales Orders For Picking window, enter:
  - Order number
  - Order type
  - Item
  - Customer
  - Orders (required)



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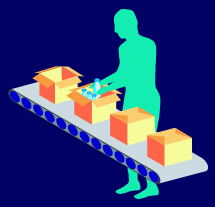
Concurrent Pick Release

- You can pick release through the release sales orders function. You can run release sales orders for picking in the background, enabling you to run other processes simultaneously.
- From the release sales orders for Picking window, enter:
  - Order number
  - Order type
  - Item
  - Customer
  - Orders (required)



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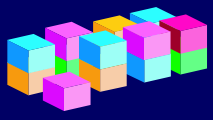
Standard Report Submission (SRS) Pick Release

- You can run a specific release at the same time every day. SRS runs pick release in the background multiple times.
- From the release sales orders for Picking window, go to the Parameters window to enter:
  - Release rules name (required)
  - Batch prefix
  - Name (required)
  - Parameters



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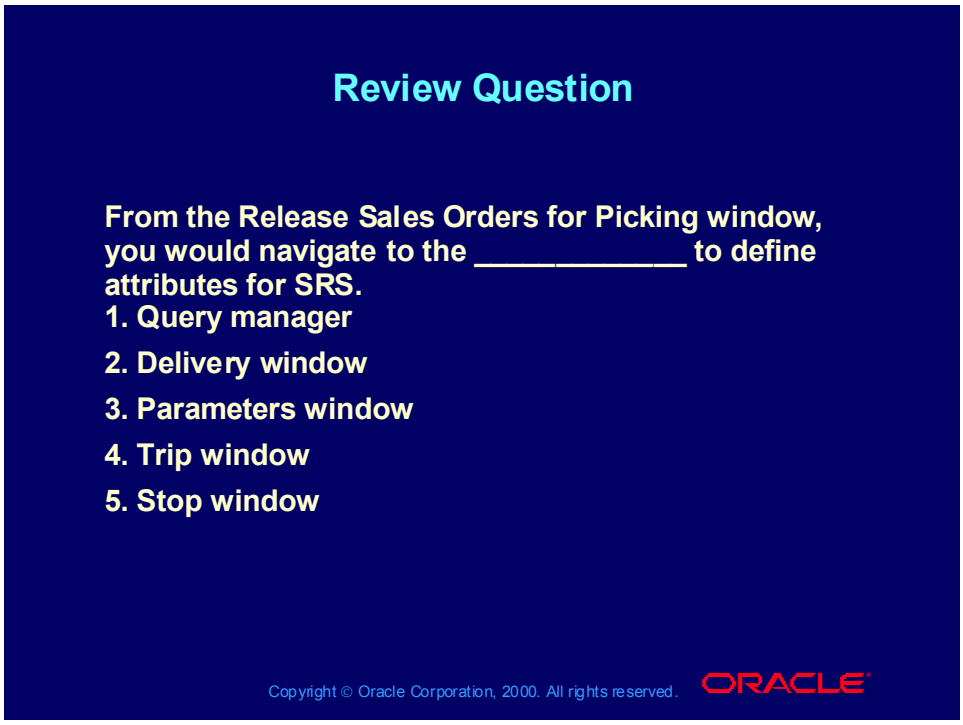

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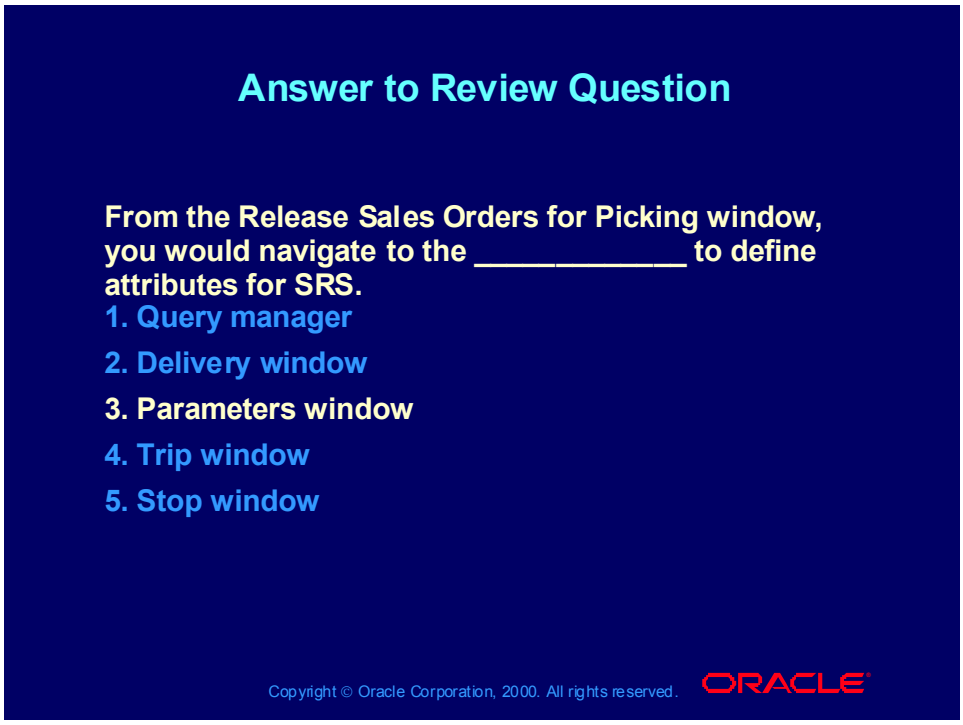

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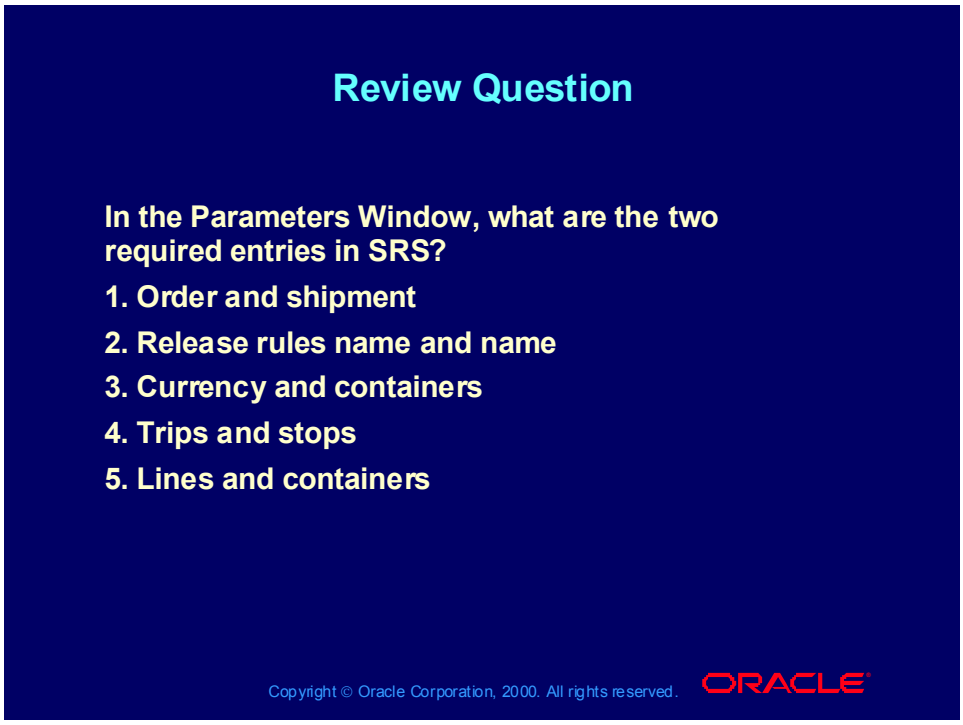

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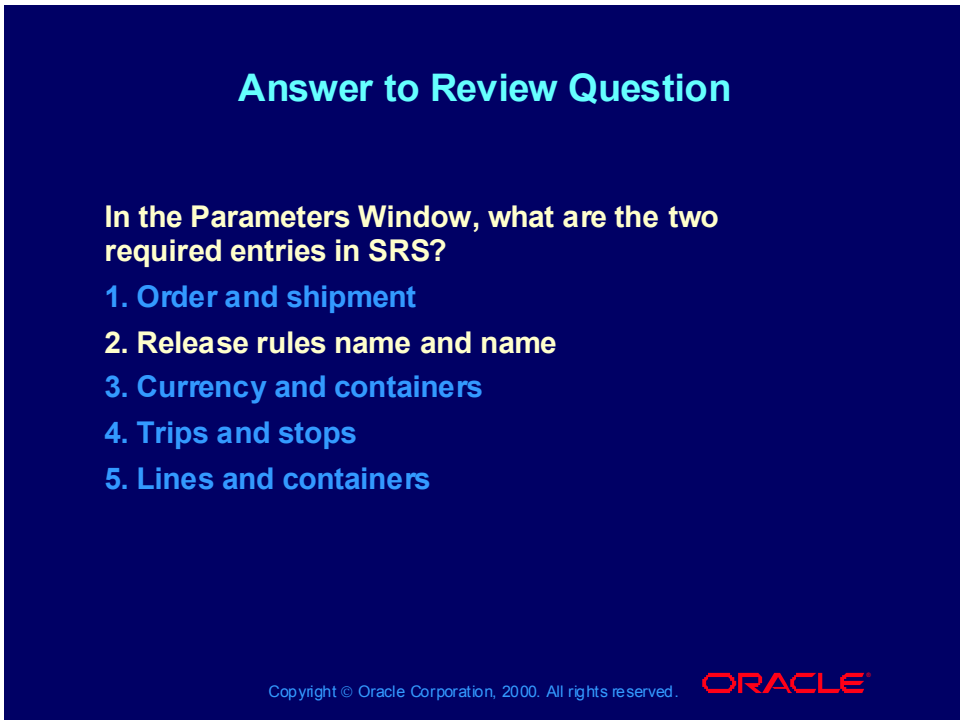

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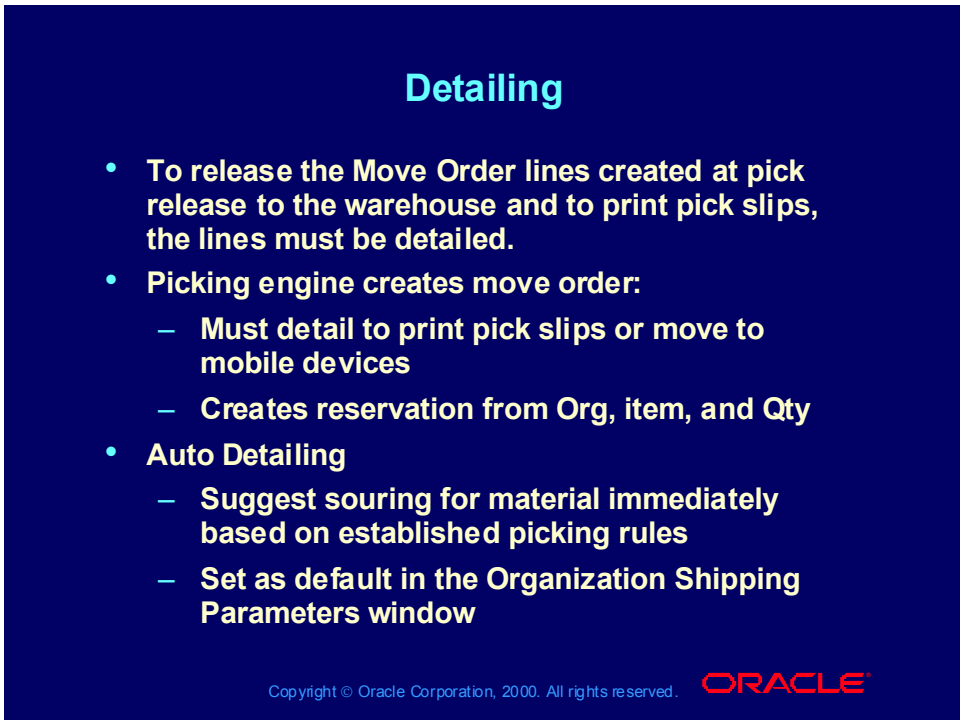

Detailing

Pick release creates move order lines. In order to release those lines to the warehouse and print pick slips, the lines must be detailed. The process by which the picking engine generates transaction line suggestions is called “detailing.” The detailing process for a pick wave move order Line also creates a high level (organization level) reservation on the material if no reservations previously existed.

Users can choose to do this immediately after the move order lines are created, or users can postpone this step until a later time. Postponing the detailing process may be employed by organizations that pick release across multiple warehouses but prefer to allow each warehouse to determine when to release order lines to the floor.

Detailing the order lines immediately after they are created is called “auto-detailing.” Postponing the detailing process is referred to as “manual-detail.” Users can set up a default detailing mode in the shipping execution organization parameters. This default can be overridden at each pick release.

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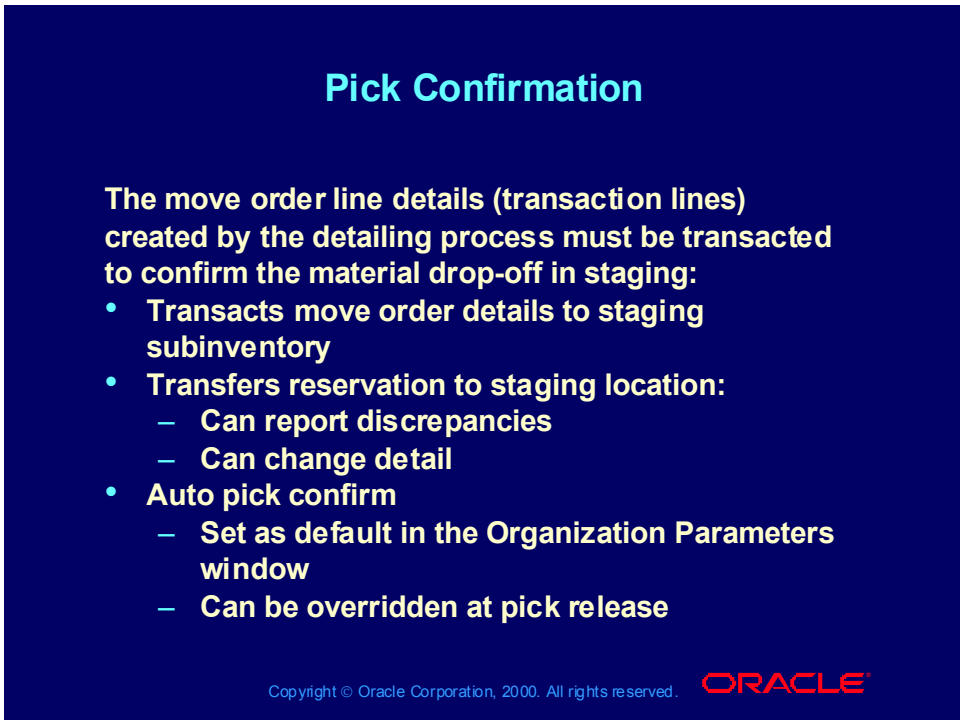

Pick Confirmation

The move order line details (transaction lines) created by the detailing process must be transacted to confirm the material drop-off in staging. This process is called pick confirmation.

Pick confirmation executes the subinventory transfer that moves the material from its source location in the warehouse into the staging location. Pick confirmation automatically transfers the high level reservation to a detailed reservation (including lots, subinventory, revisions, and locators) in the staging location. At pick confirmation, a user can report a missing quantity or change the transaction line if the picker chose to use material from a different lot, serial, locator, or subinventory. If an organization's picks rarely deviate from the suggested picking lines and the overhead of requiring a pick confirmation is unmanageable, the pick confirm transactions can occur immediately after the lines are detailed. This option is called "auto pick confirm." Users can set up a default pick confirm policy in the Inventory organization parameters. This default can be overridden at each pick release.

Note that even if an automatic pick confirm is employed, the material is only transacted to the staging subinventory and reserved. A user can still manage any discrepancies found by deleting the reservation and transacting the material back to its original subinventory. If mobile devices such as bar code scanners are used to perform inventory transactions, you should use manual pick confirmation for greatest inventory accuracy and control.

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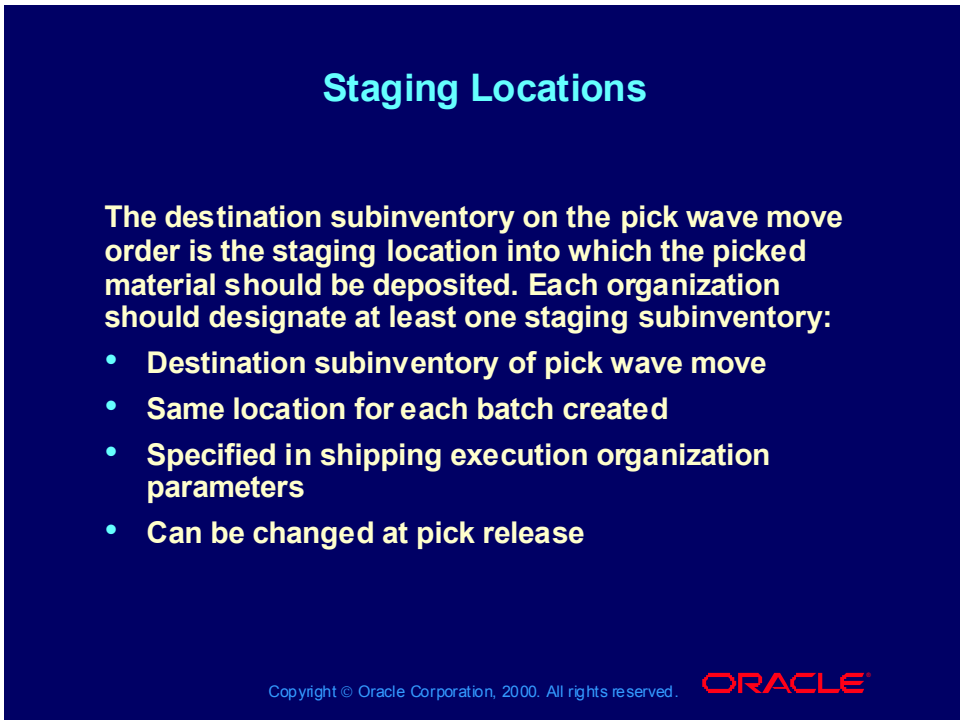

Staging Locations

The destination subinventory on the pick wave move order is the staging location into which the picked material should be deposited. Each organization should designate at least one staging subinventory. Each batch created at pick release has the same destination as staging subinventory. The default staging subinventory and locator to be used for all pick wave move order can be specified through a shipping execution organization parameter. This location can be changed at pick release.

To model different staging lanes within the staging area, facilities may choose to either create different subinventories or designate staging lane locators within one staging subinventory.

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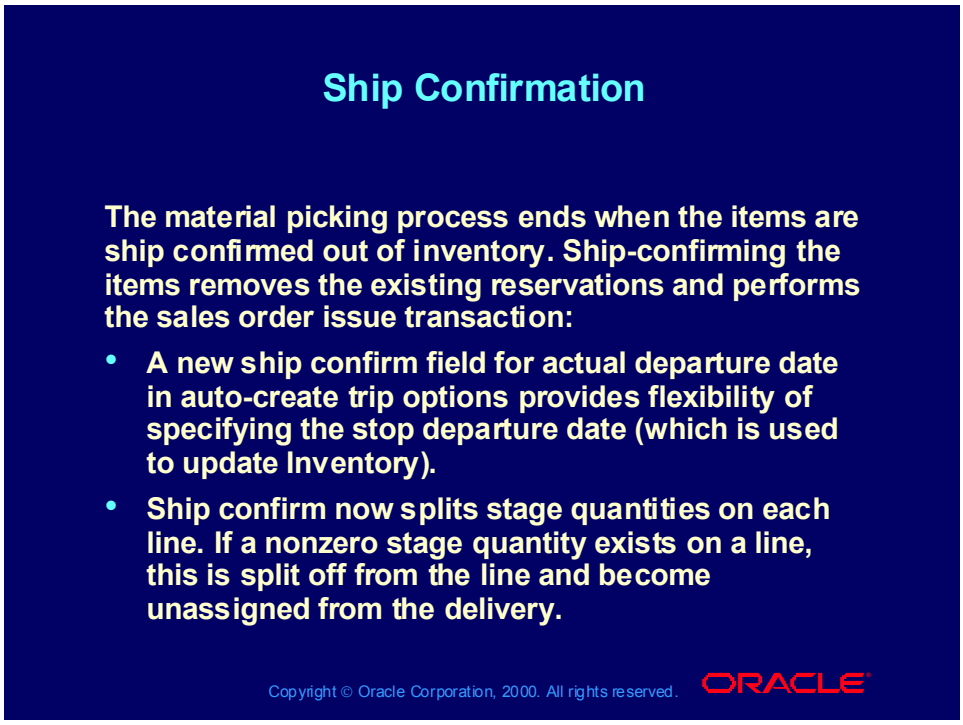

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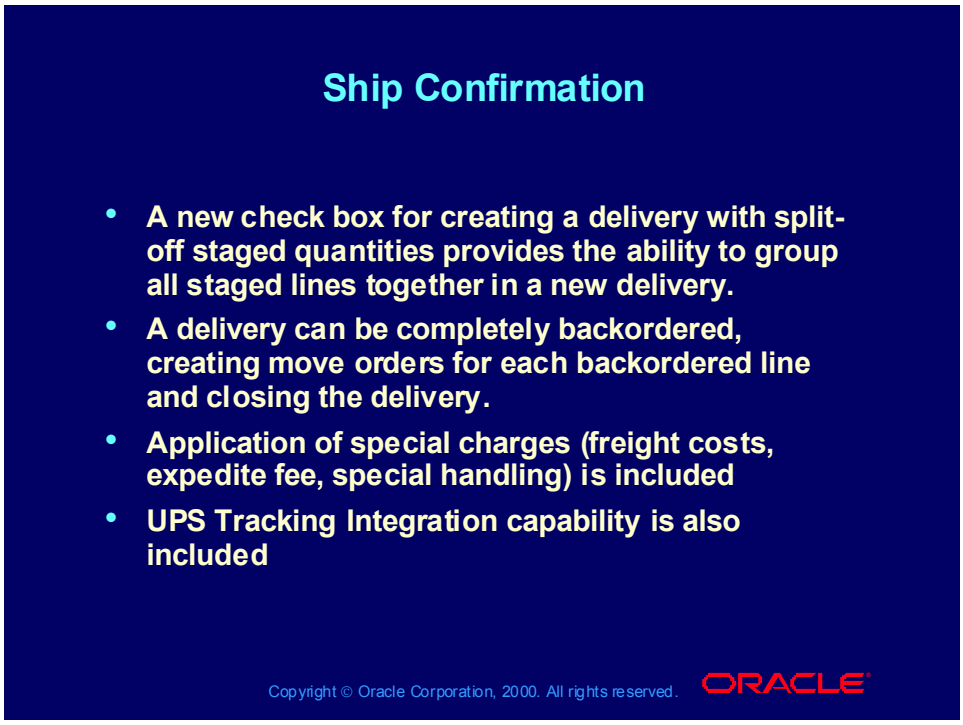

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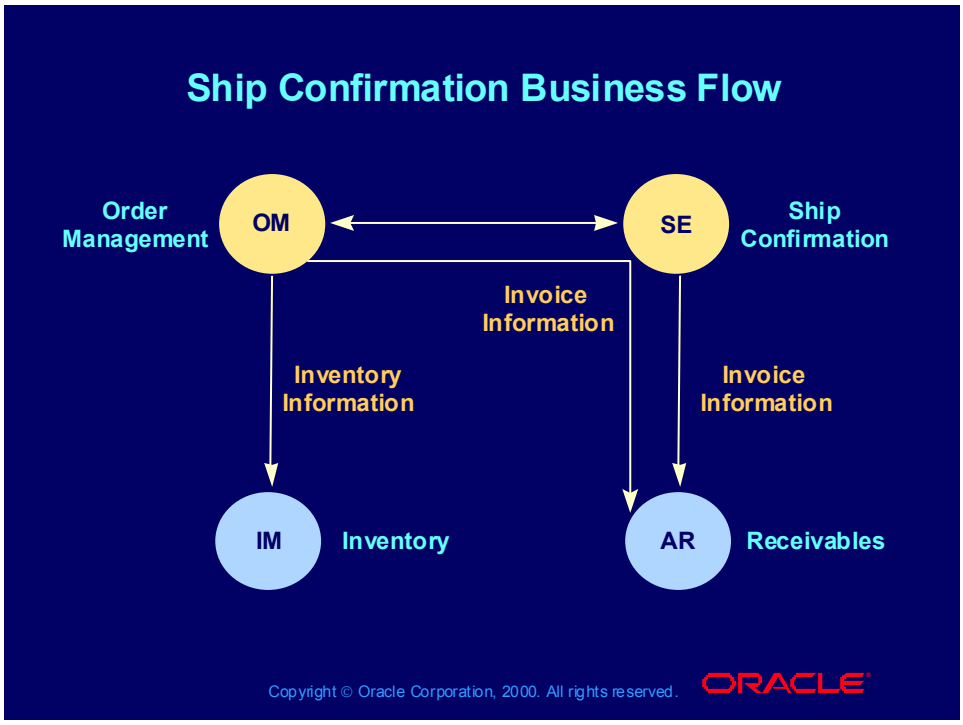
Ship Confirmation Business Flow



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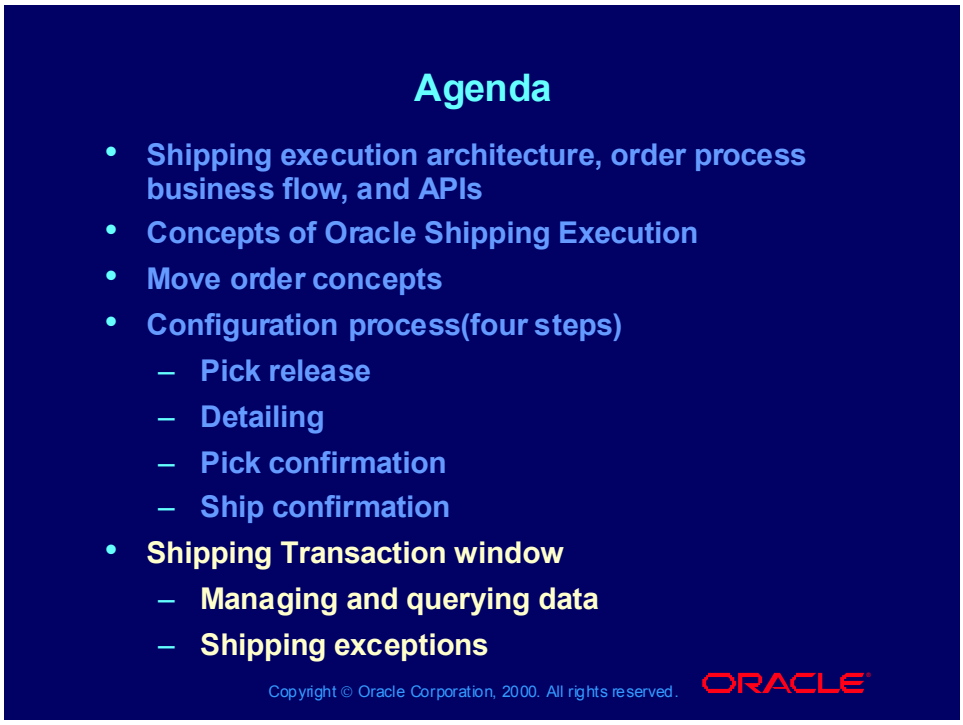
Agenda



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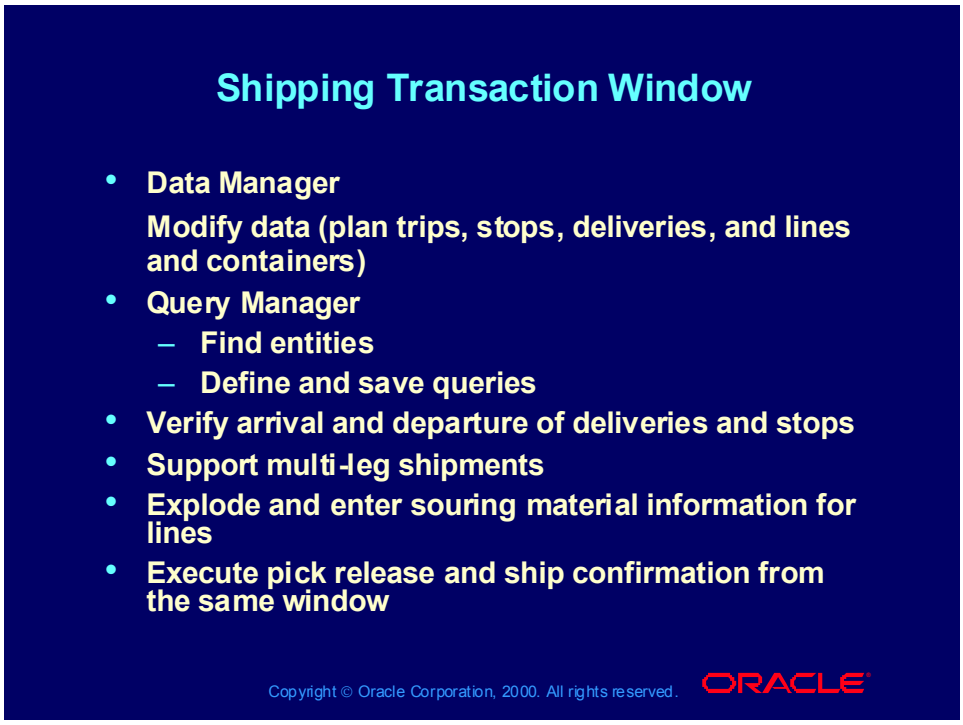

Shipping Transaction Window

The Shipping Transaction window is a workbench that consolidates three major shipping forms seen in release 11: departure planning, ship confirm, and view shipping information. In addition to the consolidation, this new window contains major modifications which support many new features: trips, stops, delivery legs, deliveries, and delivery lines. The window is composed of a query manager and a data manager. The query manager enables you to specify and find trips, stops, deliveries and, delivery lines and containers, plus provides the opportunity to save the queries to use in the navigator tree. The data manager enables you to navigate and modify the data easily.

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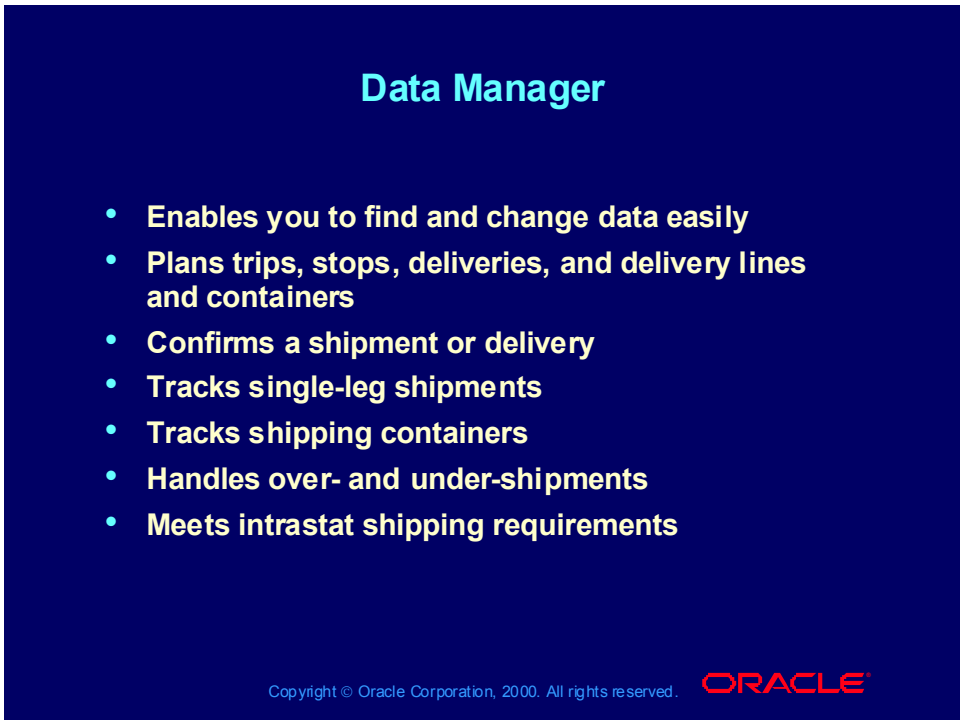

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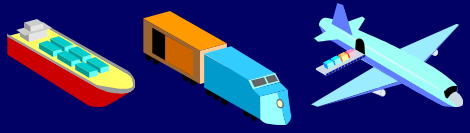
Creating Trips

From the Shipping Transaction window, go to the Trip window to enter:

- Name
- Ship method
- Organization (vehicle information)
- Item name, number (vehicle information) prefix and number
- Arrive after trip
- Routing instructions
- Actions button for further options



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Creating Stops

From the Shipping Transaction window, go to the Stop window to enter:

- Location (required)
- Seal code
- Planned arrival and departure dates (required)
- Departure weight and volume
- Departure fill percentage
- Actions button for further options

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Creating Deliveries

From the Shipping Transaction window, go to the Delivery window to enter:

- Name
- Organization (required)
- Initial ship from and to
- Ship from and to date
- Ultimate ship to (required)
- Intermediate and pooled ship to
- Waybill

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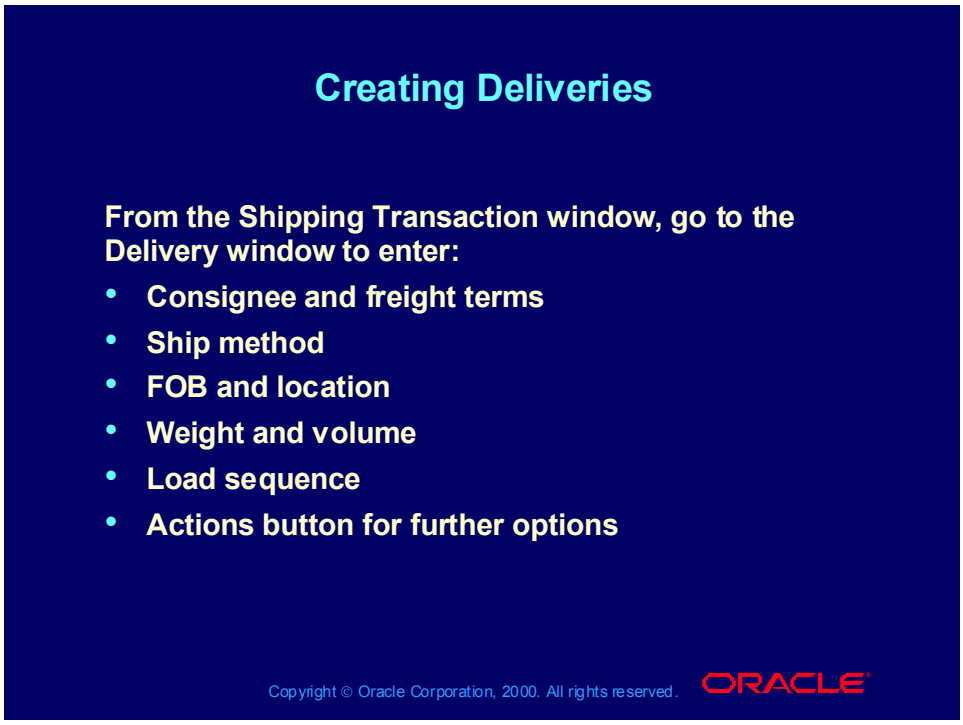

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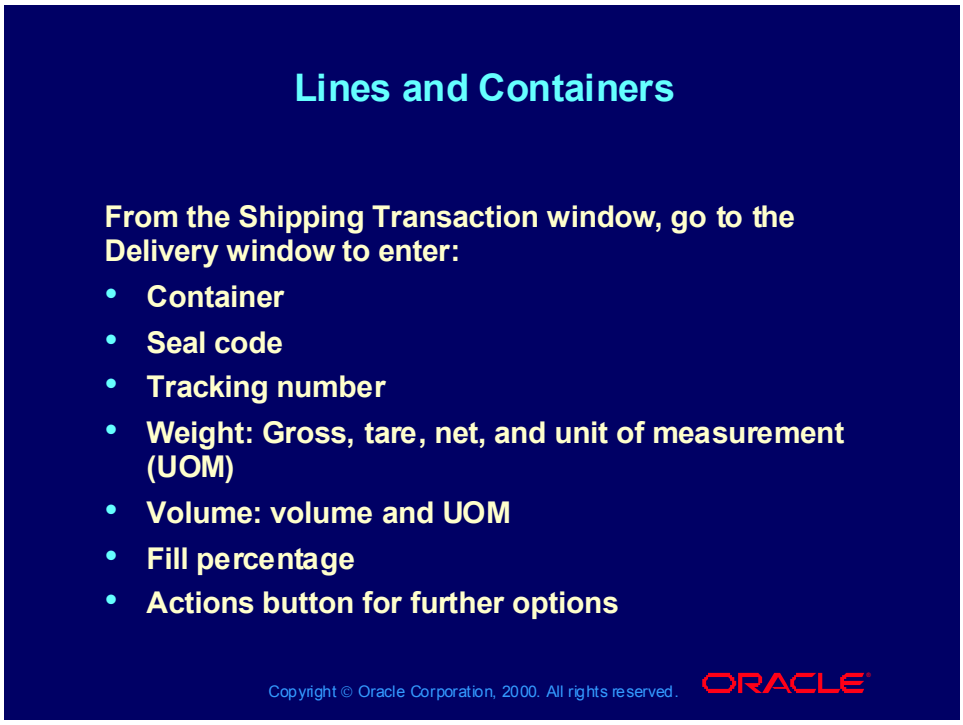

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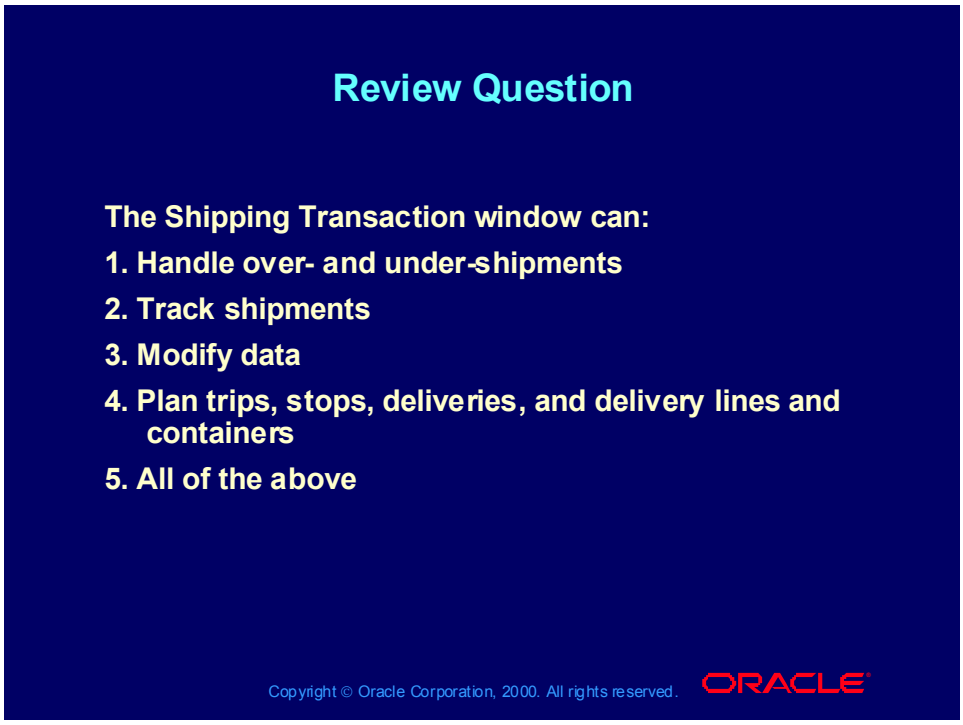

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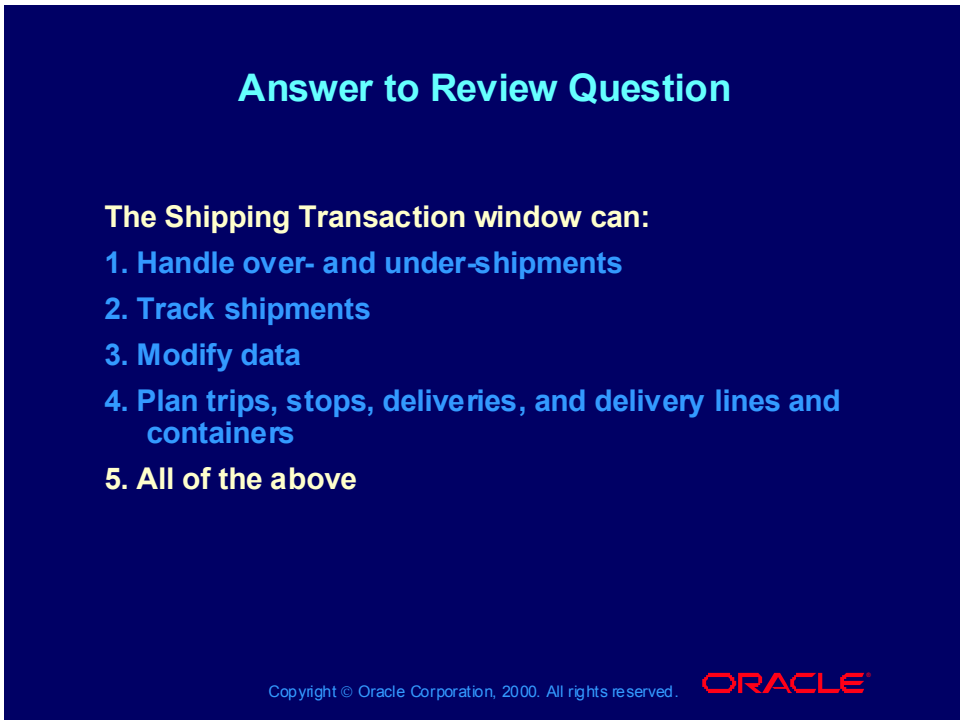

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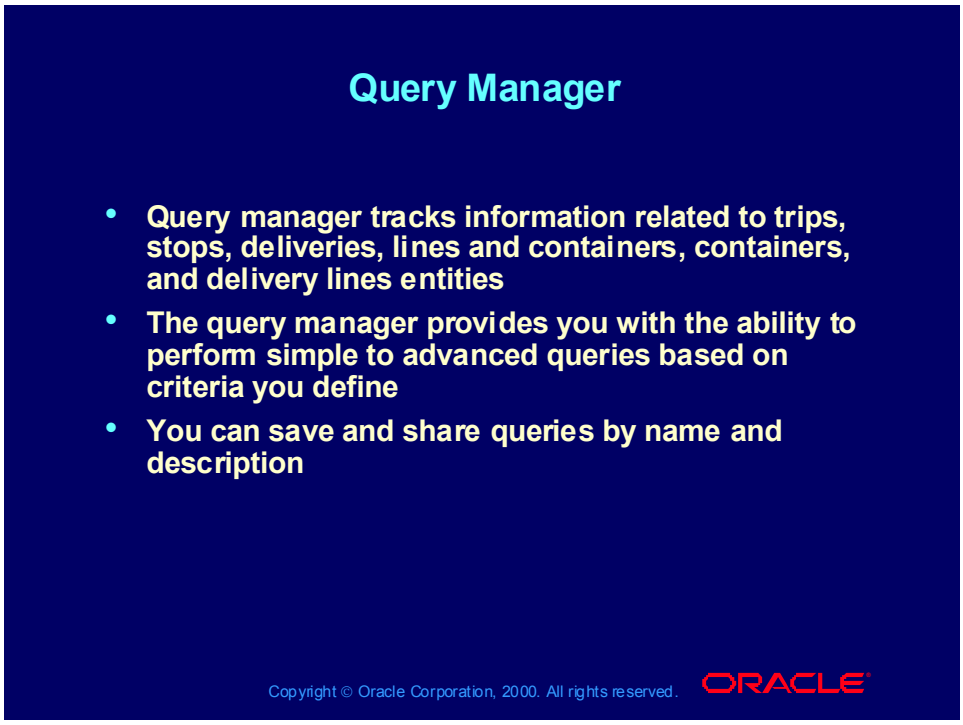

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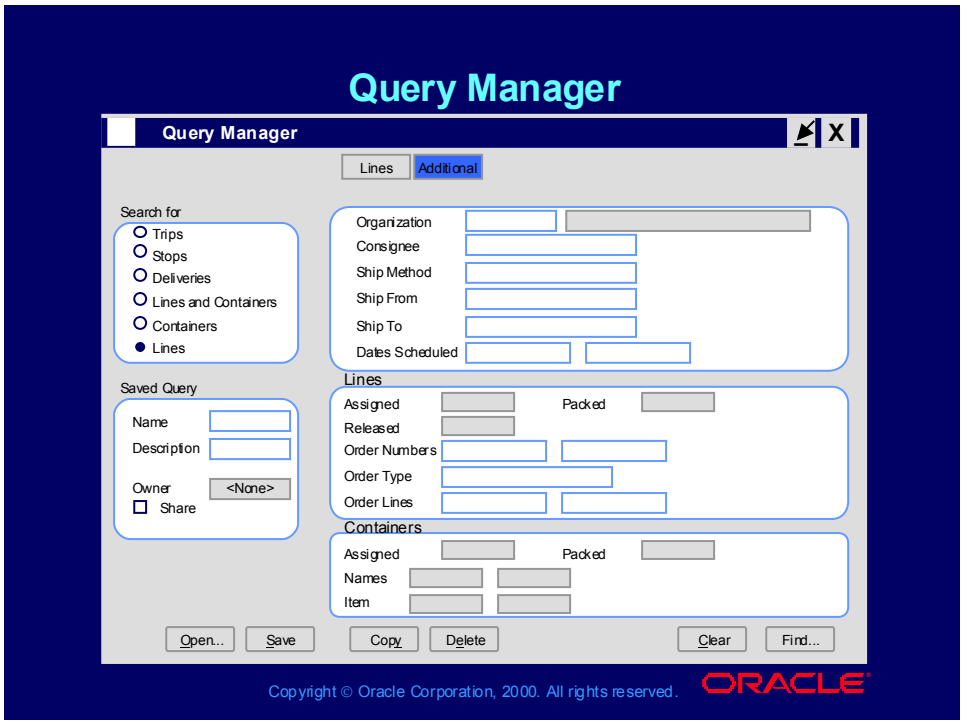
Query Manager



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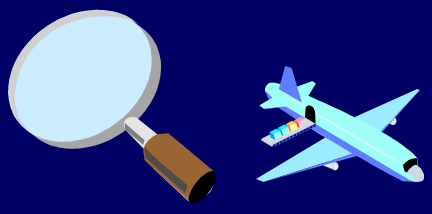
Query Trips

Query Trips

From the Shipping Transaction window, go to the Query Manager window to query:

- Name
- Status
- Planned
- Ship method
- Organization
- Number prefix and number



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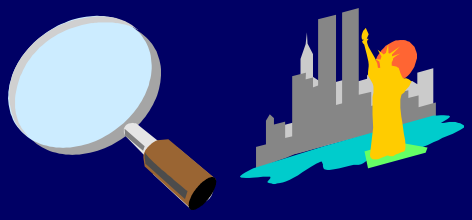
Query Stops

Query Stops

From the Shipping Transaction window, go to the Query Manager window to query:

- Stop location
- Stop status
- Departure fill
- Seal codes
- Trips
- Arrival and departure dates



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Query Deliveries

Query Deliveries

From the Shipping Transaction window, go to the Query Manager window to query:

- Delivery name
- Bill of lading
- Status, assigned, and planned
- Organization
- Ship from/to, intermediate ship to
- Consignee and freight terms
- Ship method
- FOB
- Pick-up and drop-off dates

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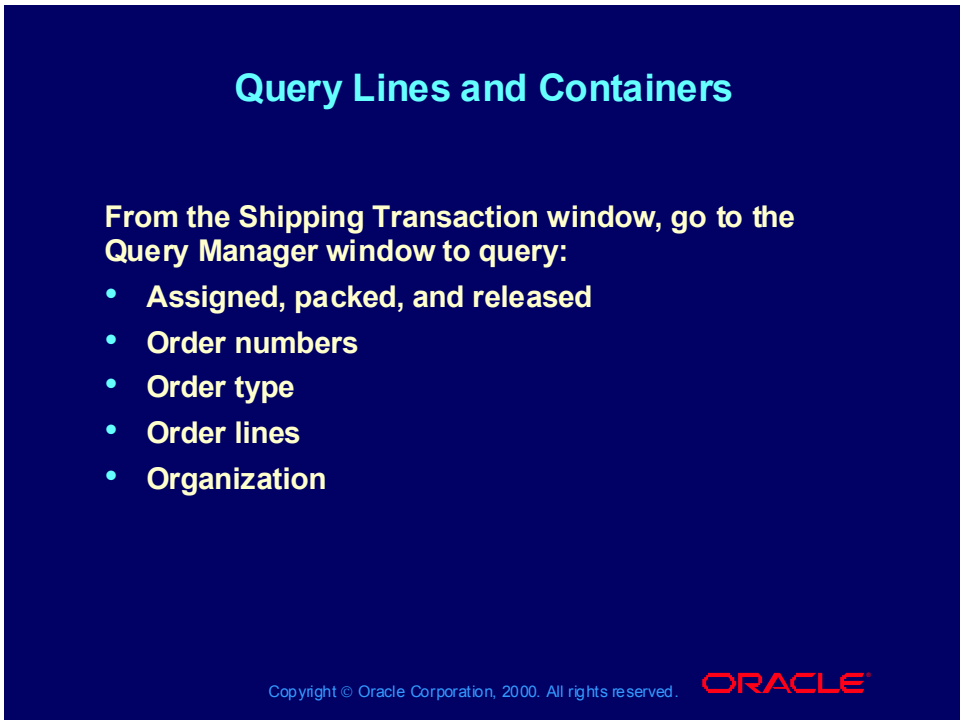

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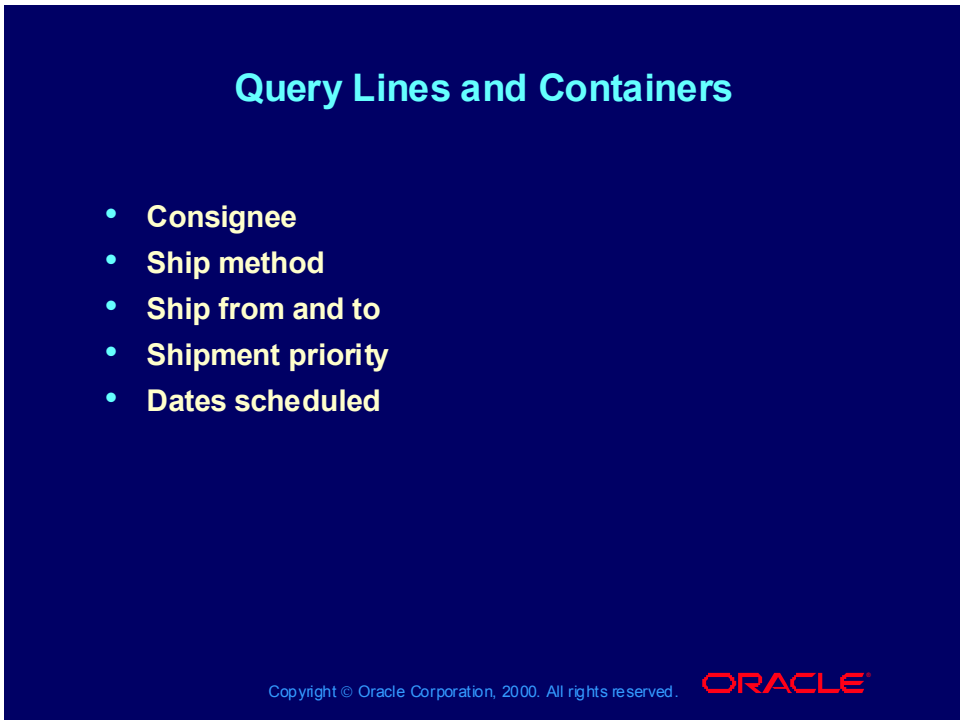

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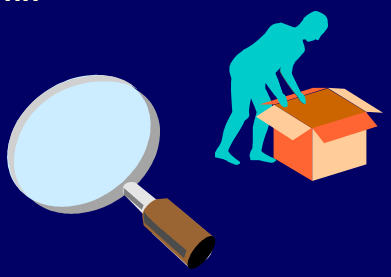
Query Containers

Query Containers

From the Shipping Transaction window, go to the Query Manager window to query:

- Assigned, packed, and fill
- Names
- Organization
- Consignee
- Ship method
- Ship from and ship to
- Shipment priority
- Dates scheduled



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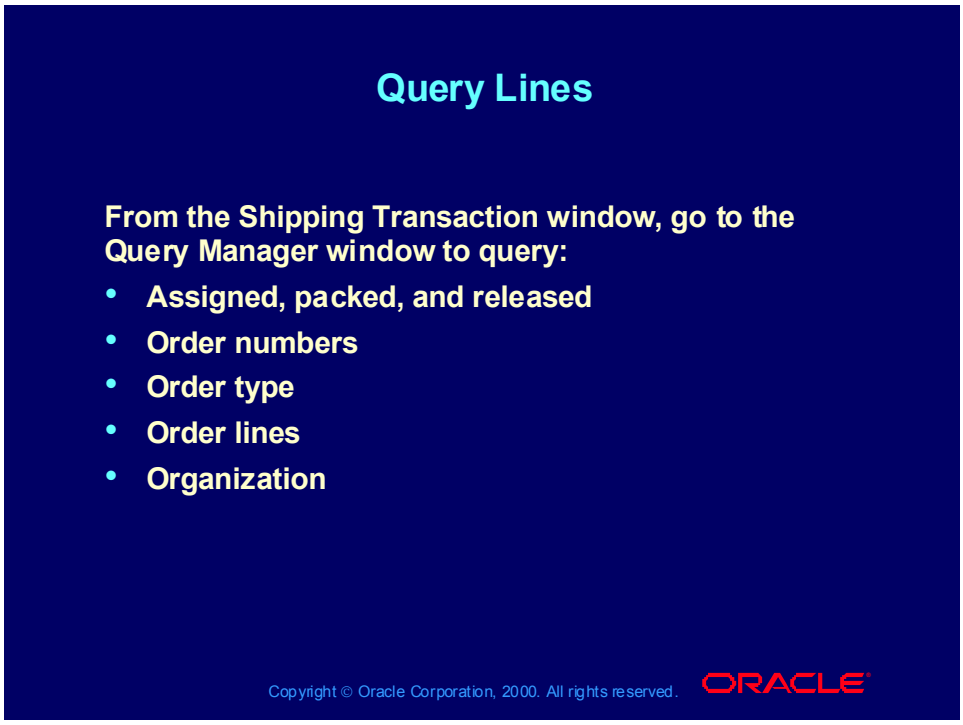

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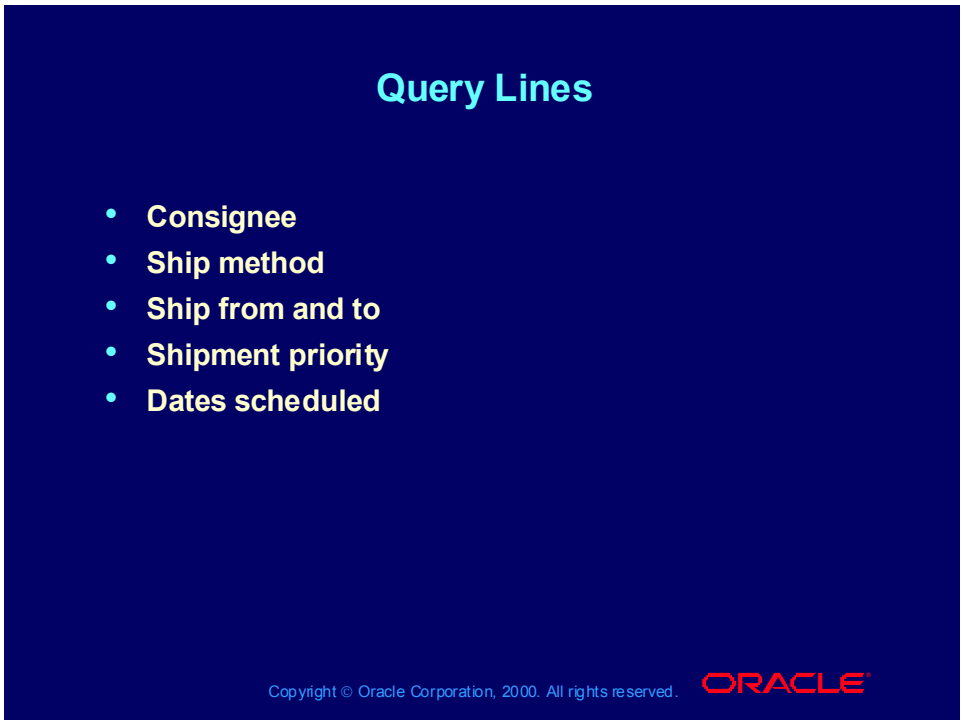

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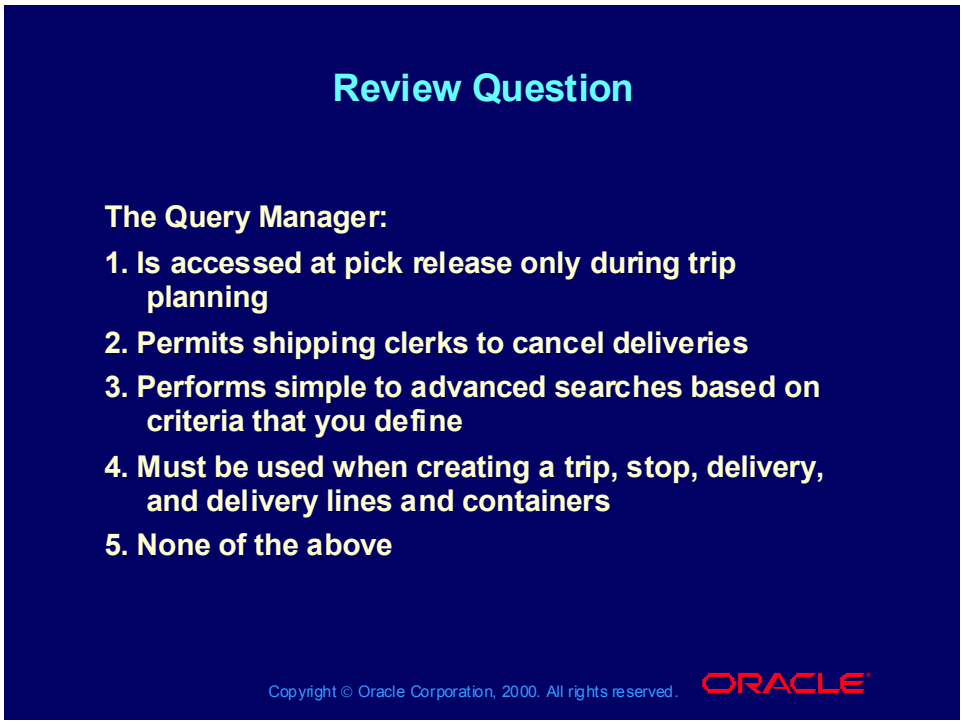

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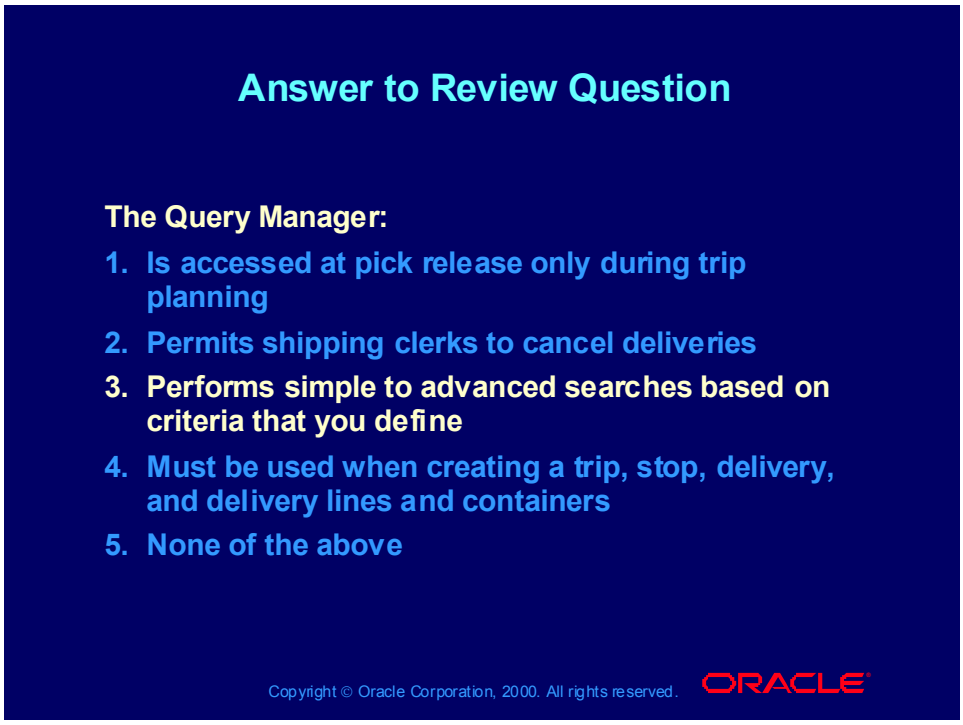

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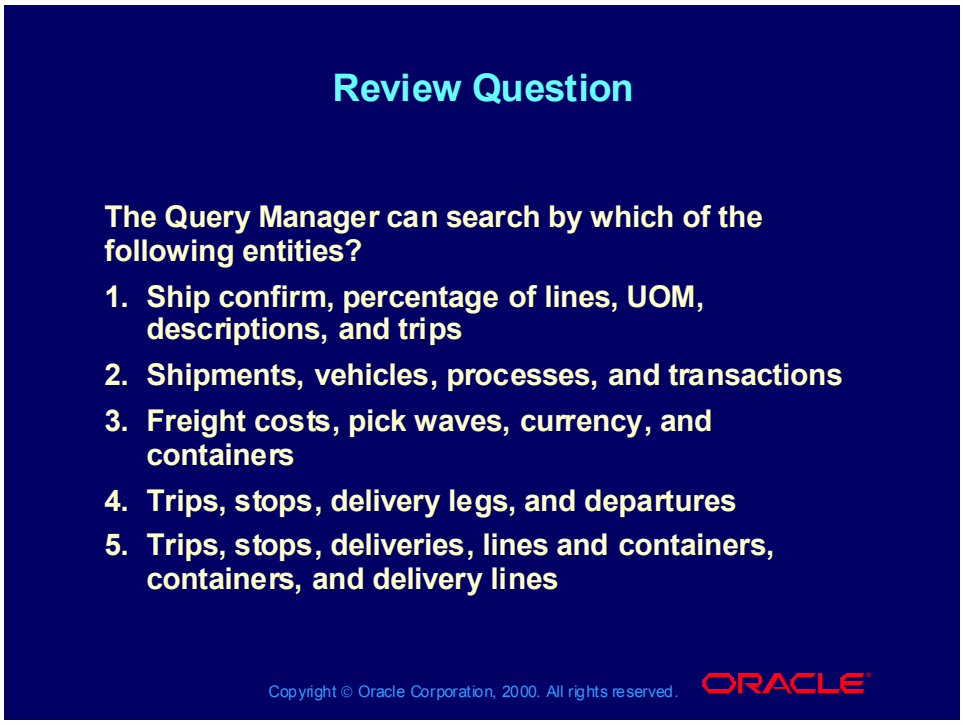

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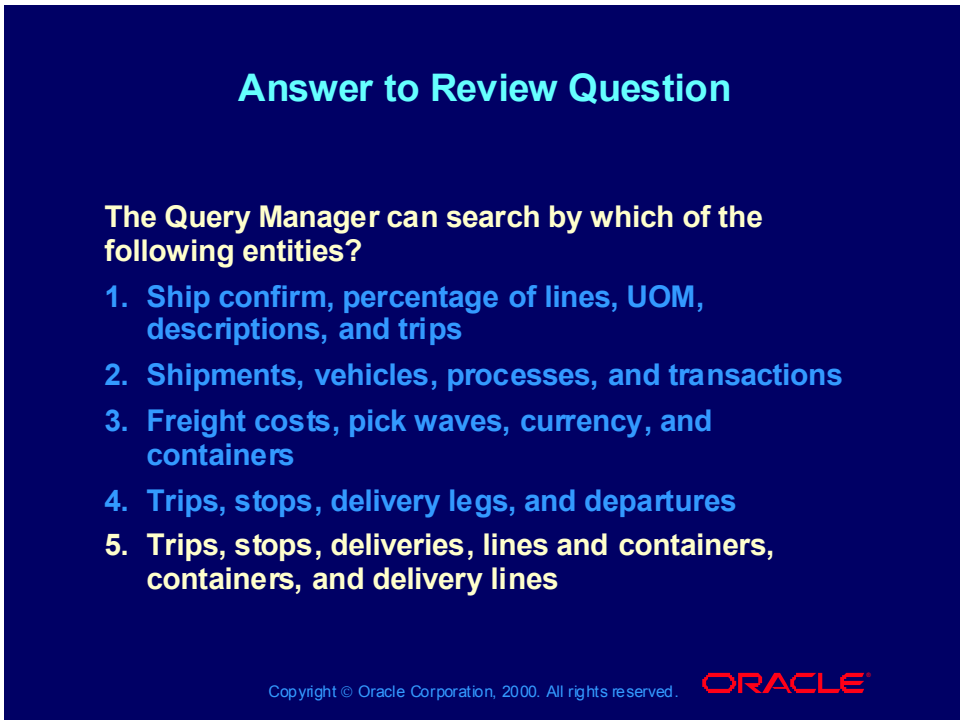

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Shipping Exceptions

The shipping exceptions feature helps you identify and correct shipping exceptions that violate the requirements of your operation or that of your carriers and customers.

The shipping exceptions feature gives you the ability to define exceptions and the processes for handling them. You can record exceptions automatically from within Oracle Shipping Execution, or you can log exceptions manually through the user interface input forms. You can initiate exception handling, and view and track the exceptions as you manage them to resolution.

APIs are provided that enable you, with some custom programming, to use third-party applications to log exceptions.

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Summary

In this lesson, you should have learned about:

- Shipping execution architecture, order process business flow, and APIs
- Concepts of Oracle Shipping Execution
- Move order concepts
- Configuration process(four steps)
  - Pick release
  - Detailing
  - Pick confirmation
  - Ship confirmation
- Shipping Transaction window
  - Managing and querying data
  - Shipping exceptions

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Picking and Staging

Chapter 2

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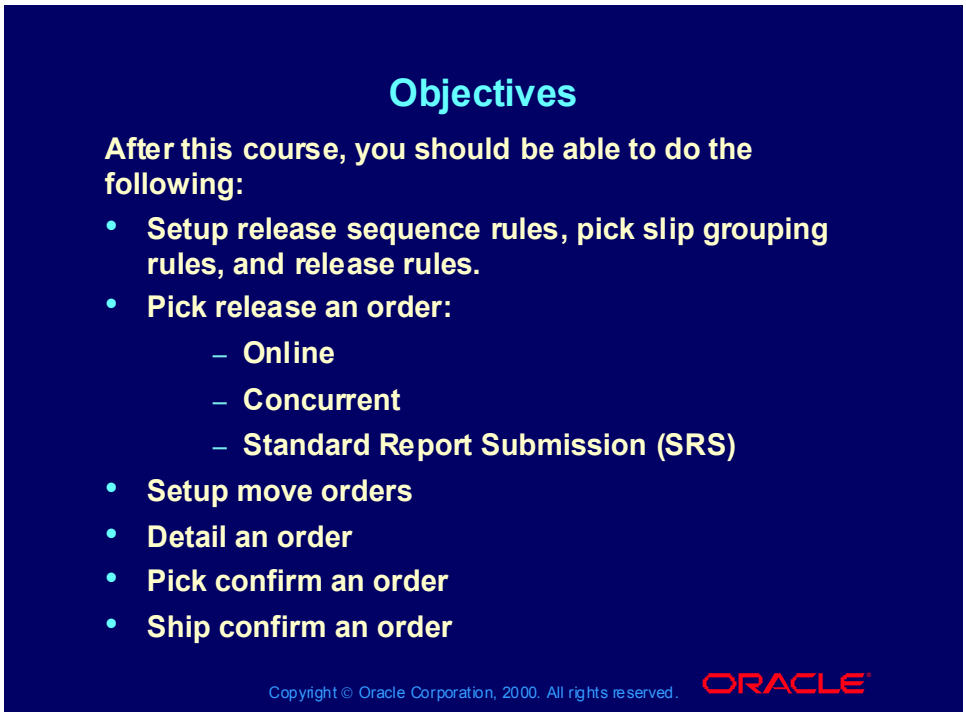

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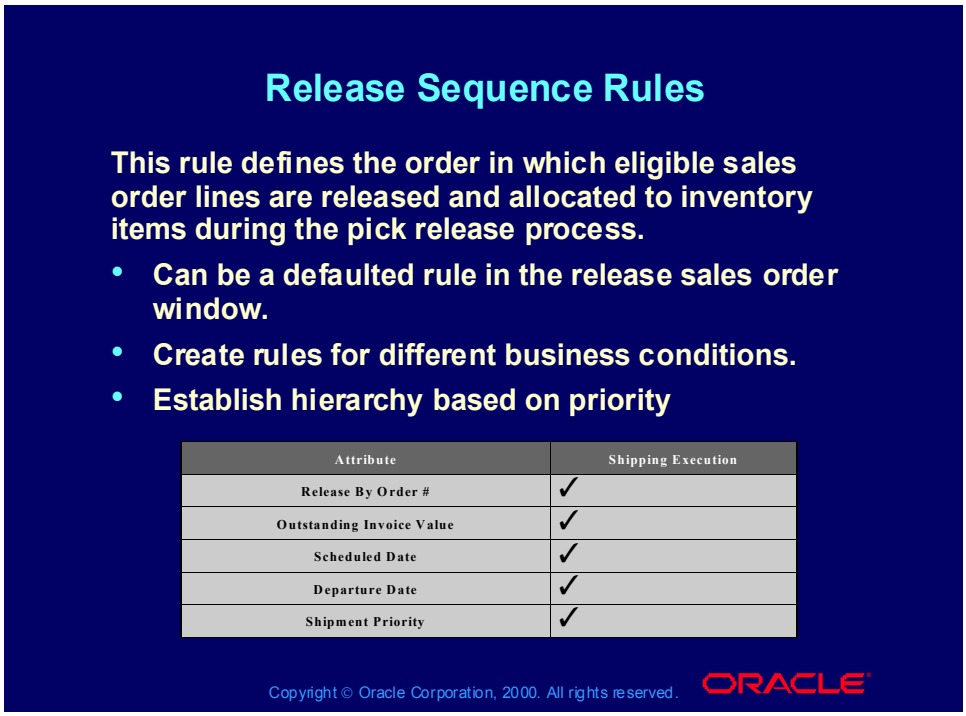
Release Sequence Rules



(N) Order Management > Shipping > Setup > Picking > Define Release Sequence Rules Form

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Pick Release > Setting Up > Defining Release Sequence Rules

This rule is used at pick release to determine the sequence in which inventory is allocated to orders lines. Rules can be defined to sequence release by order, outstanding invoice value, schedule date, departure date and shipping priority. Results of the allocation sequence can be applied in ascending or descending order. A release rule defined using outstanding invoice value is mutually exclusive. A release sequence rule can be defined to have multiple release sequence priorities. For example, a rule can be defined with shipping priority the number 1 priority descending and schedule date the number 2 priority ascending. The result would be that the highest priority orders with the earliest scheduled date would be released first. You can define as many release sequence rules as necessary.

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Pick Slip Grouping Rules

(N) Order Management > Shipping > Setup >Picking > Define Pick Slip Grouping Rules Form

When pick release is run, pick slip grouping rules determine how the pick slips are grouped. Rules can be defined to group pick slips by order number, sub inventory, customer , ship to, carrier, delivery, shipping priority, item, location. lot, revision or any combination. An example of a pick slip grouping rule is by customer and sub inventory. The grouping rules makes picking more efficient by putting logical lines to be picked on one pick slip.

Note: warehouse management system (WMS), this new product will be available a in future point release.

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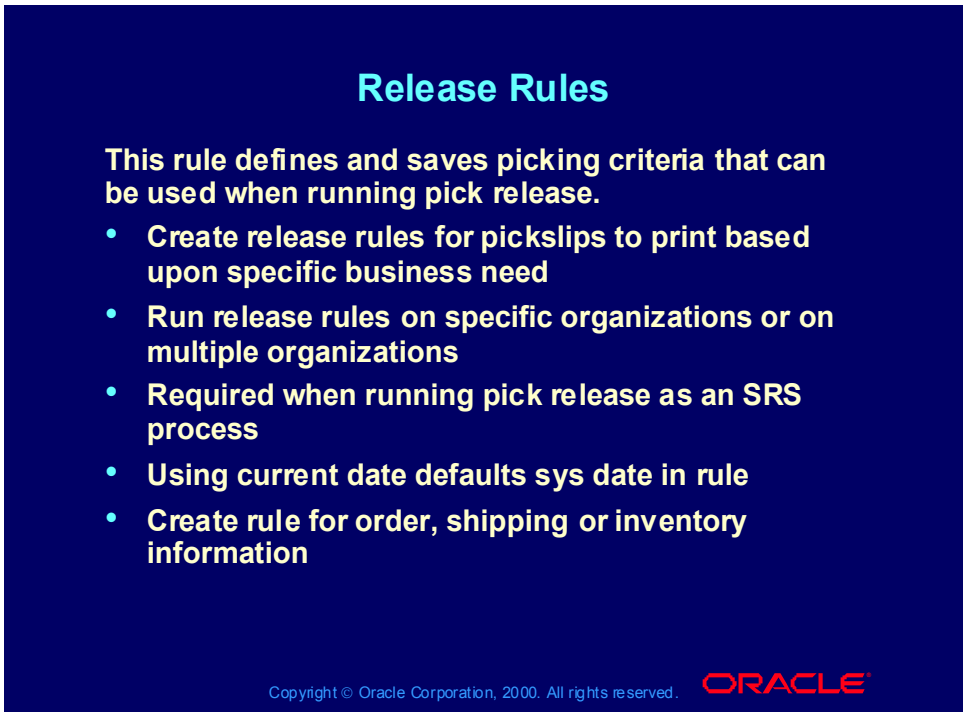
Release Rules



(N) Order Management > Shipping > Setup >Picking > Define Release Rules Form

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Pick Release > Setting Up > Defining Release Rules

The release rule window allows the user to set up picking rules that define criteria for what lines are going to be released to the warehouse on a specific pick release job.

A release rule is required if you are scheduling pick release as SRS process. A release rule can be used when running non SRS pick release jobs by selecting a defined rule in the "based on rule" field in the release sales order window.

Release rules can be created based on criteria represented in three different tabs:

- Order tab - criteria = order type, order number, customer, item, unreleased/backordered/all, ship set # , scheduled ship dates from and to, request dates from and to.
- Shipping tab - criteria = carrier, ship from, shipment priority, release sequence rule, auto create delivery, shipment priority.
- Inventory Tab - criteria = warehouse, pick slip grouping rule, auto allocate, auto pick confirm

Note: Inventory tab, when a warehouse is selected, other criteria is defaulted

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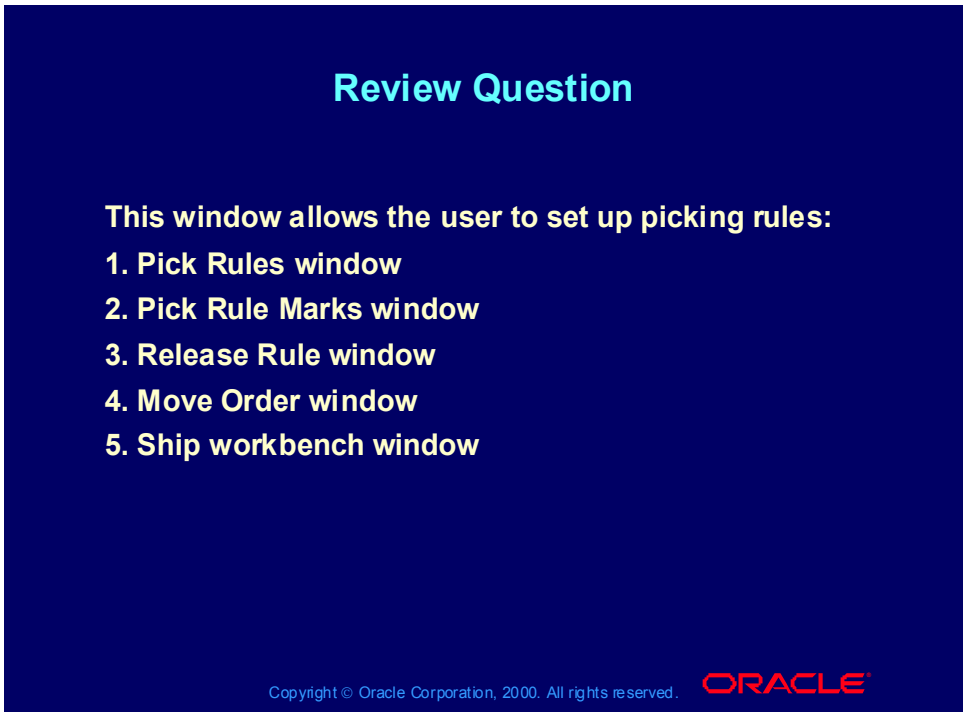

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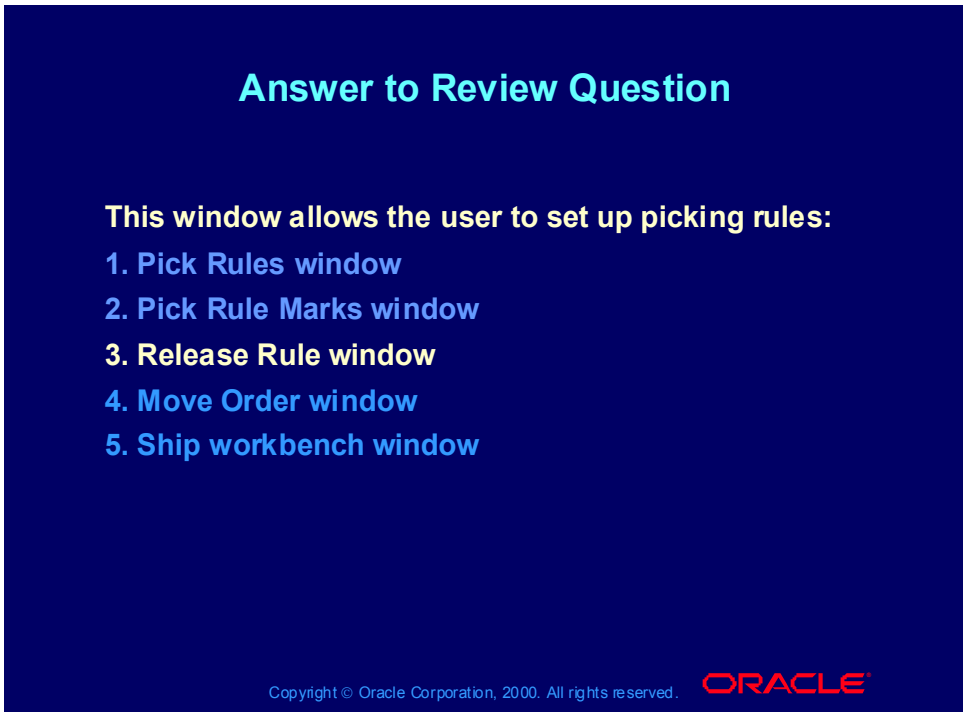

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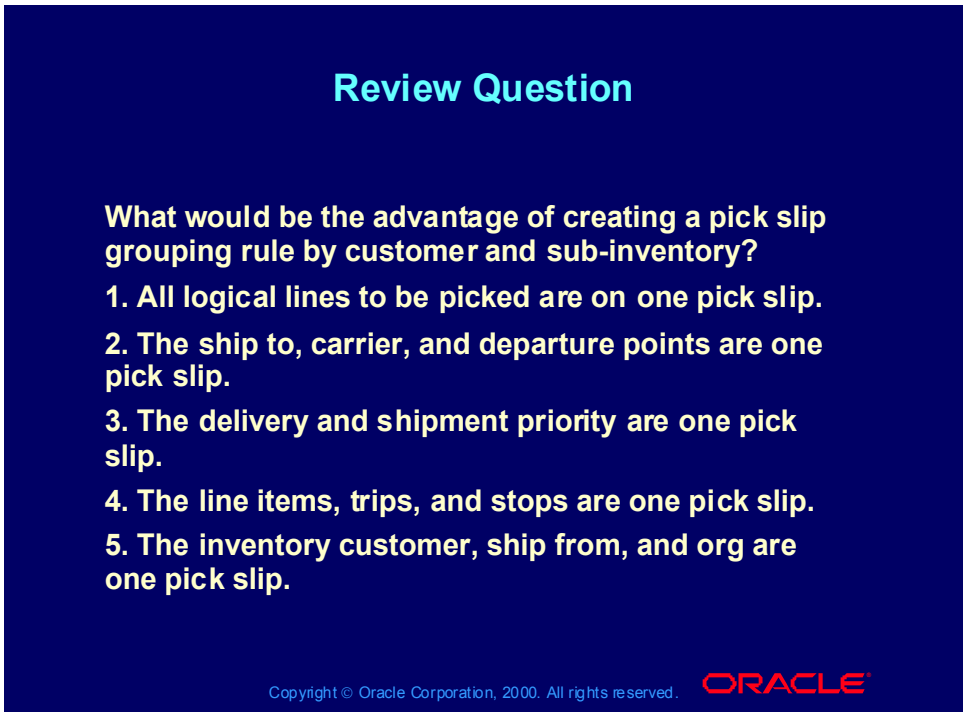

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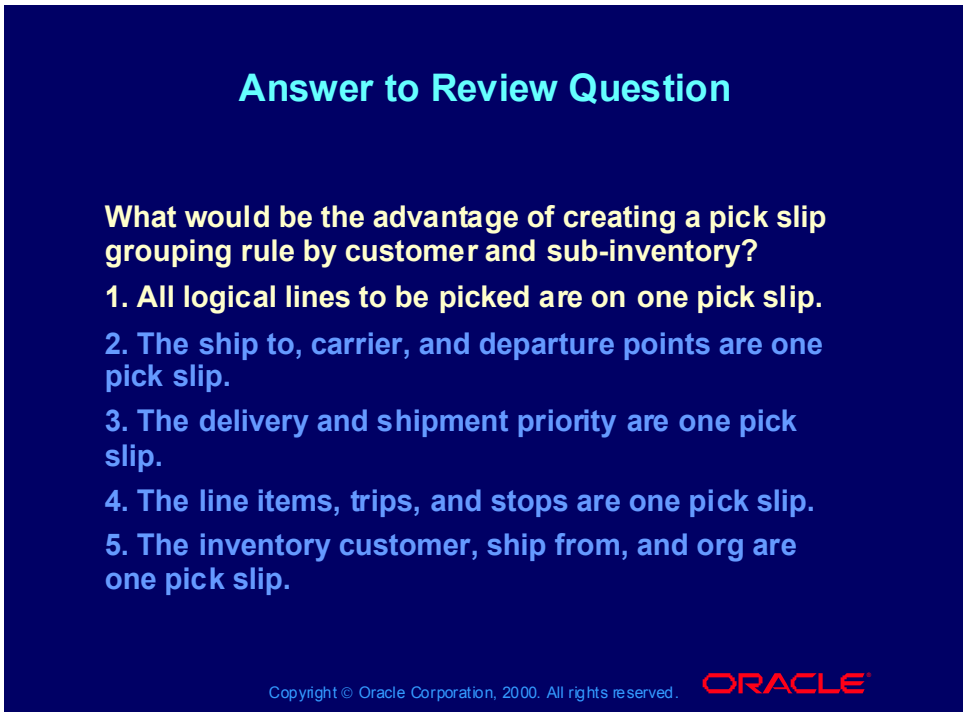

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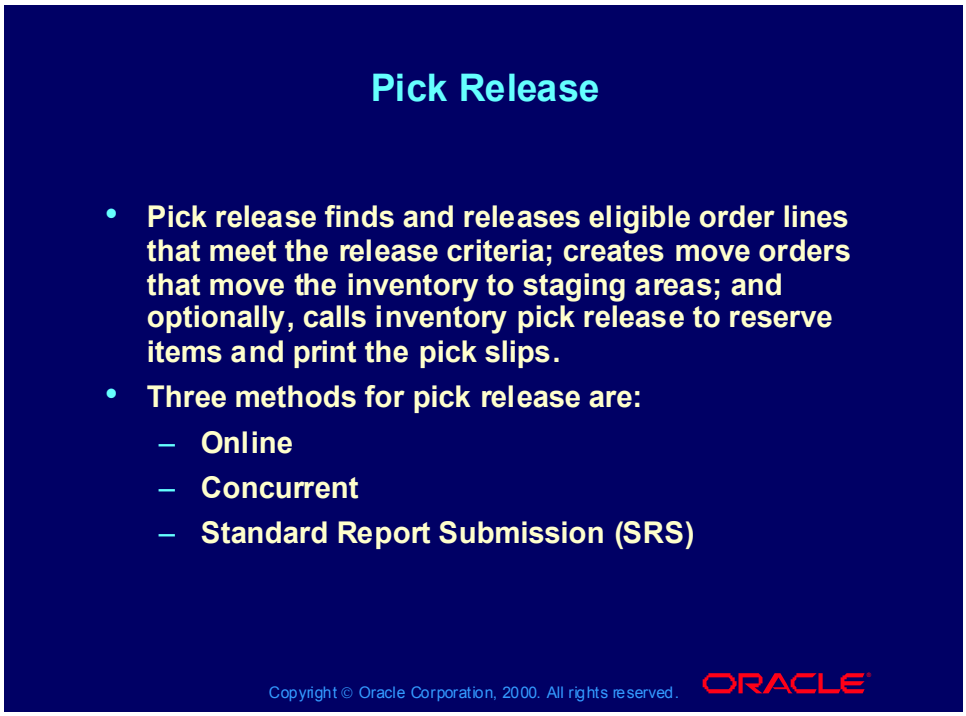

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Pick Release

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Pick Release > Overview

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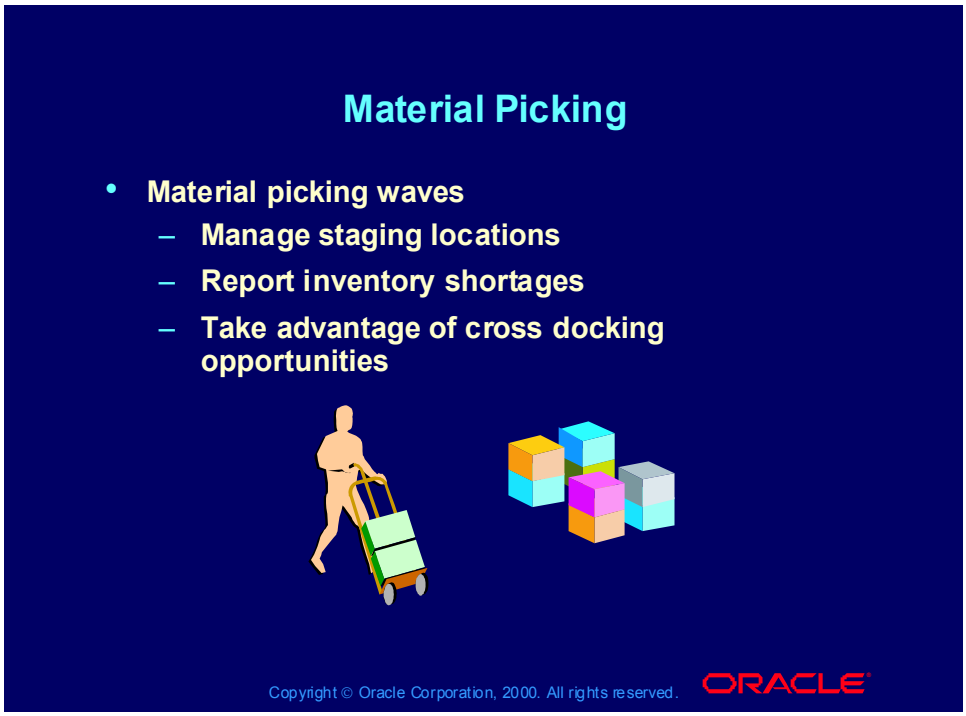

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Pick Release > Overview

Cross docking refers to the immediate picking of materials as they are received on the receiving dock, without intervening transactions such as a subinventory transfer being necessary.

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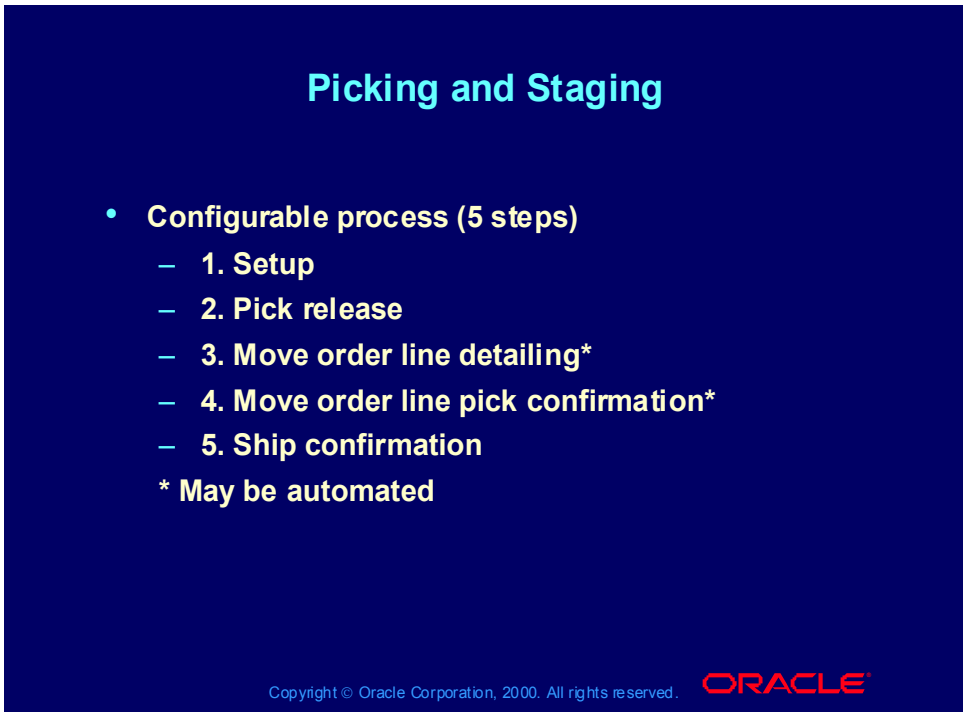

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Pick Release > Move Orders

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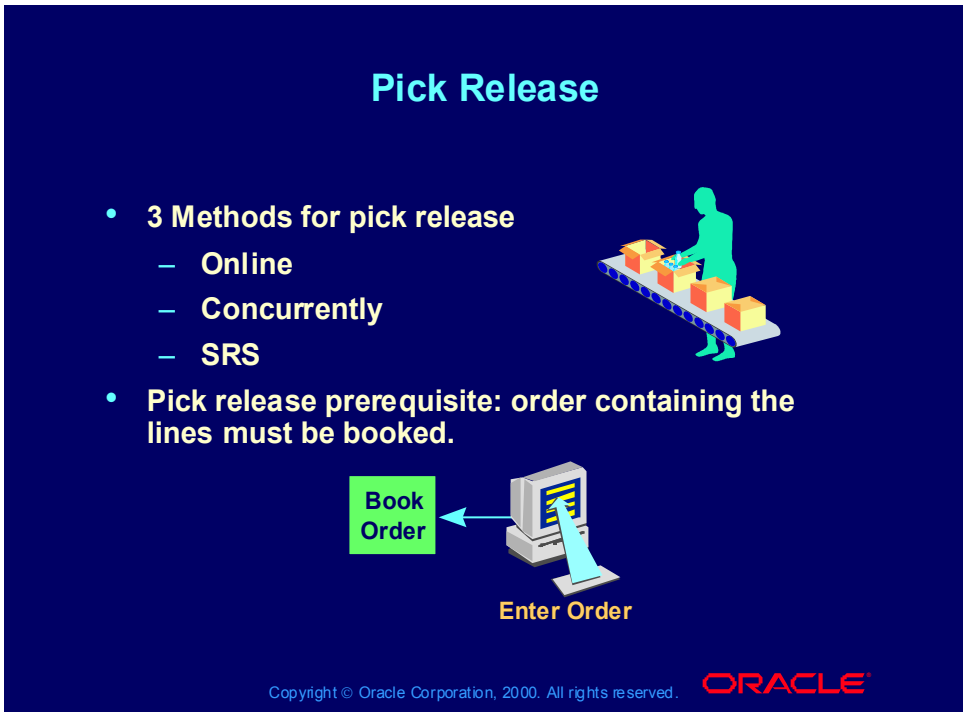
Pick Release



(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Pick Release > Overview

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Online Pick Release

Two places to run online:

(N) Shipping > Release Sales Orders > Release Sales Order

(N) Shipping > Transactions > Tools Menu > Pick Release

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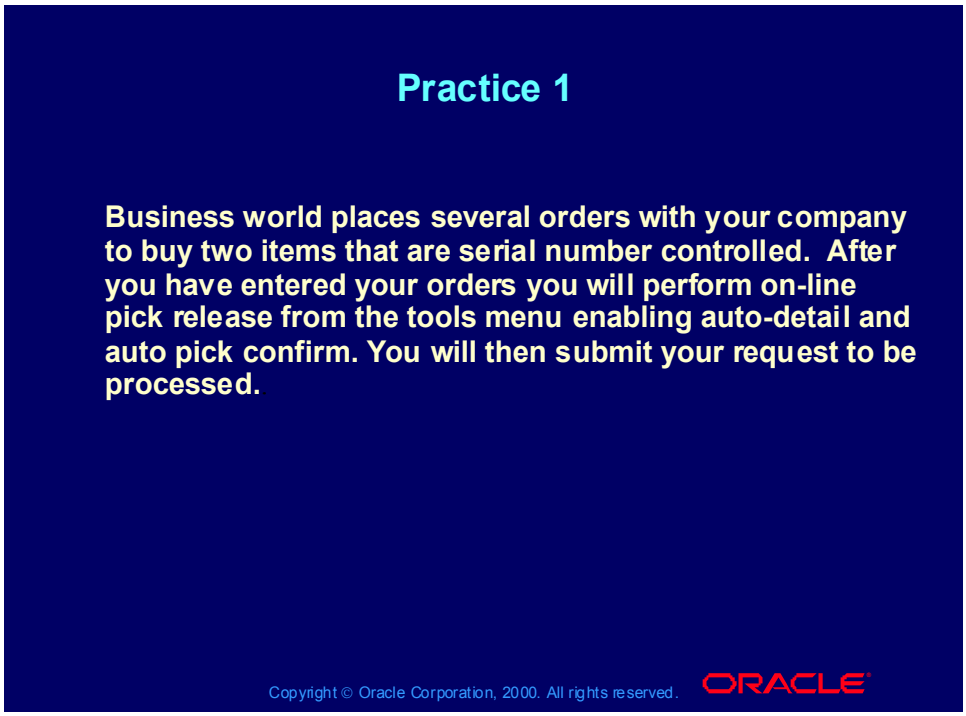

Guided Practice 1

(N) Order Management > Orders, Returns > Sales Orders

1.Select Customer Business World from LOV
Address defaults.
2. Mixed order defaults as the order type
3. Corporate defaults as the price list
4. Howard Sprague defaults as the sales person

(T) Line Items
5. Select AS54888 as the Item from the LOV
6. Enter the Qty: 10
7. UOM = Ea
8. Select AS18947 for your second ordered item
9. Enter the Qty of 5
10. UOM = Ea
11. Howard Sprague defaults as the sales person
12. Choose the Book Order button

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13. Record your order number
14. Choose the Actions button
15. Select copy as the action from LOV
16. Select create new order (record 2nd order number)
17. Choose the Flash Light icon from the Menu Bar

18. Enter the 2nd order number
19. Choose the Find button
20. Choose the Actions button and select book order

Record your order number

21. Repeat Steps 14-20 for your third order. (you may have to select the line by pressing the Ctrl and the left mouse buttons in the Order Organizer window for booking)
22. Record your order number

(N) Shipping > Transactions

23. Choose the Flash Light icon from the Menu Bar
24. Select Lines Search
25. Enter your first order number
26. Choose the Find button
27. From the Tools Menu select Pick Release window

(T) Order

28. Enter the order number.
28. Leave scheduled ship dates and requested dates blank

(T) Shipping

29. Select order number as the release sequence rule from LOV

(T) Inventory

30. Select M1 as the warehouse from LOV
31. Select departure, delivery as the pick Slip grouping rule from LOV
32. Auto Detail: Yes
33. Auto Pick Confirm: Yes
34. Choose the Concurrent button (record concurrent request number and batch number)
35. Close the window
36. From the View Menu select requests

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37. Choose the Find button

38. Find your ID # for the “Pick Selection List Generation” request. Record the status of the request and close the window. Concurrent request should read completed normal.

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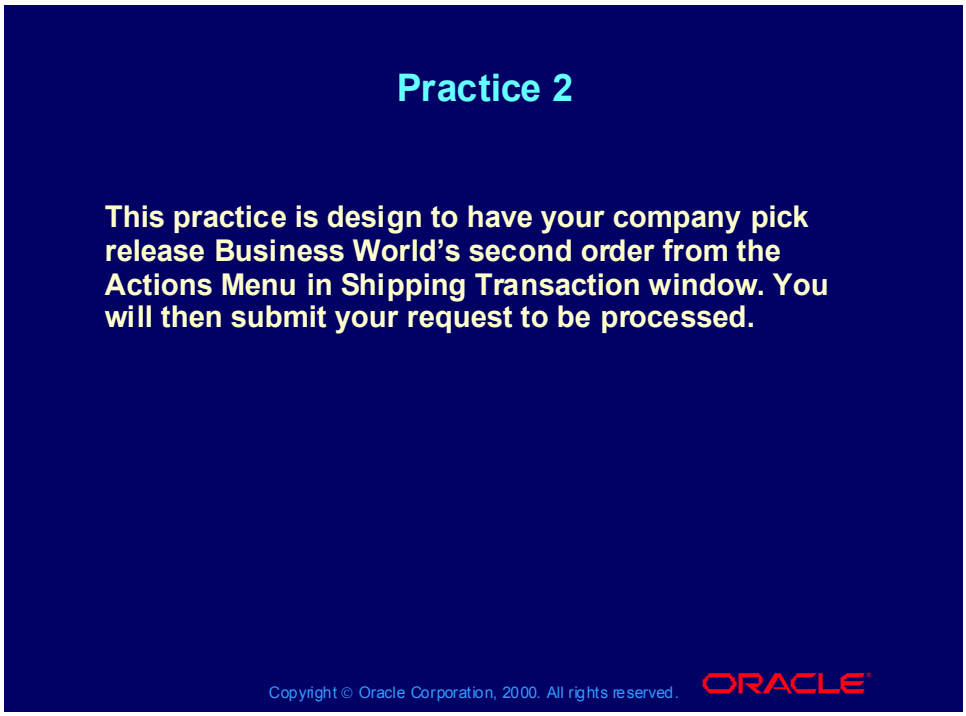

(N) Shipping > Transactions

1. Choose the Flash Light icon from the Menu Bar
2. Select Lines Search
3. Enter your 2nd order number
4. Choose the Find button
5. Select the lines by pressing the Ctrl and the left mouse buttons
6. Choose the Actions Menu
7. Select launch pick release
8. Choose the Go button
9. Choose Details button from the Message window (record request ID)
10. From the View Menu select requests
11. Choose on the Find button
12. Find your ID # for the "Pick Selection List Generation" request. Record the status of the request. Close the window. Concurrent request should read completed normal.

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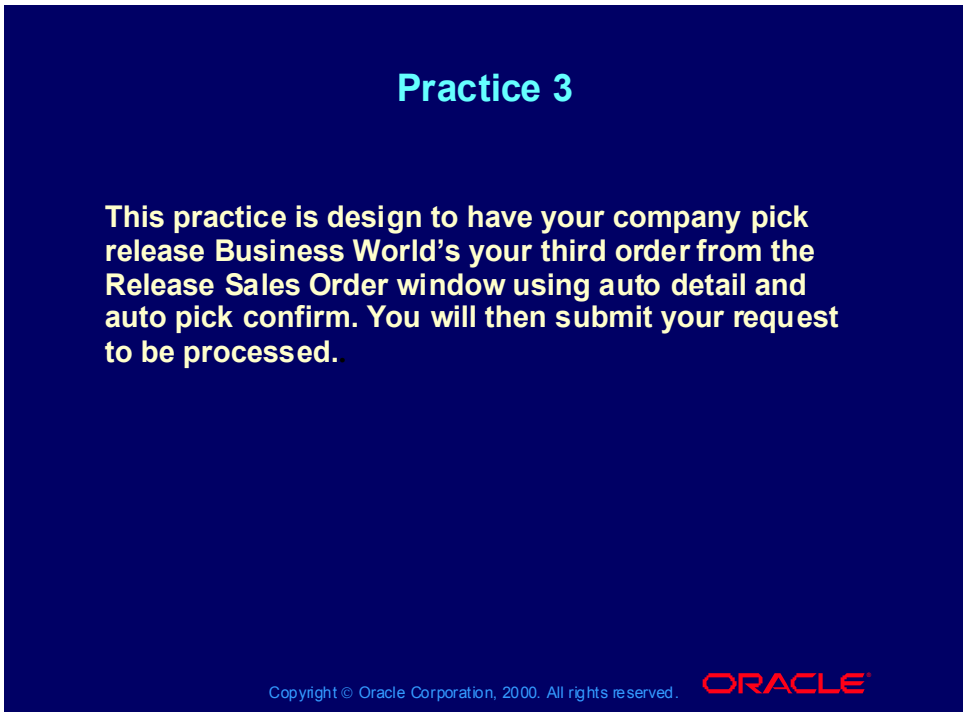

(N) Shipping > Release Sales Orders > Release Sales Orders

1. Enter the 3rd order number
2. Leave scheduled ship dates and requested dates blank

(T) Shipping

3.Select Order Number as the Release Sequence Rule from LOV.

(T) Inventory

4. Select M1 as the Warehouse from LOV
5. Select departure, delivery as the pick slip grouping rule from LOV.
6. Auto Detail: Yes
7. Auto Pick Confirm: Yes
8. Choose the Concurrent button (record concurrent request number and batch number)
9. Close the window.
10. From the View Menu select requests
11. Choose the Find button.
12. Find your ID # for the "Pick Selection List Generation" request. Once the request has completed normally. Close the window. Concurrent request should read completed normal.

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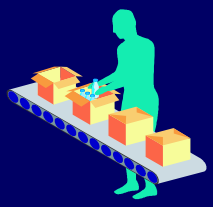
Concurrent Pick Release

- You can pick release through the release sales orders function. You can run release sales orders for picking in the background, enabling you to run other processes simultaneously.
- From the release sales orders for Picking window, enter:
  - Order number
  - Order type
  - Item
  - Customer
  - Orders (required)



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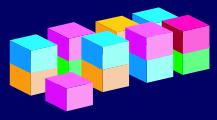
Standard Report Submission (SRS) Pick Release

- Run a specific release at the same time every day. SRS runs pick release in the background multiple times.
- From the release sales orders for Picking window, go to the Parameters window to enter:
  - Release rules name (required)
  - Batch prefix
  - Name (required)
  - Parameters



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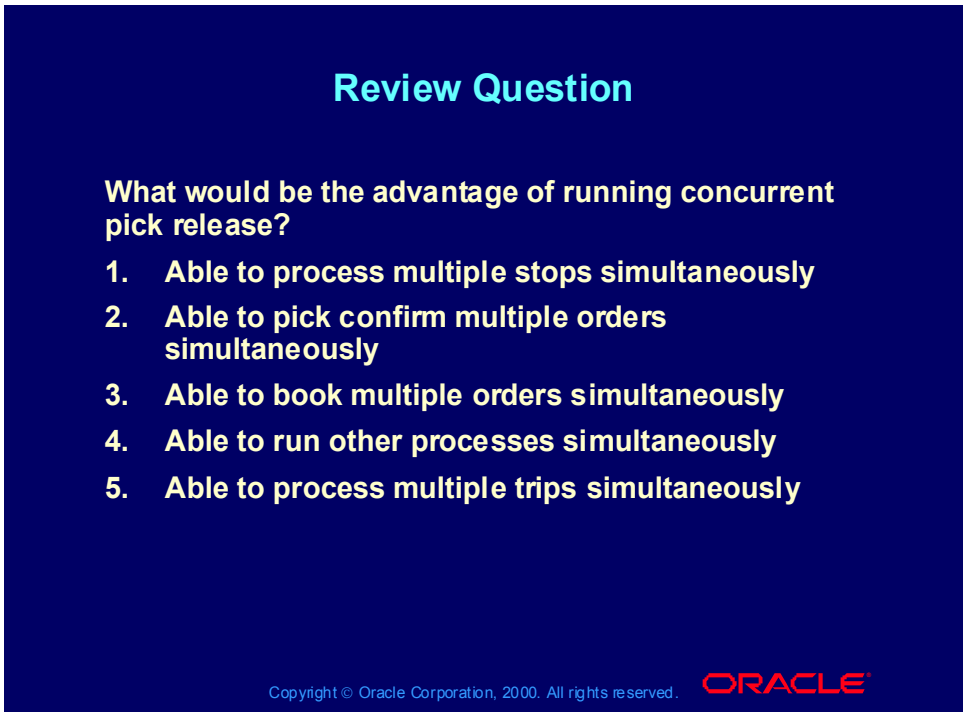

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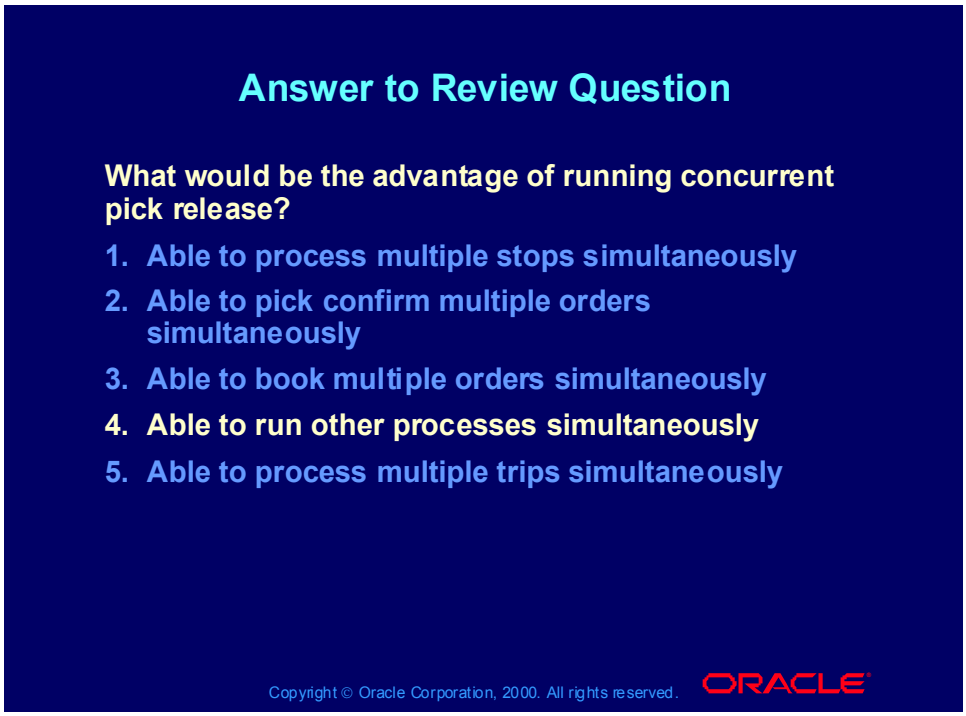

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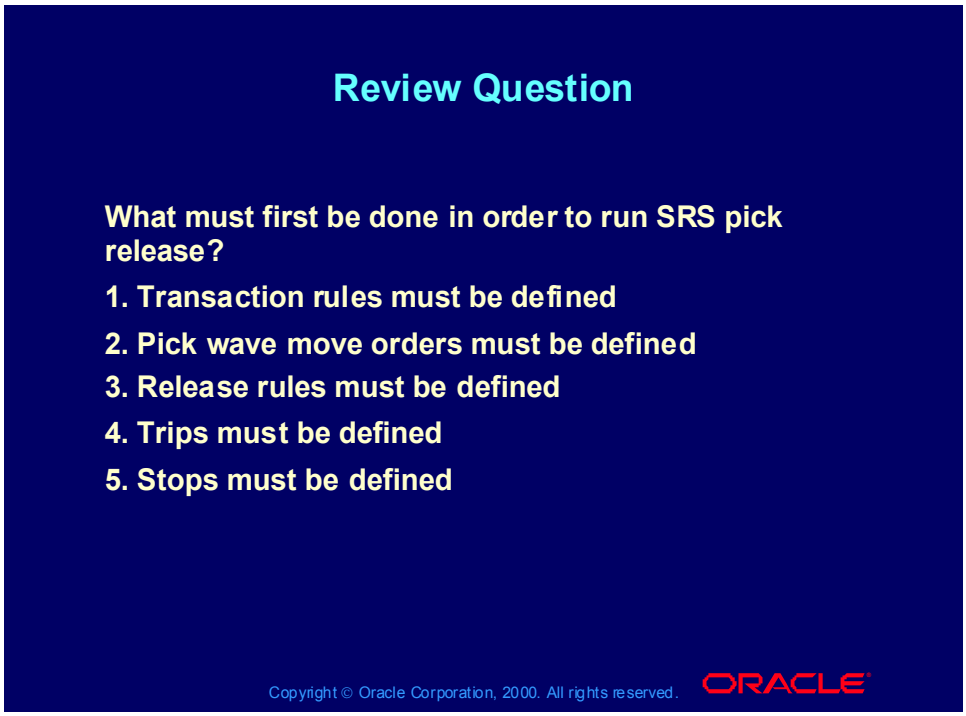

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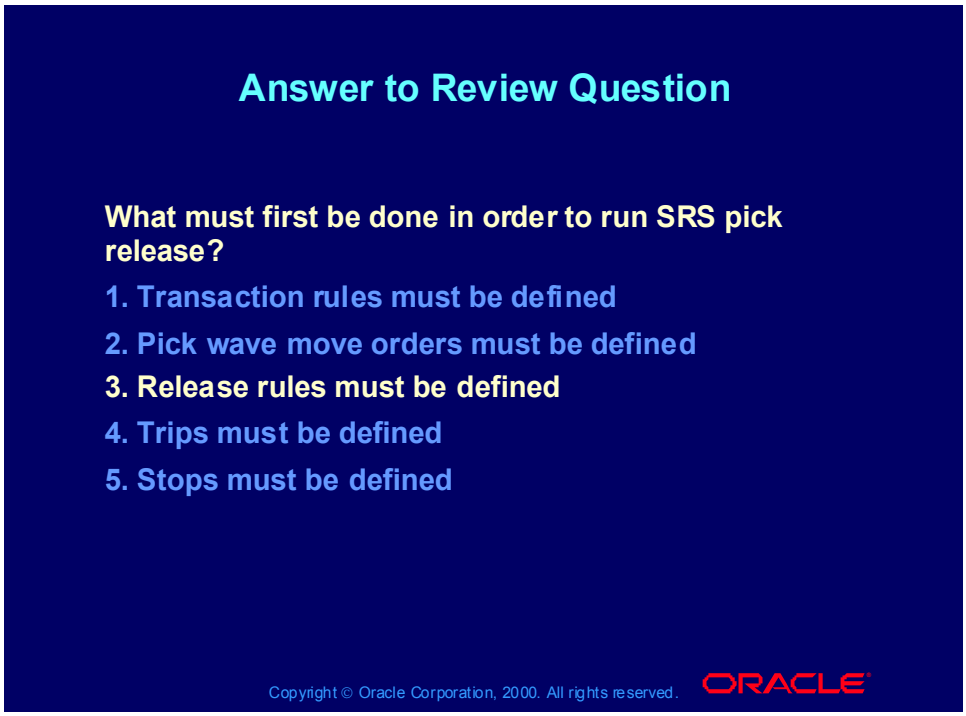

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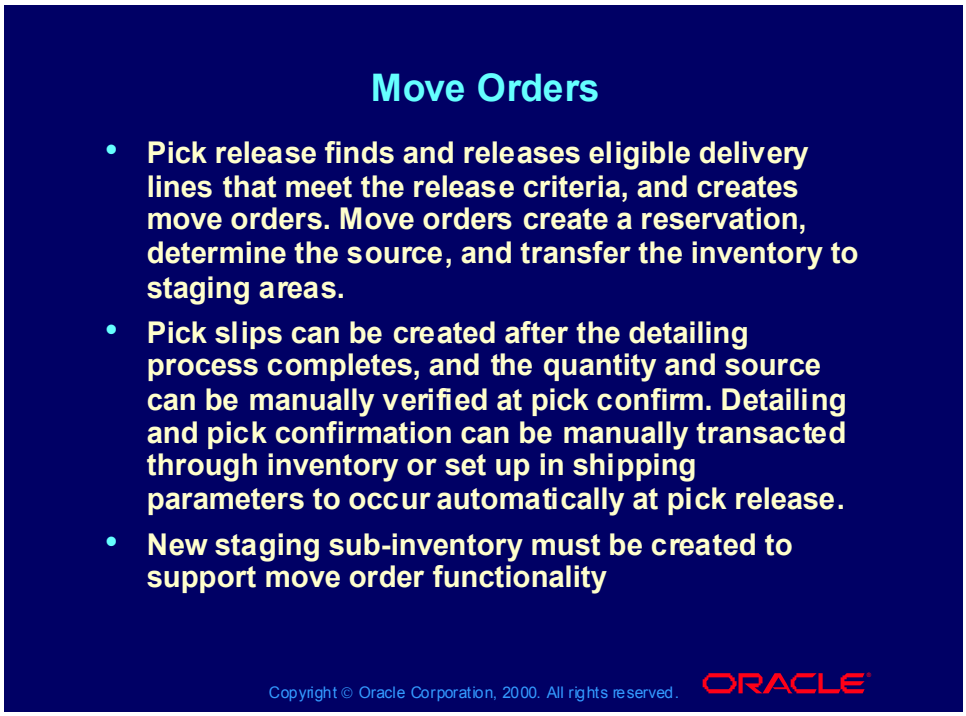
Move Orders



(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Pick Release > Move Orders

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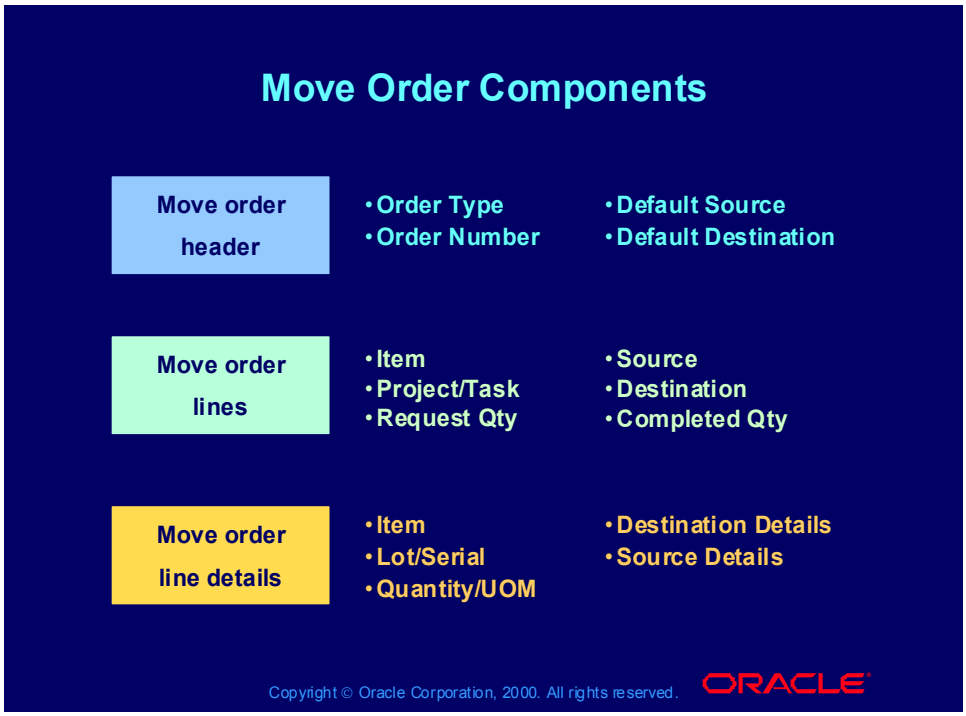
Move Order Components



Anatomy of a Move Order

Oracle Order Picking and Shipping stores the move order source type in the header. This refers to the entity that created the move order. An order could be a pick wave (for sales order picks) a replenishment type, a requisition for subinventory transfer and so on. Order Picking and Shipping also stores the default source and destination if available, the order number, and the requested date.

The lines are the requests on that move order. They store the item, requested quantity, completed quantity (if the move order has been partially fulfilled), a source and destination if known, and any project and task references if the organization is Project Manufacturing enabled. The user can also request specific serial or lot numbers if know, on the move order line.

The line details are the Inventory transactions that occur to fulfill a particular request line (move order line). If the material is locator, lot, or serial controlled, this information is filled in at the line detail level. These details are automatically filled in by Oracle Inventory using the Inventory Picking Rules and the Item - Transaction defaults (for destination locators), or the user can manually fill in the details. These details can be edited prior to transaction by a user.

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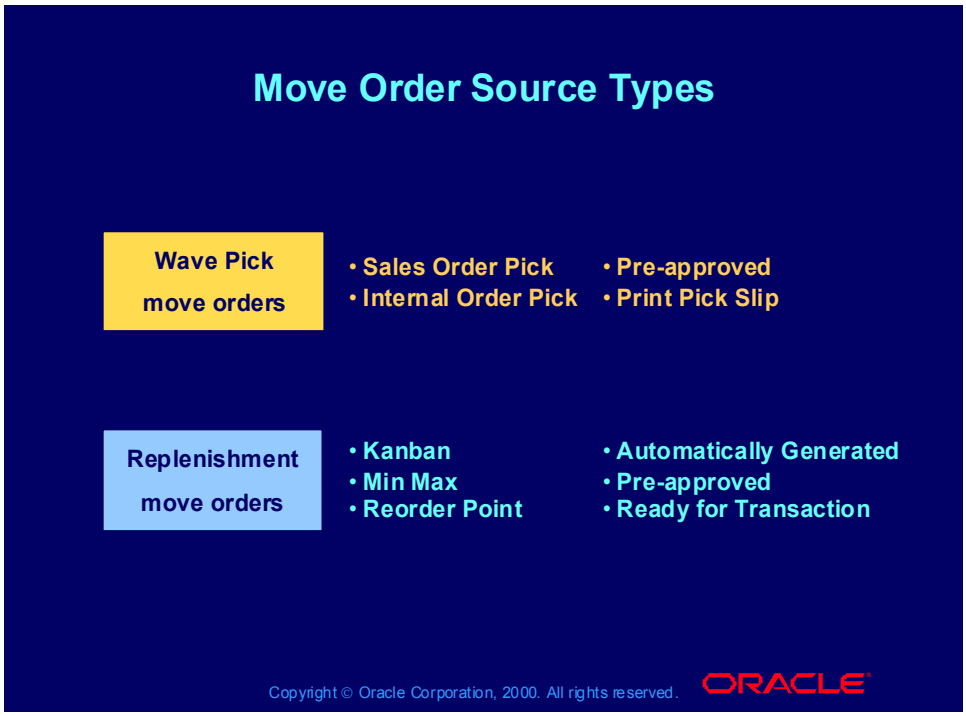
Move Order Source Types



Move Orders

With the release of Oracle Order Management, the pick release process will now generate move orders to bring the material from its source location in stores to a staging location. This will be modeled as a subinventory transfer (the staging location is a subinventory that you set up in Oracle Inventory). These orders will be pre-approved and ready to transact. Pick slips and other shipping and inventory reports will also be available.

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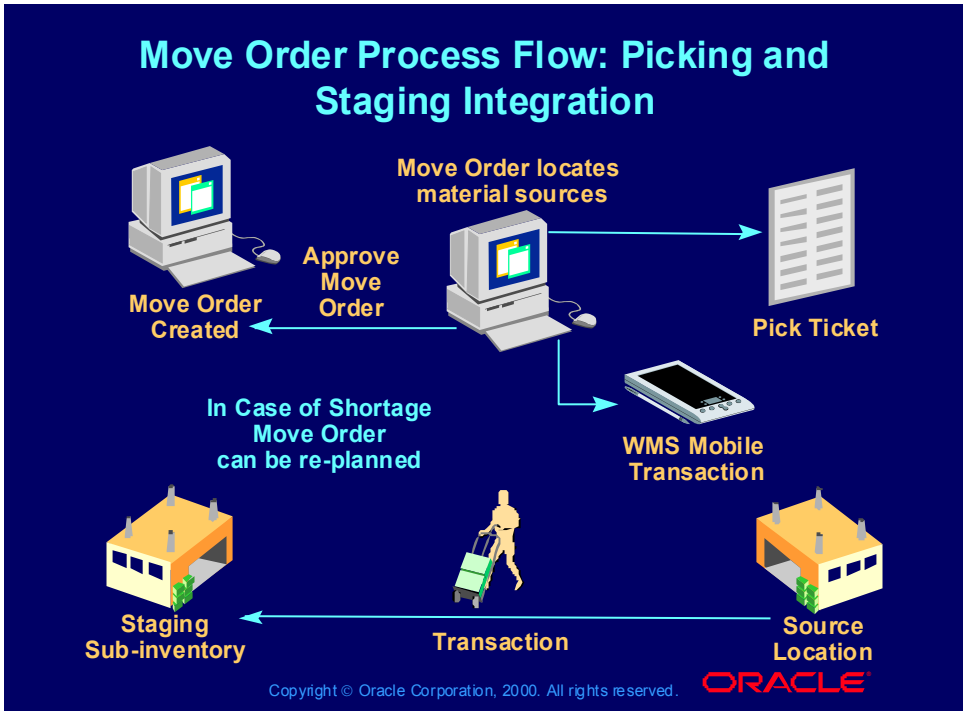
Move Order Process Flow: Picking and Staging Integration



(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Pick Release > Move Orders

First the move order is created by the Pick Release engine. Next, it must be "Detailed". Detailing is the process by which Oracle uses the picking rules to determine where to source the material to fulfill a request line (move order line). The detailing process fills in the move order line details with the actual transactions to be performed. If adequate quantity is not available to detail the move order, this process can be done again later. If no reservation exists before the detailing process, it will also create the high level reservation for the material.

Before transaction, users may print a pick slip or push the move order line details to mobile devices for transaction through the move order APIs.

The user now transacts the move order to pick confirm. The order line can be transacted all at once, or users can transact one detail line at a time as the items are moved. If the user transacts less than the requested quantity the order will remain open until the full quantity is transacted or the order is closed or canceled.

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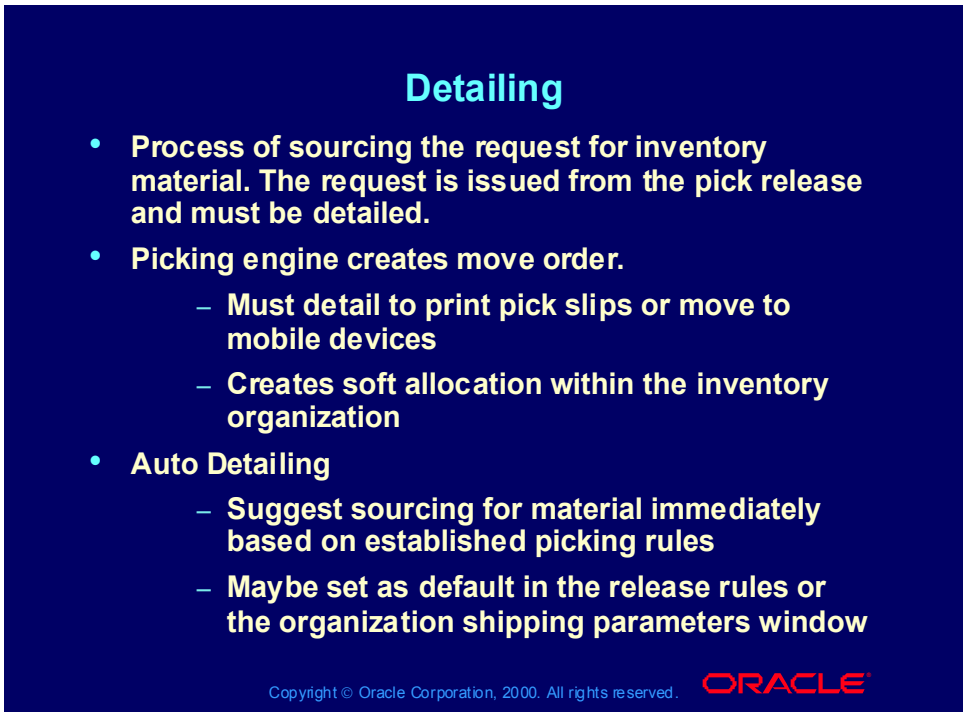
Detailing



(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Pick Release > Move Orders

Pick release creates move order lines. In order to release those lines to the warehouse and print pick slips the lines must be detailed. The process by which the picking engine generates transaction line suggestions is called “detailing”. The detailing process for a pick wave move order line also creates a high level (organization level) Reservation on the material if no reservations previously existed. Users can choose to do this immediately after the move order lines are created or to postpone this step until a later point in time. Postponing the detailing process might be employed by organizations that pick release across multiple warehouses but prefer to allow each warehouse to determine when to release their order lines to the floor. Detailing the order lines immediately after they are created is called “auto-detailing”. Postponing the detailing process is referred to as “manual-detail”. Users can set up a default detailing mode in the Shipping Execution organization parameters. This default can be overridden at each pick release.

- If auto detail is NOT used, then users are expected to:
  - Go to move transactions screen (Inventory)
  - Query the batch (created by the pick release process)
  - Auto detail the quantity manually.

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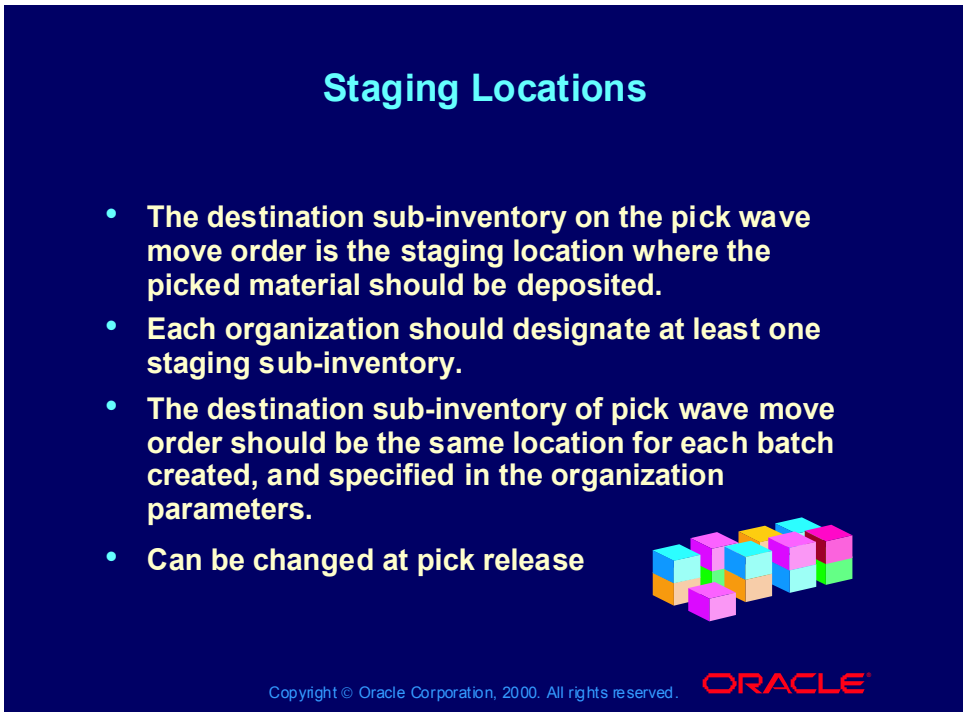
Staging Locations



(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Pick Release > Move Orders

The destination sub-inventory on the pick wave move order is the staging location into which the picked material should be deposited. Each organization must designate at least one staging sub-inventory. Each batch created at pick release will have the same destination staging sub-inventory. The default staging sub-inventory and locator to be used for all pick wave move orders can be specified through a shipping execution organization parameter. This location can be changed at pick release. To model different staging lanes within the staging area, facilities may choose to either create different sub-inventories or designate staging lane locators within one staging sub-inventory.

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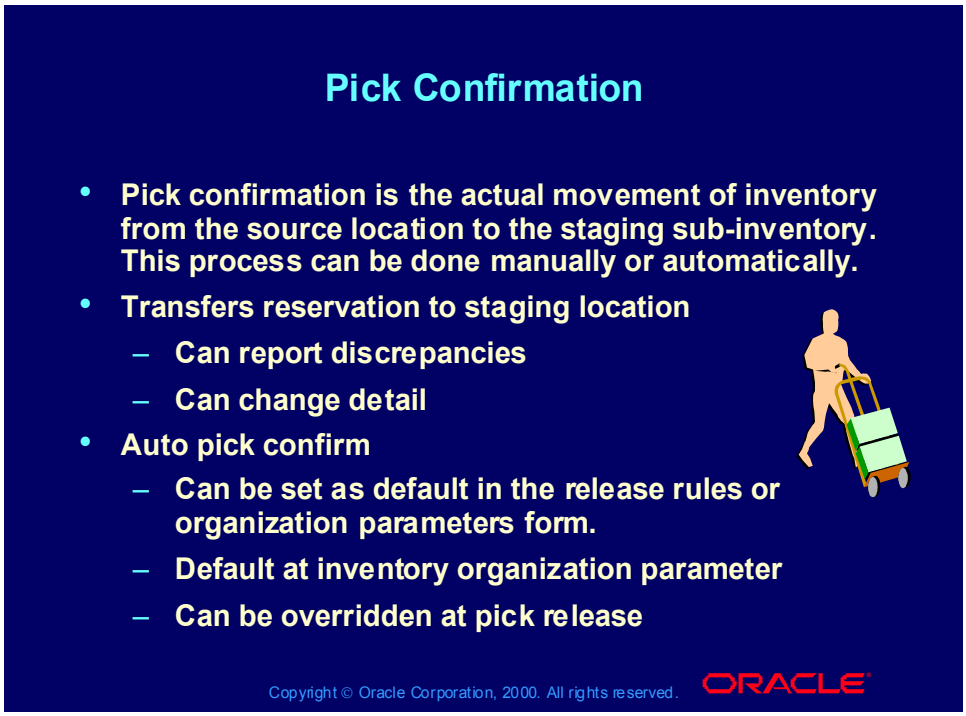
Pick Confirmation



(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Pick Release > Move Orders

The move order line details (transaction lines) created by the detailing process must be transacted to confirm the material drop-off in staging. This process is called pick confirmation. Pick confirmation executes the sub-inventory transfer that moves the material from its source location in the warehouse into the staging location. Pick confirmation automatically transfers the high level reservation to a detailed reservation (including lots, sub-inventory revisions and locators) in the staging location. At pick confirmation, a user can report a missing quantity or change the transaction line if the picker chose to use material from a different lot, serial, locator or sub-inventory. If an organizations picks rarely deviate from the suggested picking lines and the overhead of requiring a pick confirmation is unmanageable, the pick confirm transactions can occur immediately after the lines are detailed. This option is called “auto pick confirm”. Users can set up a default pick confirm policy in the inventory organization parameters. This default can be overridden at each pick release. Note that even if an automatic pick confirm is employed, the material is only transacted to the staging sub-inventory and reserved. A user can still manage any discrepancies found by deleting the reservation and transacting the material back to its original sub-inventory. If mobile devices such as bar code scanners are used to perform inventory transactions, it is suggested that you use manual pick confirmation for greatest inventory accuracy and control.

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- If Auto pick confirm is used then reservations are placed for each line up to the available quantity.
- If auto pick confirm is NOT used, then users are expected to:

  Go to Move transactions screen (Inventory)

  Query the batch (created by the pick release process)

  Pick confirm the quantity manually.

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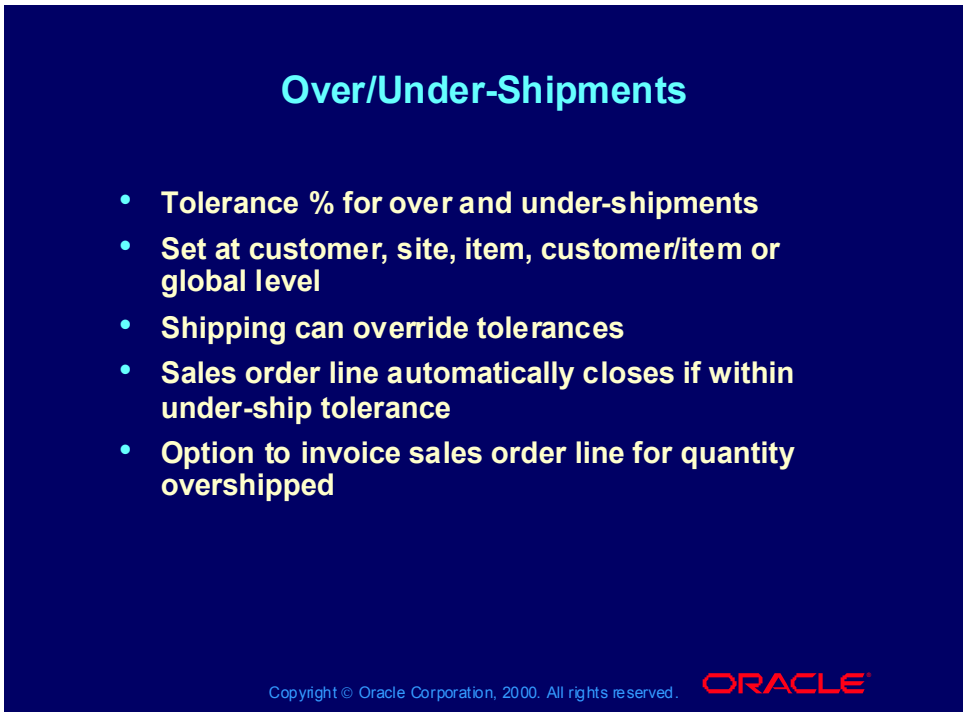

You'll be able to set up over and under shipment tolerances for orders and for returns. You can set them up at the customer or site level using customer windows, the item level using PDM (Inventory) master items window, and for customer and item combination using a new Oracle Order Management (OM) window. There will also be a set of OM profile options that will allow you to set up these tolerances globally, and then only set the other ones where they need to be different.

Here's how over-shipment tolerance will work - at ship confirm, the shipping clerk can confirm a quantity greater than the quantity on the line if it is within the over-shipment tolerance. If it is greater than the over shipment tolerance, a warning will be given. The actual quantity shipped is recorded on the line.

The under-shipment tolerance works a little different - at ship confirm, the shipper can confirm a quantity less than the quantity on the line - but if the quantity shipped is within the under-shipment tolerance, then the line will be closed once the shipment is processed. If the quantity shipped is outside the tolerance, the line will split into 2 lines - the one line representing the quantity shipped and the other containing the difference. The point of using under-ship tolerance is to save the user from having to cancel off any remaining little bits of a line, if there is no intention or need to ship it.

Invoicing of overshipments will be controlled by a new profile option called OM: overshipments Invoice Basis - which will control whether to invoice for quantity shipped or quantity ordered. There will be a corresponding new attribute on the Customer and site level, which can be used if a customer or site

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needs to be treated differently from the global option. Undershipments are always invoiced at quantity shipped.

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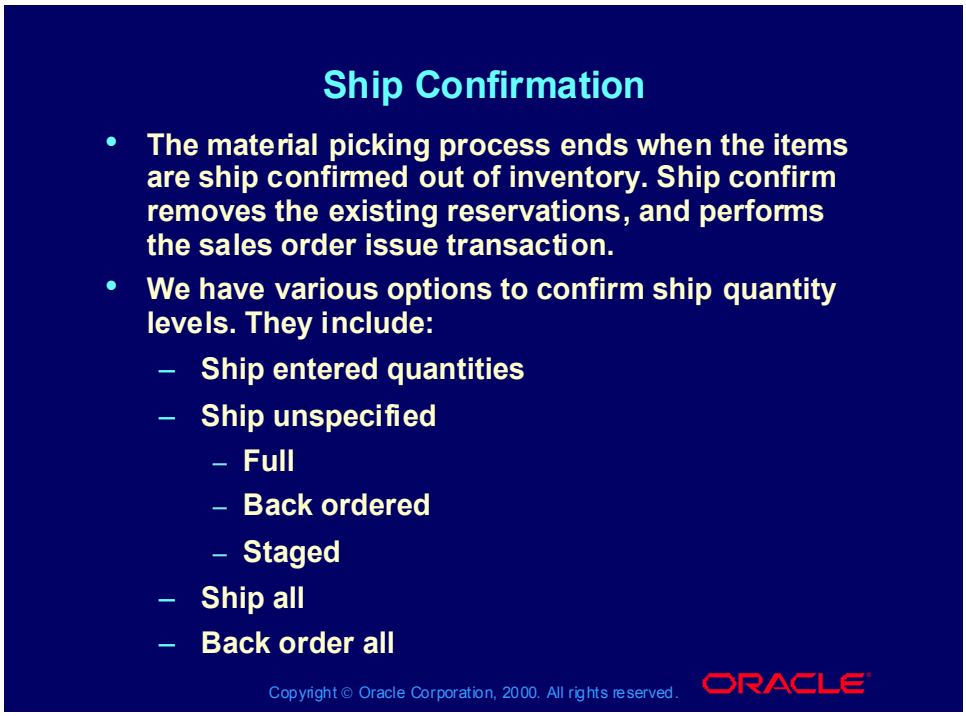

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Actions (M) Ship Confirm

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Ship Confirming a Delivery

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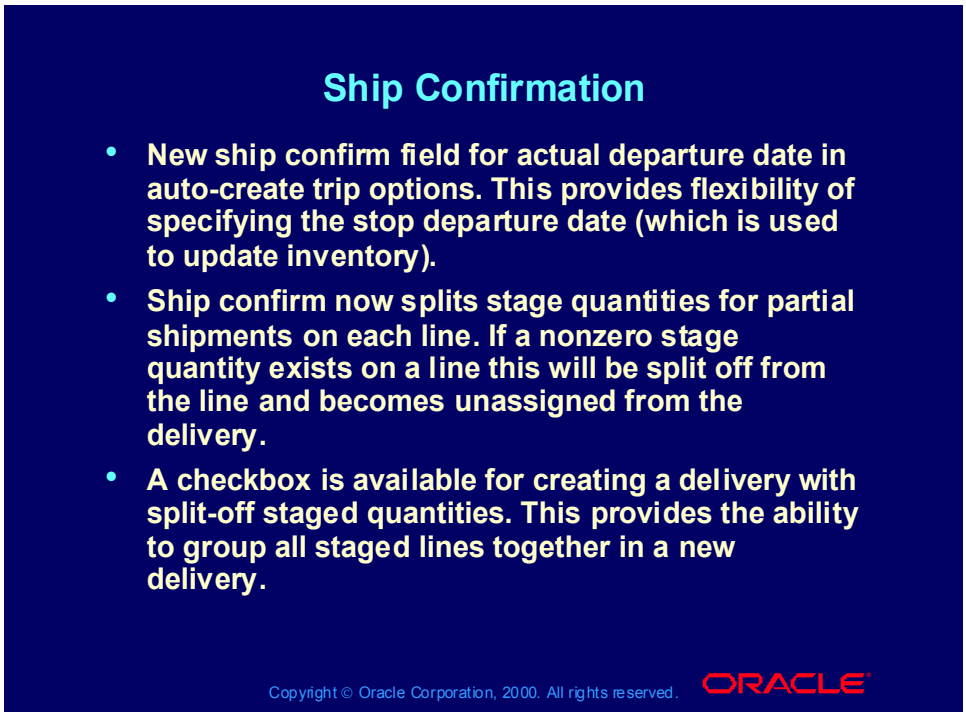

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Actions (M) Ship Confirm

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Ship Confirming a Delivery

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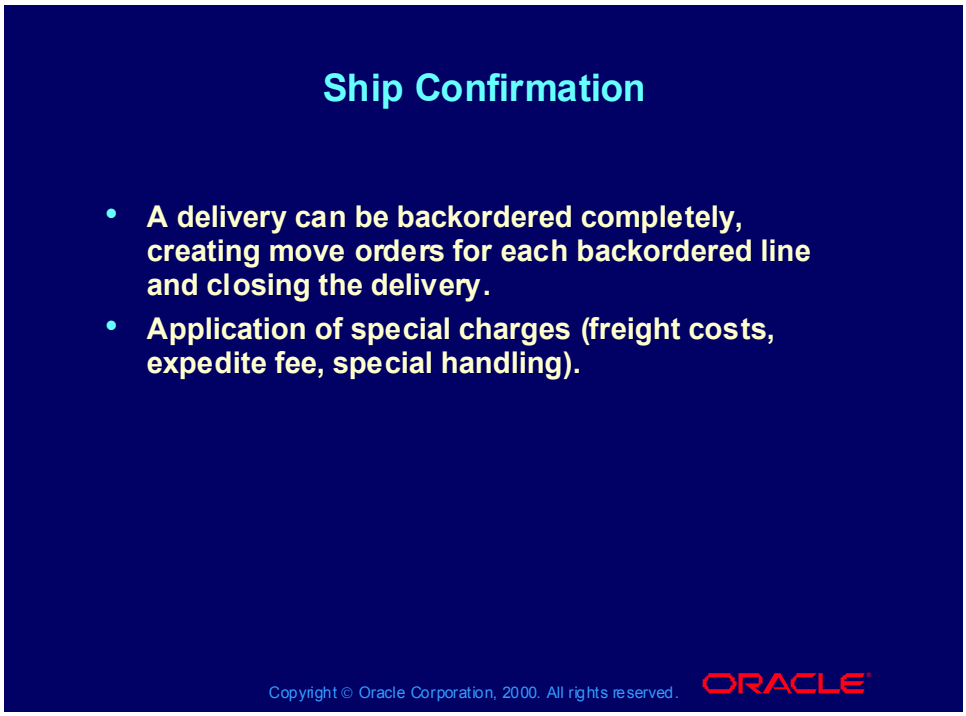

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Actions (M) Ship Confirm

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Ship Confirming a Delivery

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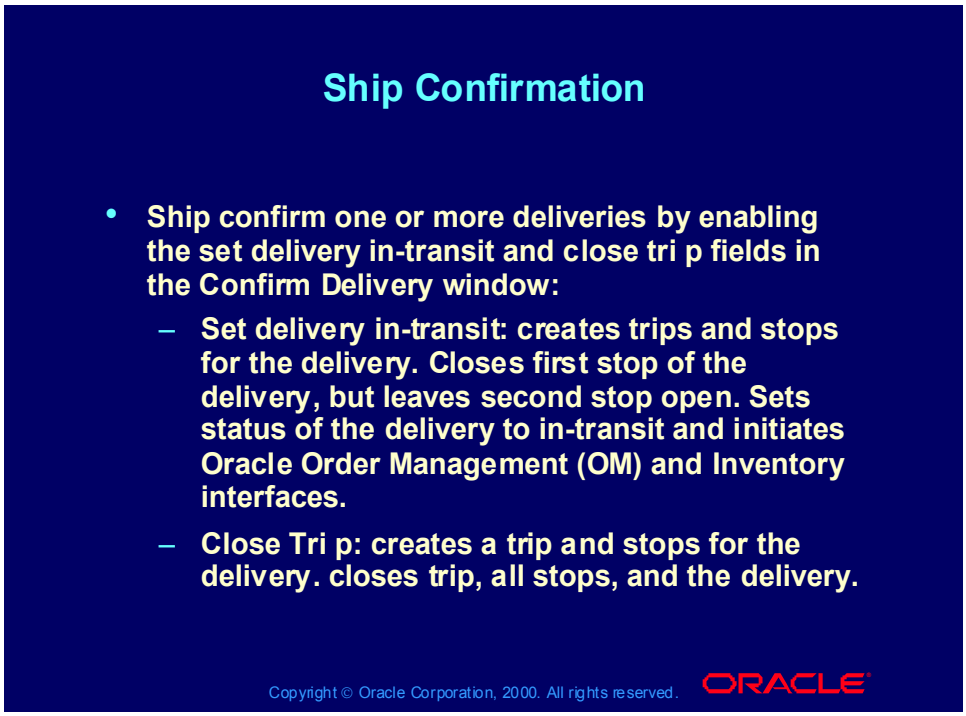

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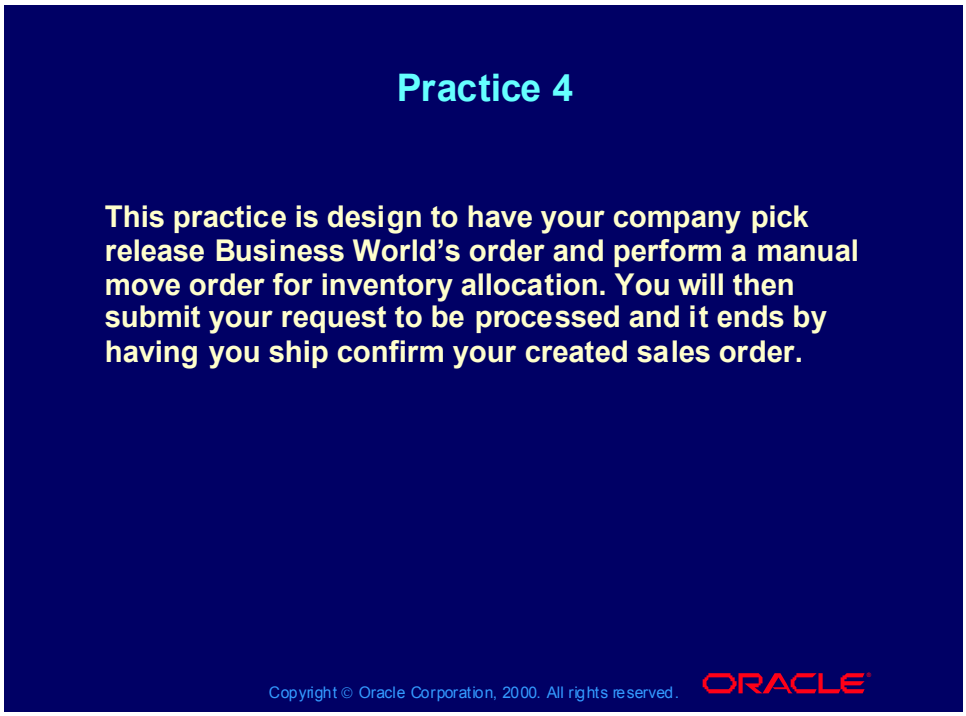

(N) Order Management > Orders, Returns > Sales Orders

1. Select Customer Business World from LOV
Address defaults
2. Mixed order defaults as the order type
3. Corporate defaults as the price list
4. Howard Sprague defaults as the sales person

(T) Line Items
5. Select AS54888 as the Item from LOV
6. Enter the Qty: 10
7. UOM = Ea
8. Howard Sprague defaults as the sales person
9. Choose the Book Order button
10. Record your order number

(N) Shipping > Release Sales Orders > Release Sales Orders

1. Enter the order number
2. Leave Scheduled Ship Dates and Requested Dates Blank

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(T) Shipping

3. Select Order Number as the Release Sequence Rule from LOV

(T) Inventory Tab

4. Select M1 as the Warehouse from LOV

5. Select departure, delivery as the pick slip grouping rule from LOV

6. Auto Detail: Yes

7. Auto Pick Confirm: NO

8. Choose the Concurrent button (record concurrent request number and batch number)

Close the window.

9. From the View Menu select requests

10. Choose the Find button.

11. Find your ID # for the "Pick Selection List Generation" request. Once the request has completed normally, close the window. Concurrent request should read completed normal.

12. Switch Responsibilities to Manufacturing Manager

(N) Inventory > Move Orders > Transact Move Orders

1. Select the Seattle Warehouse (M1)

(T) Pick Wave Tab

2. In the sales order field, choose a LOV

3. Select the Combinations button

4. Input your sales order number, then select OK

5. Select the Find button.

6. Select the checkbox in the far left of the move order line.

7. Select the Transact button, close this window

You have just performed your move order!

8. Switch Responsibilities to Order Management

(N) Shipping > Transactions

9. Choose the Flash Light icon from the Menu Bar

10. Select lines search.

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11. Enter your first order number
12. Choose the Find button
13. Select the Delivery tab (T)
14. Select the Details button
15. Enter a tracking waybill number
16. Select ship confirm from the drop down area - Go
17. Select the Ship All radial button.
18. Select the OK button.
19. Acknowledge the message regarding inventory interface being ran and close the Shipping Transaction window.

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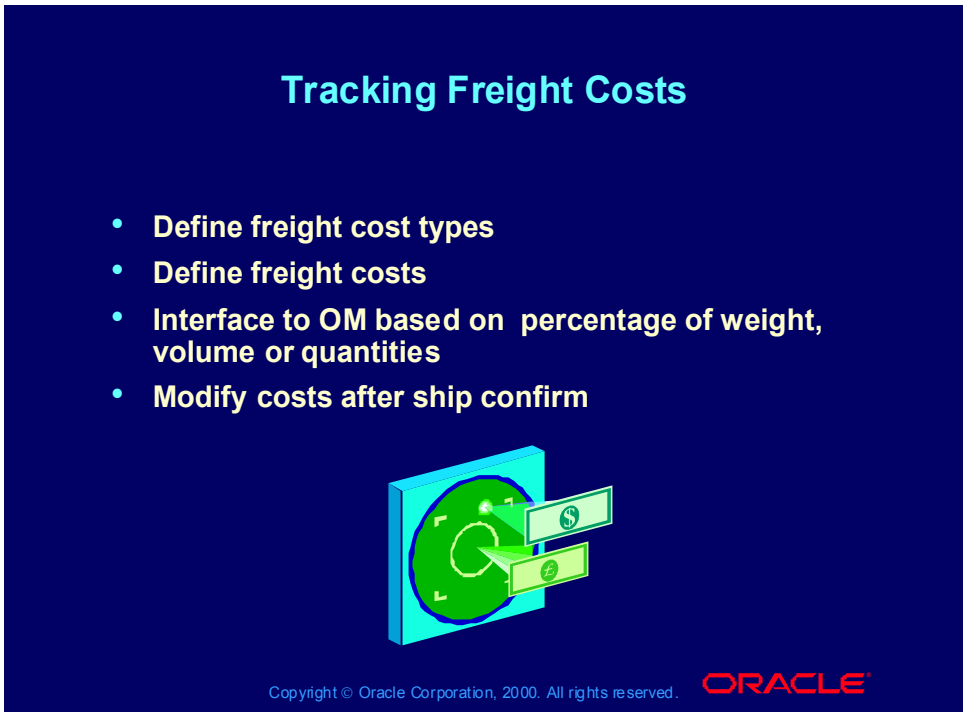
Tracking Freight Costs



You can now track freight costs. Many customers consider their shipping operation to be a profit center. By tracking the shipper's freight cost (amount shipper pays the carrier), you can determine the profit margin between the shipper's freight cost and the amount a customer pays for freight.

You can assign freight costs to trips, stops, deliveries, delivery lines, delivery legs, or containers.

You can now modify freight costs after ship confirm. However, you can only invoice the customer for the modified costs if you have not yet run the OM interface (previously called Update Shipping). Once you have run the OM interface, you can no longer pass modified freight cost information back to OM. You can still modify freight costs, but you won't be able to pass the information to OM.

You can apportion the freight costs on a per line basis based on percentage of weight, volume, or quantity. If you have a weight defined for the items, then the apportionment will be based on weight. If you don't have a weight defined, then the apportionment will be based on volume. If you don't have a weight or a volume defined for the item, the apportionment will be based on quantity.

The currency of the freight costs will be automatically converted when you run the OM interface (pass freight costs back to OM). A set of books currency will be used for the operating unit of the warehouse or ship from location as the default currency. The currency will be converted to the currency of the sales order.

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Shipping Exceptions

The shipping exceptions feature helps you identify and correct shipping exceptions that violate the requirements of your operation or that of your carriers and customers.

The shipping exceptions feature gives you the ability to define exceptions and processes for handling them. You can record exceptions automatically from within Oracle Shipping Execution, or you can log exceptions manually through the user interface input forms. You can initiate exception handling, and view and track the exceptions as you manage them to resolution.

API's are provided that allow you, with some custom programming, to use third party applications to log exceptions.

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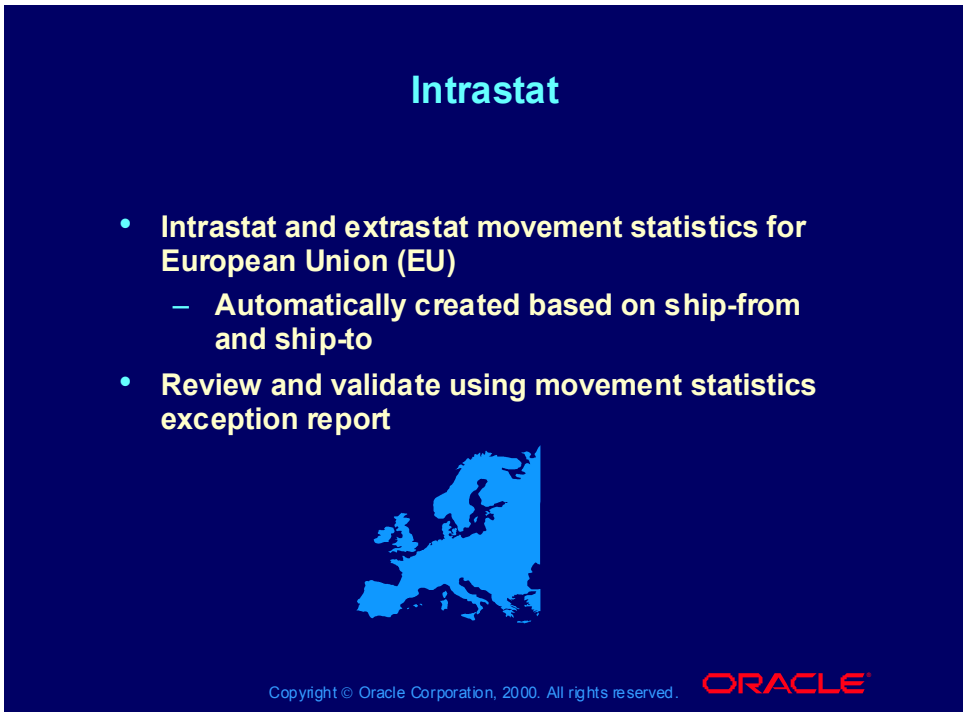
Intrastat



Oracle Purchasing, OM, and Inventory now provide you with the ability to support the automatic creation of the intrastat and extrastat movement statistics declarations to governmental authorities.

You can compile all of the material receipt (arrival) and shipment (dispatch) transactions for the given period and automatically create the Intrastat records.

You can then review and validate the data using the movement statistics exception report, update the information using the Movement Statistics window, and run the standard movement statistics declaration report.

In addition the Oracle e-Commerce Gateway now supports the outbound EDIFACT INSTAT and EXSTAT transactions for electronic reporting to governmental authorities.

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Global Packing Slip

The packing slip has been enhanced to support many of the requirements needed for shipments made in European Countries. In Europe the packing slip acts more like a legal document similar to how a bill of lading is used in the US.

For example some countries require an audit trail of the packing slips created for a particular shipper and the shipper must provide a gapless sequence of packing list created. This requirement is supported.

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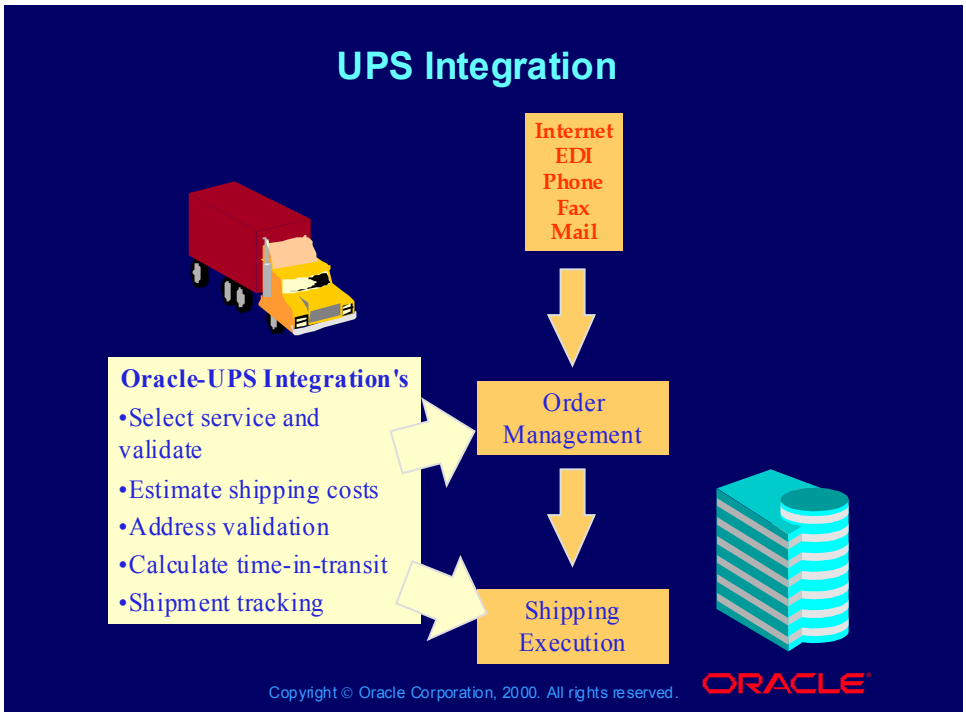
UPS Integration



The integration with UPS can be described as a collaboration between two companies that have provided its customers with proven transportation services, coming together to provide a common solution for those customers who use both Oracle Shipping Execution and UPS. The integration will be in the form of API's

Oracle-UPS APIs is a set of programs which integrate shipping information, provided by UPS Online Tools into Oracle Applications suite to help customers streamline operations in the fulfillment cycle.

Oracle - UPS integration will enable Oracle customers to:

- Verify address/postal code for their shipment.
- Inquire about time in transit for ground shipments.
- Get shipping costs for deliveries.
- Track the packages after shipment.

Oracle-UPS APIs will be used throughout the Oracle ERP Application Suite. OM and Customer Relationship Management (CRM) Applications will use these APIs to verify address and postal code and to provide customers with shipping service selection while taking orders. Shipping execution will use these APIs to integrate UPS functionality seamlessly into the Oracle shipping functionality

Instructor Note: Reference setup for the profile option WSH: Internet Proxy URL

This feature is available in R 11i.2.

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Negotiations with other carriers are underway and will be released in the future.

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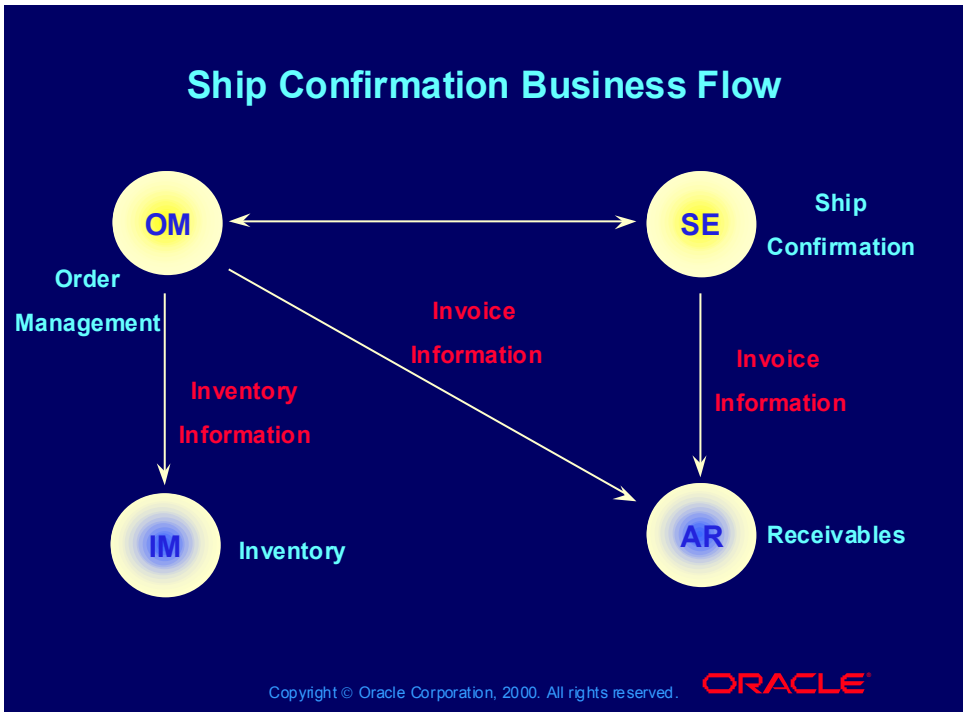
Ship Confirmation Business Flow



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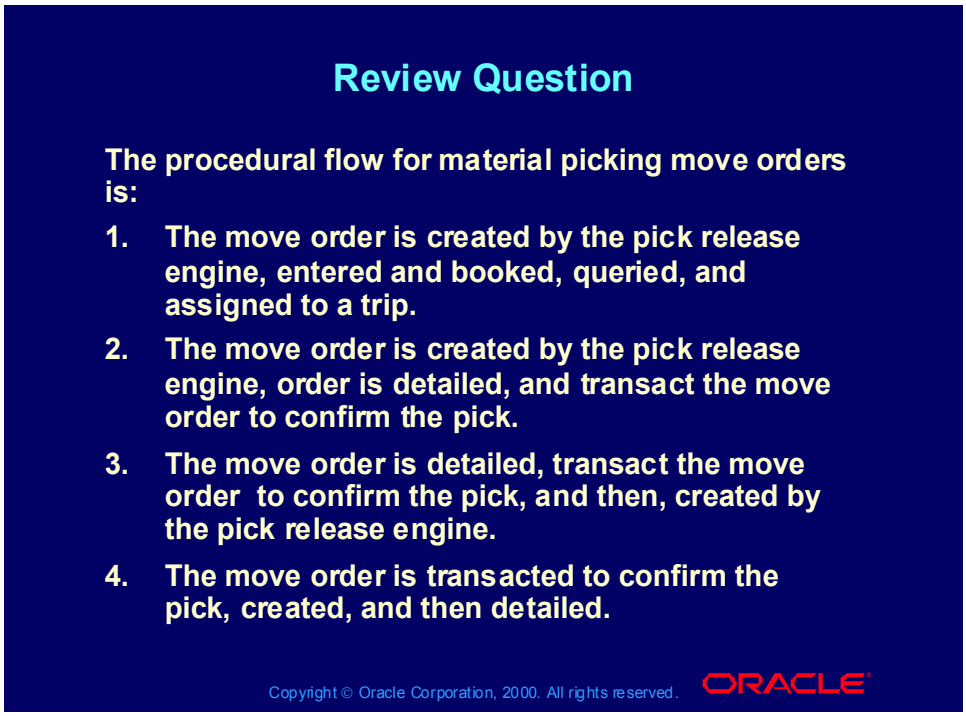

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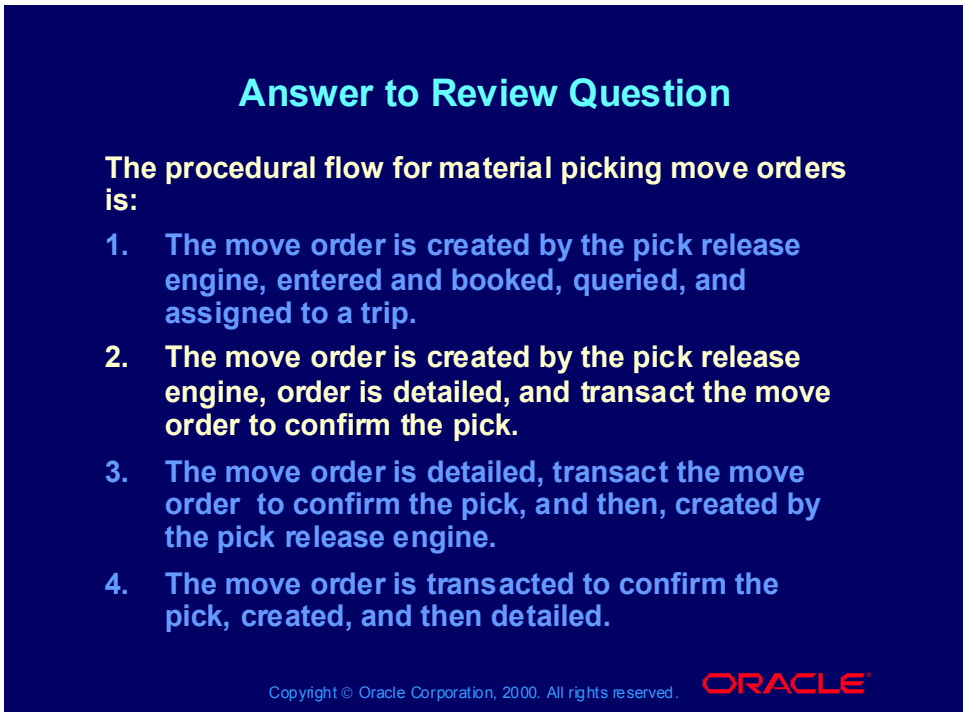

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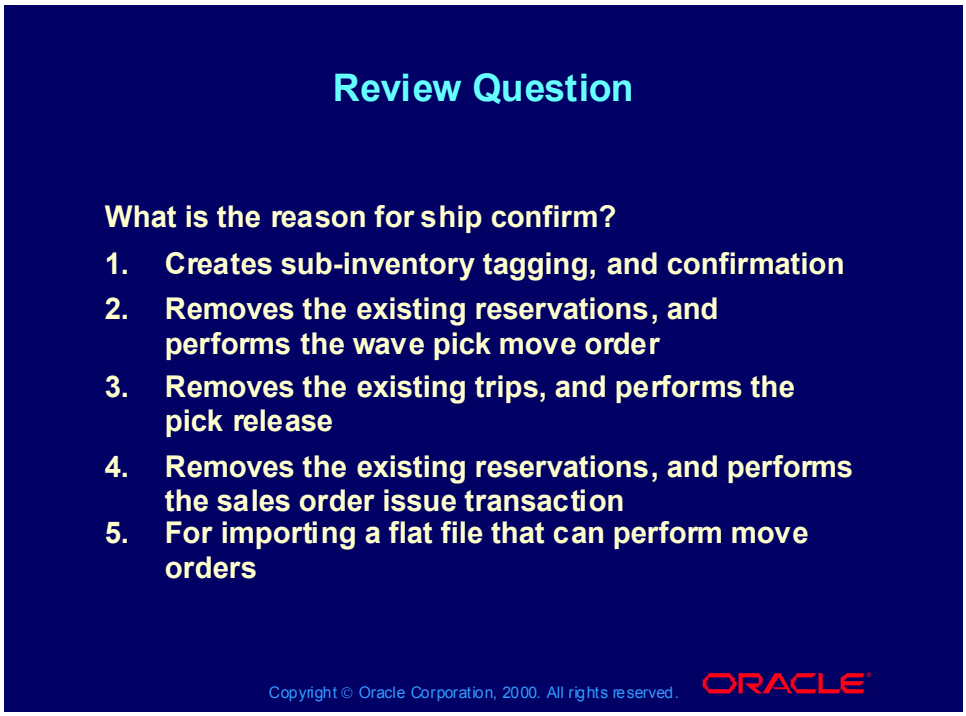

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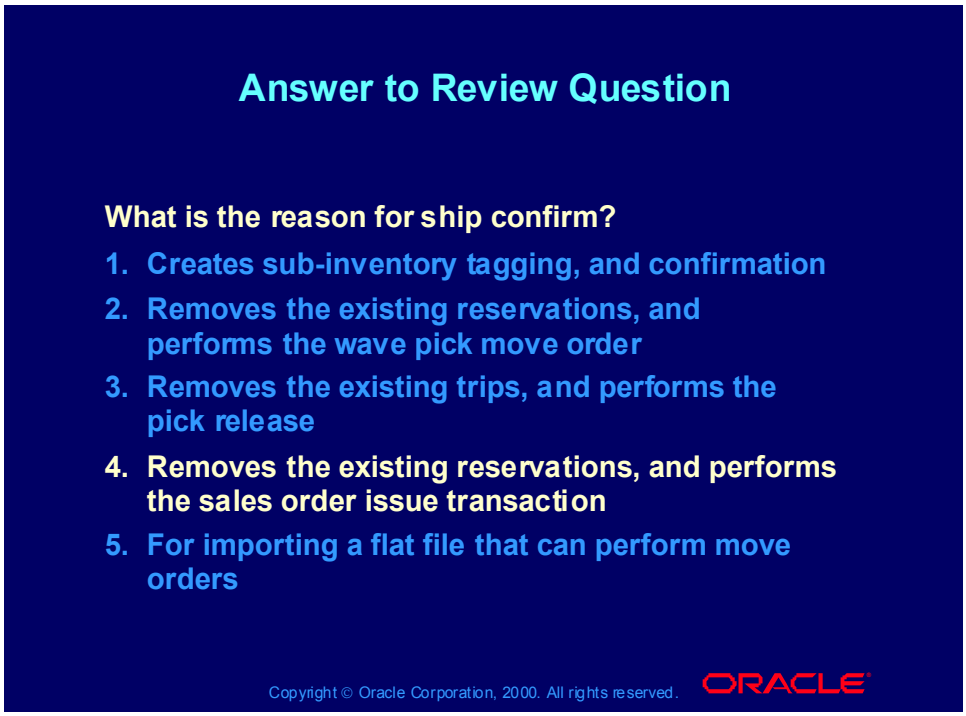

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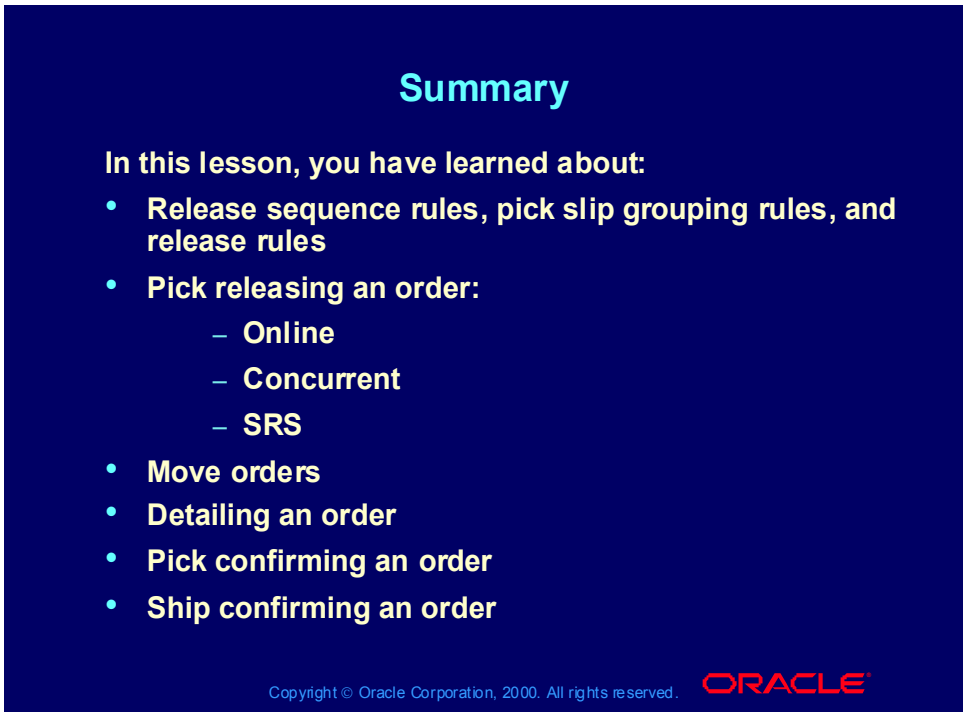

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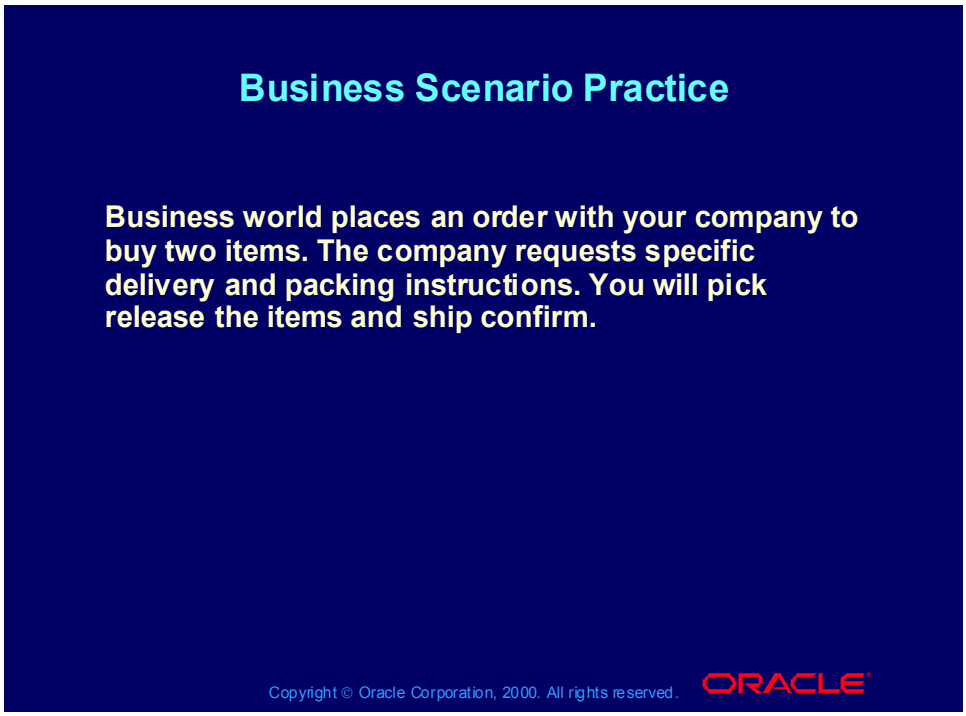

Business World wants to place an order with your company for the following products:

ITEM	QUANTITY
AS54888	5
AS18947	15

They would like to have all items shipped together today, and delivered via UPS. This is a rush order that must be fulfilled ASAP!

Based upon this information, define:

- Sales order for the above items and quantity
- Ship set
- Packing instructions

Your will pick release this order independently from other created batches. You will depend upon the system to detail, and pick confirm your items, and the system will create the delivery for you.

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Based upon this information:

- Define pick release parameters
- Launch pick release
- Verify delivery assignment

Ship confirm this delivery for all items and assign a freight cost and an expedite fee to the order.

Based upon this information, define:

  - Ship confirm information
  - Freight costs

Create a second order, pick release without pick confirming or detailing. Perform your move order, then ship confirm your order.

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R11i Oracle Shipping Execution: Transportation and Shipping Delivery Management

Chapter 3

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Objectives

After completing this course, you should be able to do the following:

- Define the concepts of Oracle Shipping Execution
- Create a delivery
  - Manually
  - Automatically
- Automatically create deliveries for a delivery lines
- Automatically pack delivery lines assigned to deliveries into containers
- Assign or unassign delivery lines to/from a delivery
- Plan or unplan a delivery

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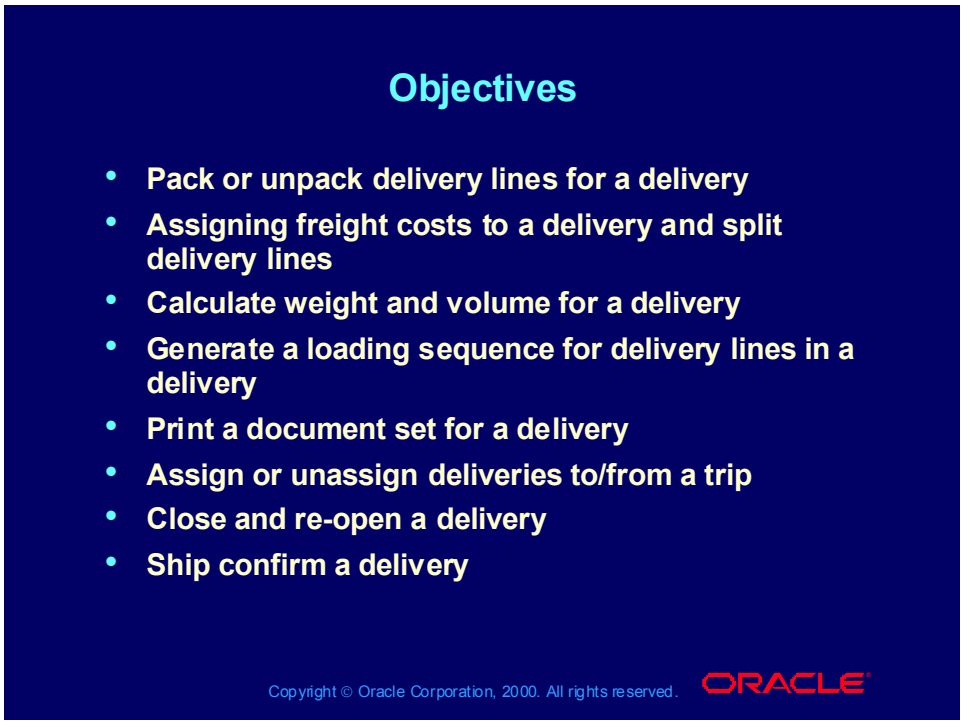

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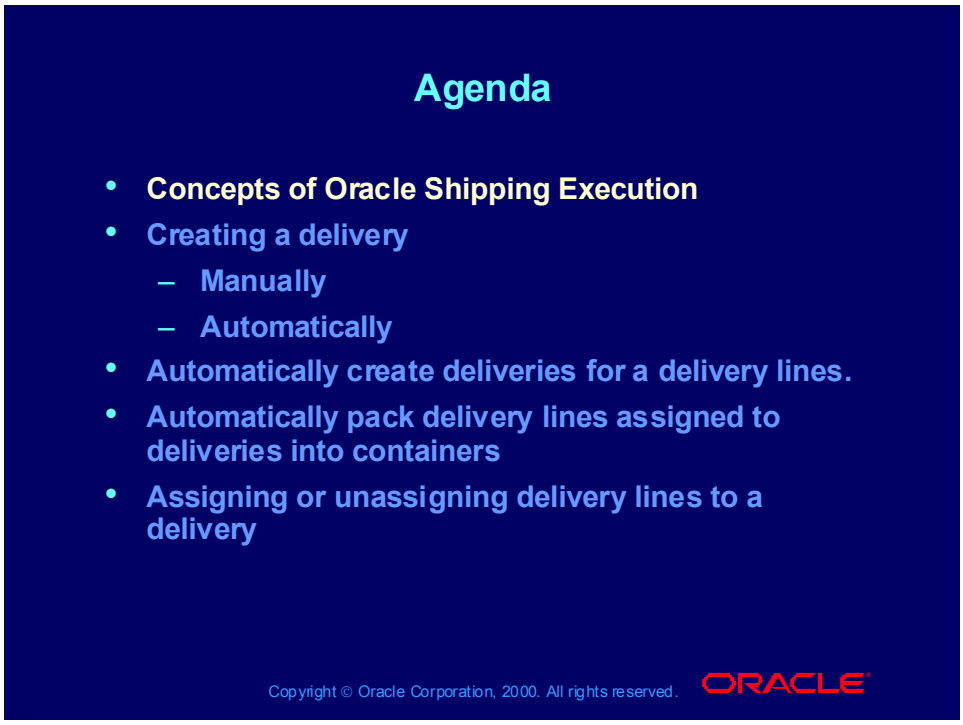

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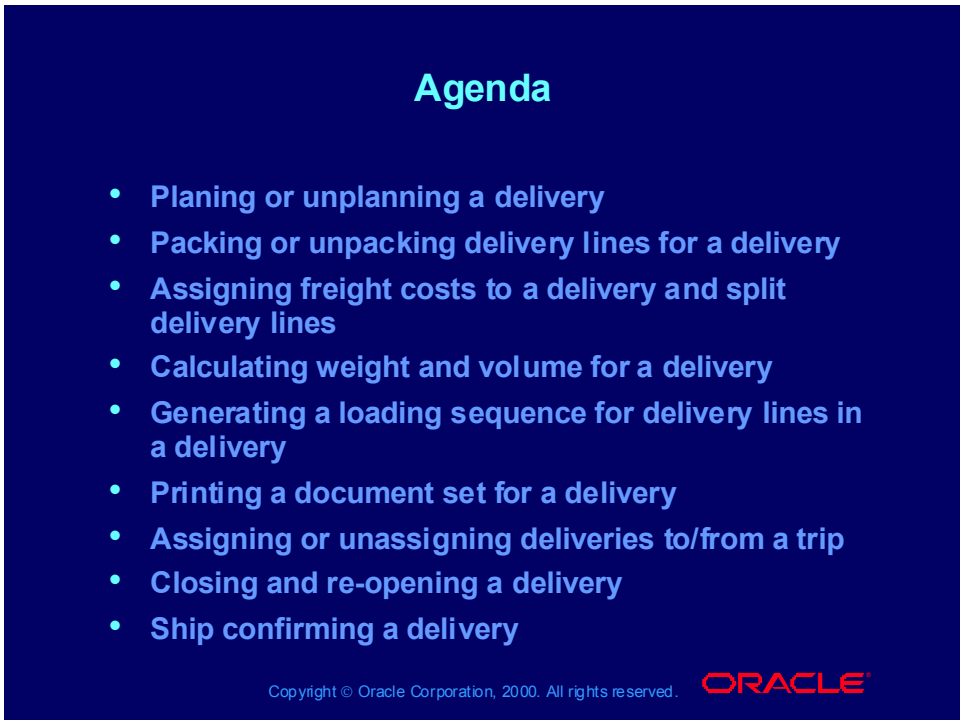
Agenda



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These are the key concepts behind the application. Becoming familiar with these concepts will make learning the application much easier.

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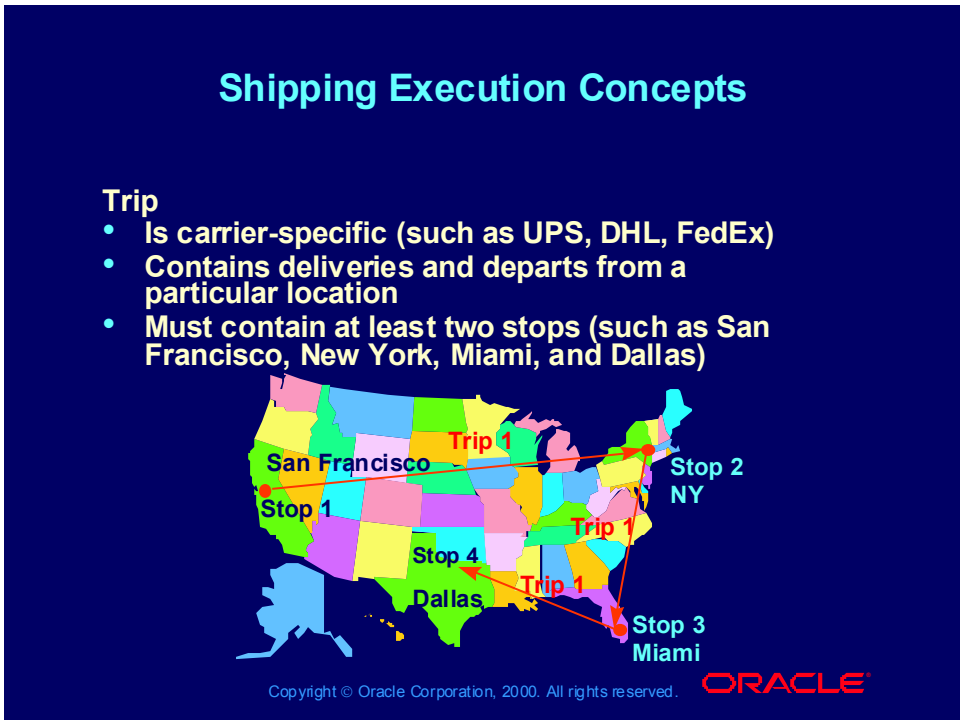

Trips

Trip 1

San Francisco to New York, New York to Miami, and Miami to Dallas.

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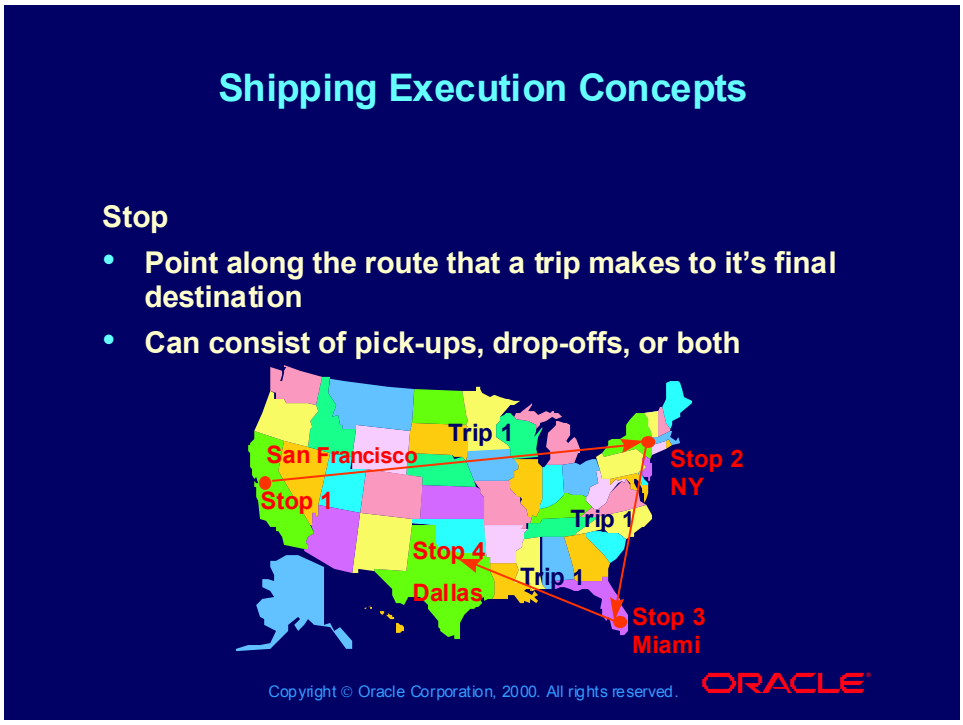

Stops

A Stop represents a point along the route that a trip makes to it's final destination e.g,. New York. This point may also have some activity associated with it. The activity might include picking up a new delivery, dropping off a delivery, or both.

Trip 1

San Francisco (stop 1) to New York (stop 2), New York to Miami (stop 3), and Miami to Dallas (stop 4).

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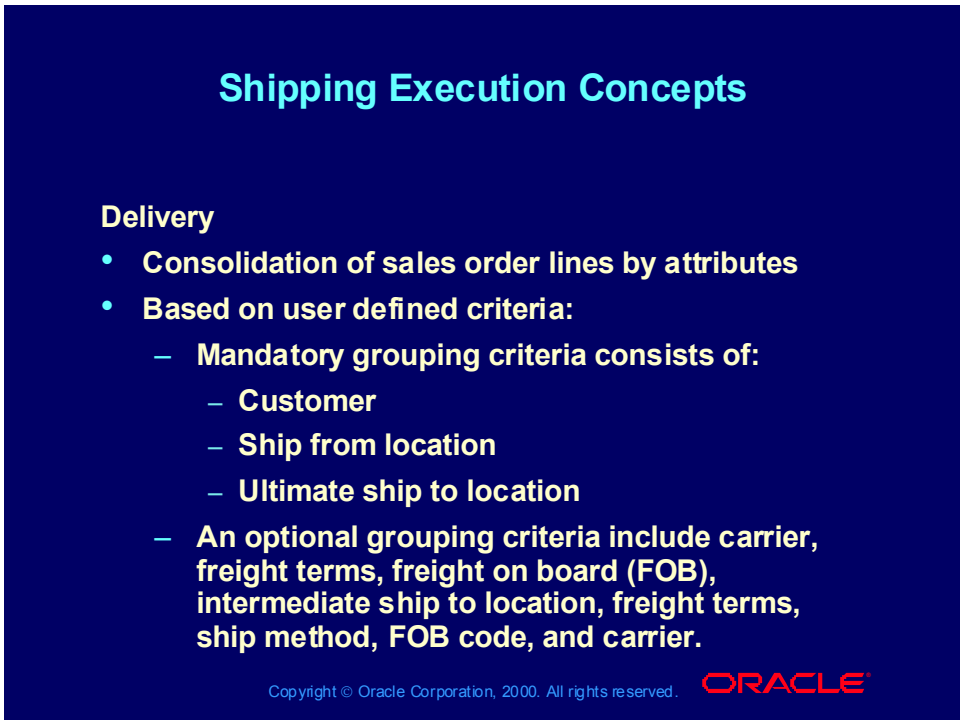

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Delivery Leg

A delivery leg consists of two stops where the delivery is picked up and dropped off respectively on the same trip. The delivery may travel through several legs to get to its final destination. A delivery leg is synonymous with the bill of lading.

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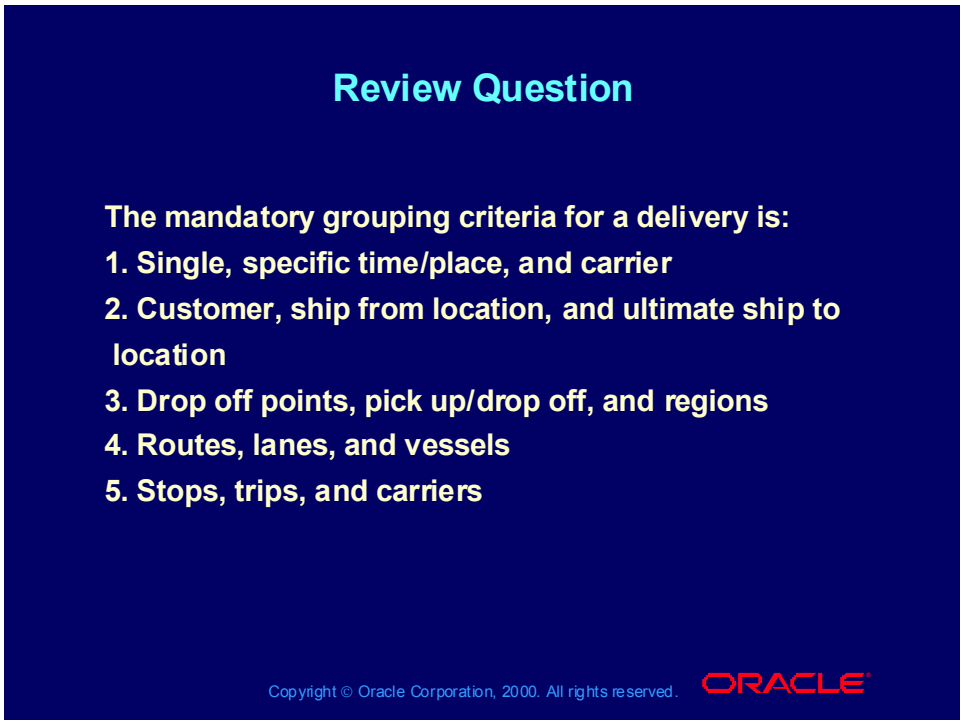

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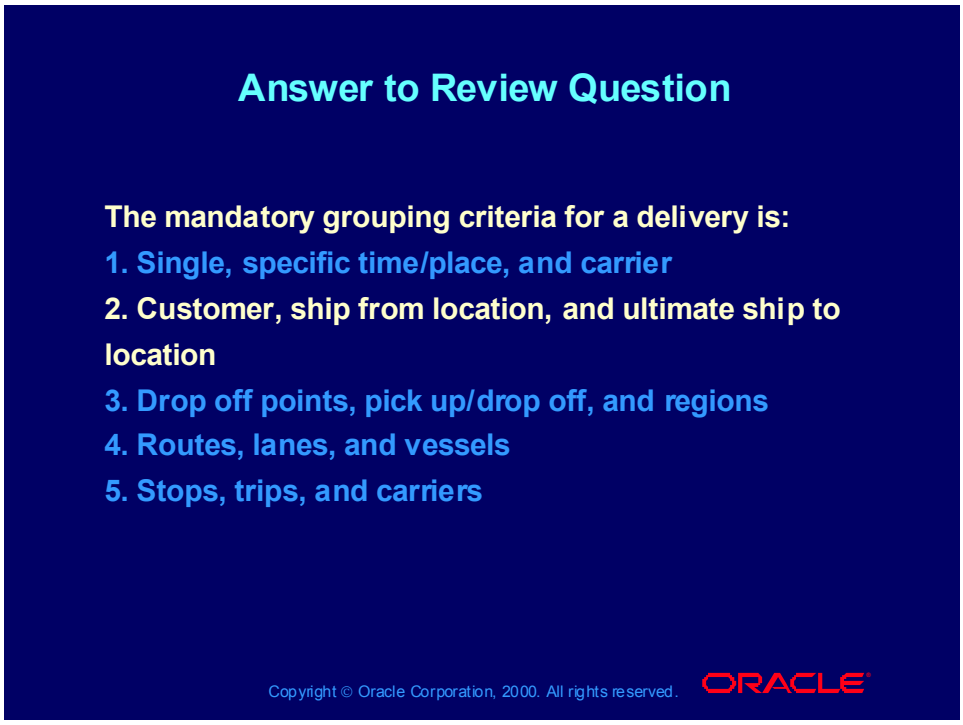

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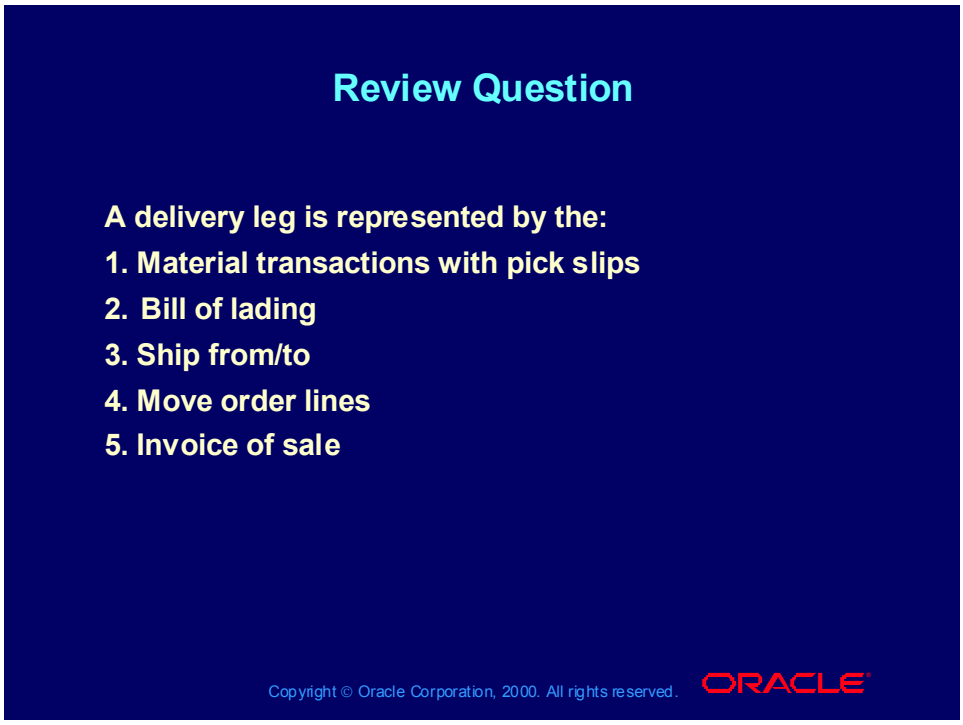

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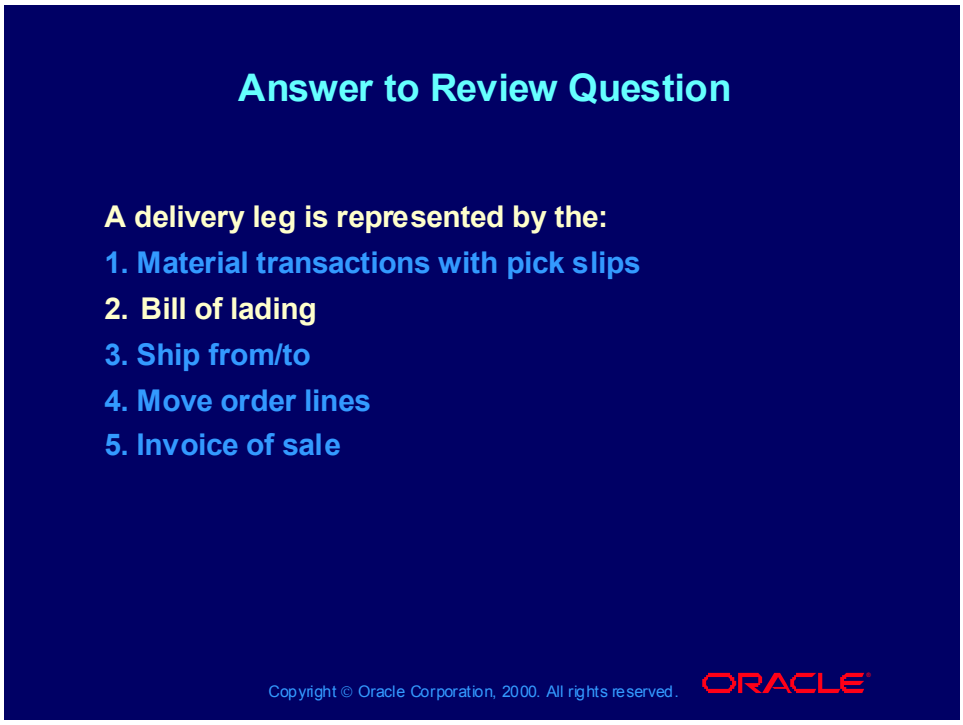

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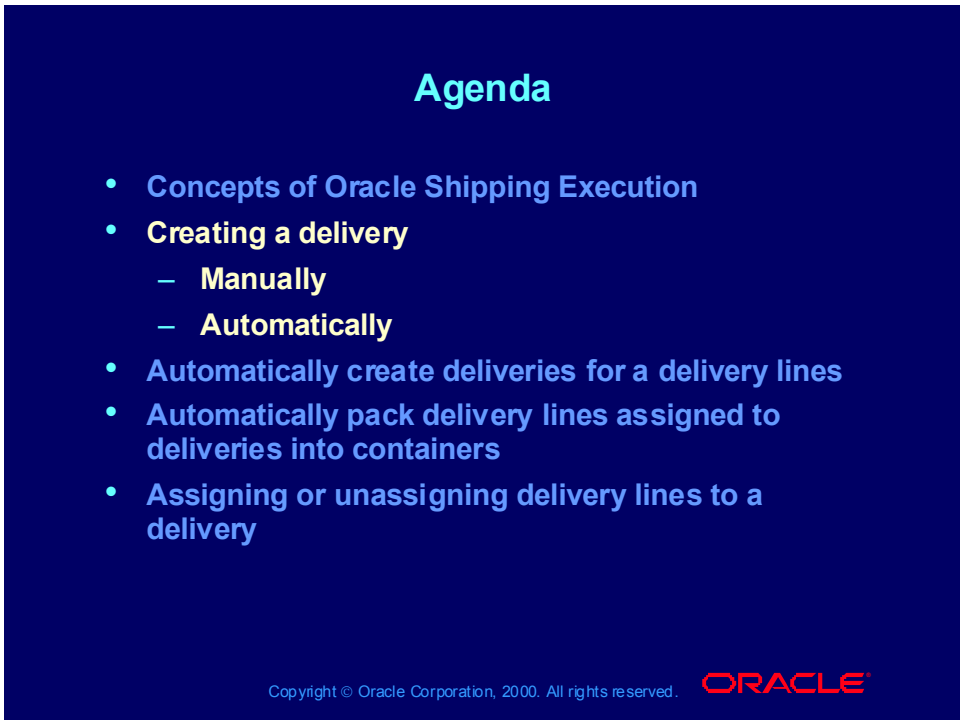

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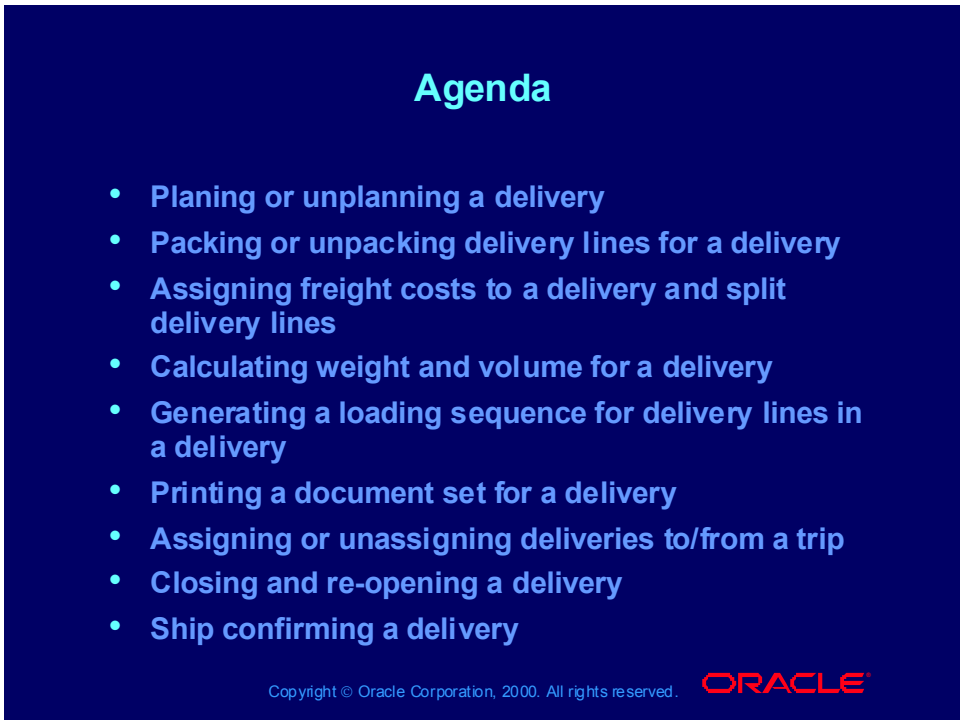

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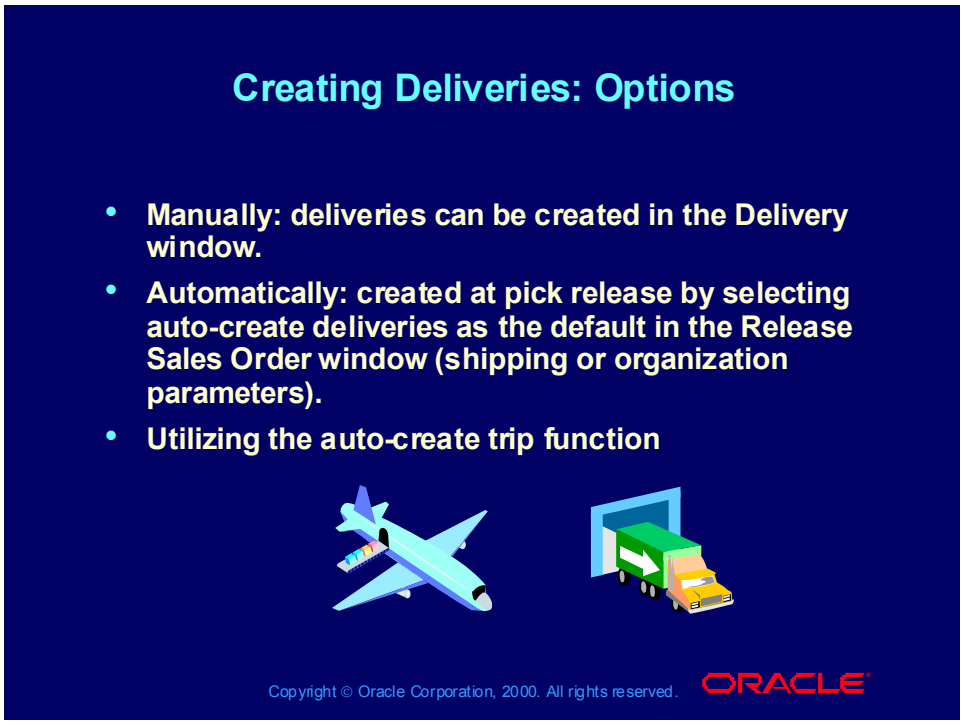
Creating Deliveries: Options



(N) Shipping > Shipping > Data Entry > Delivery Data Entry

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Creating Deliveries

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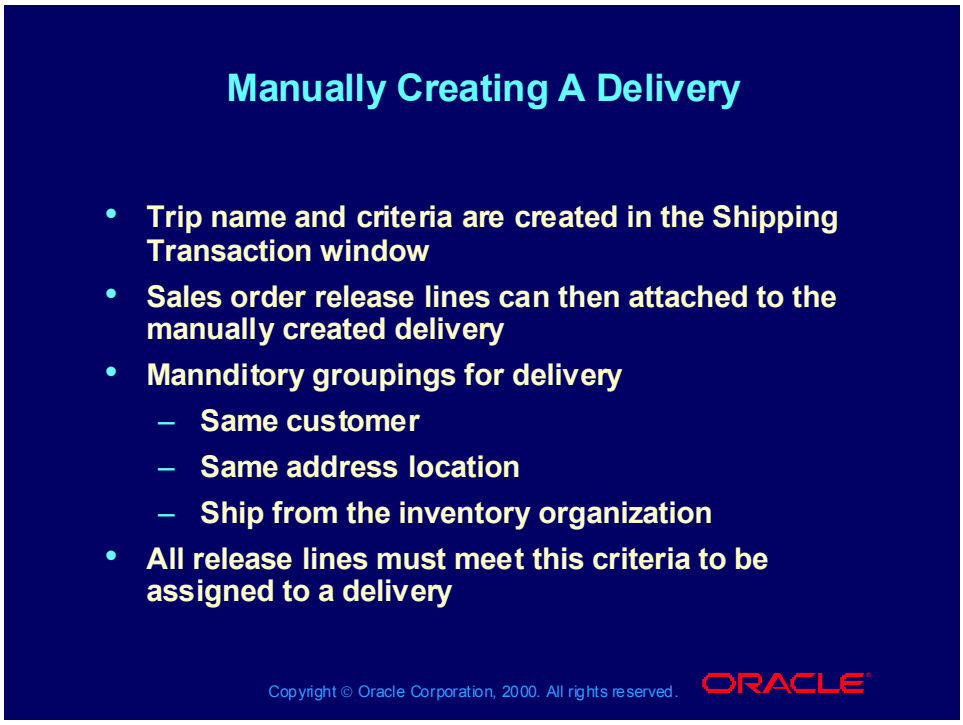

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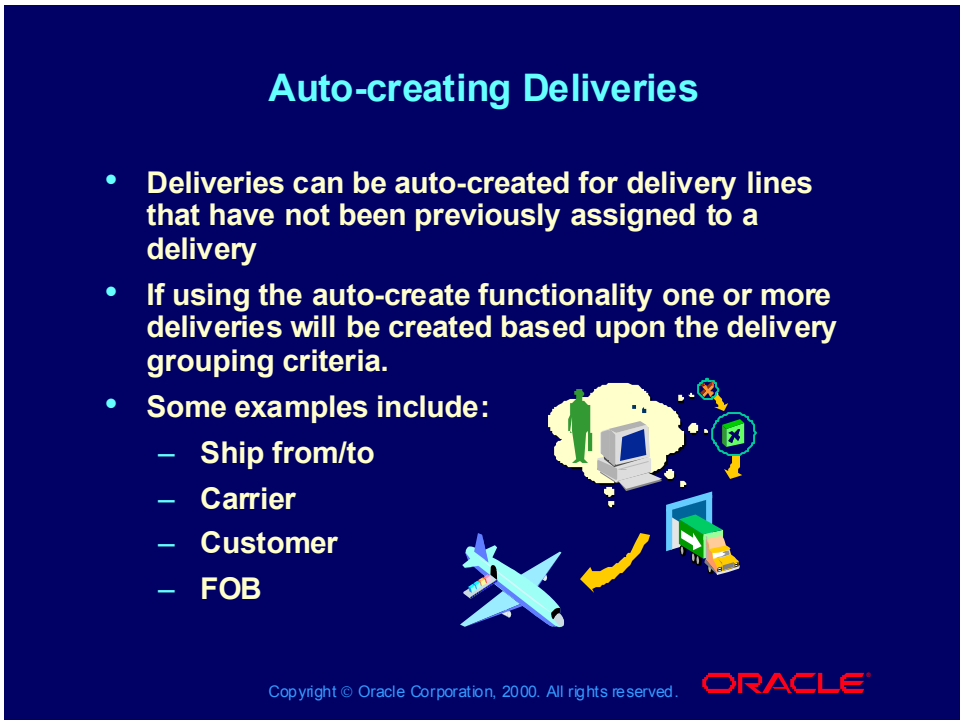
Auto-creating Deliveries



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery Lines (B) Find > Select Delivery Lines (B) Go (T) Delivery

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Auto-creating Deliveries

Prerequisites For Auto-creating Deliveries

- Delivery status must be open.

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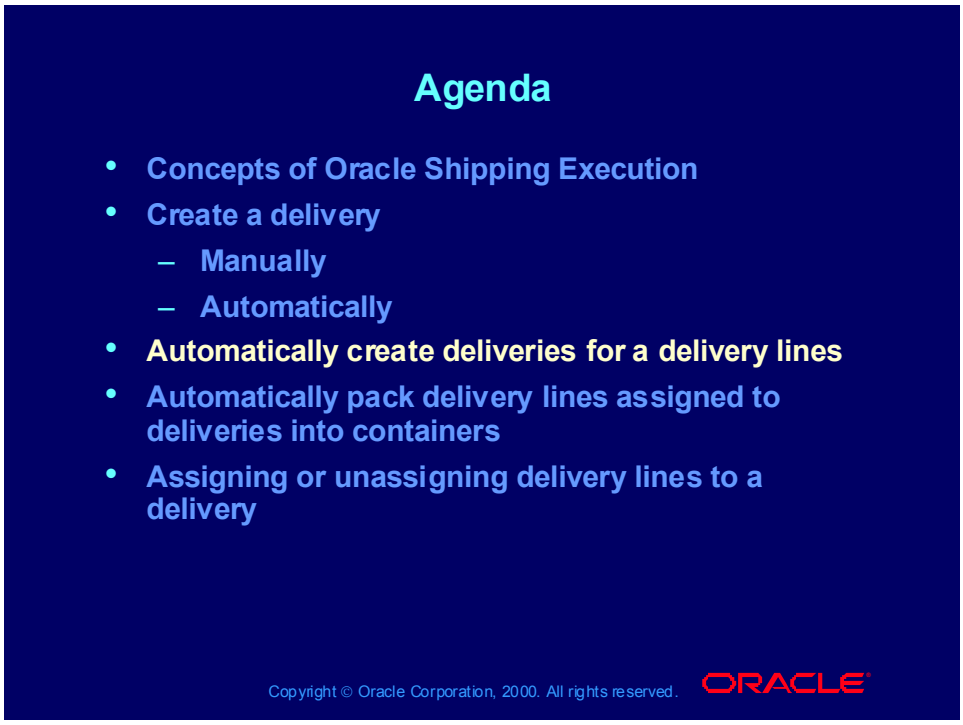

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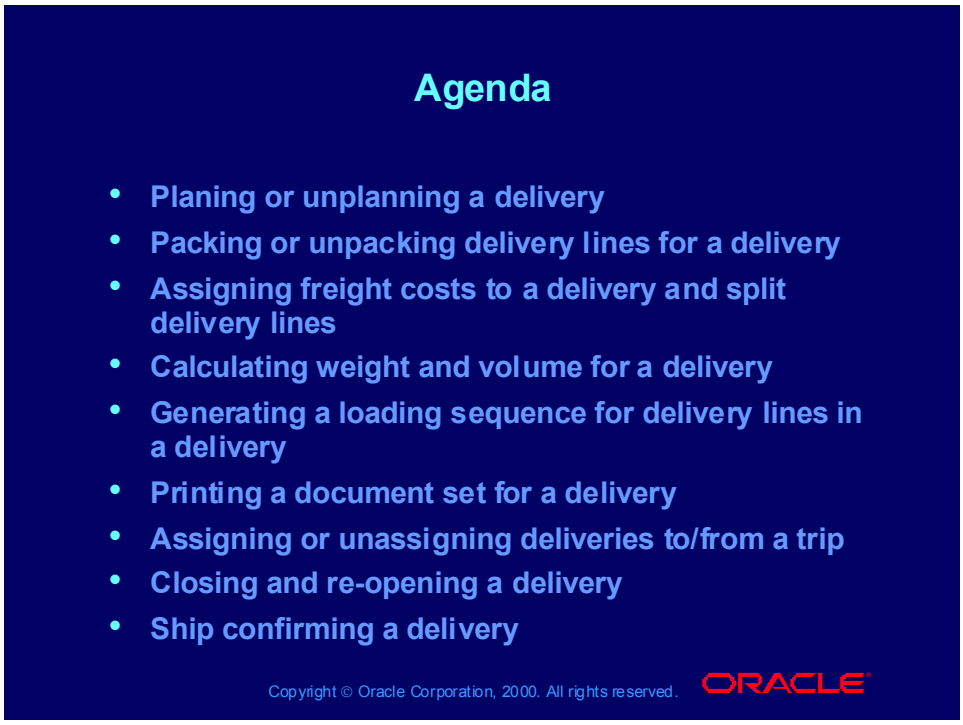

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Auto-creating Deliveries for Delivery Lines

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery Lines (B) Find > Select Delivery Lines (B) Go (T) Delivery

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Auto-creating Deliveries

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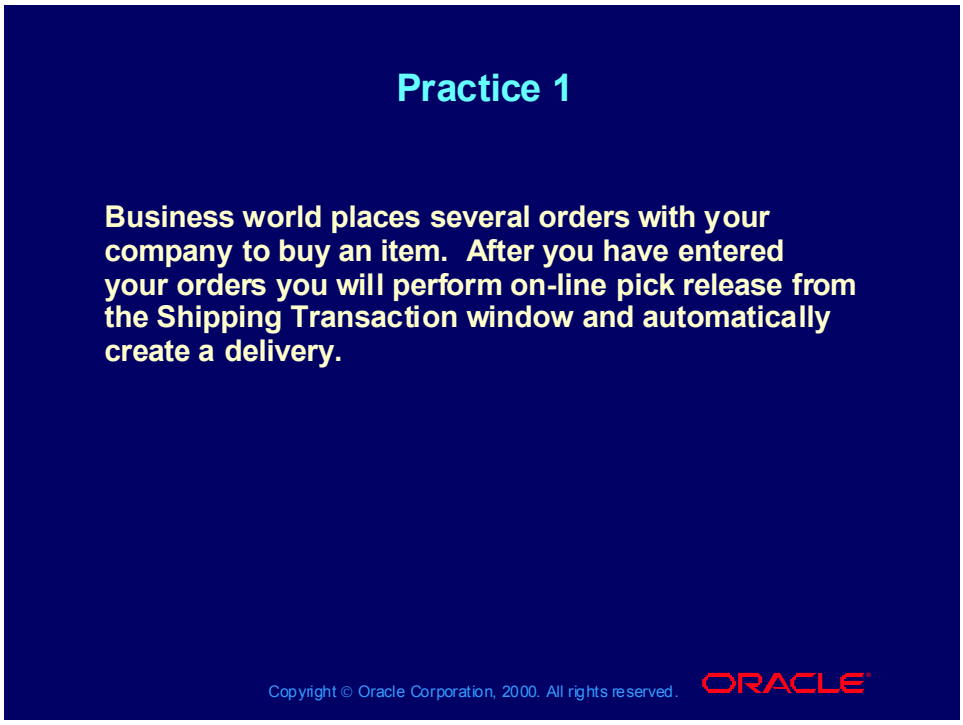
Practice 1



(N) Orders, Returns > Sales Orders > (T) Main

1. Select Customer Business World from LOV
2. Address defaults
3. Mixed order defaults as the order type
4. Corporate defaults as the Price List from LOV
5. Howard Sprague defaults as the Sales Person from LOV

(T) Line Items

6. Select AS54888 as the Item from LOV
7. Enter the Qty: 10
8. Ea defaults as the UOM
9. Location defaults as the Tax code from LOV
10. Howard Sprague defaults as the Sales Person

(T) Shipping (record the warehouse name)

11. Choose the Book Order button (record order number)
12. Choose the Actions button
13. Select copy as the action from LOV.

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14. Select create new order (record 2nd order number)
15. Choose the Flash Light icon from the Toolbar
16. Enter the 2nd order number
17. Choose the Find button
18. Choose the Actions button and the select Book Order button

(N) Shipping > Transactions

19. Choose the Flash Light button from the Toolbar.
20. Select Lines Search
22. Enter the 1st order number
23. Choose the Find button
24. Select the line by pressing the Ctrl and the left mouse buttons
25. Choose the Actions menu
26. Select Launch Pick Release
27. Choose the Go button
28. Choose Details button from the Message window (record request ID).
29. From the View menu select Requests
30. Choose the Find button
31. Find your ID # for the "Pick Selection List Generation" request. Record the status of the request. Close the window
32. Concurrent request should read completed normal

(N) Shipping > Transactions

33. Choose the Flash Light button from the Toolbar
34. Select lines Search
35. Enter the 1st order number
36. Choose the Find button

(T) Delivery

37. Verify the delivery was Auto Created. (Delivery name exists)
38. Select the Delivery by pressing the Ctrl and the left mouse buttons
39. Choose the Actions menu
39. Select Ship Confirm
40. Choose the Go button
41. Select ship all, check both set delivery in transit and close trip (this process will auto-create and close the trip)
42. Choose the OK button

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43. Choose the Flash Light icon from the Toolbar
44. Enter the order number
45. Choose the Find button
46. Select the delivery line by pressing the Ctrl and the left mouse buttons

(T) Path by Trip

47. Verify that a trip was auto created at ship confirm. (trip name exists)

(T) Path by Stop

48. Verify that a trip was auto created at ship confirm

Guided Practice 2
Manually Creating a Delivery

(N) Shipping > Transactions > Data Entry > Delivery Data Entry

1. Choose the Details button and enter a name for the delivery (record name)
2. Select the organization for the delivery (M1)
3. Select the initial ship from location from LOV (M1-Seattle)
4. Select the ultimate ship to location (San Jose1064) and enter ship from/to dates
5. Choose Done and save your work

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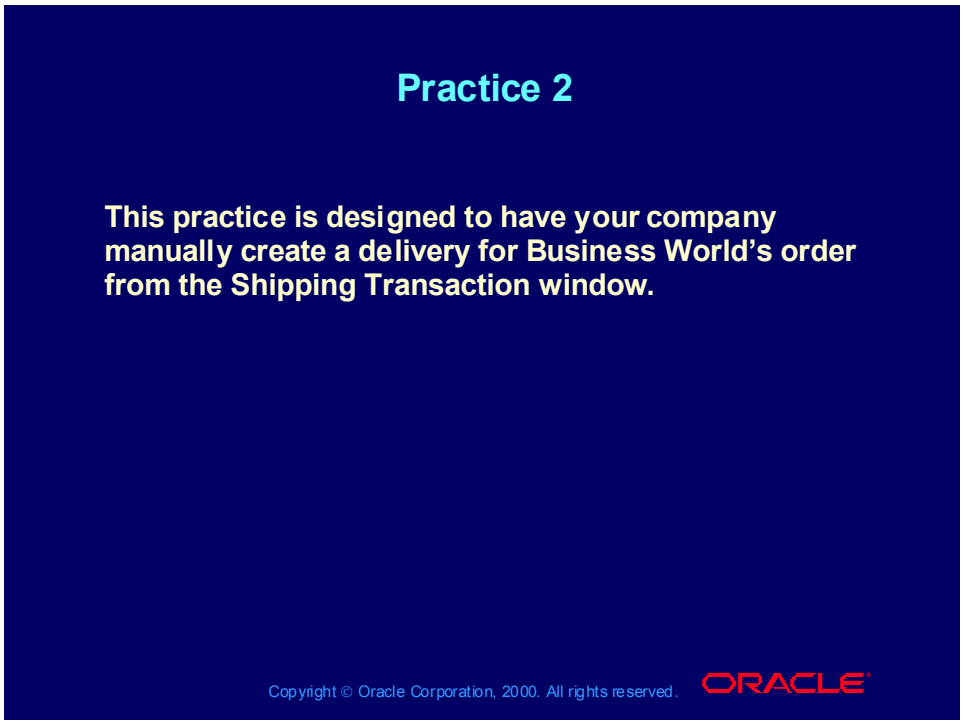

(N) Shipping > Transactions > Data Entry > Delivery Data Entry

1. Choose the Details button and enter a name for the delivery (record name)
2. Select the organization for the delivery (M1)
3. Select the initial ship from location from LOV (M1-Seattle)
4. Select the ultimate ship to location (San Jose1064) and enter ship from/to dates
5. Choose Done and save your work

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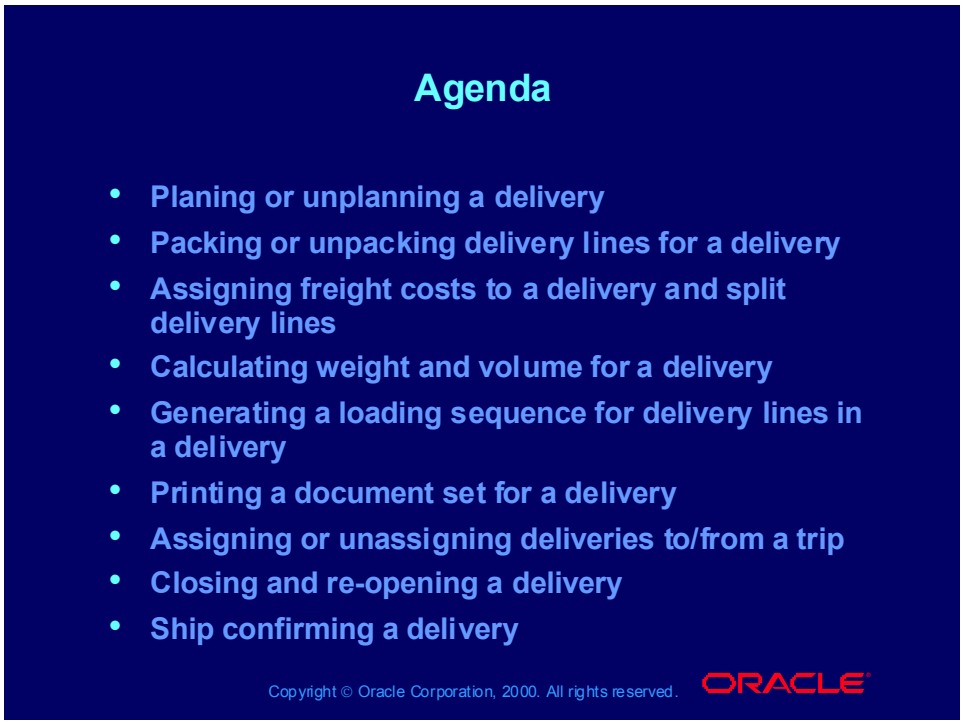

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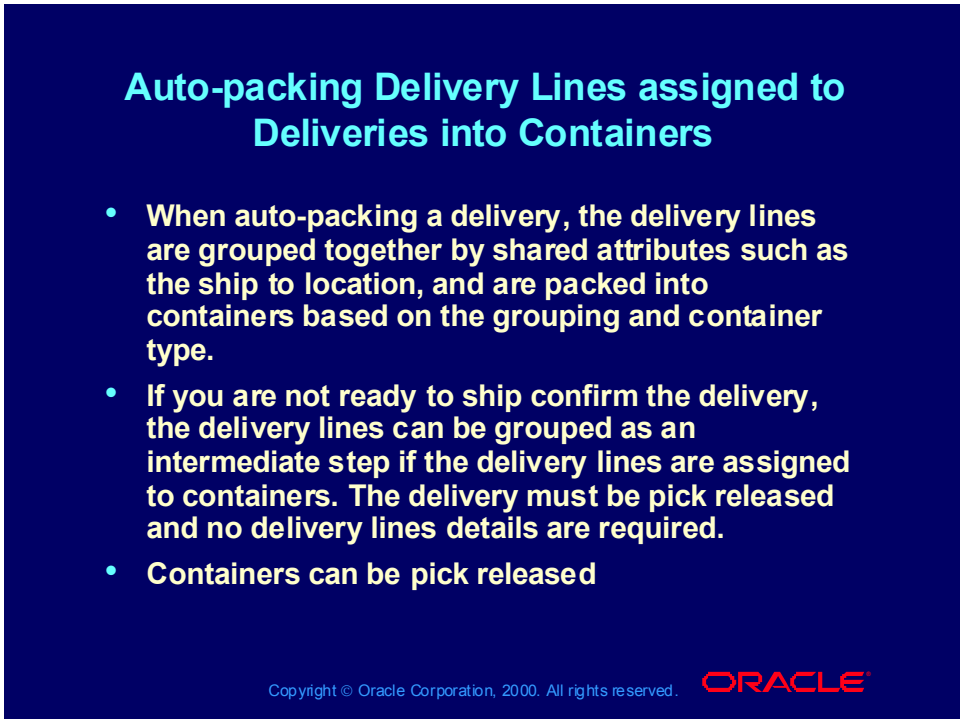
Auto-packing Delivery Lines assigned to Deliveries into Containers



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery Lines (B) Find > Select Delivery Lines (B) Actions (M) Auto-pack or Auto pack Master (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Containers > Auto-packing Delivery Lines into Containers

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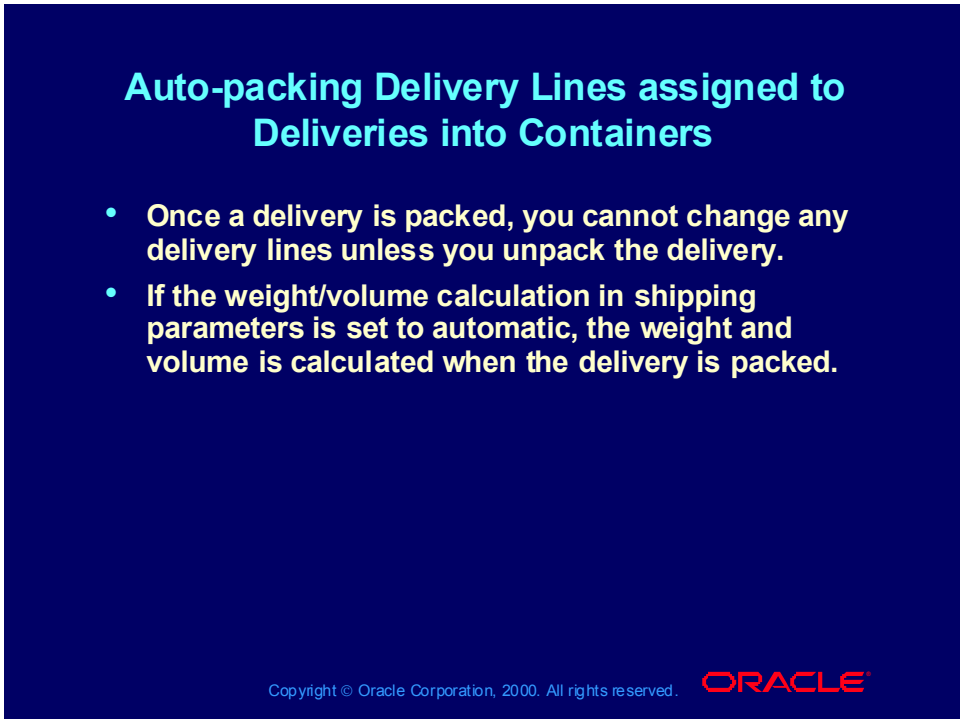
Auto-packing Delivery Lines assigned to Deliveries into Containers



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery Lines (B) Find > Select Delivery Lines (B) Actions (M) Auto-pack or Auto pack Master (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Containers > Auto-packing Delivery Lines into Containers

The system will warn you if you violate the percentage fill constraints for a container.

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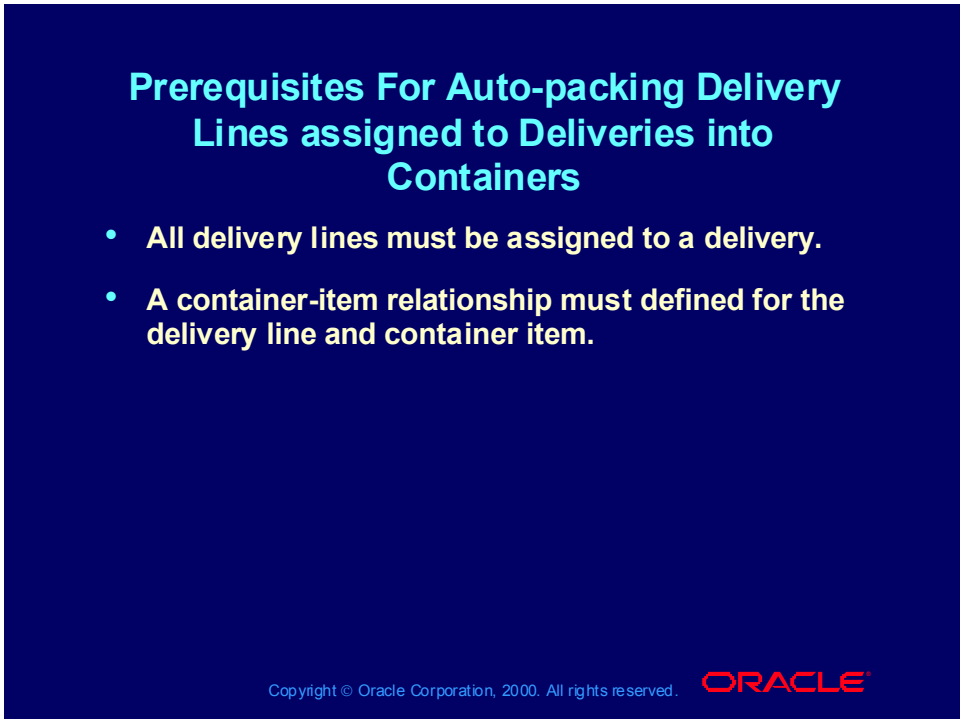
Prerequisites For Auto-packing Delivery Lines assigned to Deliveries into Containers



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery Lines (B) Find > Select Delivery Lines (B) Actions (M) Auto-pack or Auto pack Master (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Containers > Auto-packing Delivery Lines into Containers

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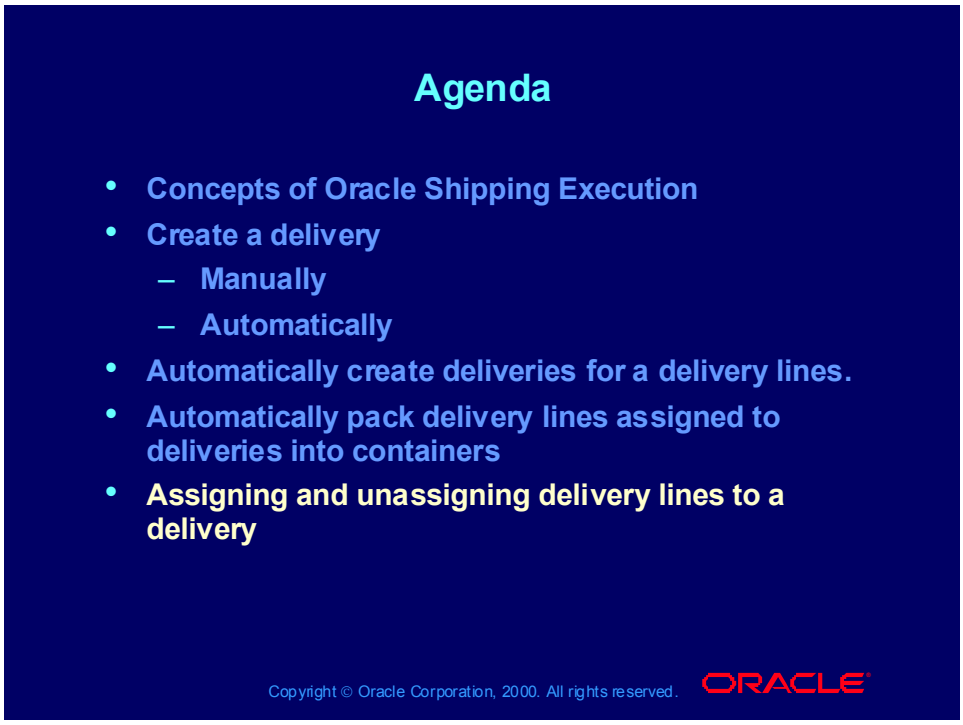

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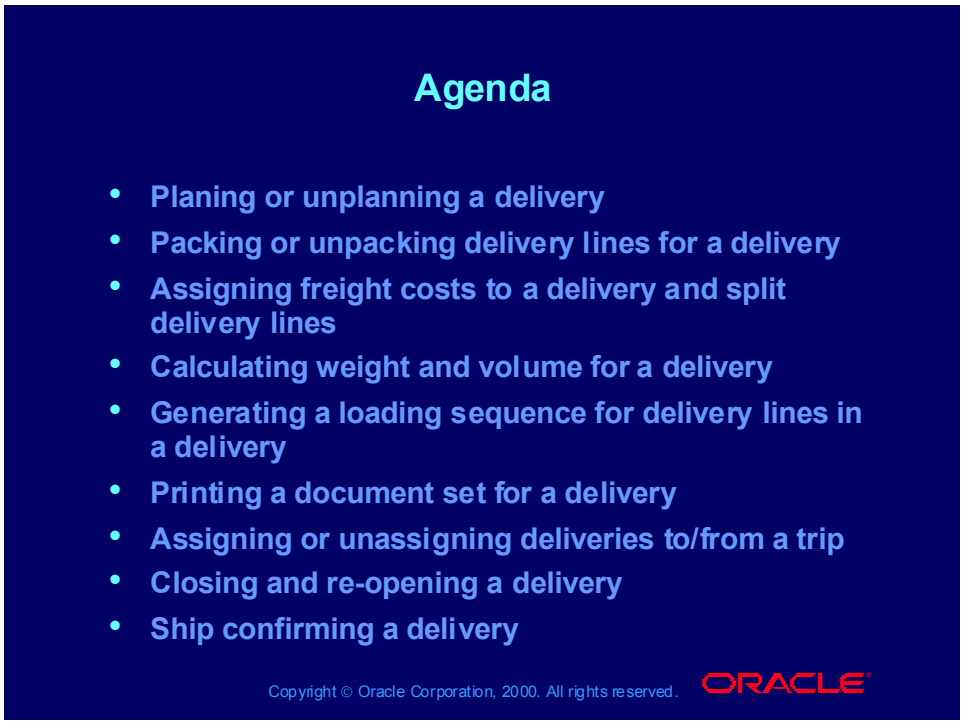
Agenda



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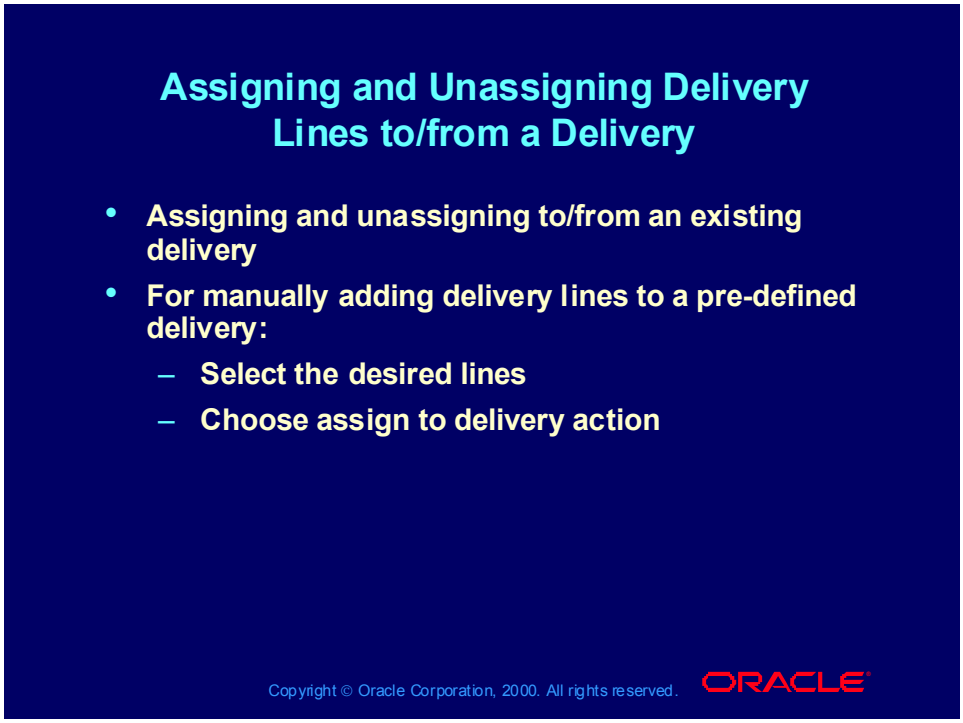
Assigning and Unassigning Delivery Lines to/from a Delivery



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery Lines (B) Find > Select Delivery Lines (B) Actions (M) Assign to Delivery (B) Go

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery Lines (B) Find > Select Delivery Lines (B) Actions (M) Unassign to Delivery (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Delivery Lines > Assigning Delivery Lines to a Delivery or Unassigning Delivery Lines to a Delivery

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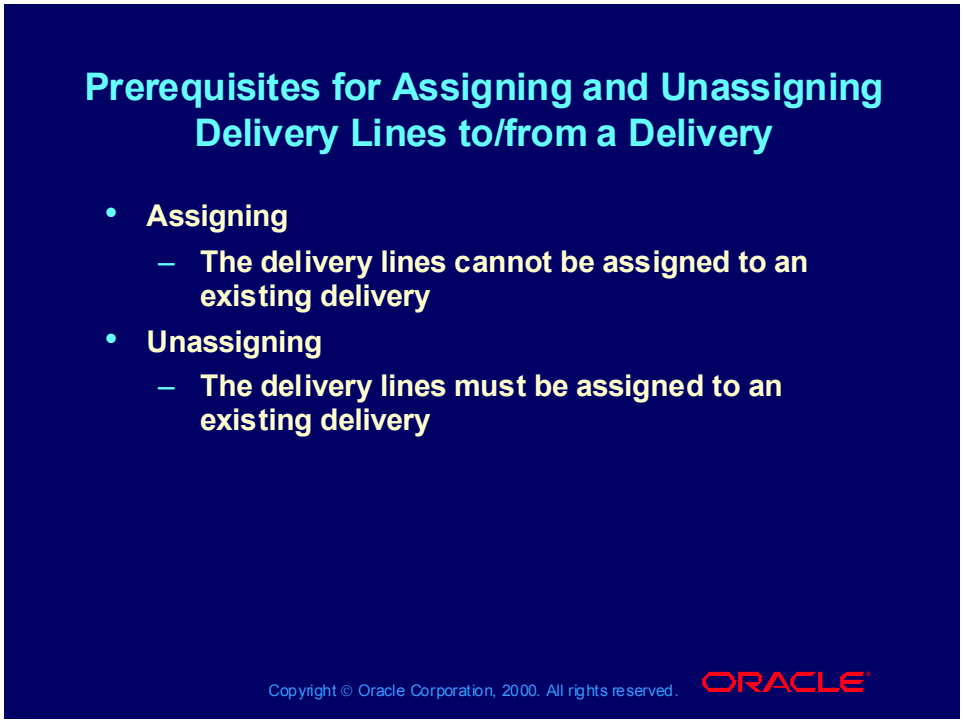
Prerequisites for Assigning and Unassigning Delivery Lines to/from a Delivery



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery Lines (B) Find > Select Delivery Lines (B) Actions (M) Assign to Delivery (B) Go

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery Lines (B) Find > Select Delivery Lines (B) Actions (M) Unassign to Delivery (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Delivery Lines > Assigning or Unassigning Delivery Lines to/from a Delivery

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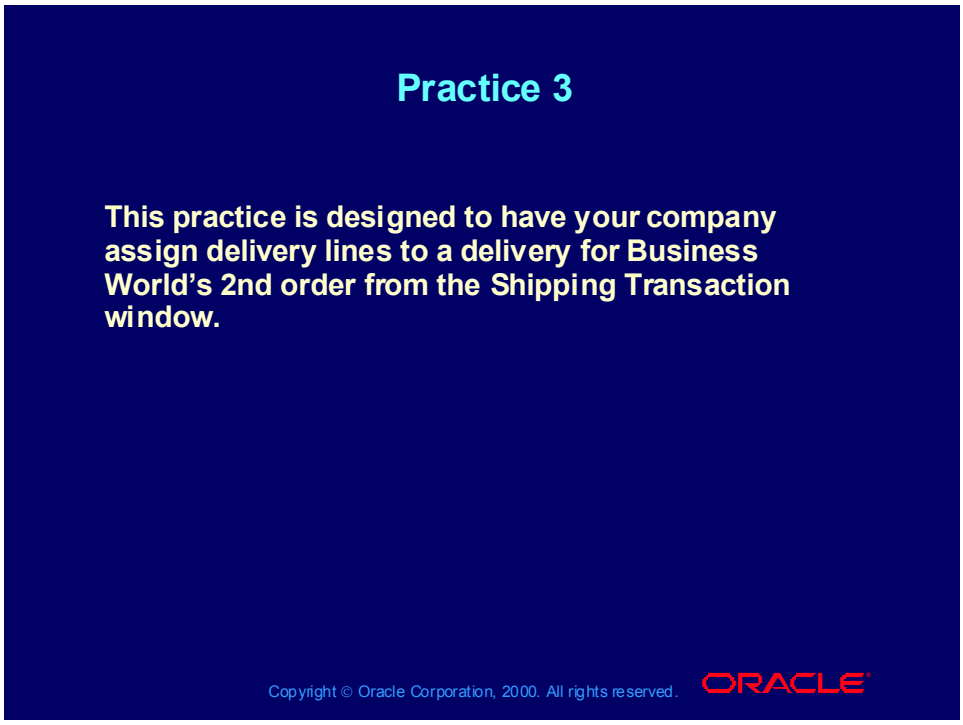

(N) Shipping > Transactions

1. Choose the Flash Light button from the Toolbar
2. Select lines search
3. Enter the 2nd order number
4. Choose the Find button
5. Select the delivery line by pressing the Ctrl and the left mouse buttons
7. Choose the Actions button
8. Select assign to delivery
9. Choose the Go button
10. Select recorded delivery name from LOV
11. Choose the OK button
12. Save your work

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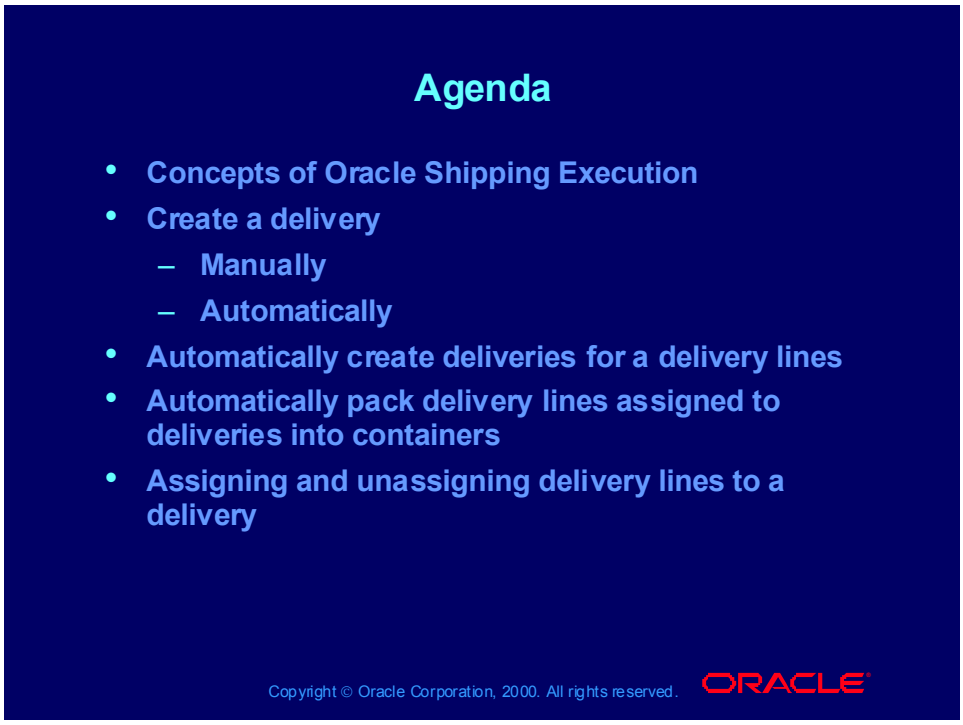

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Planning a Delivery

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery Lines (B) Find (B) Actions (M) Plan (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Planning or Unplanning a Delivery

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Prerequisites For Planning a Delivery

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery Lines (B) Find (B) Actions (M) Plan (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Planning or Unplanning a Delivery

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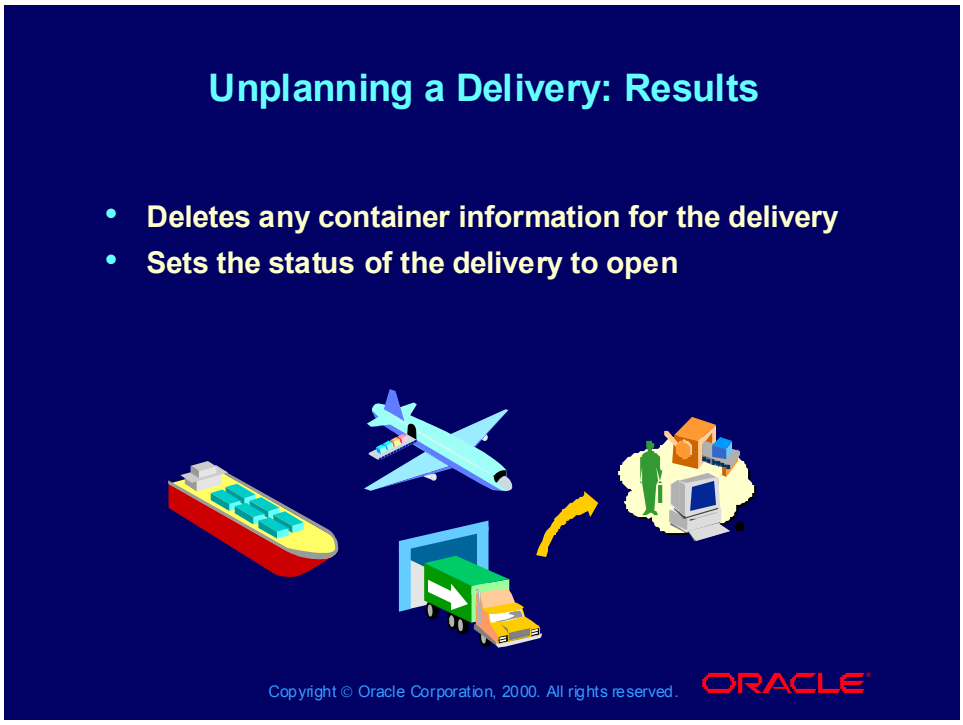
Unplanning a Delivery: Results



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery Lines (B) Find (B) Actions (M) Unplan (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Planning or Unplanning a Delivery

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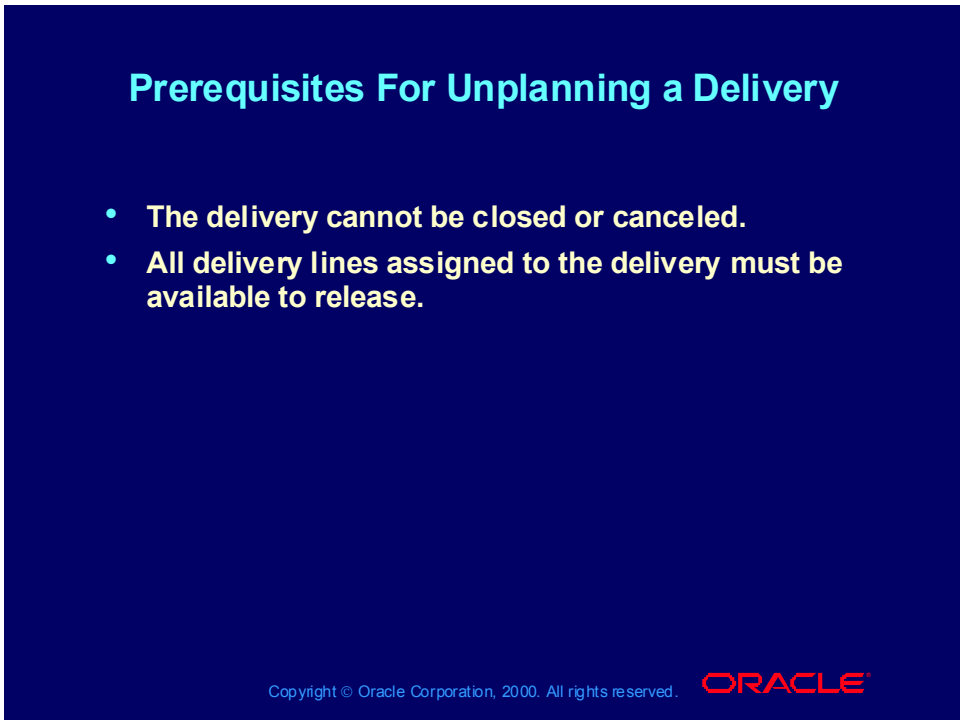
Prerequisites For Unplanning a Delivery



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery Lines (B) Find (B) Actions (M) Unplan (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Planning or Unplanning a Delivery

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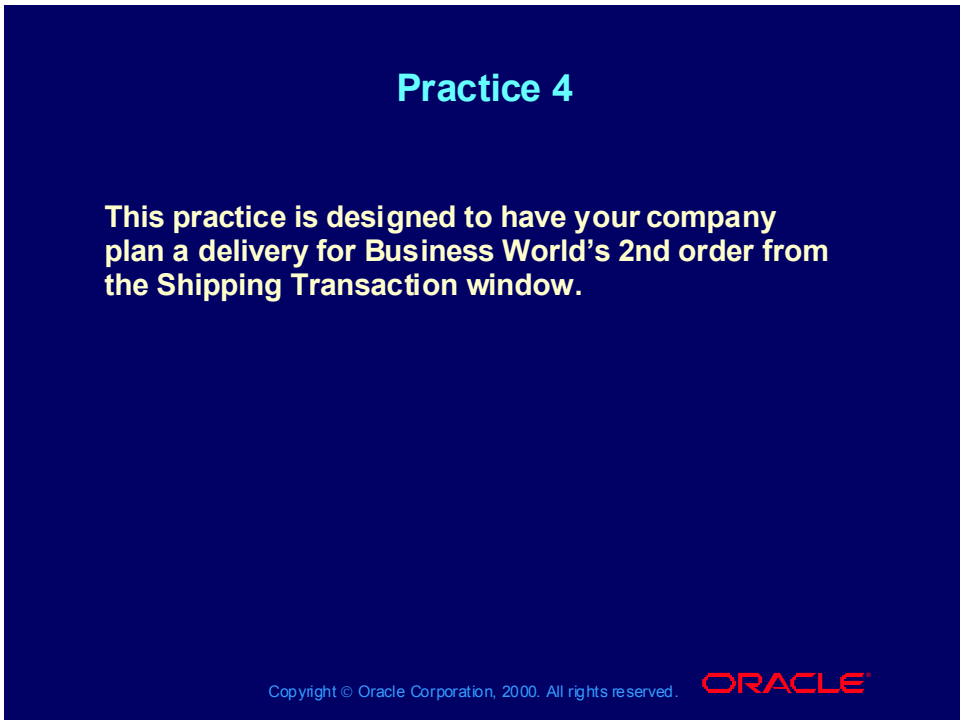

(T) Delivery

1. Choose the Actions button
2. Select Plan
3. Choose the Go button
4. A checkmark displays in the Planned box to indicate that the trip is in Planned status
5. Save your work

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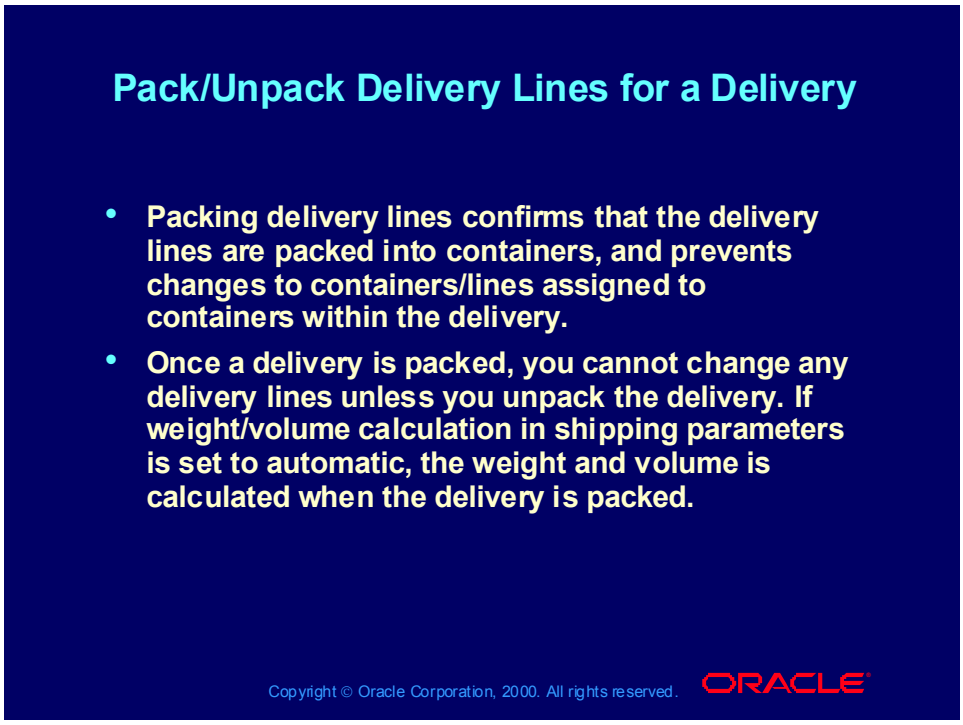
Pack/Unpack Delivery Lines for a Delivery



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Find (B) Actions (M) Pack (B) Go

(N) Shipping > Transactions > Ship Confirm > Search for the Delivery (B) Find (B) Actions (M) Unpack (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Packing Deliveries > Packing or Unpacking Delivery Lines for a Delivery

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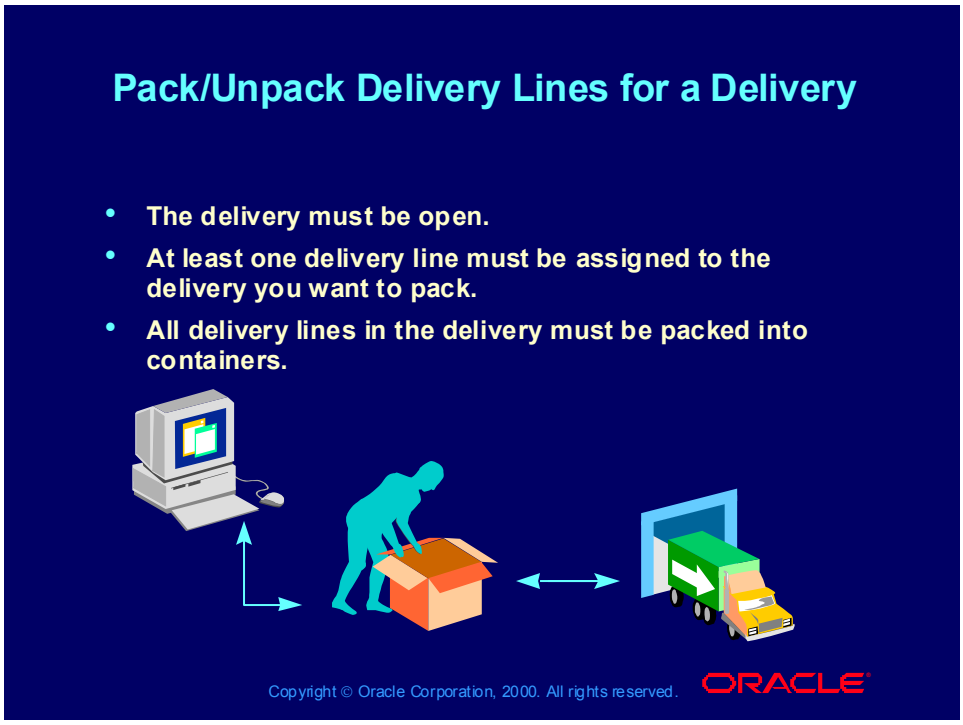
Pack/Unpack Delivery Lines for a Delivery



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Find (B) Actions (M) Pack (B) Go

(N) Shipping > Transactions > Ship Confirm > Search for the Delivery (B) Find (B) Actions (M) Unpack (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Packing Deliveries > Packing or Unpacking Delivery Lines for a Delivery

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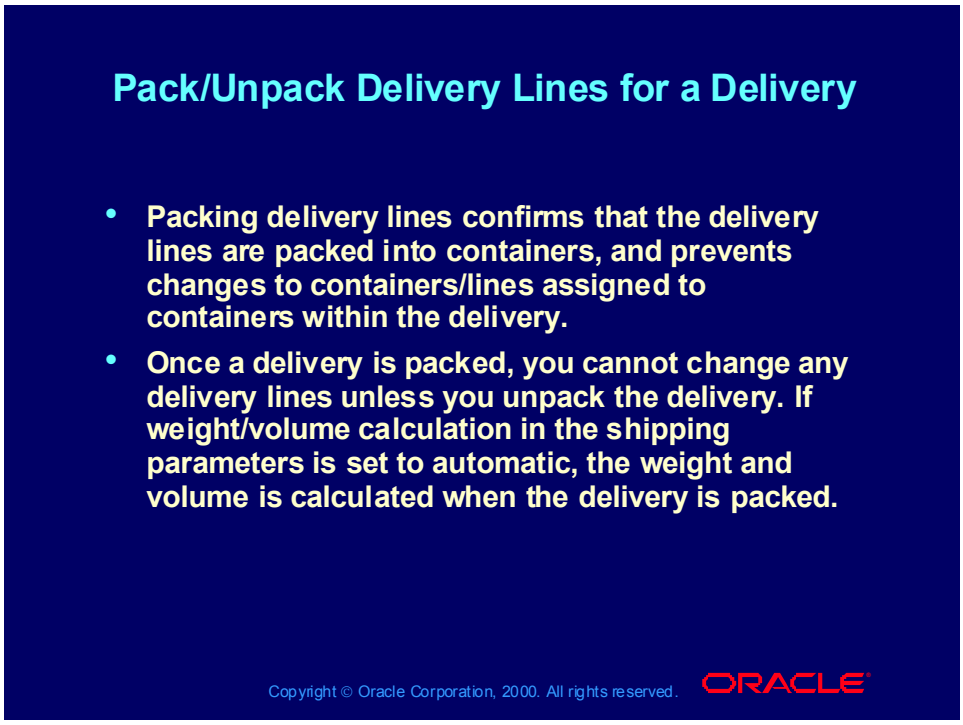
Pack/Unpack Delivery Lines for a Delivery



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Find (B) Actions (M) Pack (B) Go

(N) Shipping > Transactions > Ship Confirm > Search for the Delivery (B) Find (B) Actions (M) Unpack (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Packing Deliveries > Packing or Unpacking Delivery Lines for a Delivery

Unpack returns the status of the delivery line to the status it had prior to being packed. Unpacking a delivery line allows you to modify it.

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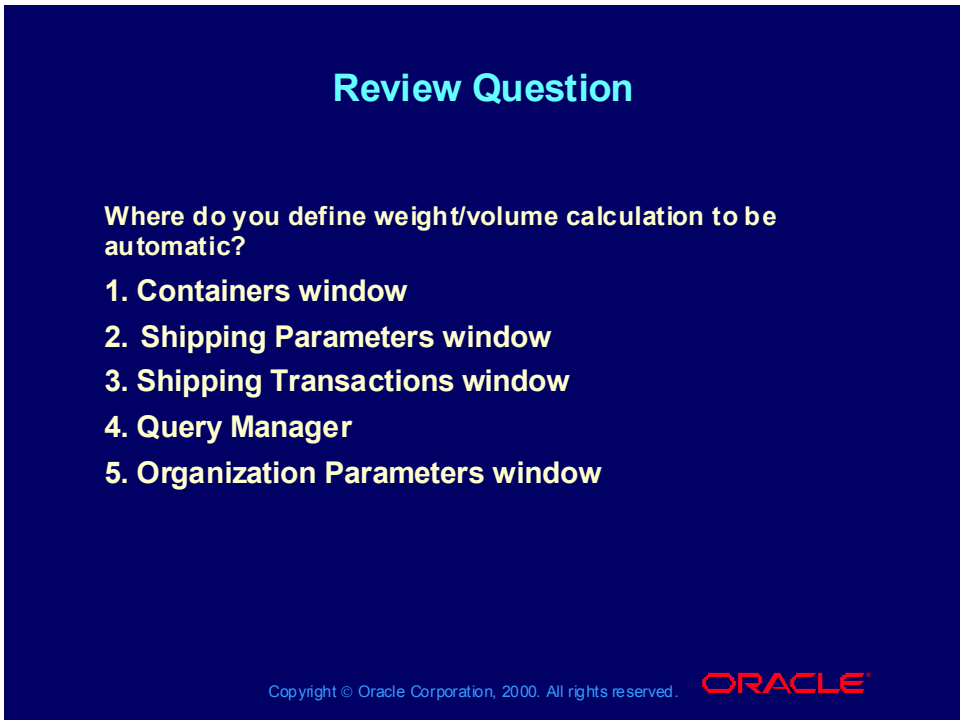

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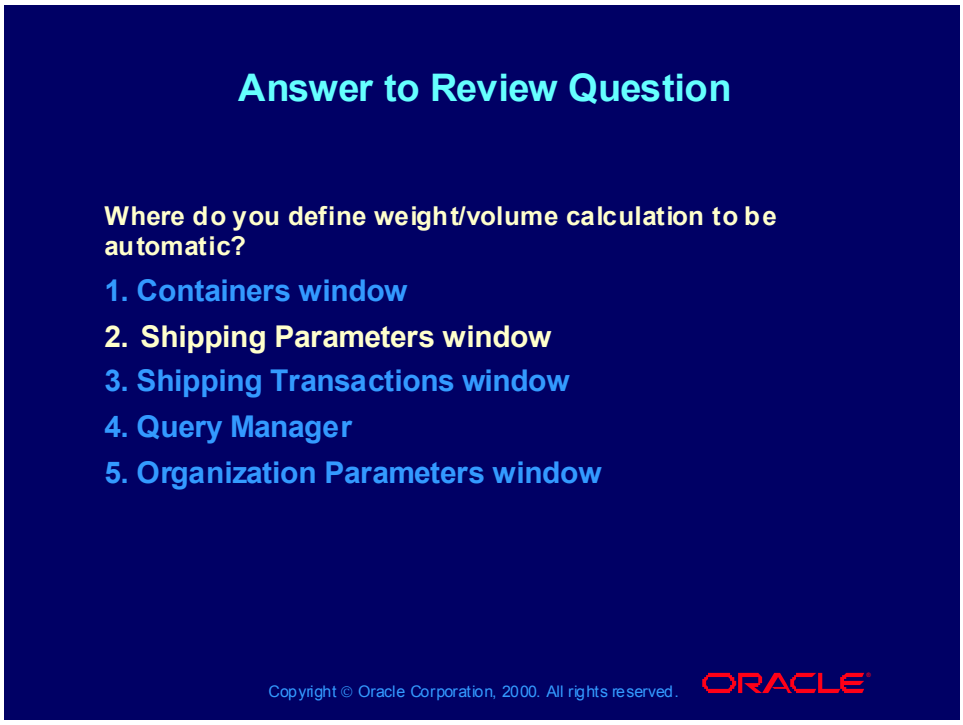

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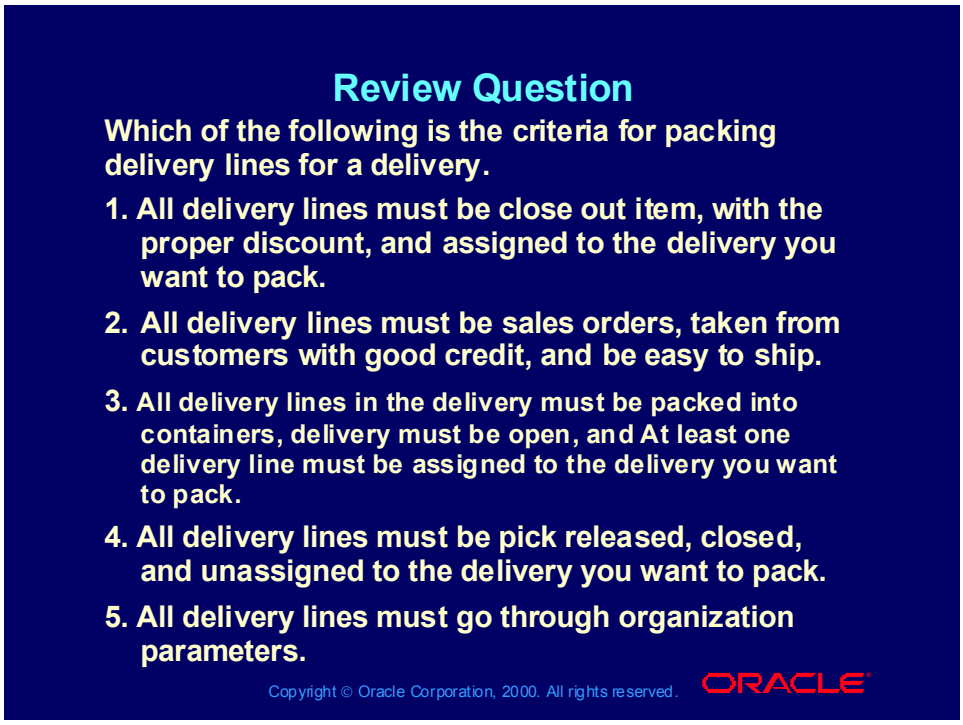

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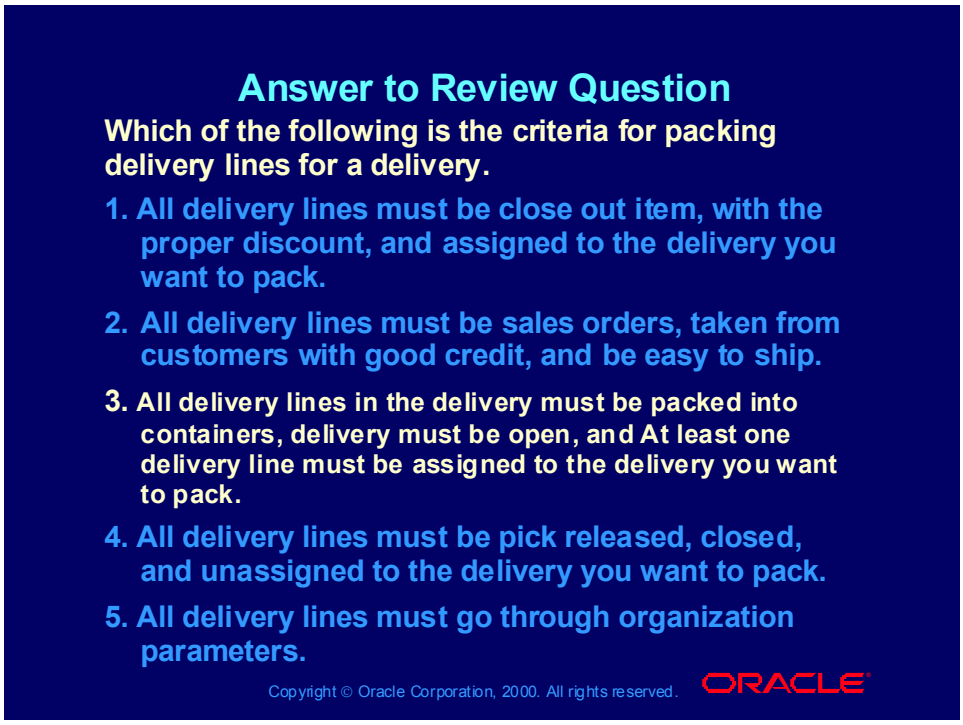

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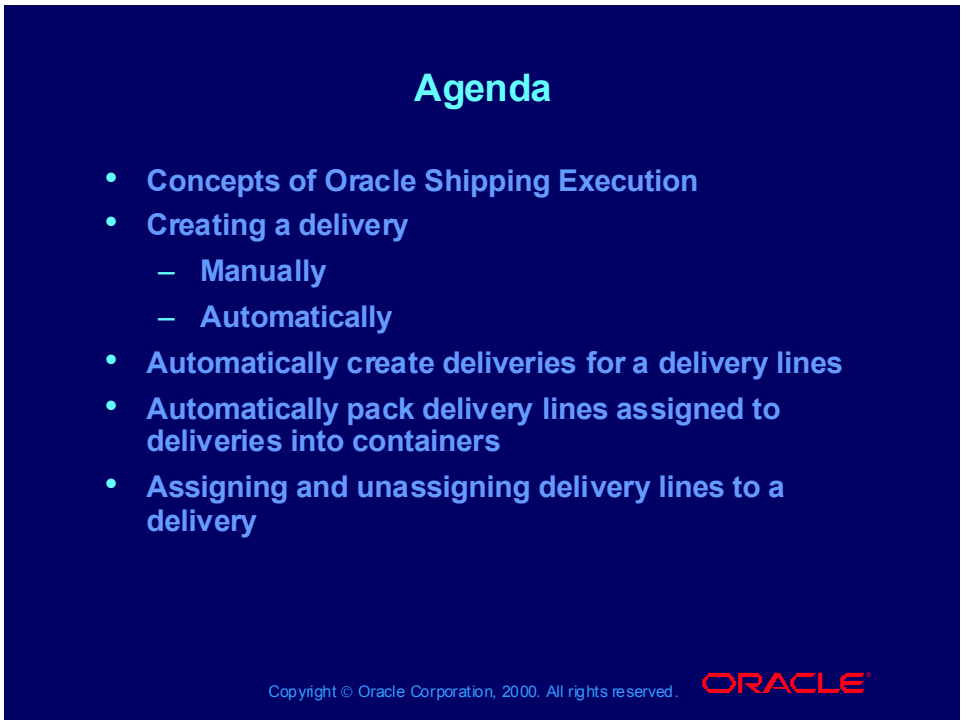

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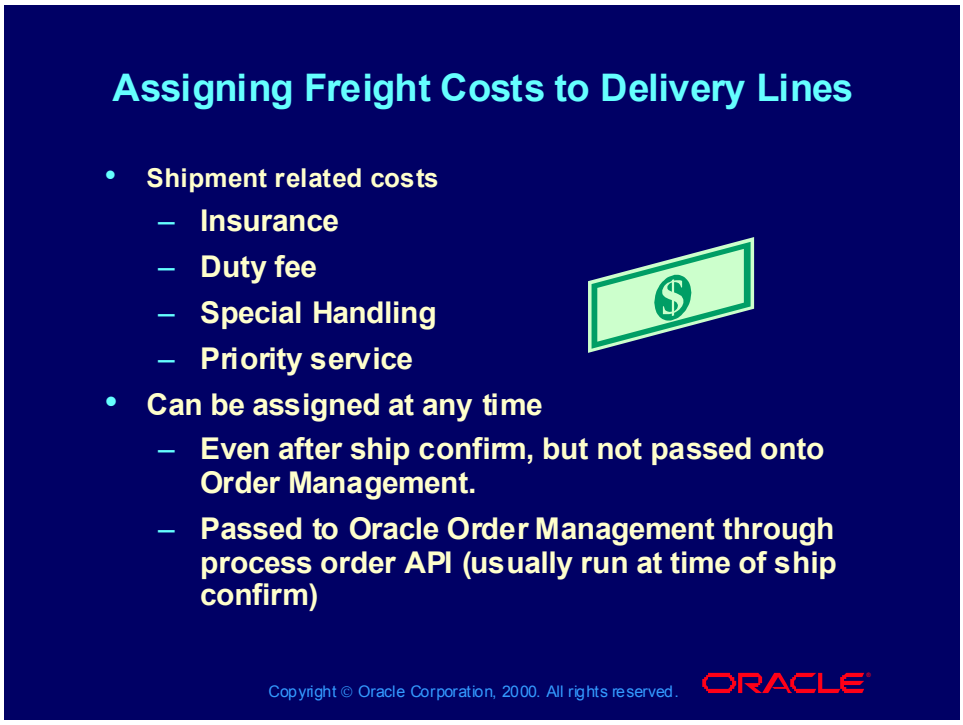
Assigning Freight Costs to Delivery Lines



(N) Shipping > Transactions (I) Flashlight Icon Search to find the Containers (B) Actions (M) Freight Costs (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Containers > Assigning Freight Costs to a Container

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Assigning Freight Costs to Delivery Lines

(N) Shipping > Transactions (I) Flashlight Icon Search to find the Containers (B) Actions (M) Freight Costs (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Containers > Assigning Freight Costs to a Container

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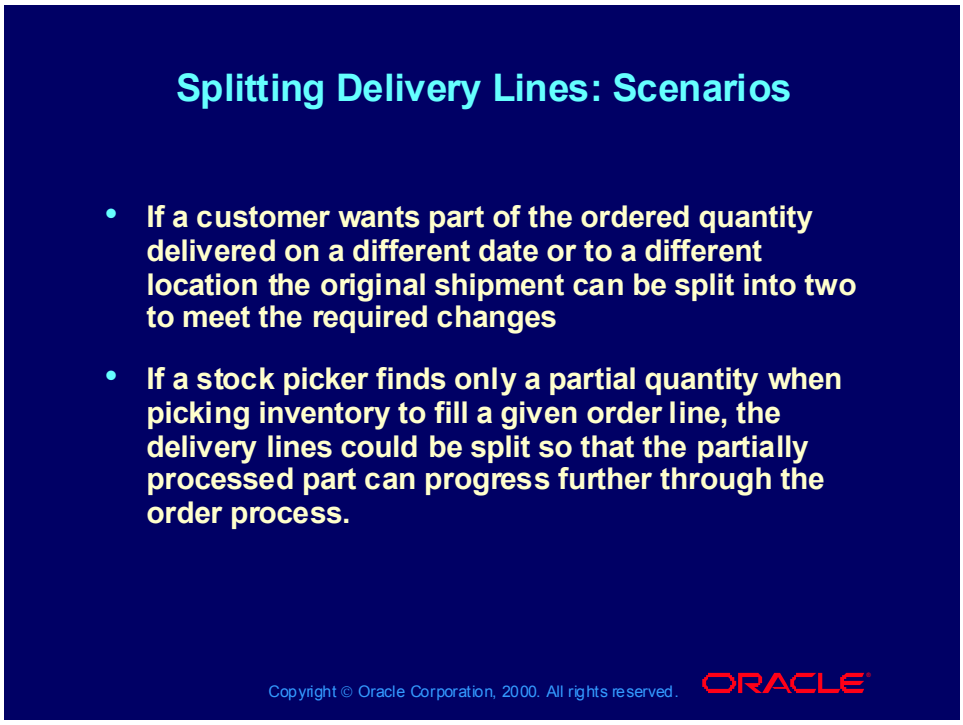
Splitting Delivery Lines: Scenarios



(N) Shipping > Transactions (I) Flashlight Icon Search to find the Delivery Lines you want to split (B) Actions (M) Split Line (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Delivery Lines > Splitting Delivery Lines

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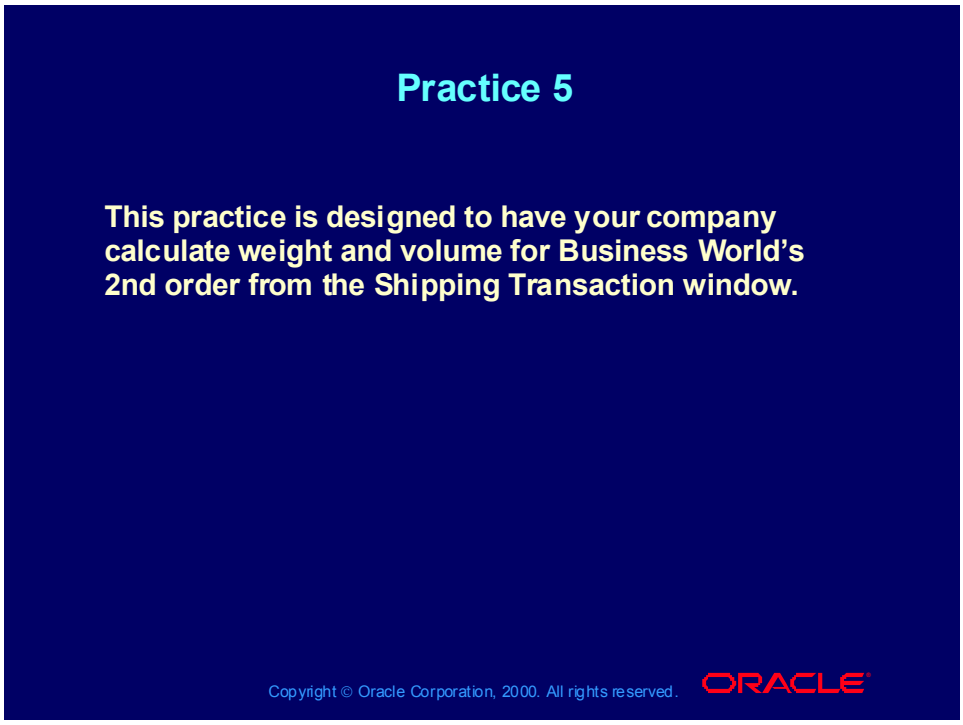

1. Choose the Actions button
2. Select Freight Costs
3. Choose the Go button
4. Enter the cost type, currency code, and amount
5. Choose the Done button
6. Save your work

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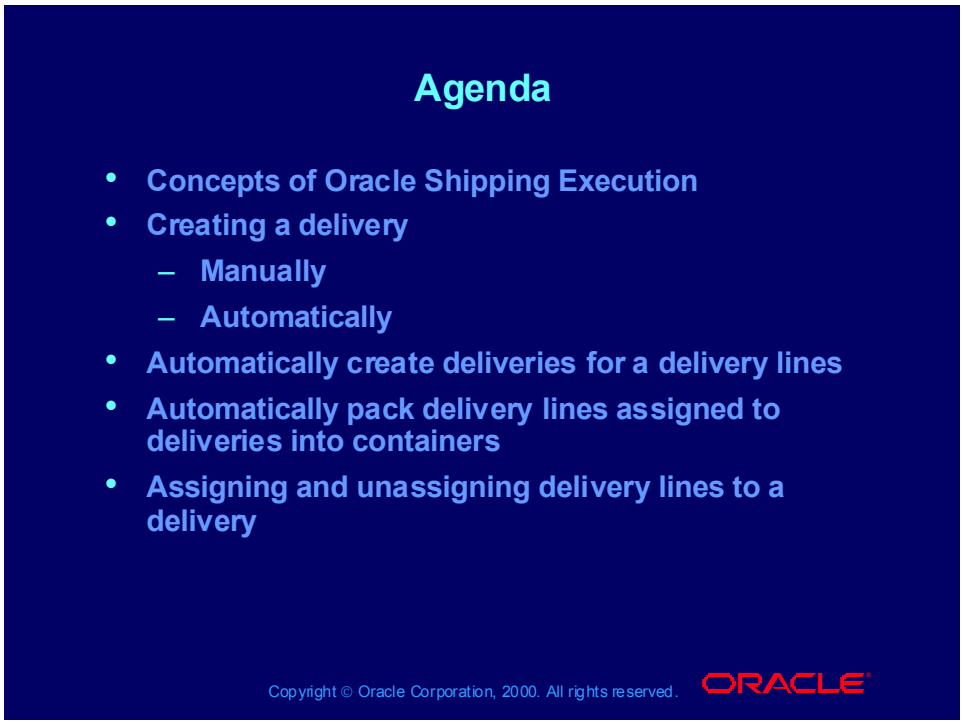

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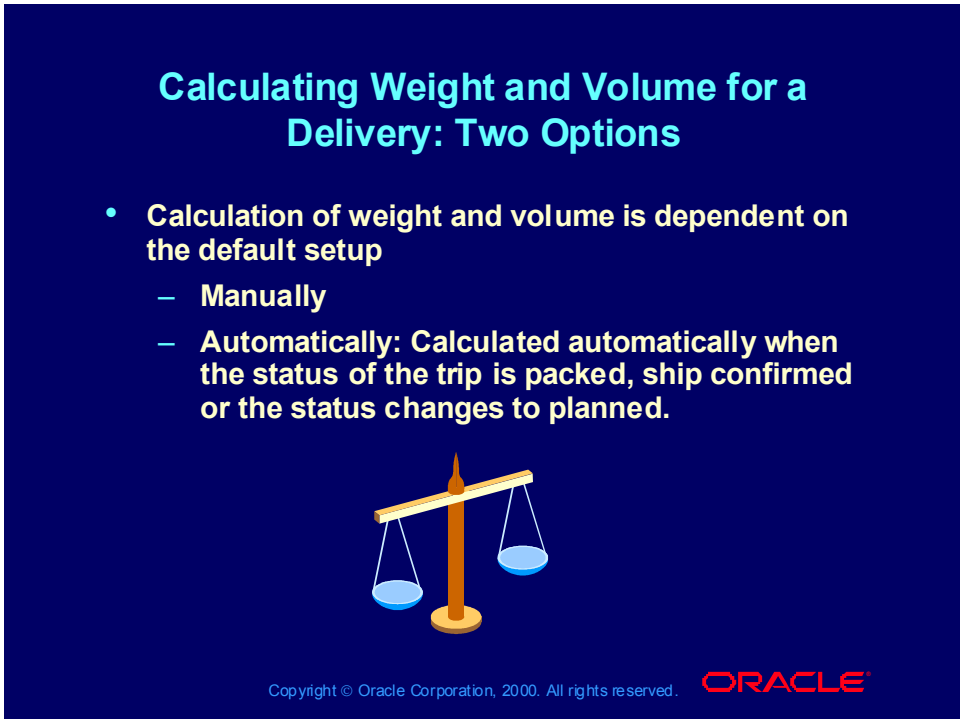
Calculating Weight and Volume for a Delivery: Two Options



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Find (B) Actions (M) Calculate Weight and Volume (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Packing Deliveries > Calculating Weight and Volume for a Delivery

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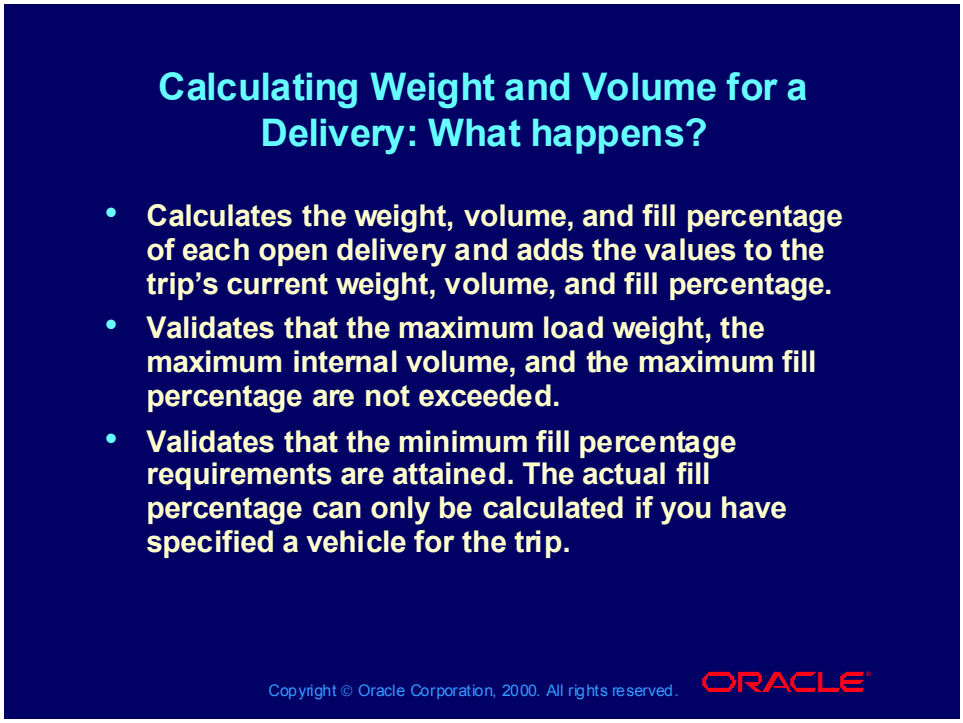
Calculating Weight and Volume for a Delivery: What happens?



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Find (B) Actions (M) Calculate Weight and Volume (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Packing Deliveries > Calculating Weight and Volume for a Delivery

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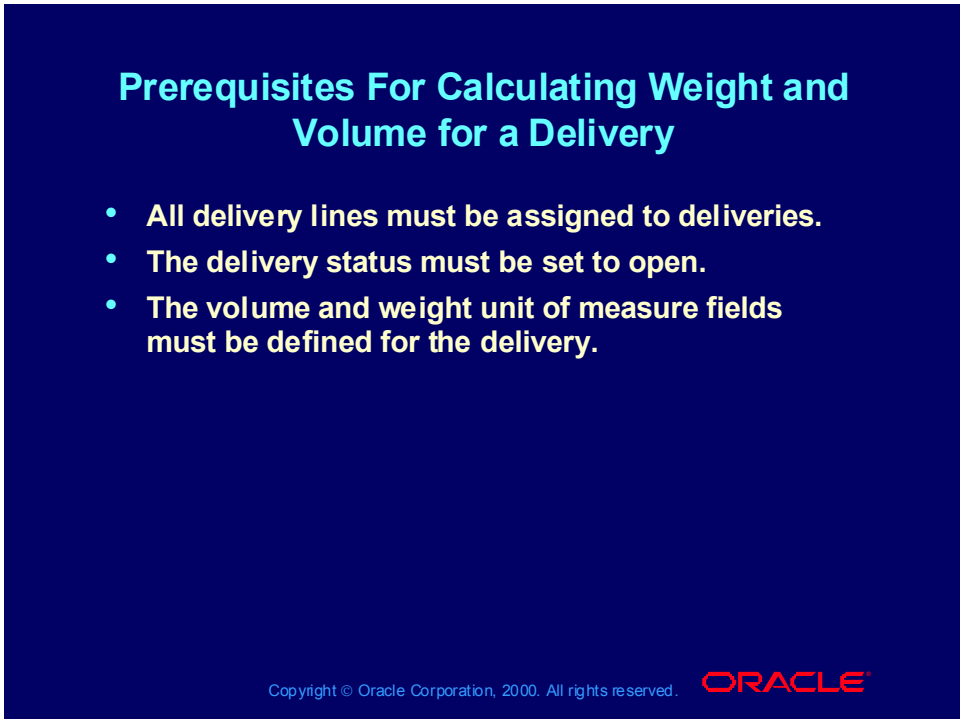
Prerequisites For Calculating Weight and Volume for a Delivery



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Find (B) Actions (M) Calculate Weight and Volume (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Packing Deliveries > Calculating Weight and Volume for a Delivery

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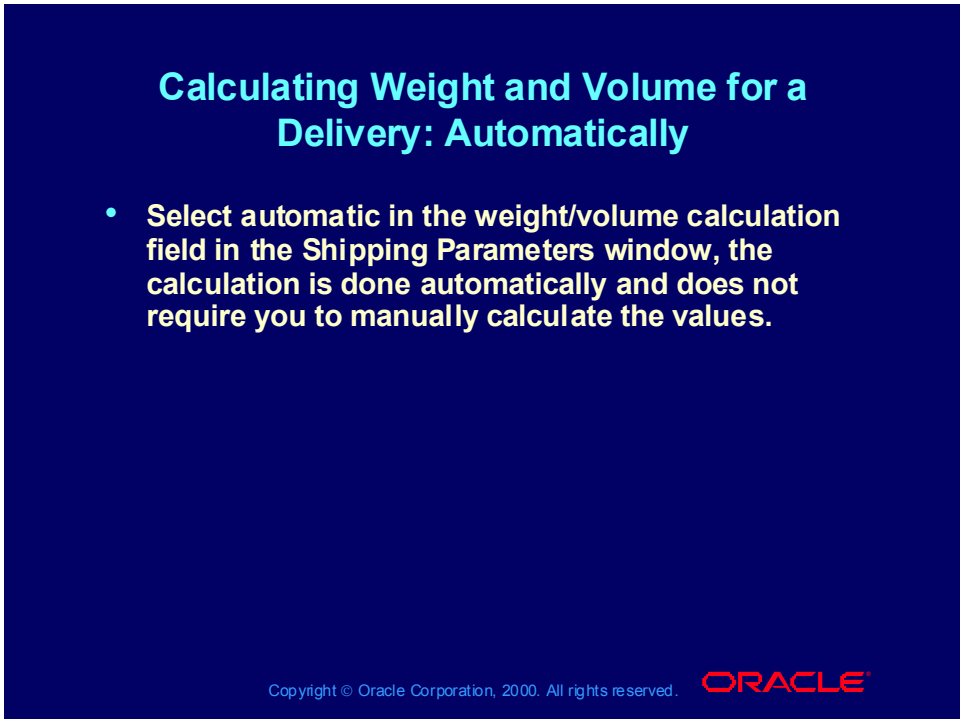
Calculating Weight and Volume for a Delivery: Automatically



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Find (B) Actions (M) Calculate Weight and Volume (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Packing Deliveries > Calculating Weight and Volume for a Delivery

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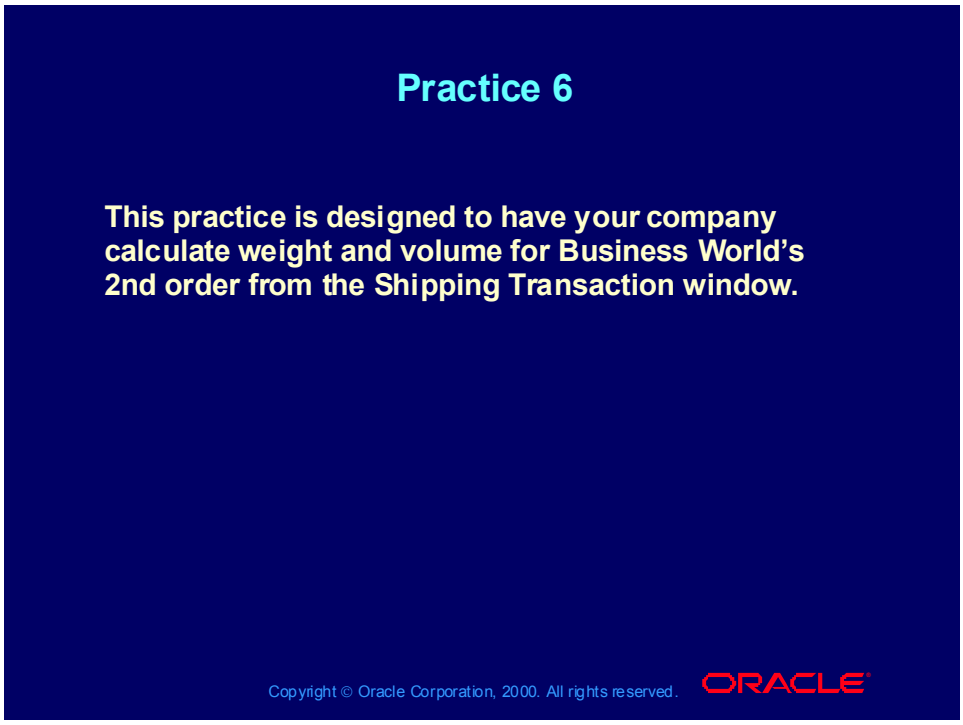

(T) Delivery

1. Choose the Actions button
2. Select Calculate Weight/Volume
3. Choose the Go button

The weight and volume is calculated and you can view the information in the Lines/Containers tab

4. Save your work

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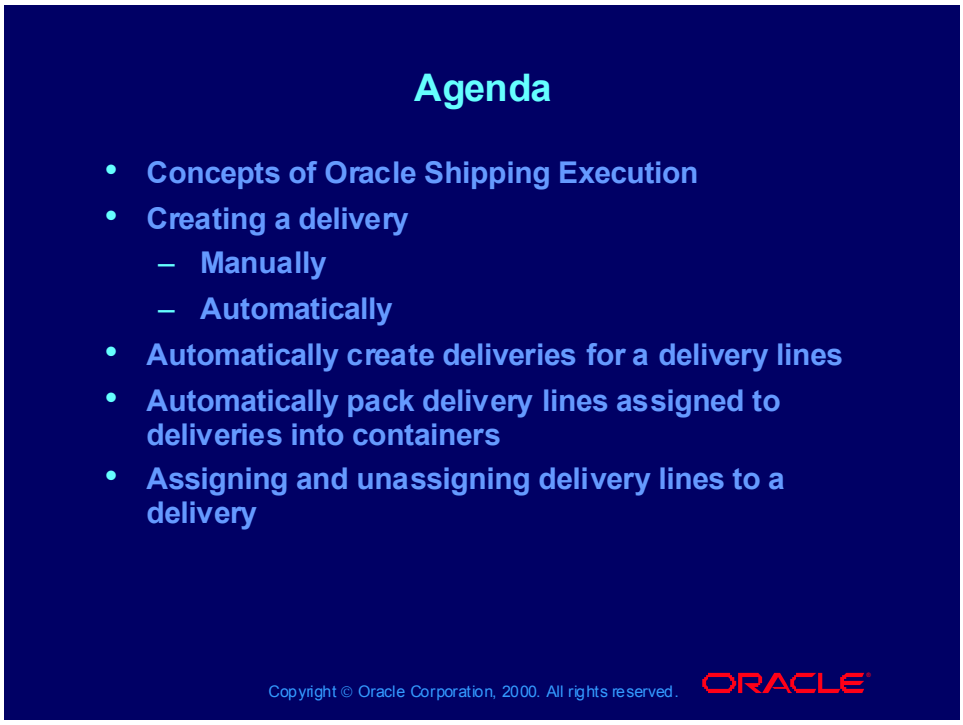

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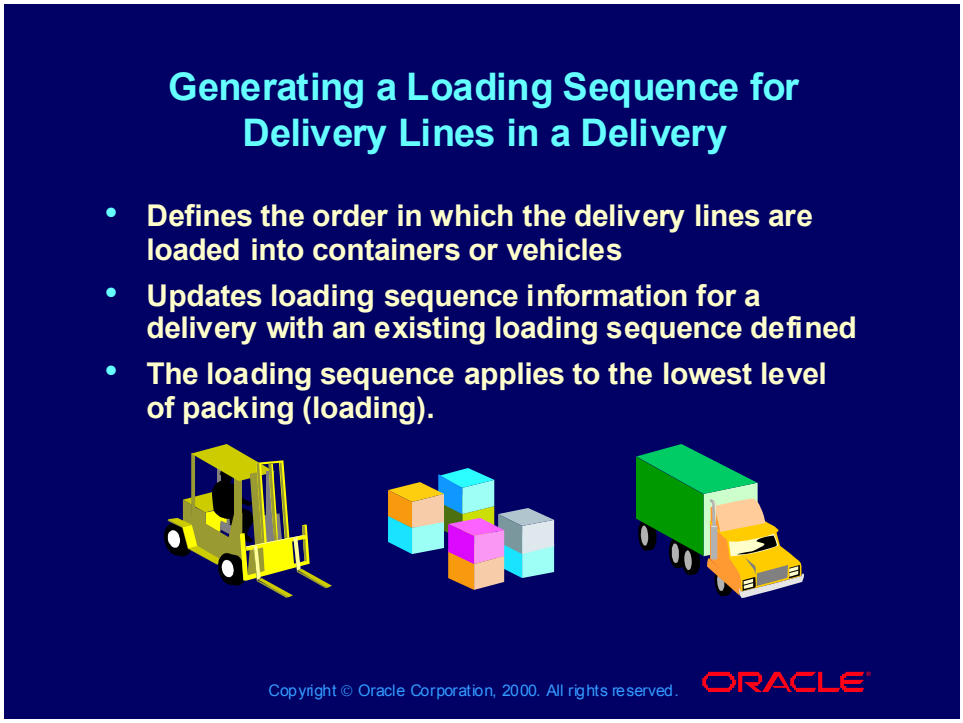
Generating a Loading Sequence for Delivery Lines in a Delivery



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery containing the Delivery Lines for which you want to generate a loading sequence (B) Find (T) Delivery tab > Select the order (B) Actions (M) Generate Loading Sequence (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Generating a Loading Sequence for Delivery Lines in a Delivery

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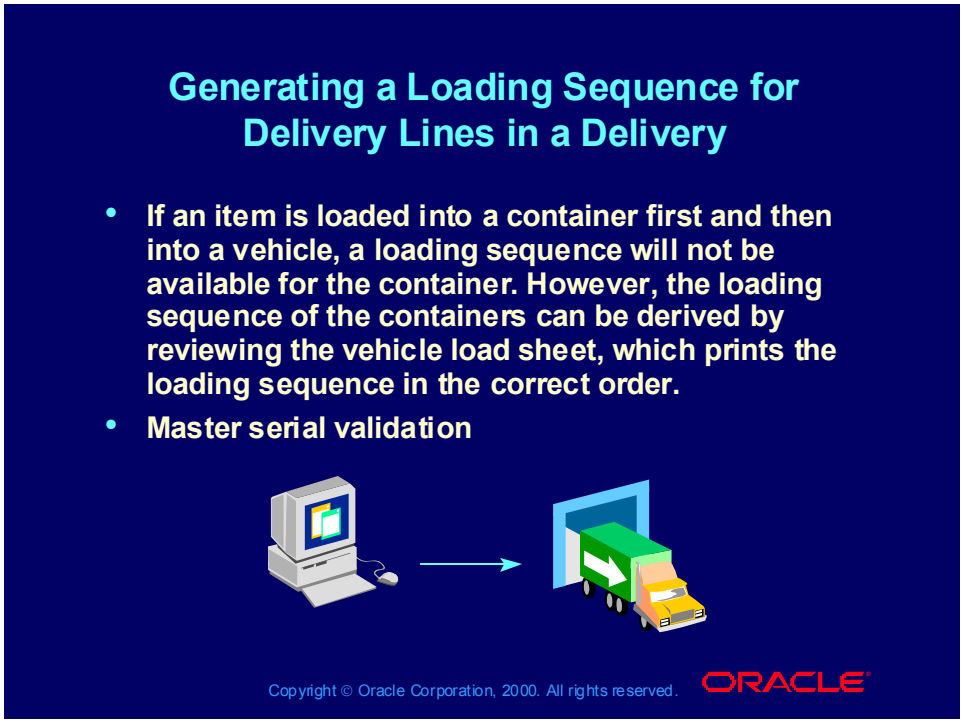
Generating a Loading Sequence for Delivery Lines in a Delivery



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery containing the Delivery Lines for which you want to generate a loading sequence (B) Find (T) Delivery tab > Select the order (B) Actions (M) Generate Loading Sequence (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Generating a Loading Sequence for Delivery Lines in a Delivery

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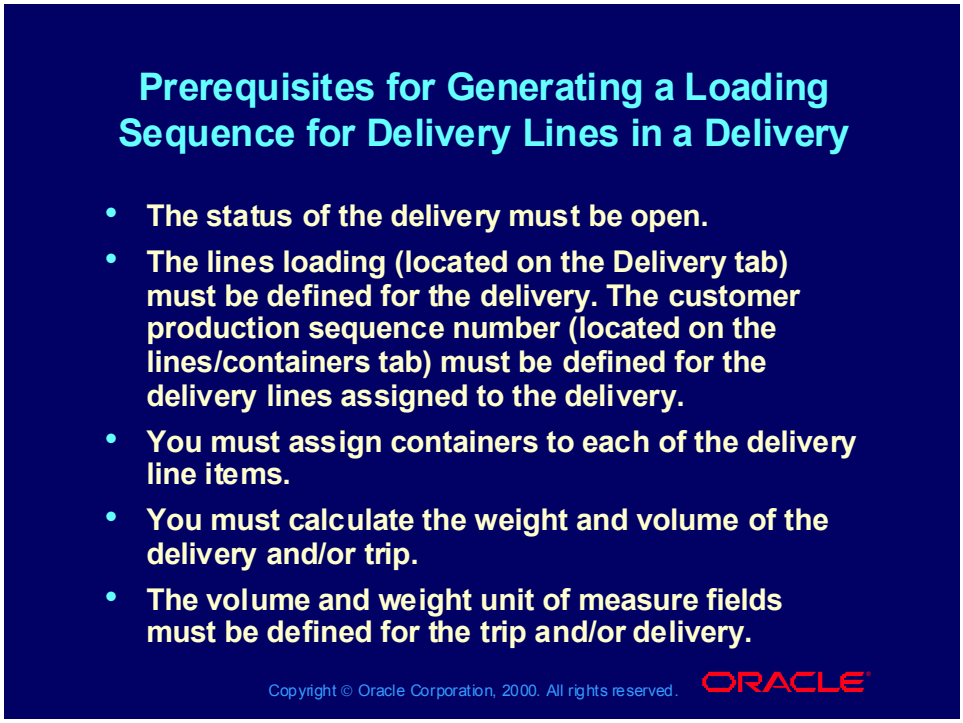
Prerequisites for Generating a Loading Sequence for Delivery Lines in a Delivery



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery containing the Delivery Lines for which you want to generate a loading sequence (B) Find (T) Delivery tab > Select the order (B) Actions (M) Generate Loading Sequence (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Generating a Loading Sequence for Delivery Lines in a Delivery

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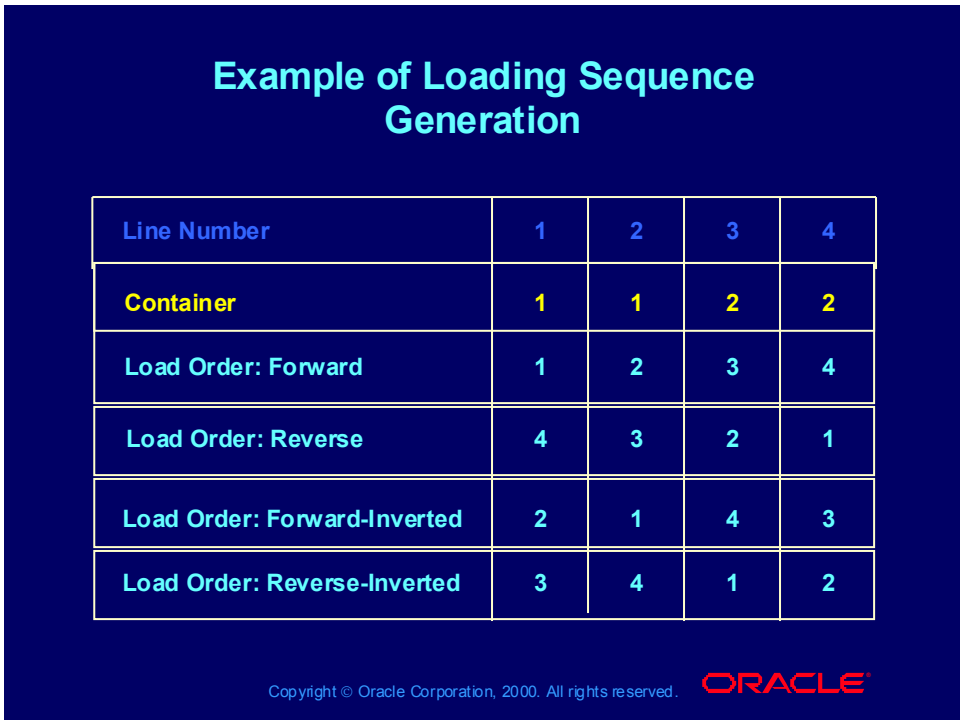
Example of Loading Sequence Generation



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery containing the Delivery Lines for which you want to generate a loading sequence (B) Find (T) Delivery tab > Select the order (B) Actions (M) Generate Loading Sequence (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Example of Generating a Loading Sequence for Delivery Lines in a Delivery

The Line Number shown above is the delivery line.

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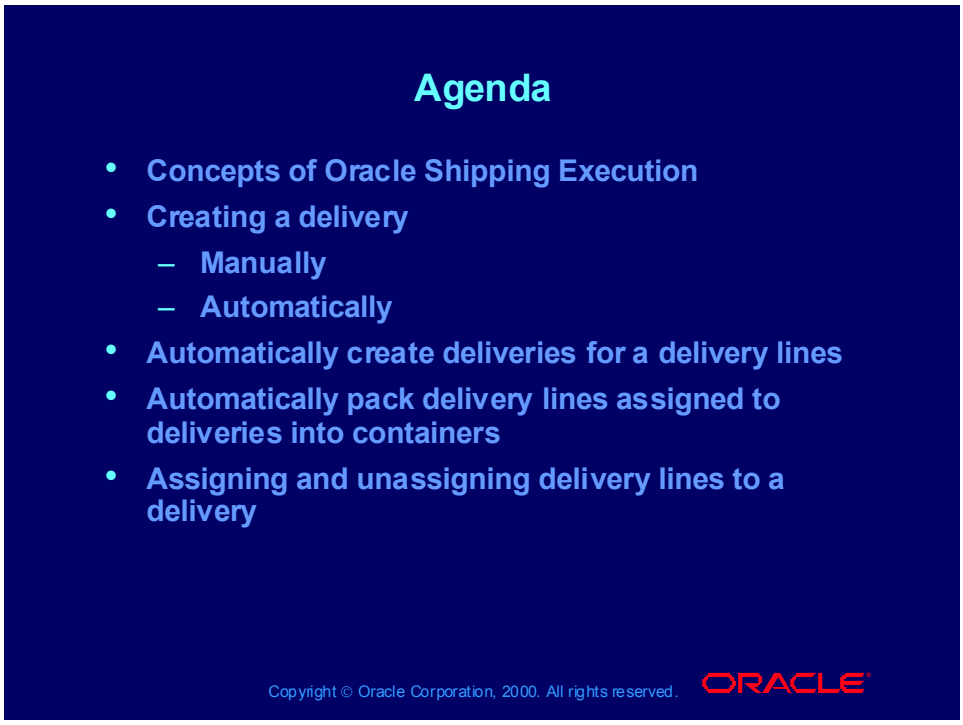

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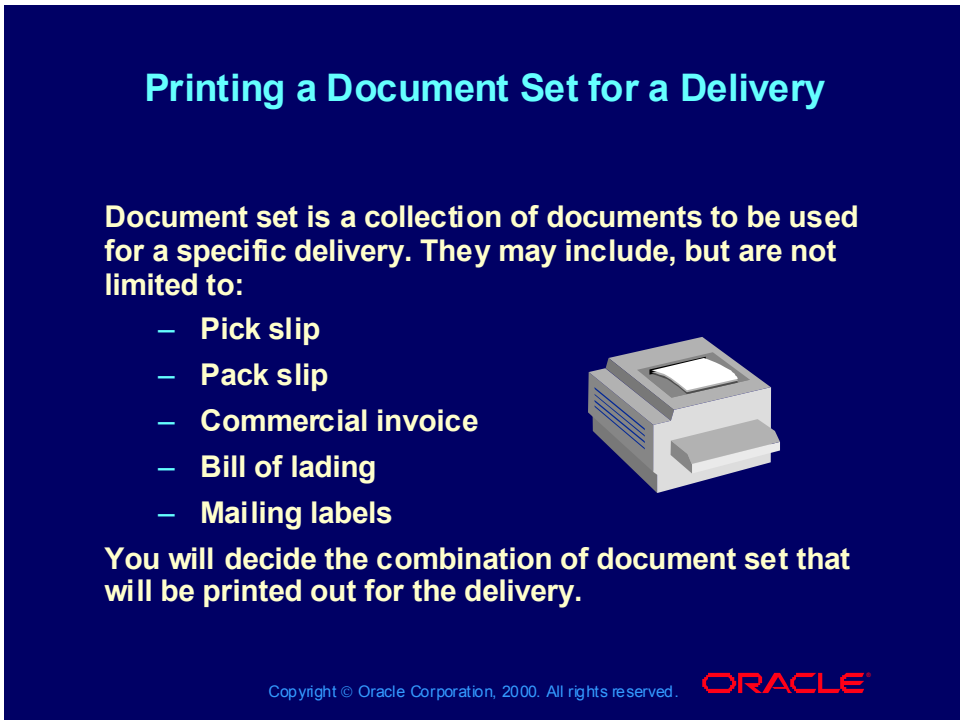
Printing a Document Set for a Delivery



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Actions (M) Printing a Document Set (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Printing a Document Set for a Delivery

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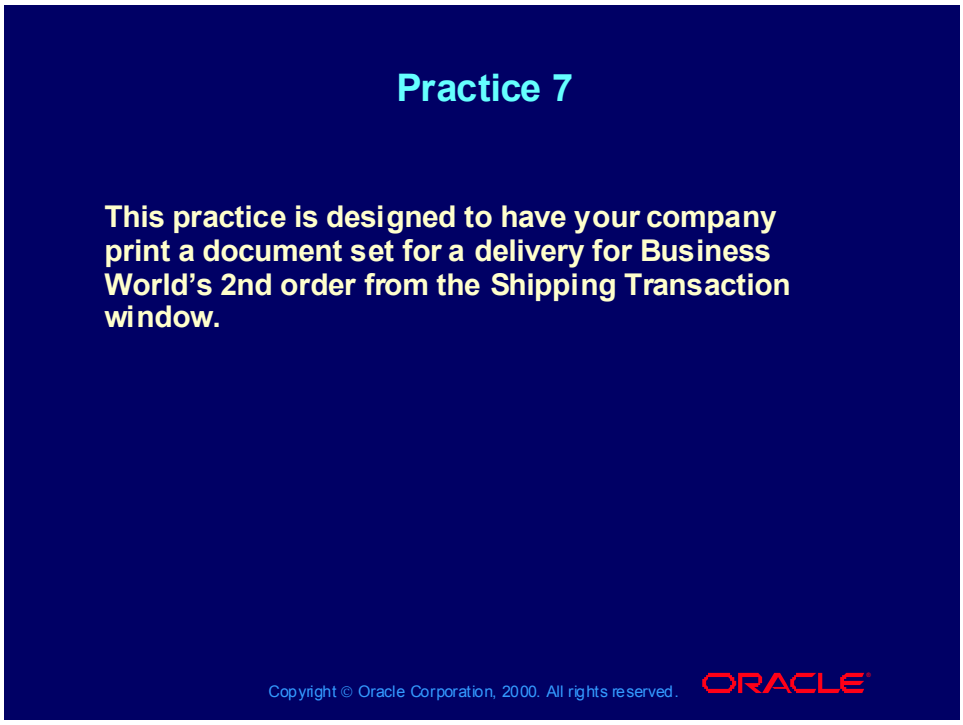

1. Choose the Actions button
2. Select Print Document Set
3. Choose the Go button
3. Select the document set and choose the OK button
4. The document set for the trip is printed
5. Save your work

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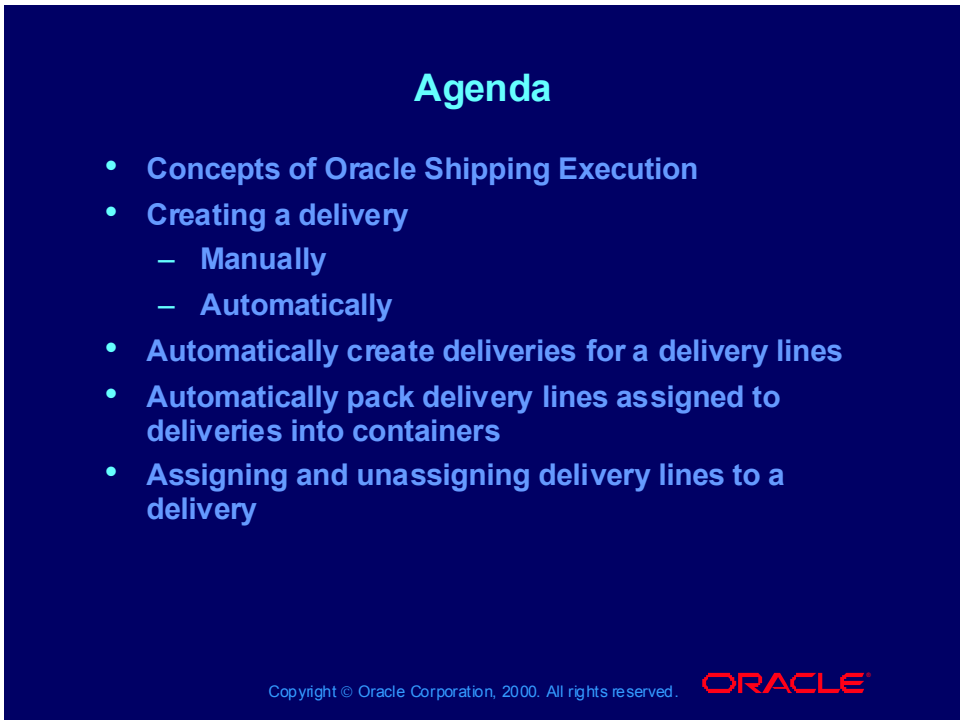

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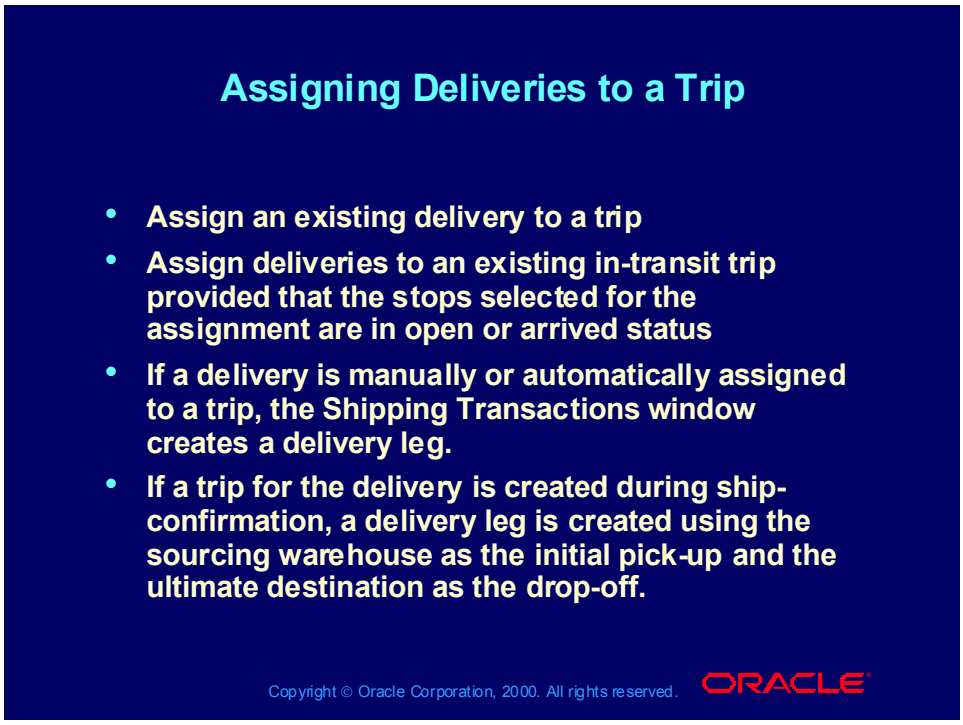
Assigning Deliveries to a Trip



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Find > Select trip (B) Actions (M) Assign to Trip (B) Go

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Find > Select trip (B) Actions Actions (M) Unassign Trip (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Assigning Deliveries to a Trip or Unassigning Deliveries to a Trip

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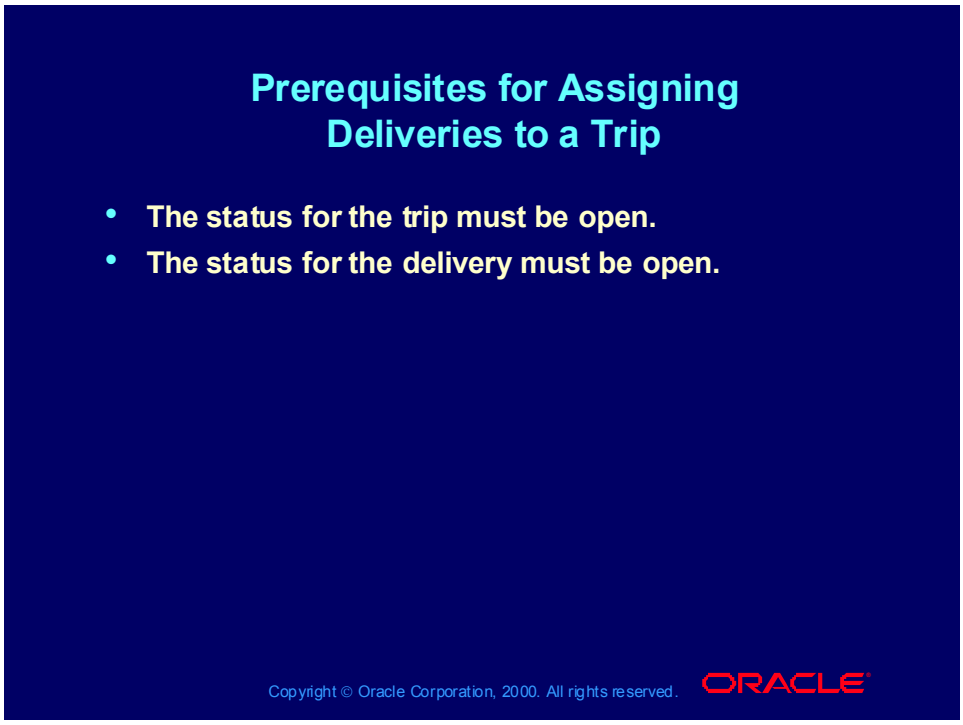
Prerequisites for Assigning Deliveries to a Trip



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Find > Select trip (B) Actions (M) Assign to Trip (B) Go

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Find > Select trip (B) Actions Actions (M) unassign Trip (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Assigning Deliveries to a Trip or unassigning Deliveries to a Trip

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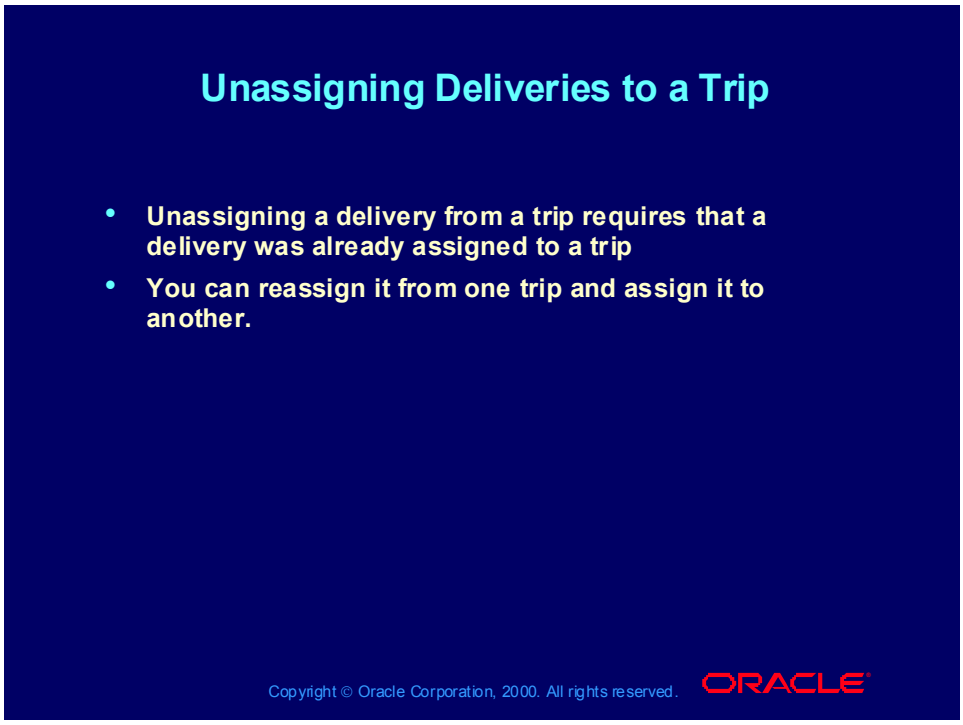
Unassigning Deliveries to a Trip



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Find > Select trip (B) Actions (M) Assign to Trip (B) Go

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Find > Select trip (B) Actions Actions (M) Unassign Trip (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Assigning Deliveries to a Trip or Unassigning Deliveries to a Trip

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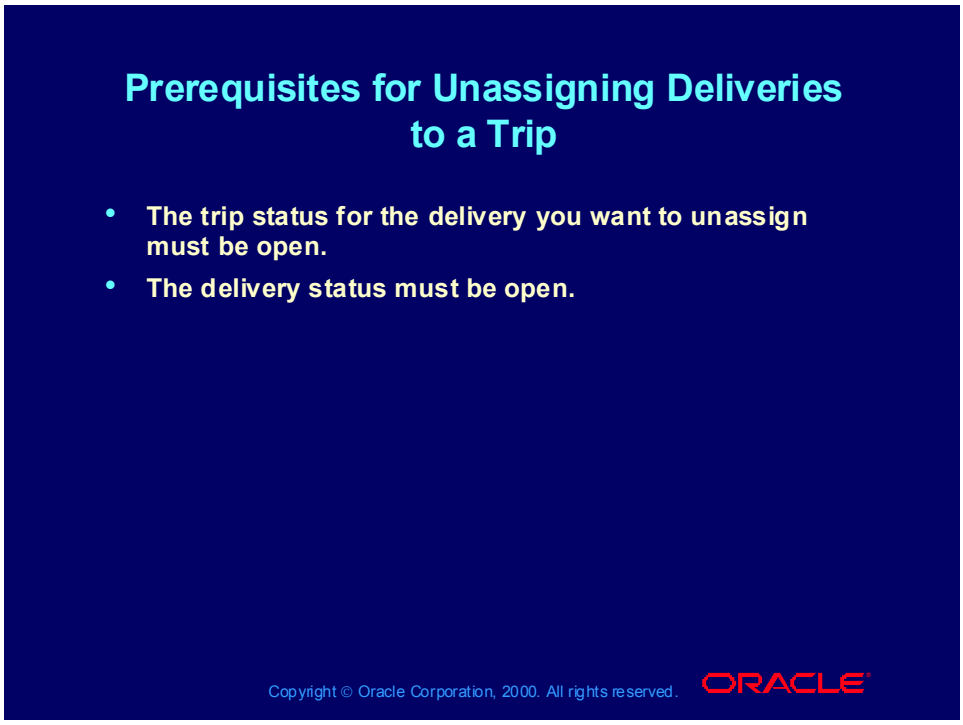
Prerequisites for Unassigning Deliveries to a Trip



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Find > Select trip (B) Actions (M) Assign to Trip (B) Go

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Find > Select trip (B) Actions Actions (M) unassign Trip (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Assigning Deliveries to a Trip or unassigning Deliveries to a Trip

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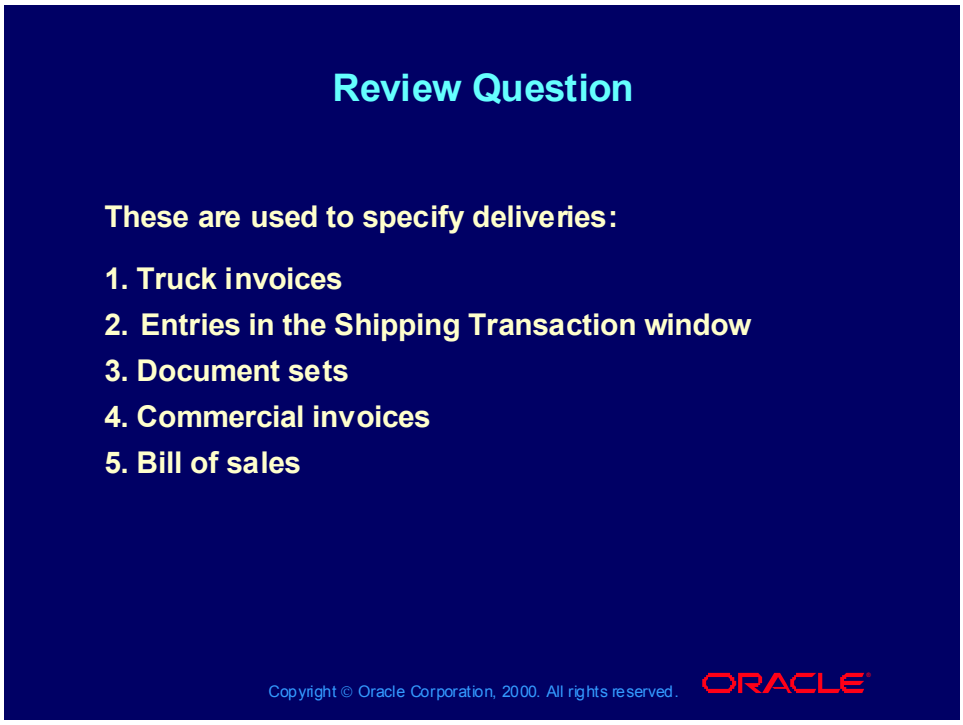

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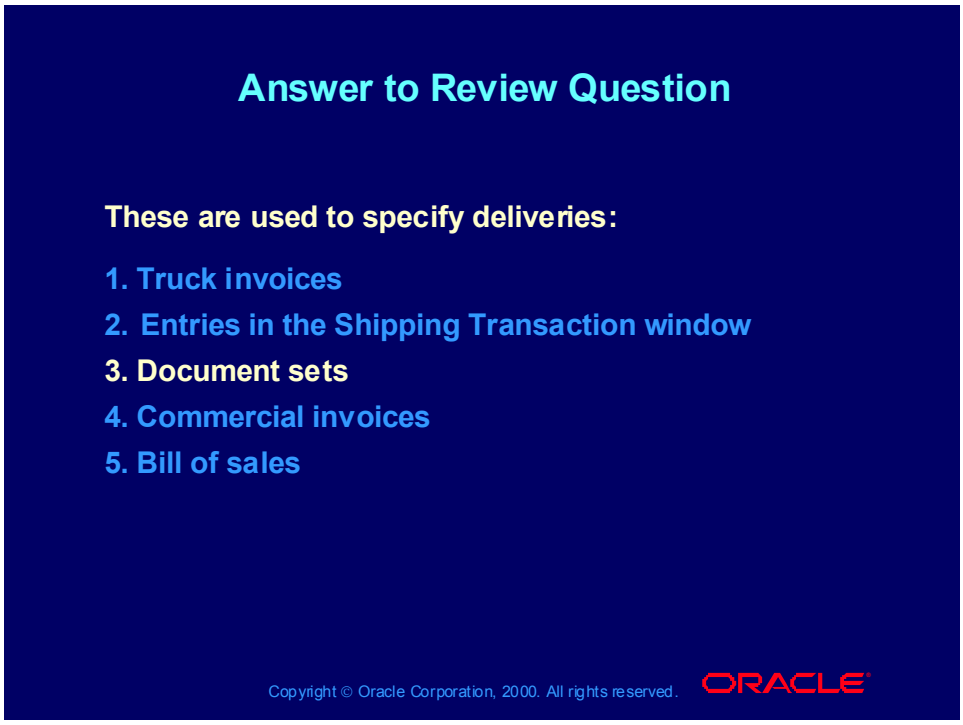

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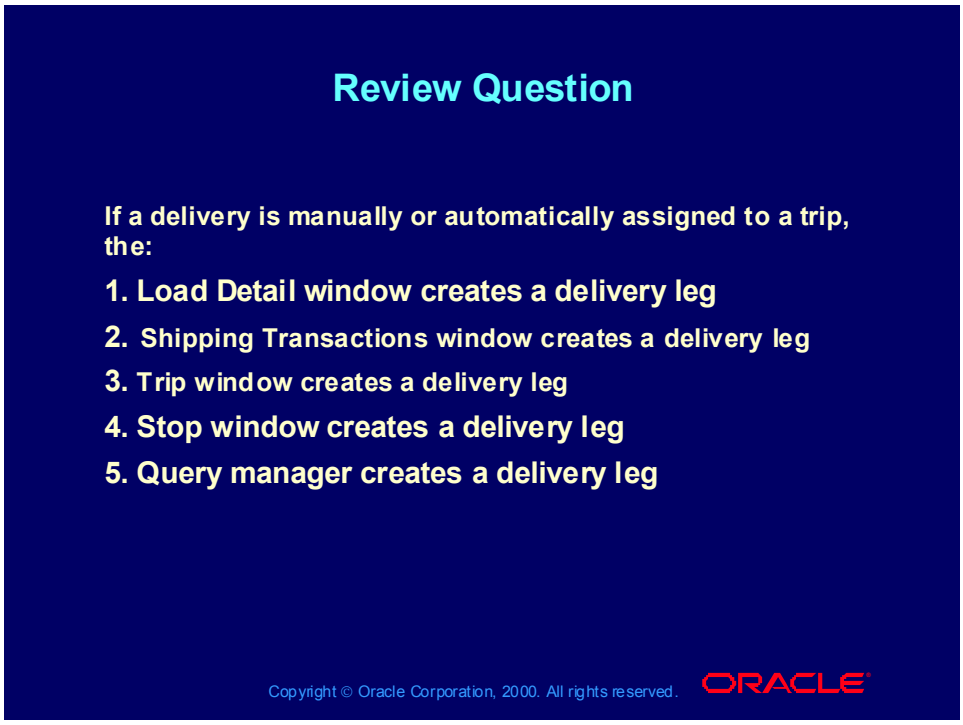

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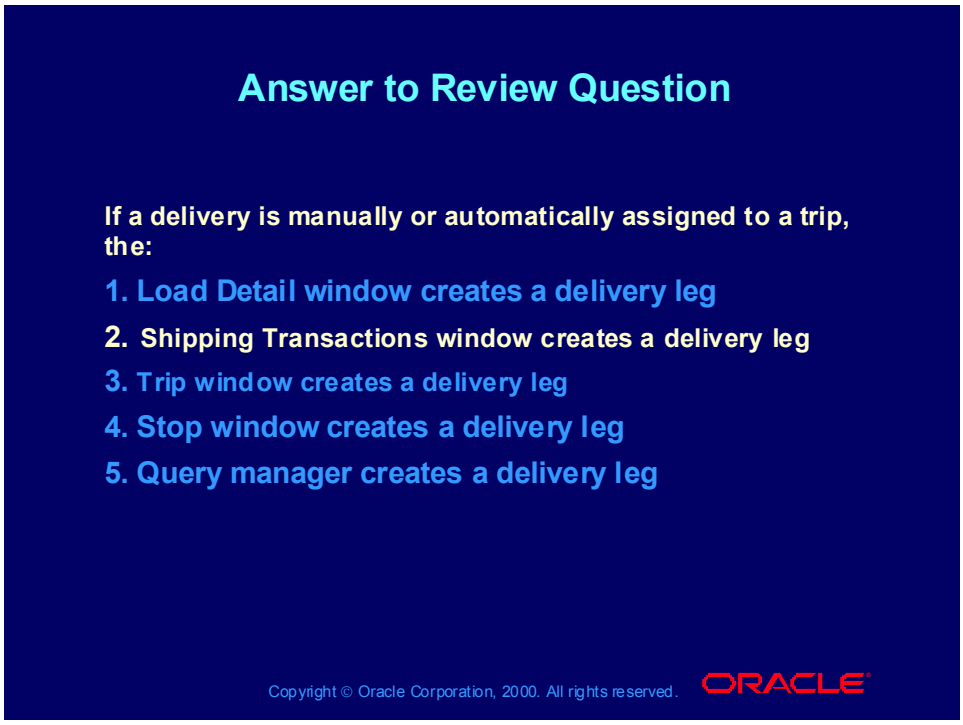

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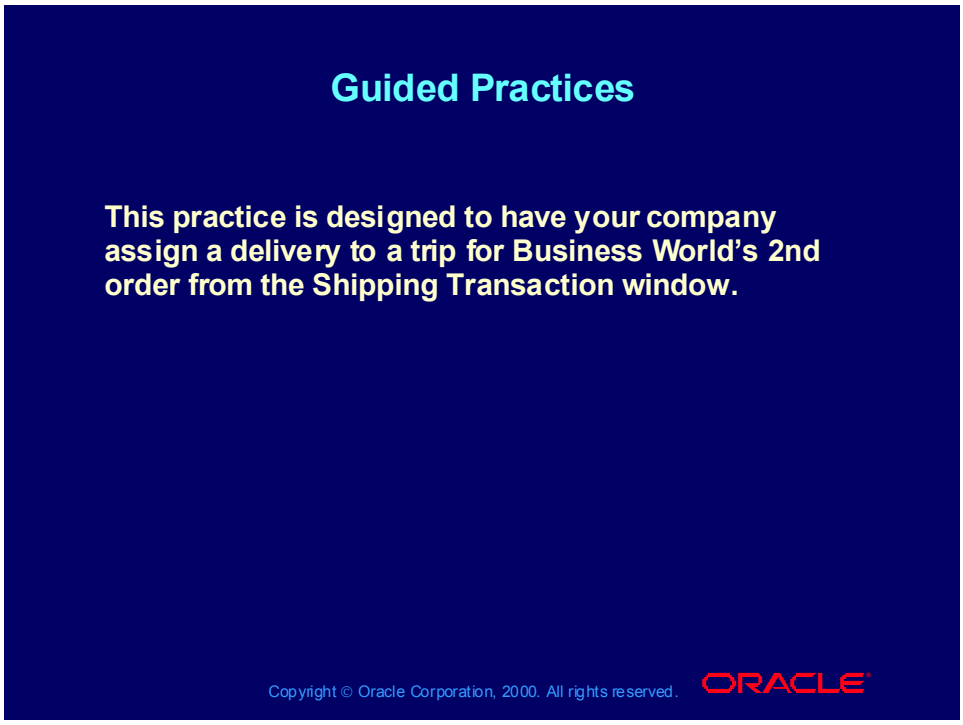

(N) Shipping > Transactions

1. Choose the Flash Light button from the Toolbar
2. Select delivery search
3. Select recorded delivery name
4. Choose the Find button
5. Select the delivery by pressing the Ctrl and the left mouse buttons.
6. Choose the Actions button
7. Select autocreate a trip
8. Choose the Go button.

(T) Path by trip

9. Select recorded trip name
10. Choose the OK button
11. Save your work

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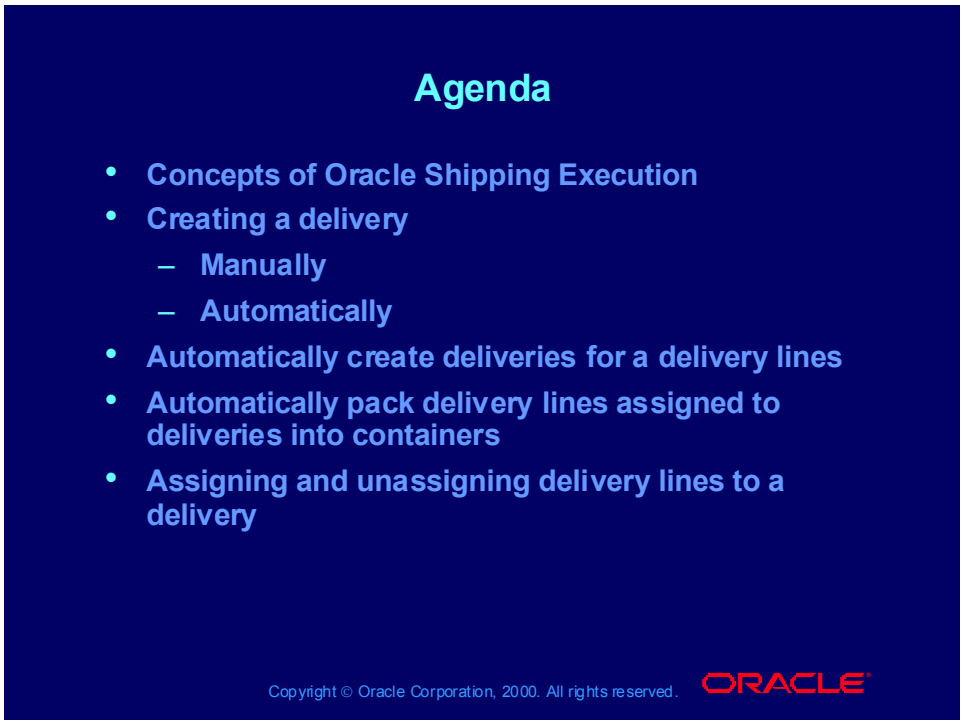

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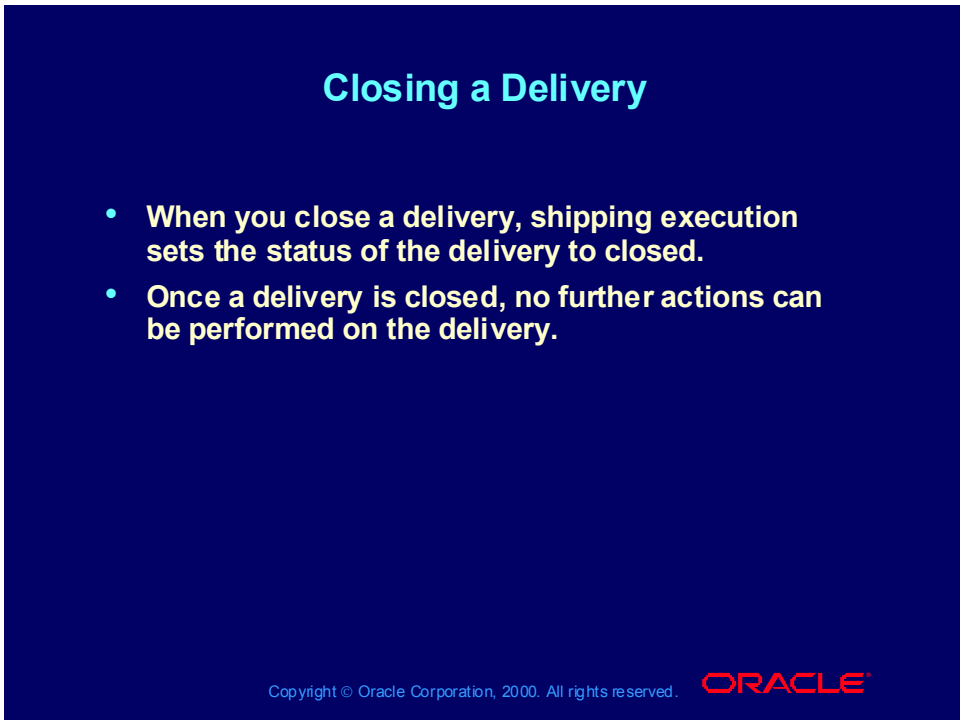

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Actions (M) Close > (B) Go

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Actions (M) Re-open > (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Closing or Re-opening a Delivery

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Re-opening a Delivery

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Actions (M) Close > (B) Go

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Actions (M) Re-open > (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Closing or Re-opening a Delivery

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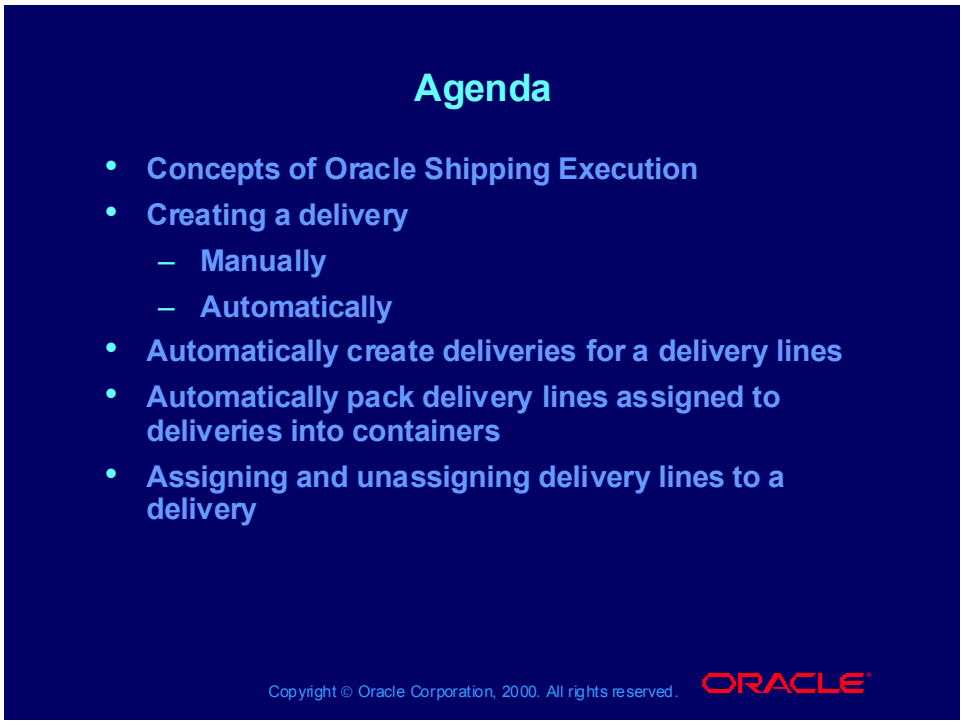

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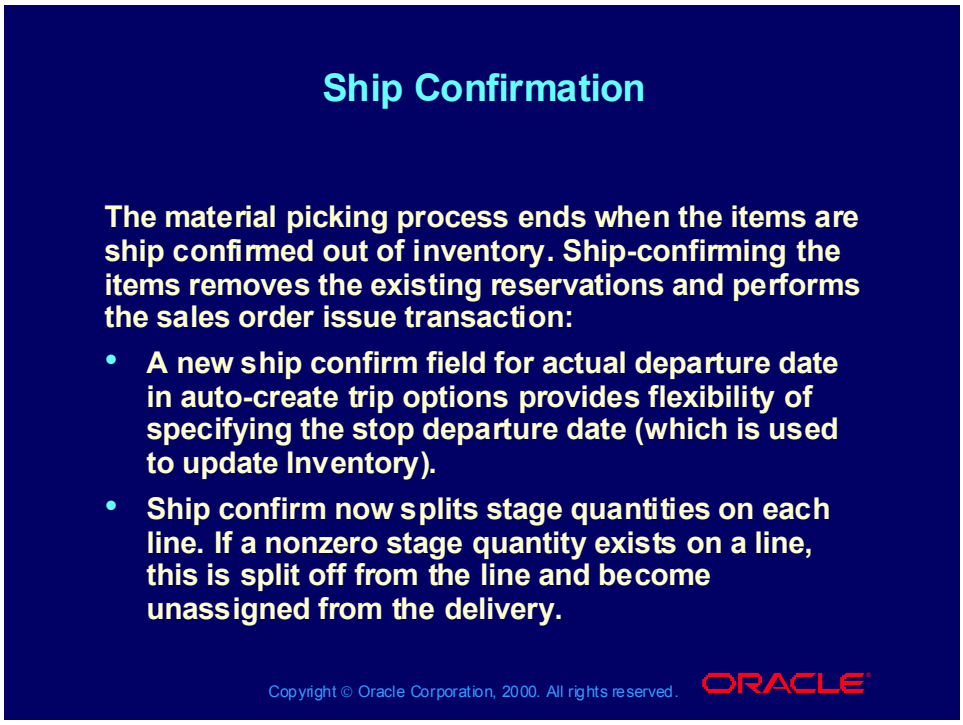

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Find (B) Actions (M) Ship Confirm(B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Ship Confirming a Delivery

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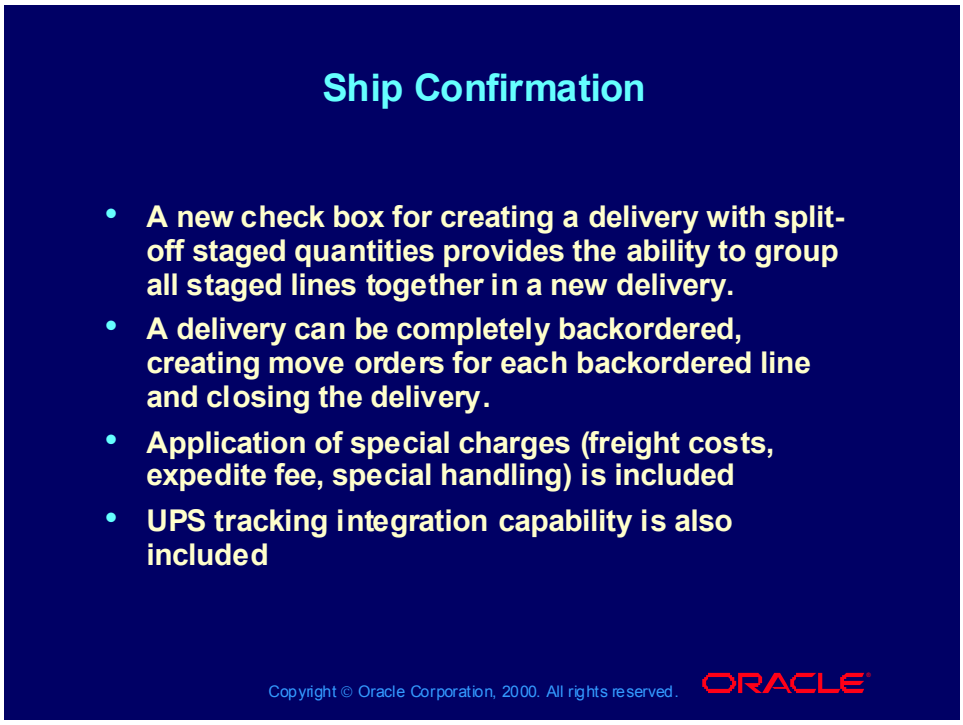
Ship Confirmation



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Find (B) Actions (M) Ship Confirm (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Ship Confirming a Delivery

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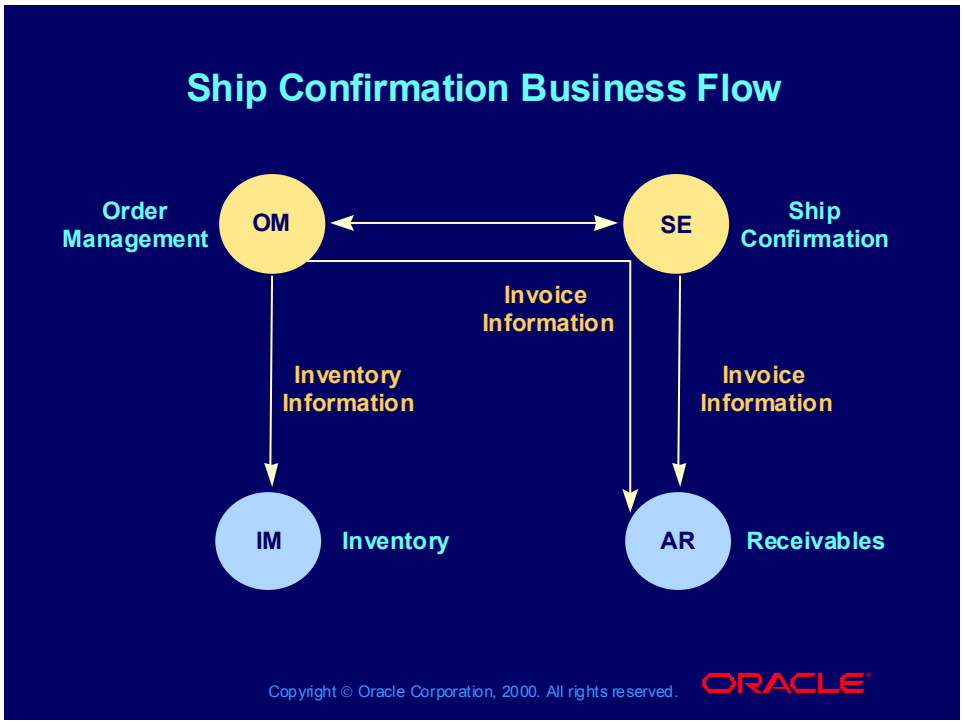
Ship Confirmation Business Flow



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Prerequisites for Ship Confirmation

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Find (B) Actions (M) Ship Confirm (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Deliveries > Ship Confirming a Delivery

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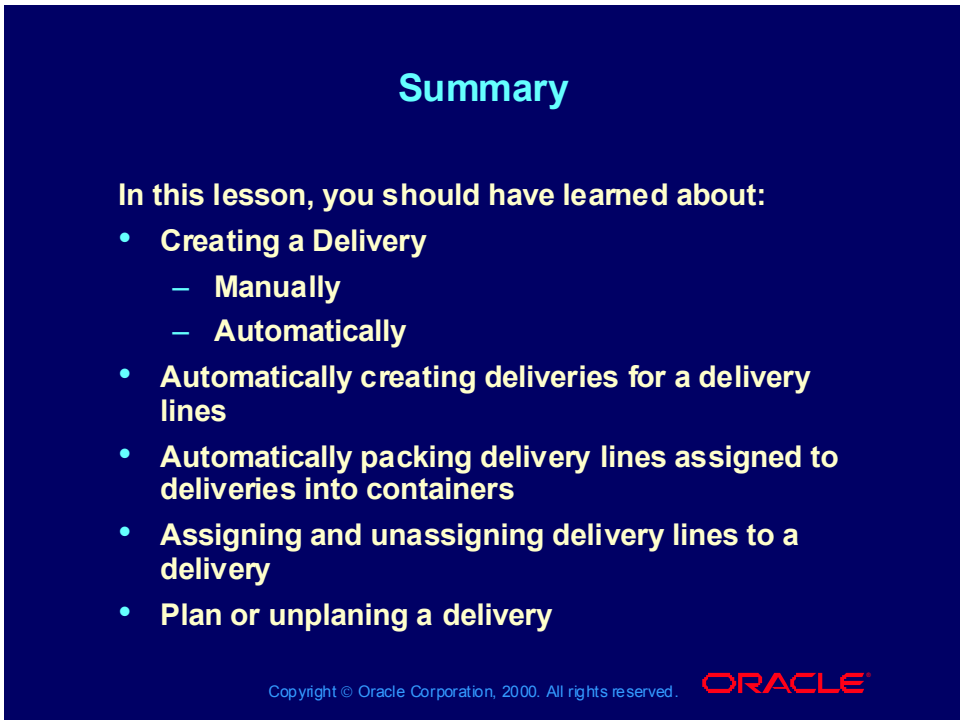

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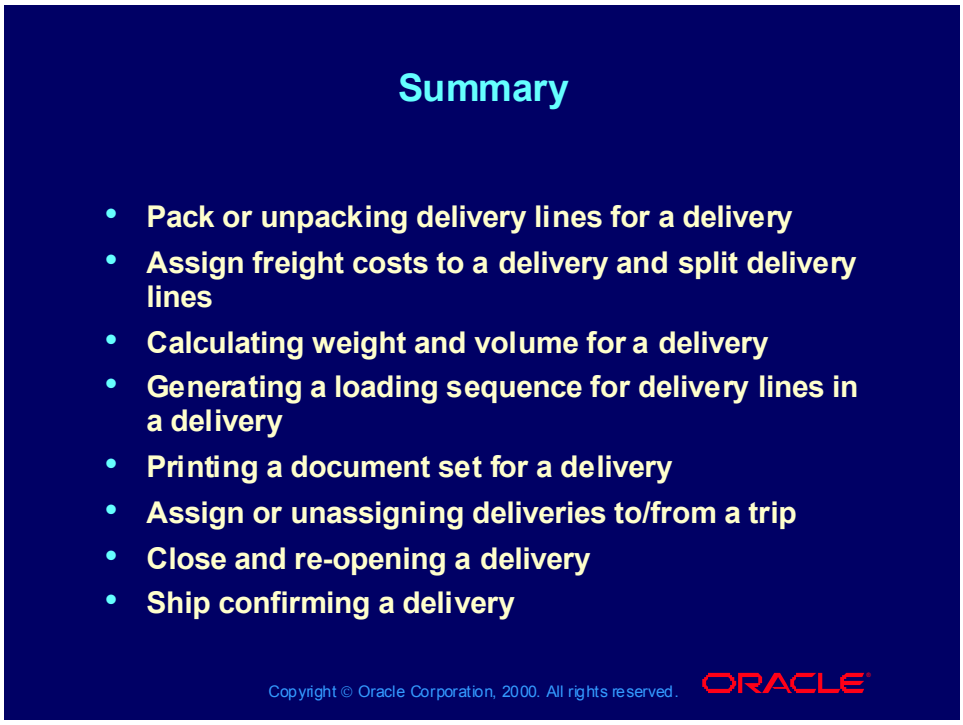

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R11i Oracle Shipping Execution: Transportation and Shipping Trip Management

Chapter 4

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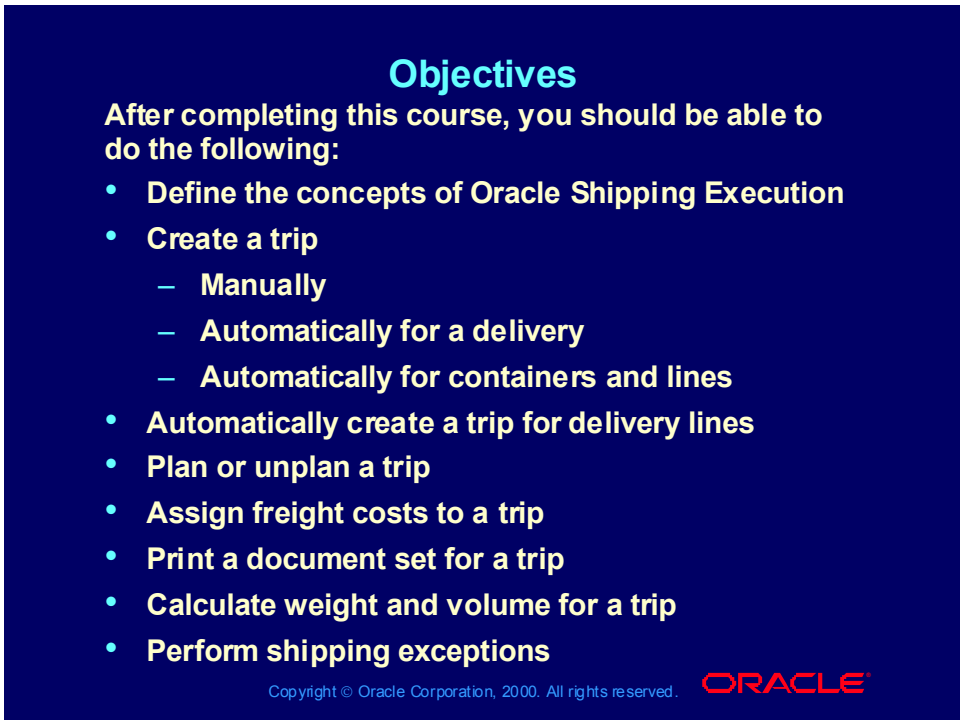
Objectives



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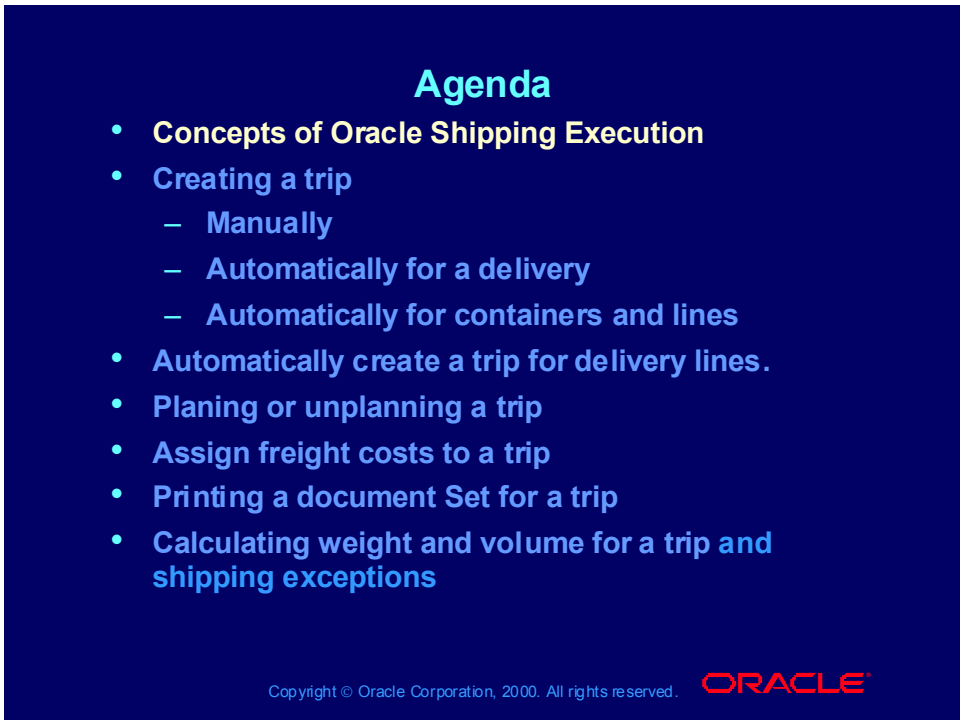

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These are the key concepts behind the application. Becoming familiar with these concepts will make learning the application much easier.

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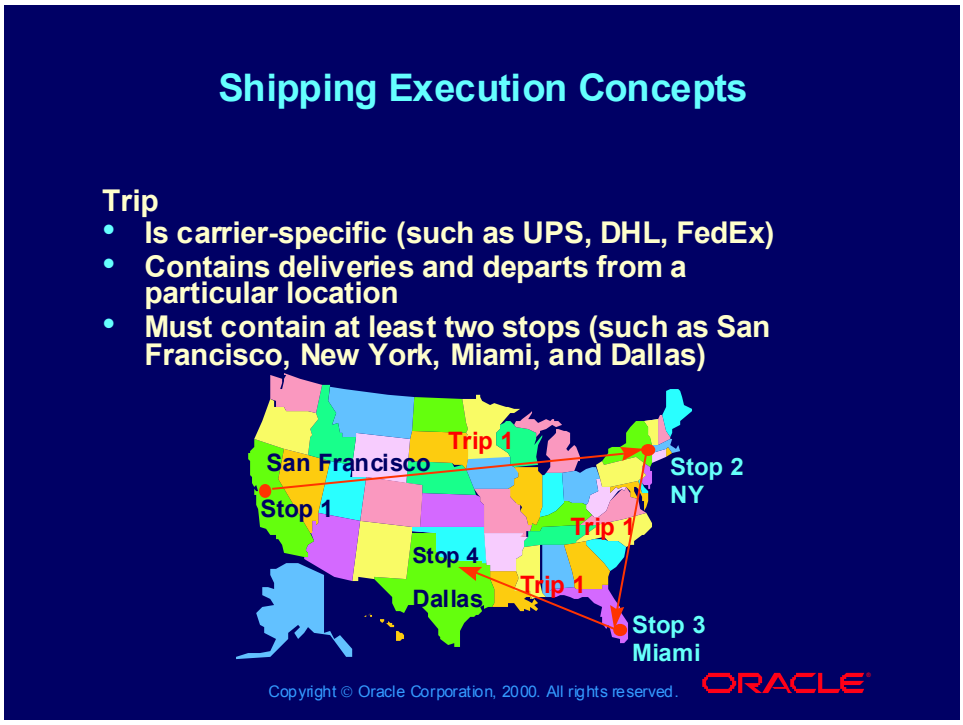

Trips

Trip 1

San Francisco to New York, New York to Miami, and Miami to Dallas.

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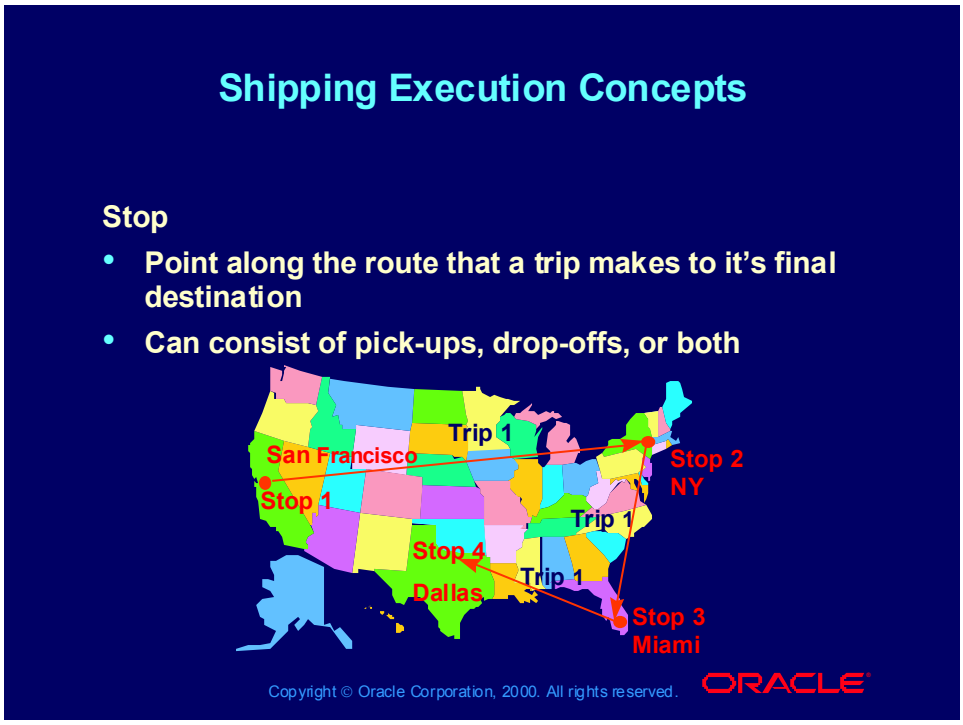

Stops

A Stop represents a point along the route that a trip makes to it's final destination e.g,. New York. This point may also have some activity associated with it. The activity might include picking up a new delivery, dropping off a delivery, or both.

Trip 1

San Francisco (stop 1) to New York (stop 2), New York to Miami (stop 3), and Miami to Dallas (stop 4).

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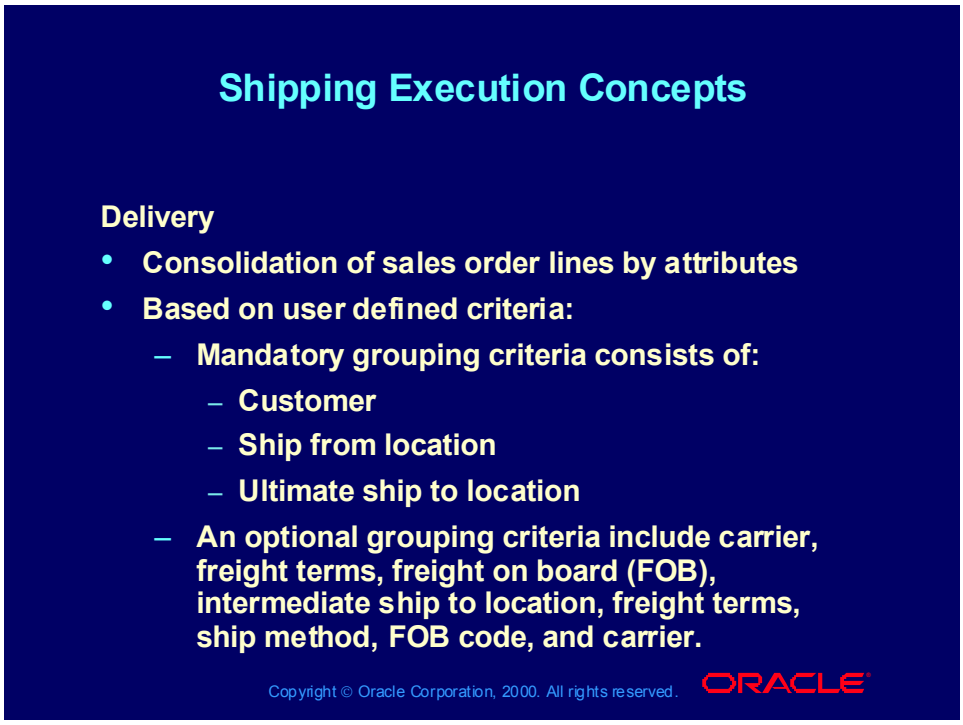

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Delivery Leg

A delivery leg consists of two stops where the delivery is picked up and dropped off respectively on the same trip. The delivery may travel through several legs to get to its final destination. A delivery leg is synonymous with the bill of lading.

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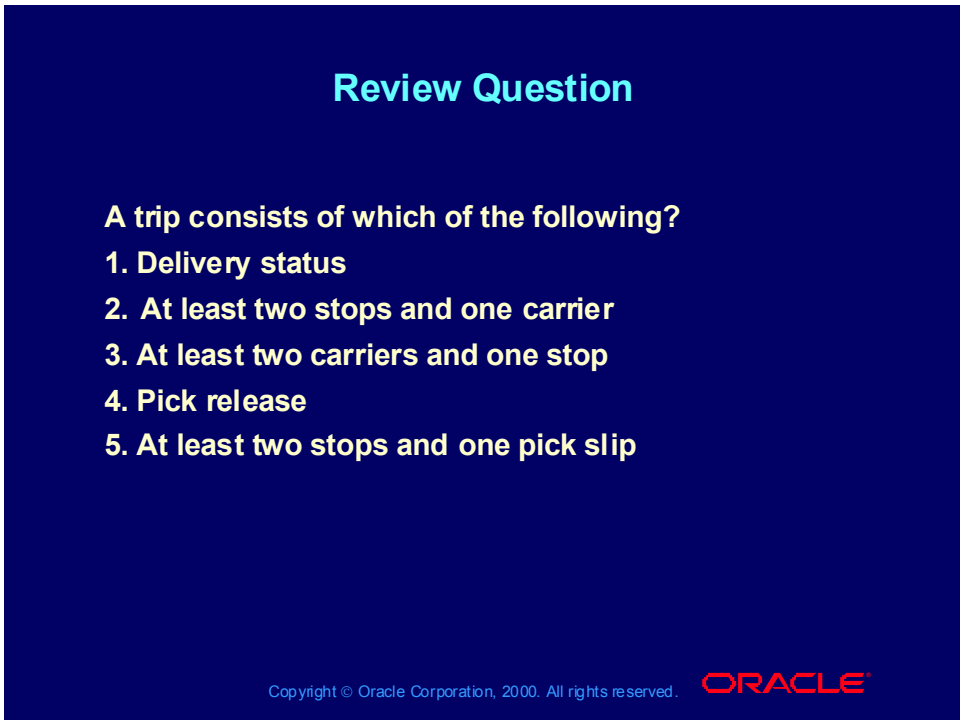

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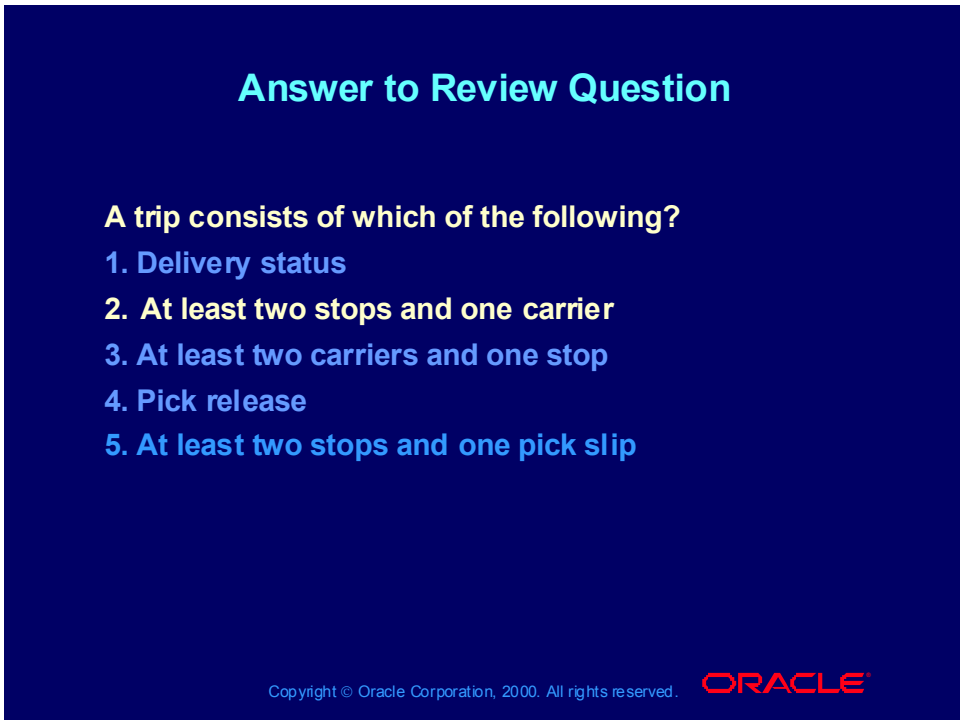

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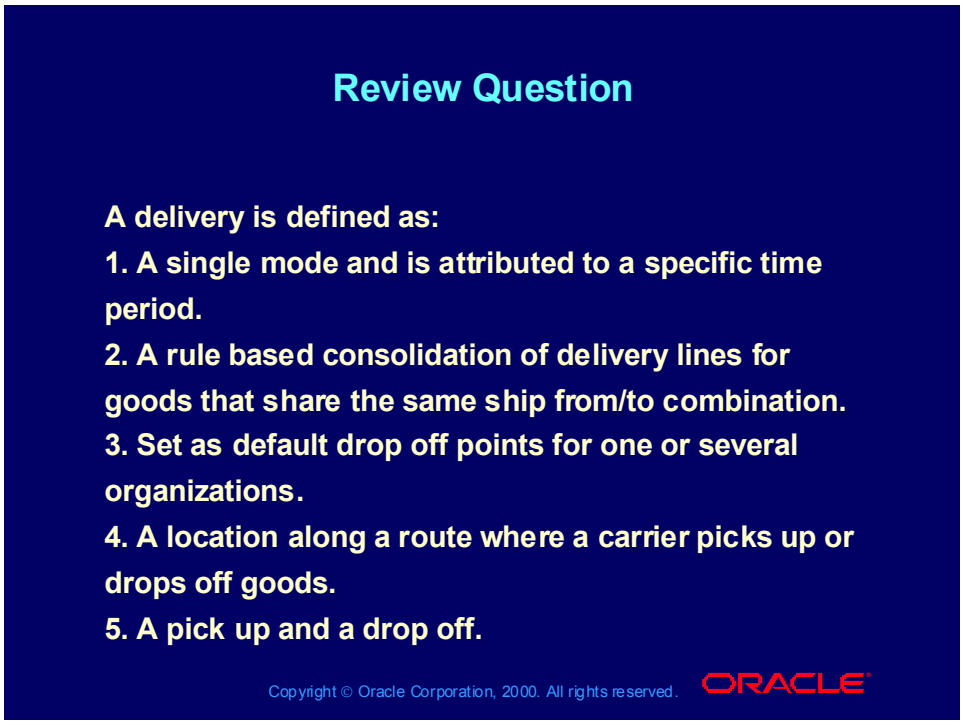

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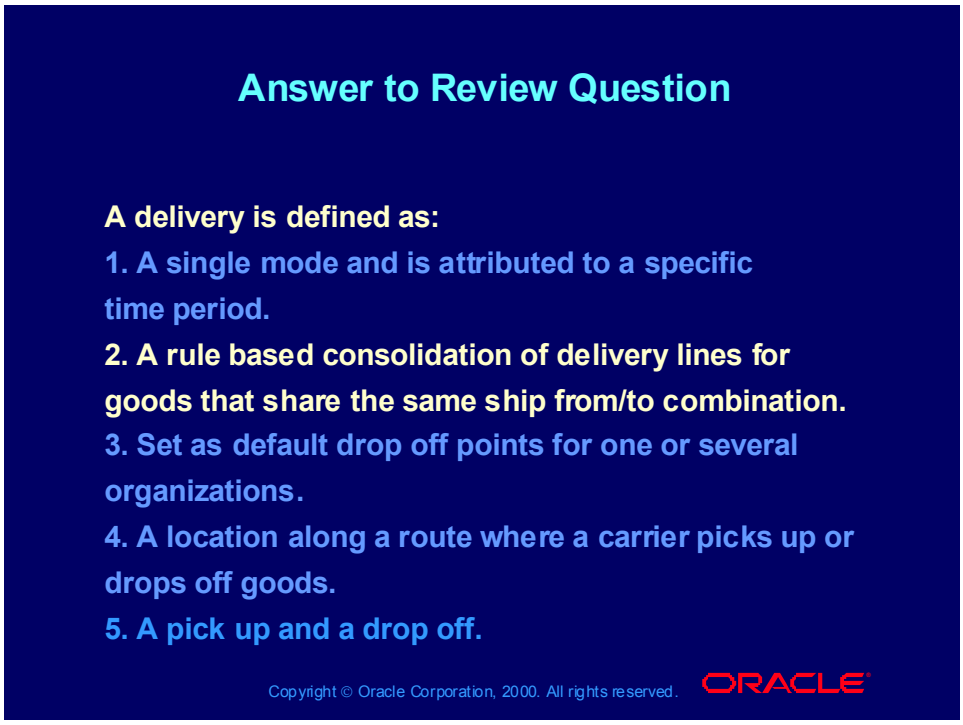

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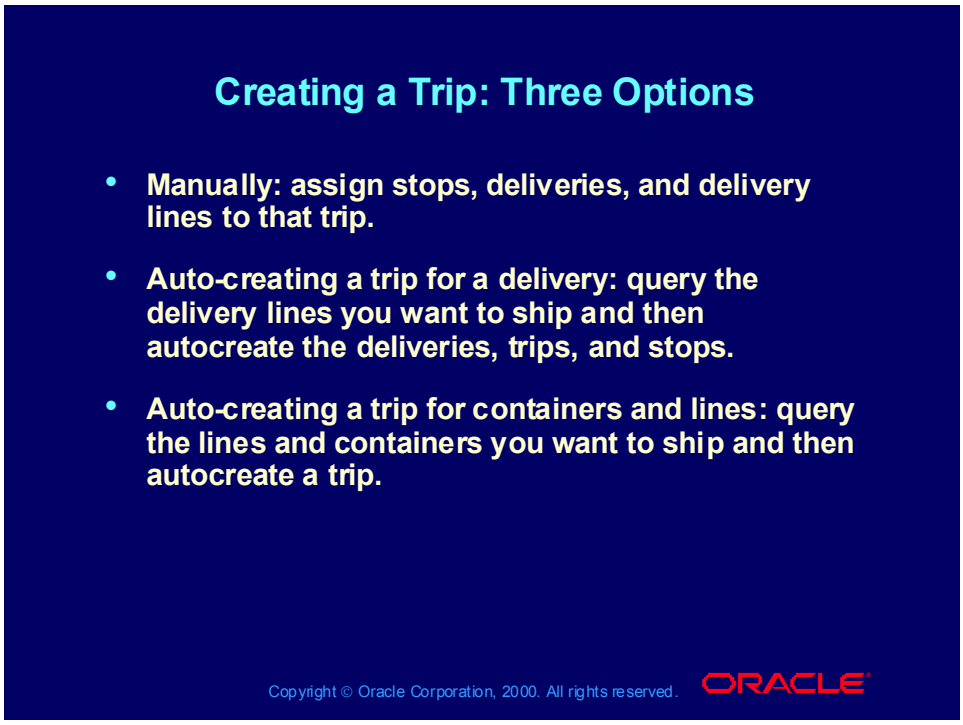
Creating a Trip: Three Options



(N) Shipping > Transactions > Detail

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery Lines (B) Find (B) Actions (M) Auto-create trip (B) Go

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery Lines (B) Find Select the Delivery Lines (B) Actions (M) Auto-create trip (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Planning Trips > Creating a Trip

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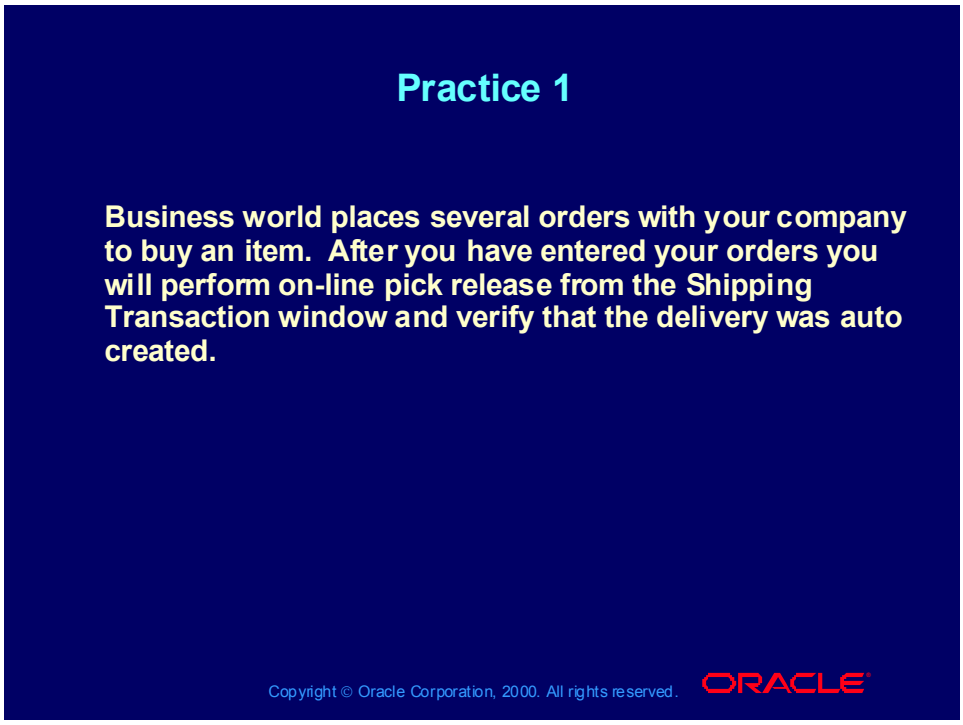
Practice 1



(N) Order Management > Orders, Returns > Sales Orders

1. Select Customer Business World from LOV
2. Address defaults
3. Mixed order defaults as the order type
4. Corporate defaults as the price list from LOV
5. Howard Sprague defaults as the sales person from LOV

(T) Line Items

6. Select AS54888 as the item from LOV
7. Enter the Qty: 10
8. Ea defaults as the UOM
9. Location defaults as the Tax code from LOV
10. Howard Sprague defaults as the sales person

(T) Shipping (record the warehouse name)

11. Choose the Book Order button (record order number)

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12. Choose the Actions button
13. Select copy as the action from LOV

(N) Shipping > Transactions

19. Choose the Flash Light button from the Toolbar.
20. Select lines search
22. Enter the order number
23. Choose the Find button
24. Select the line by pressing the Ctrl and the Left Mouse buttons
25. Choose the Actions menu
26. Select launch pick release
27. Choose the Go button
28. Choose Details button from the Message window (record request ID)
29. From the View menu select requests
30. Choose the Find button
31. Find your ID # for the "Pick Selection List Generation" request. Record the status of the request and close the window
32. Concurrent request should read completed normal

(N) Shipping > Transactions

33. Choose the Flash Light button from the Toolbar
34. Select lines search
35. Enter the order number
36. Choose the Find button

(T) Delivery
37. Verify the delivery was auto created (record your delivery number)

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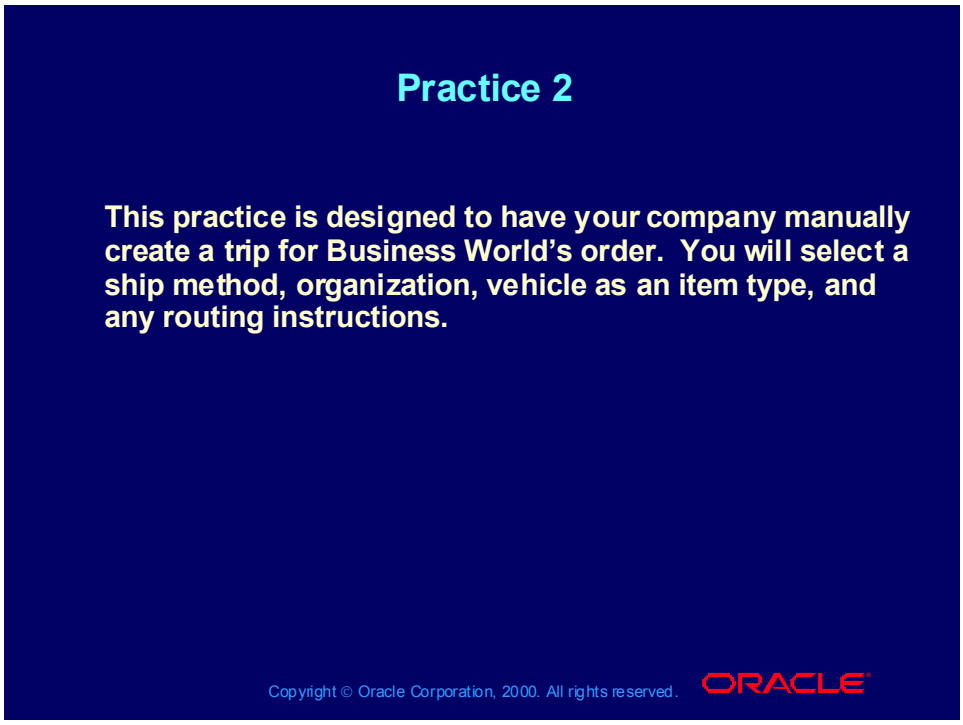

Open window again if it is already open

(N) Shipping > Transactions > (B) Detail

1. Enter a name for the trip (record name)
2. Select the ship method (DHL)
3. In the vehicle region, select an organization (M1)
4. Select truck as the item name (vehicle name)
5. Optionally, enter the routing instructions, if any
6. Choose Done and save your work

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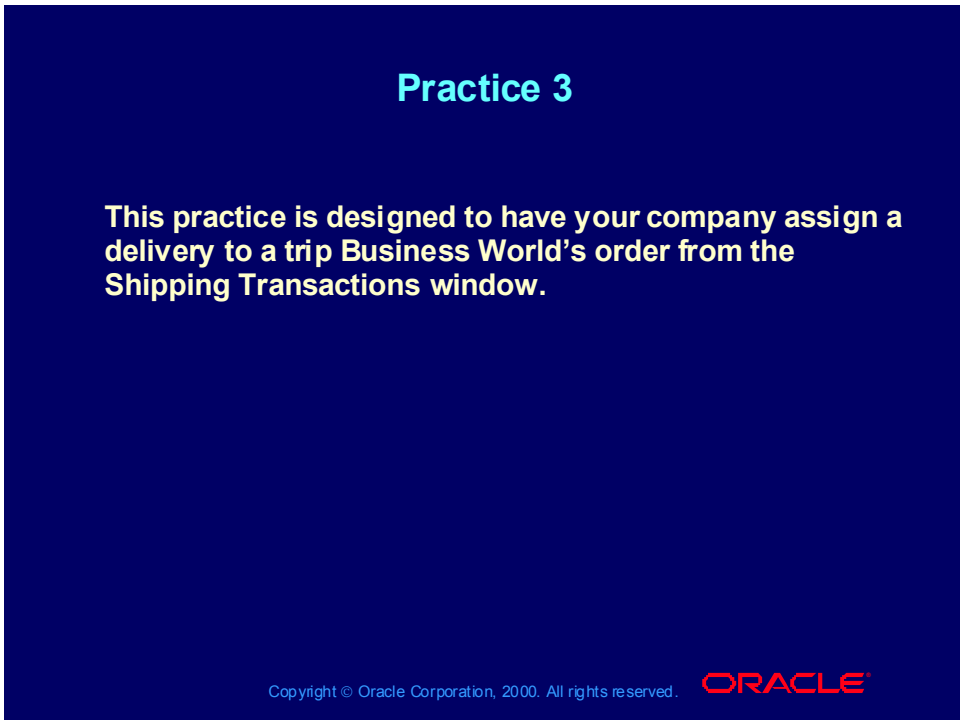

(N) Shipping > Transactions

1. Choose the Flash Light button from the Toolbar
2. Select delivery search
3. Select recorded delivery name (from guided practice 1)
4. Choose the Find button
5. Select the delivery by pressing the Ctrl and the Left Mouse buttons
6. Choose the Actions button
7. Select assign to trip
8. Choose the Go button
9. Select trip name from LOV (Trip created in previous practice)
10. Choose the OK button
11. Save your work

Calculating Weight and Volume for a Delivery

12. Choose the Actions button
13. Select calculate weight/volume
14. Choose the Go button

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The weight and volume is calculated and you can view the information using the scroll bar

(T) Lines/Containers

15. Save your work

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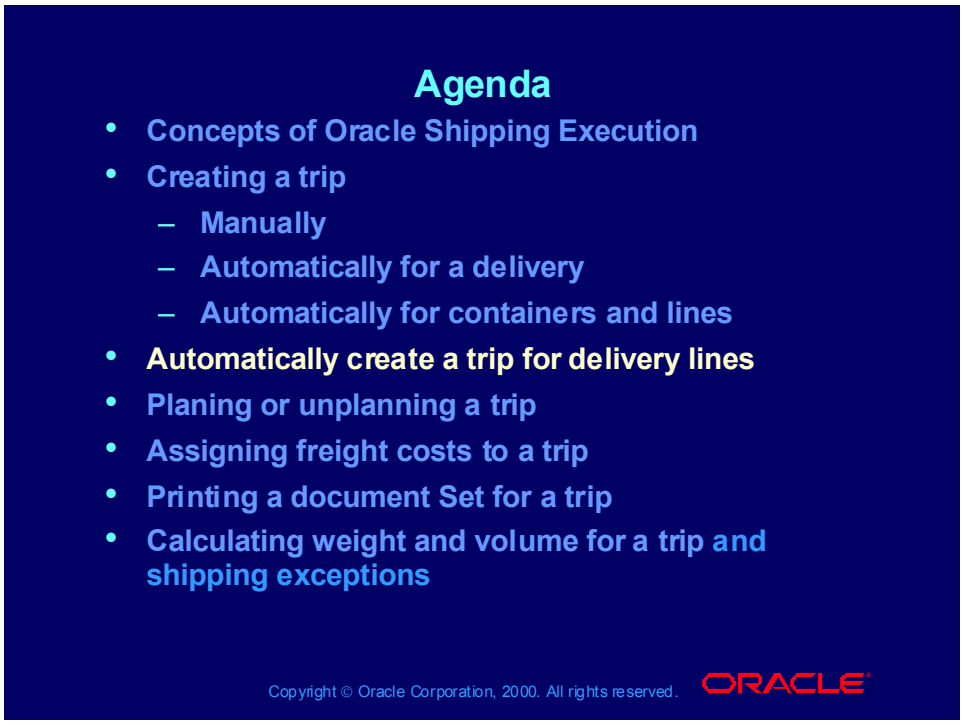

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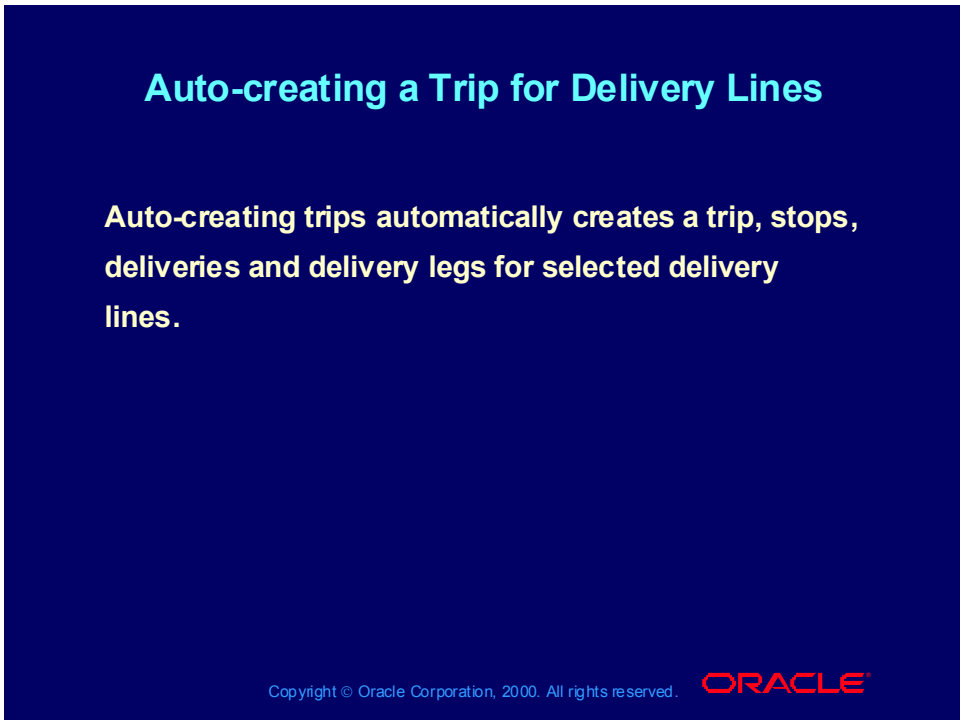
Auto-creating a Trip for Delivery Lines



(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery Lines (B) Find Select the Delivery Lines (B) Actions (M) Auto-create trip (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Planning Trips > Creating a Trip

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Prerequisites For Auto-creating a Trip for Delivery Lines

(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery Lines (B) Find Select the Delivery Lines (B) Actions (M) Auto-create trip (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Planning Trips > Creating a Trip

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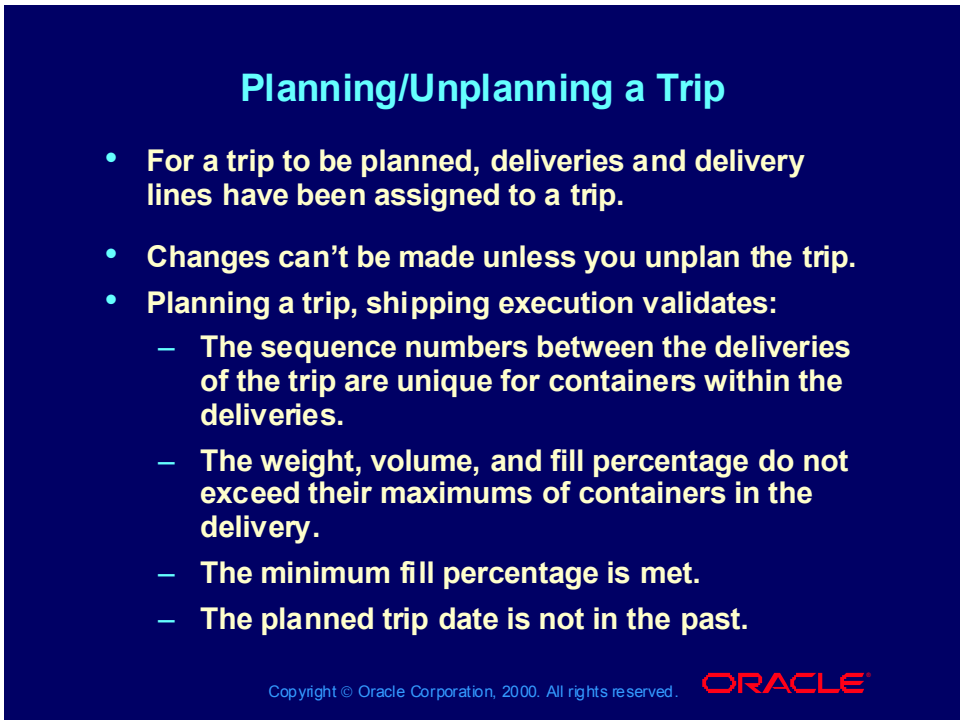

(N) Shipping > Transactions (I) Flashlight Icon Search to find the Trip (B) Actions (M) Plan (B) Go

(N) Shipping > Transactions (I) Flashlight Icon Search to find the Trip (B) Actions (M) Unplan (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Planning Trips > Planning a Trip

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Planning Trips > Unplanning a Trip

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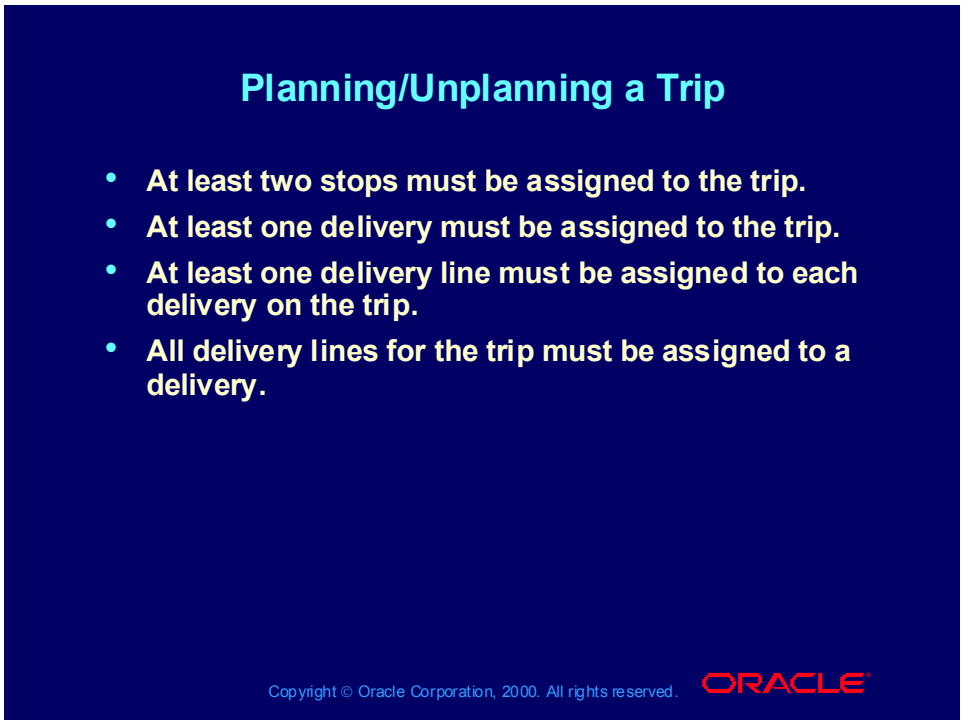
Planning/Unplanning a Trip



(N) Shipping > Transactions (I) Flashlight Icon Search to find the Trip (B) Actions (M) Plan (B) Go

(N) Shipping > Transactions (I) Flashlight Icon Search to find the Trip (B) Actions (M) Unplan (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Planning Trips > Planning a Trip

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Planning Trips > Unplanning a Trip

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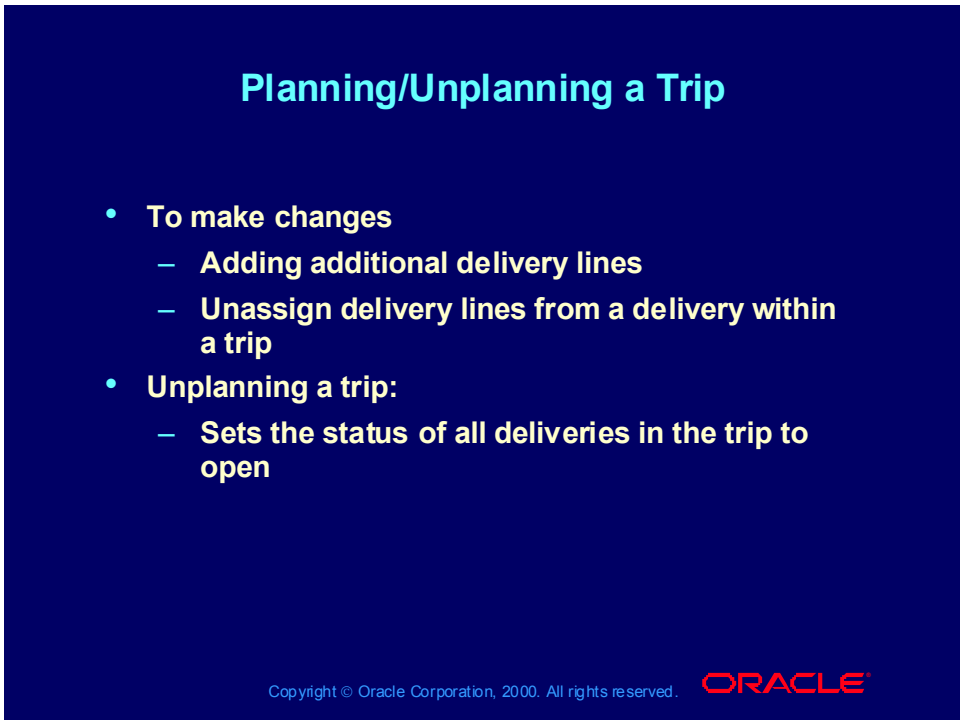
Planning/Unplanning a Trip



(N) Shipping > Transactions (I) Flashlight Icon Search to find the Trip (B) Actions (M) Plan (B) Go

(N) Shipping > Transactions (I) Flashlight Icon Search to find the Trip (B) Actions (M) Unplan (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Planning Trips > Planning a Trip

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Planning Trips > Unplanning a Trip

Unplanning a Trip unassigns delivery lines, deletes container information, changes the status of the deliveries to Open and sets the status of the trip to open.

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Prerequisites For Unplanning a Trip

(N) Shipping > Transactions (I) Flashlight Icon Search to find the Trip (B) Actions (M) Plan (B) Go

(N) Shipping > Transactions (I) Flashlight Icon Search to find the Trip (B) Actions (M) Unplan (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Planning Trips > Planning a Trip

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Planning Trips > Unplanning a Trip

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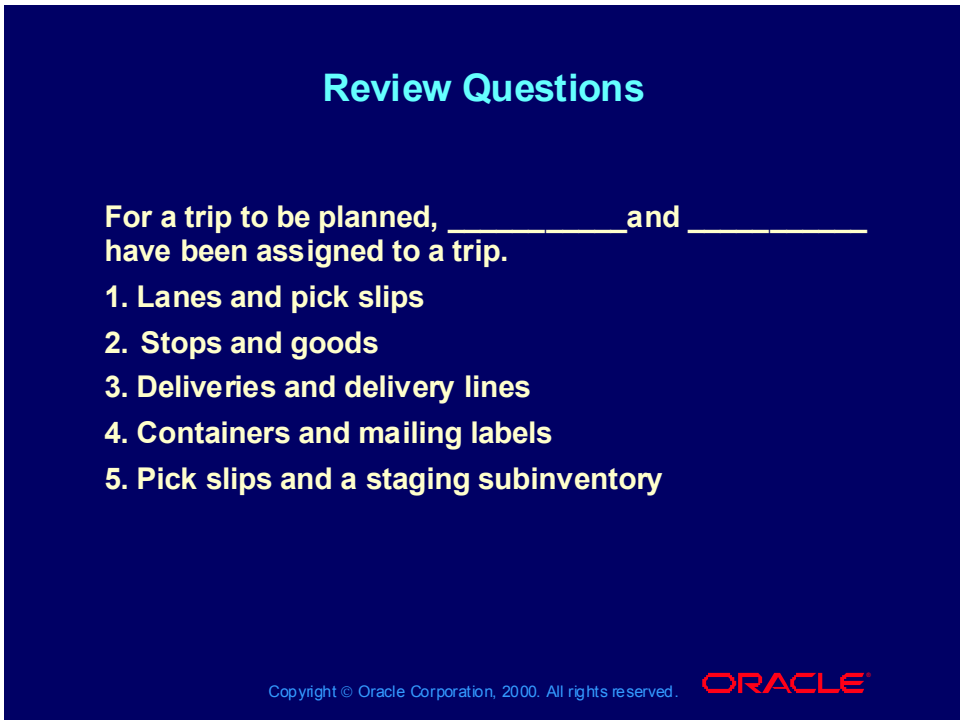

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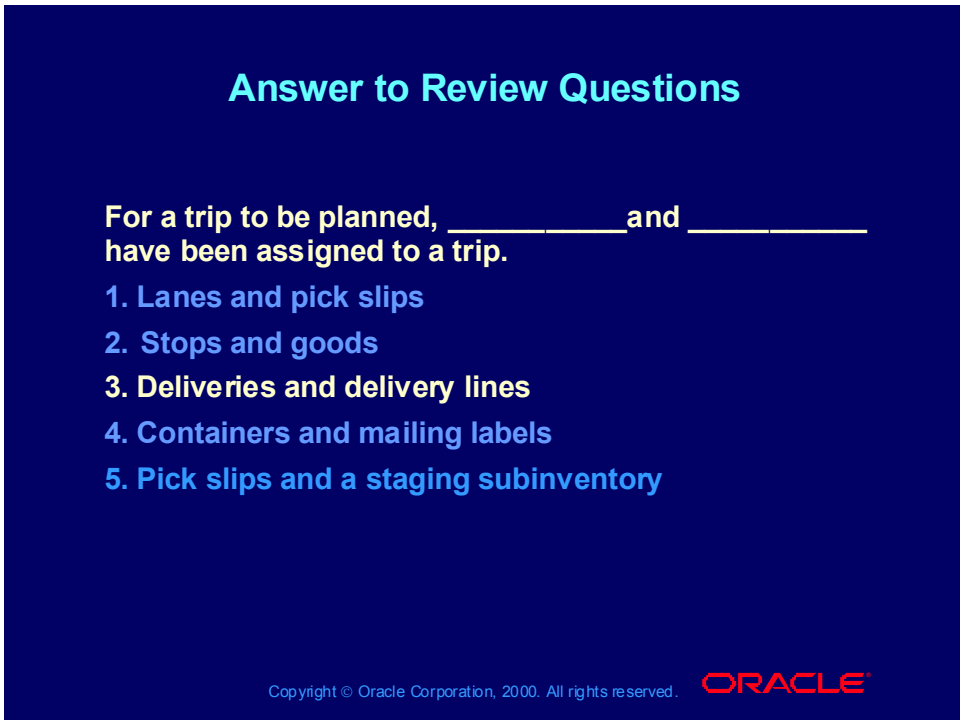

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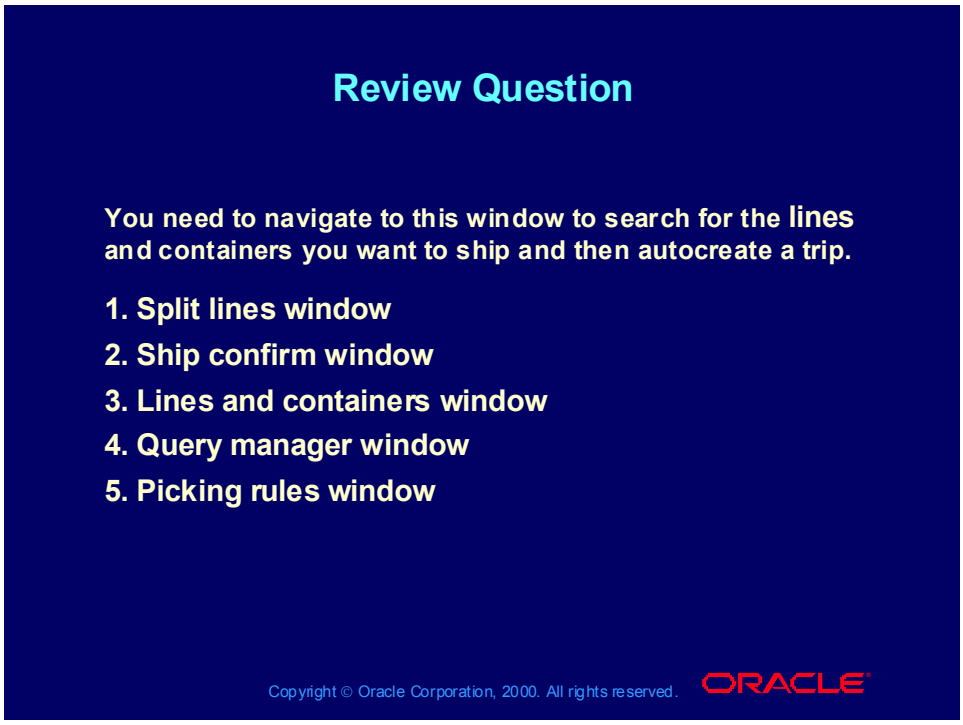

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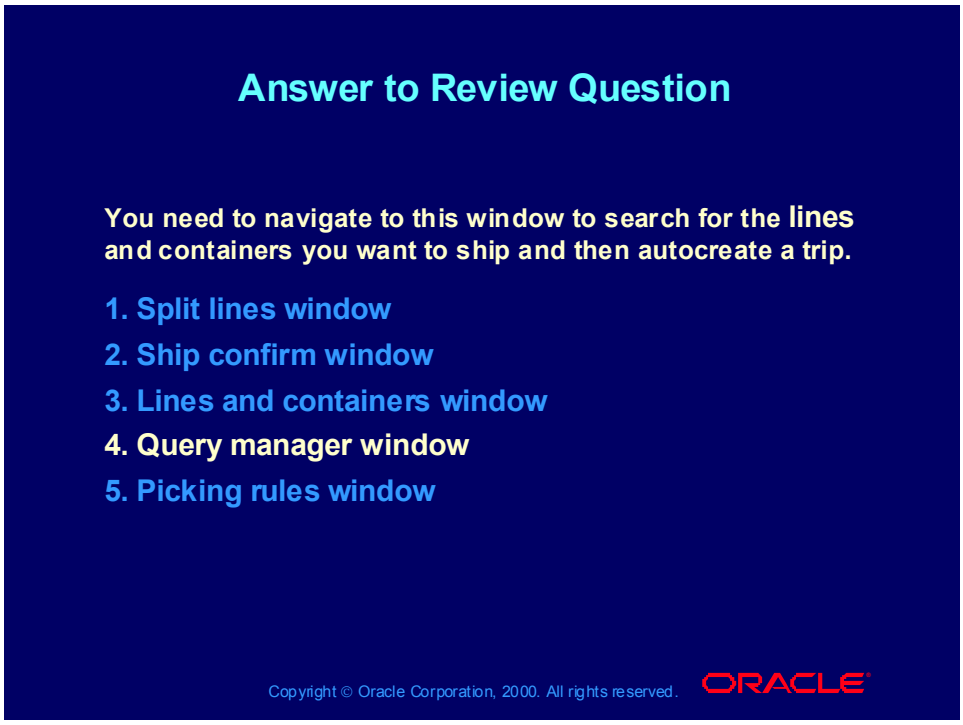

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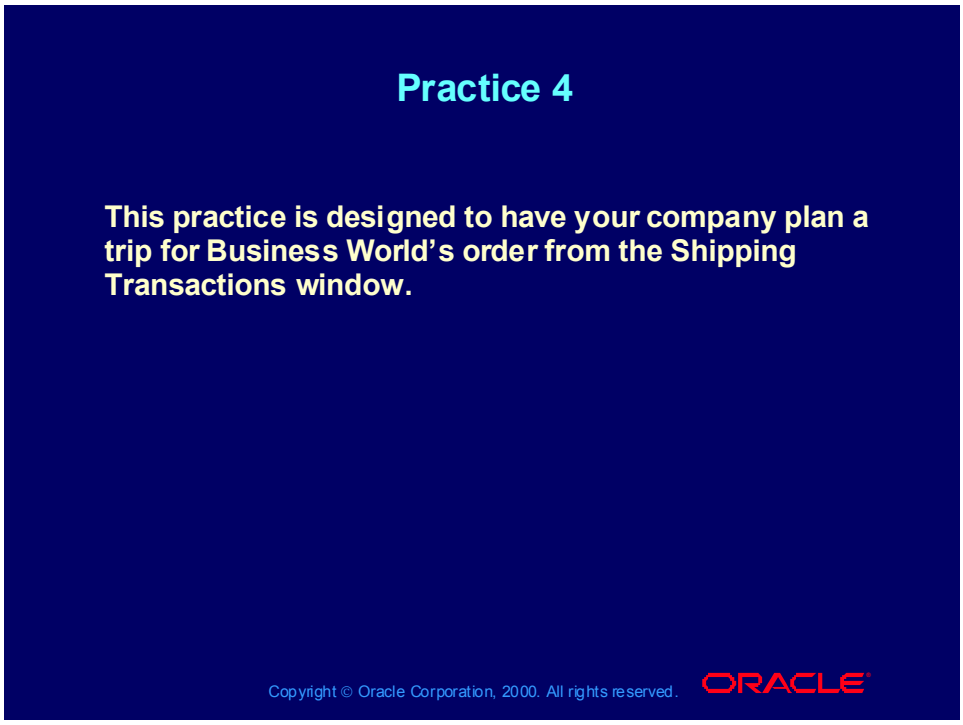

(T) Path by Trip

1. Choose the Actions button
2. Select Plan
3. Choose the Go button
4. A checkmark displays in the planned box to indicate that the trip is in planned status
5. Save your work

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Assigning Freight Costs to a Trip

(N) Shipping > Transactions (I) Flashlight Icon Search to find the Trip (B) Actions (M) Freight Costs (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Planning Trips > Assigning Freight Costs

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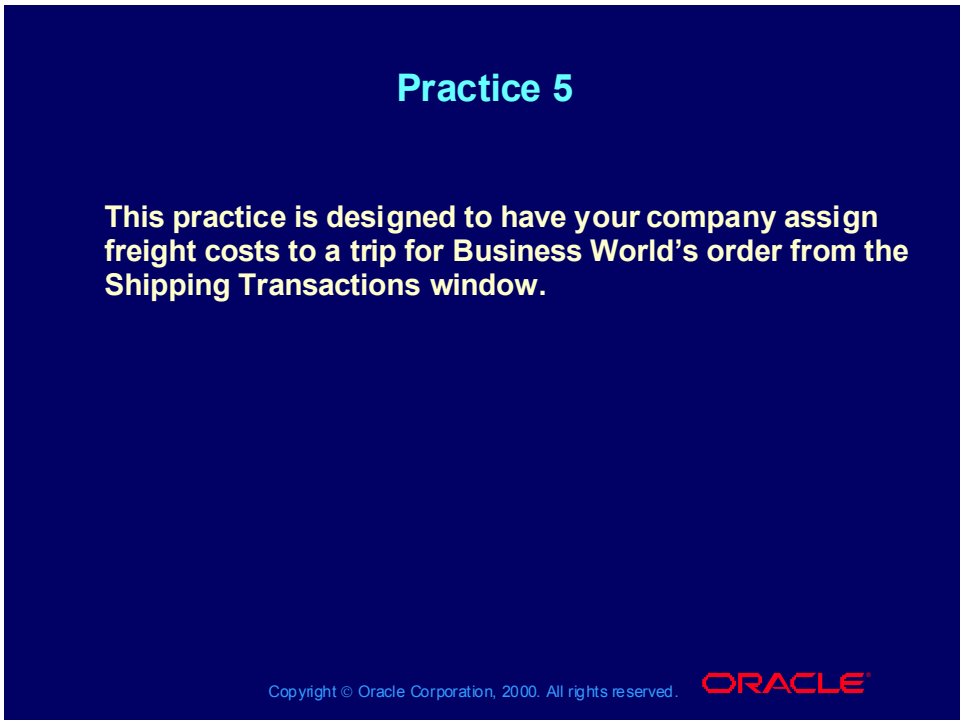

1. Choose the Actions button
2. Select freight costs
3. Choose the Go button
4. Enter the cost type (handling), currency code, and amount
5. Choose the Done button
6. Save your work

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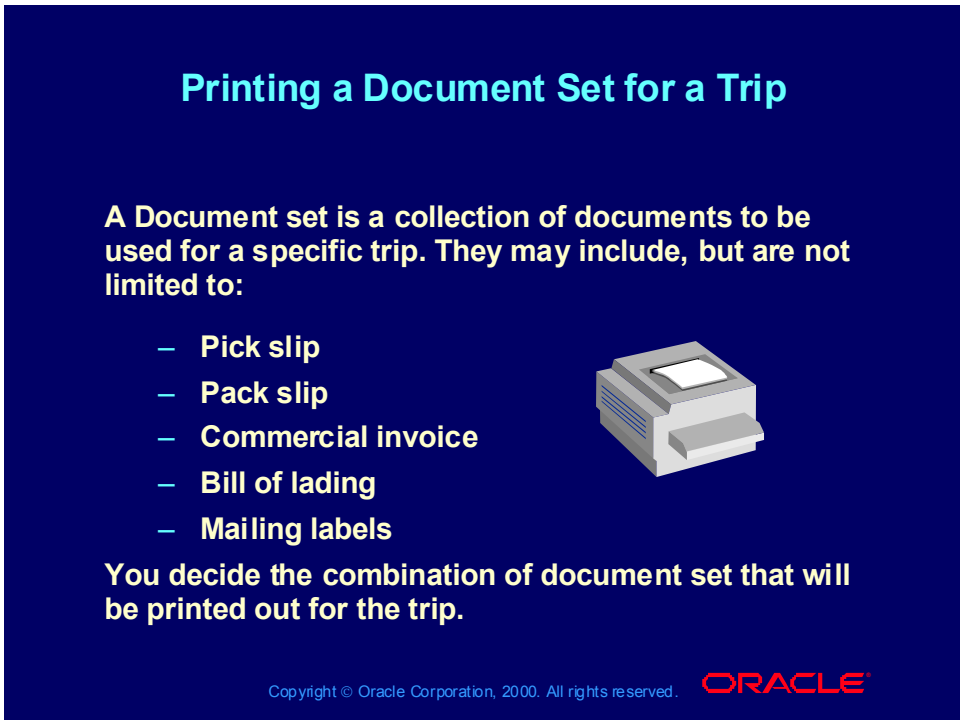
Printing a Document Set for a Trip



(N) Shipping > Transactions (I) Flashlight Icon Search to find the Trip (B) Actions (M) Print Document Set (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Planning Trips > Print Document Set

Users can create additional documents and include them in their own Document Sets. For example, a Material Safety Data Sheet (MSDS) could be added to your document set to be included for shipments of chemicals.

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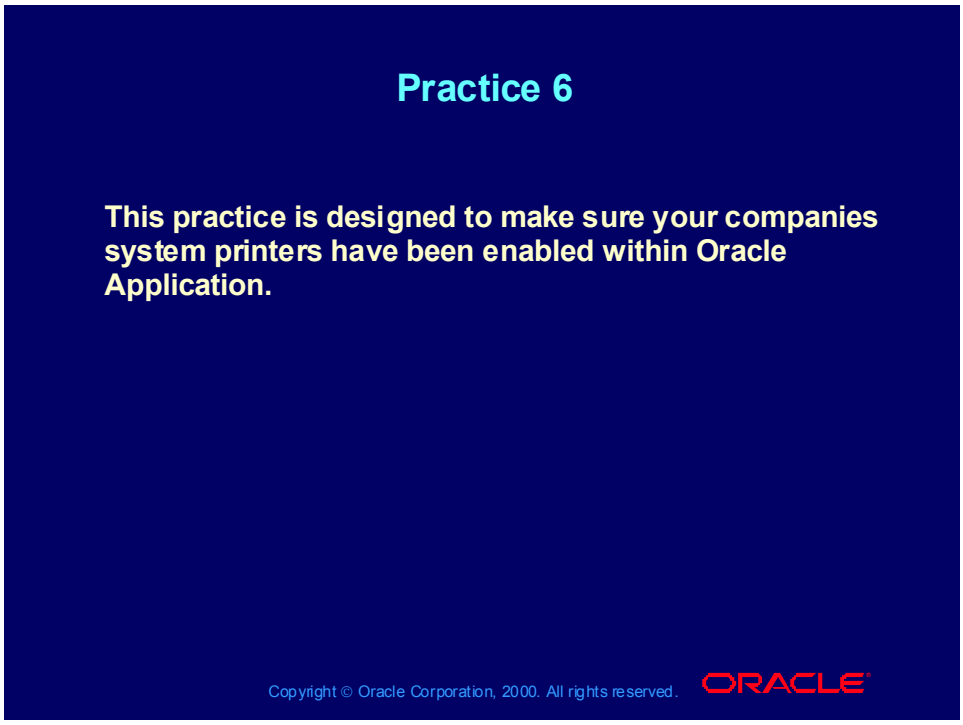

(N) Shipping > Setup > Document > Choose Printers

1.Verify commercial invoice, packing slip report, pick slip report, and vehicle load sheet summary are all listed in the document region

2. Save you work

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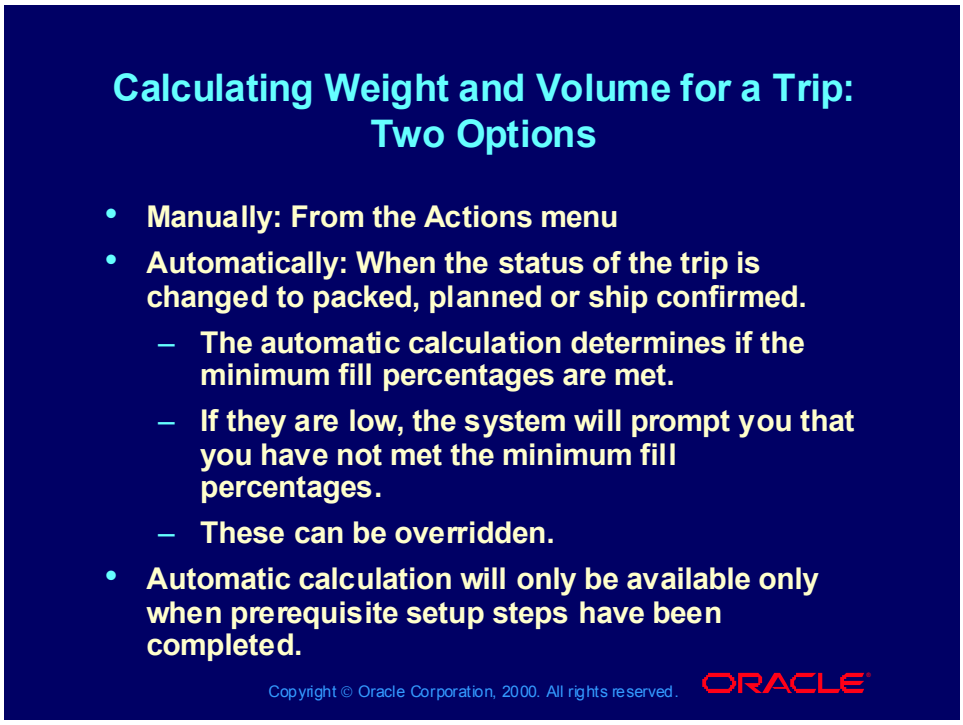
Calculating Weight and Volume for a Trip: Two Options



(N) Shipping > Transactions (I) Flashlight Icon Search to find the Trip (B) Actions (M) Calculating Weight and Volume for a Trip (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Planning Trips > Calculating Weight and Volume for a Trip

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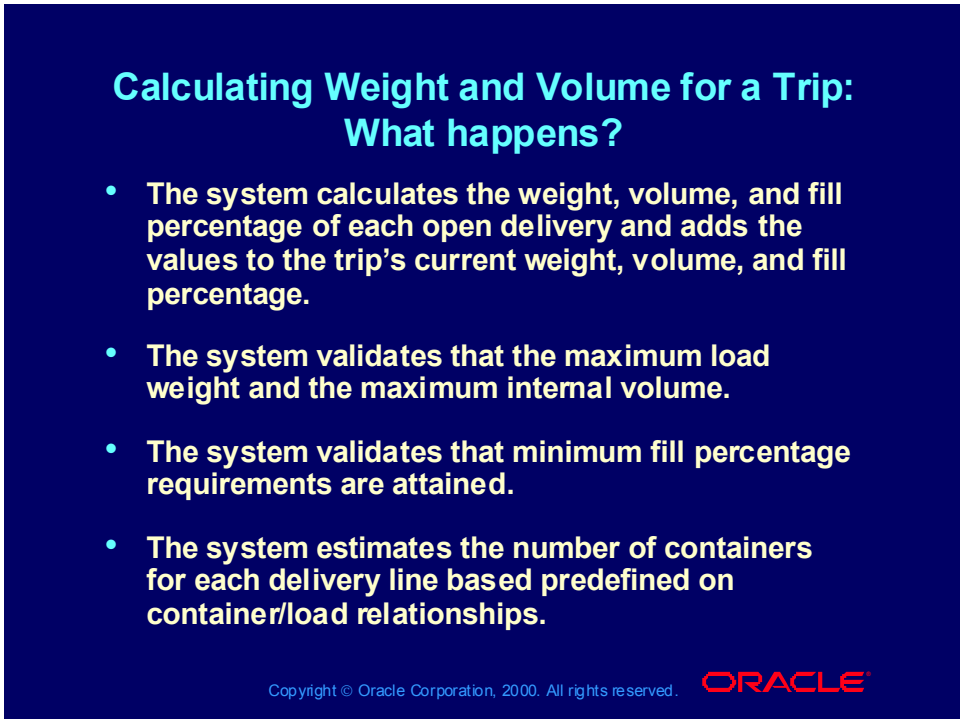
Calculating Weight and Volume for a Trip: What happens?



(N) Shipping > Transactions (I) Flashlight Icon Search to find the Trip (B) Actions (M) Calculating Weight and Volume for a Trip (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Planning Trips > Calculating Weight and Volume for a Trip

If fill percentages are violated the system will provide a warning to let you decide if you want to take further action.

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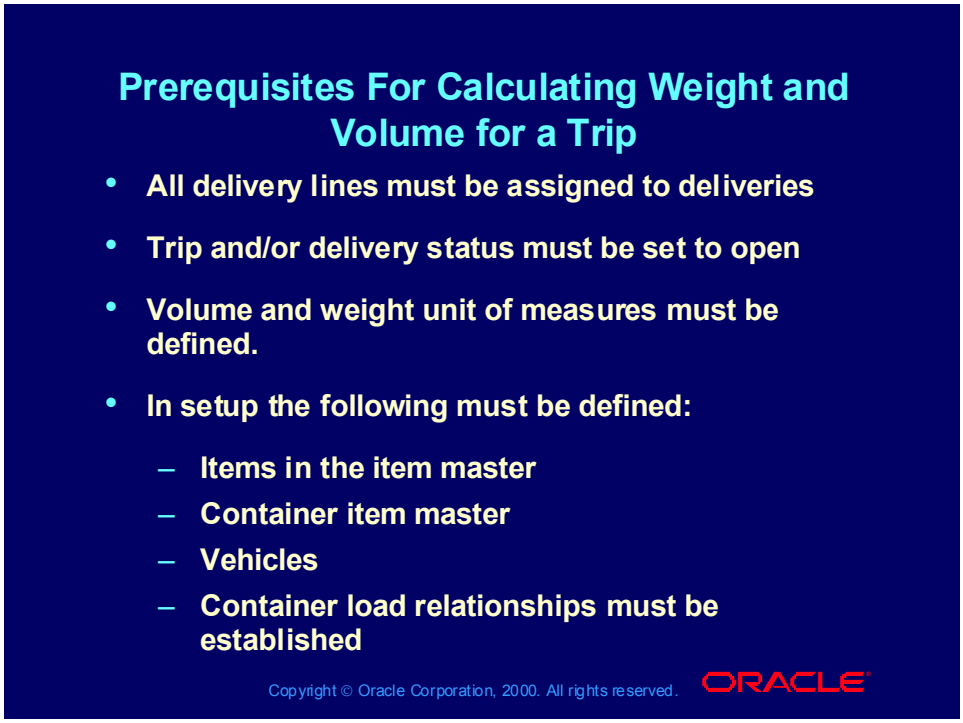
Prerequisites For Calculating Weight and Volume for a Trip



(N) Shipping > Transactions (I) Flashlight Icon Search to find the Trip (B) Actions (M) Calculating Weight and Volume for a Trip (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Planning Trips > Calculating Weight and Volume for a Trip

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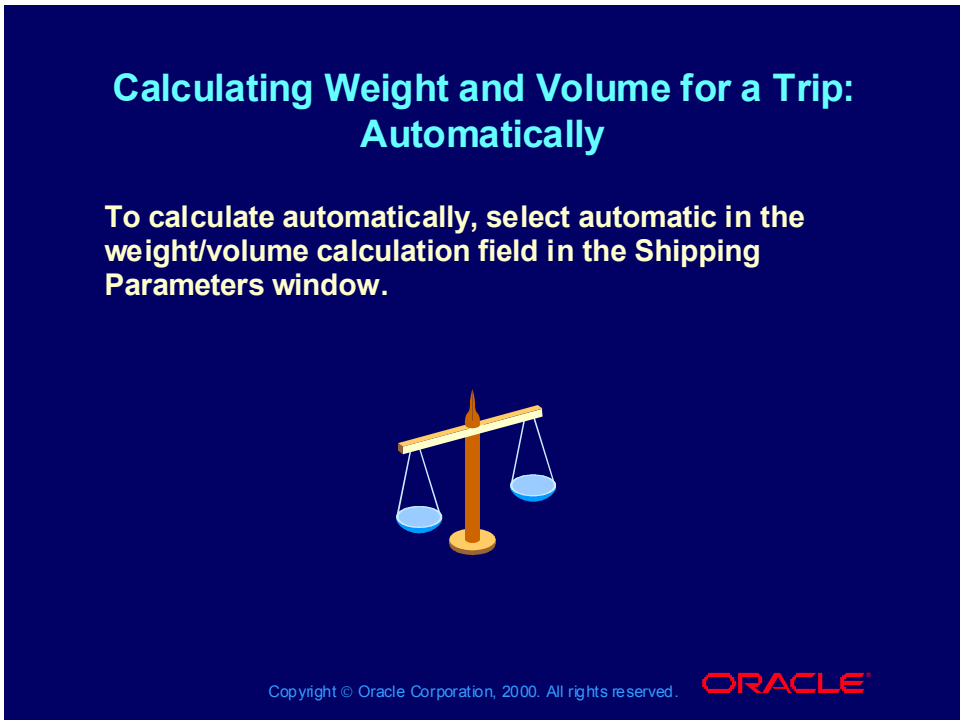
Calculating Weight and Volume for a Trip: Automatically



(N) Shipping > Transactions (I) Flashlight Icon Search to find the Trip (B) Actions (M) Calculating Weight and Volume for a Trip (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Planning Trips > Calculating Weight and Volume for a Trip

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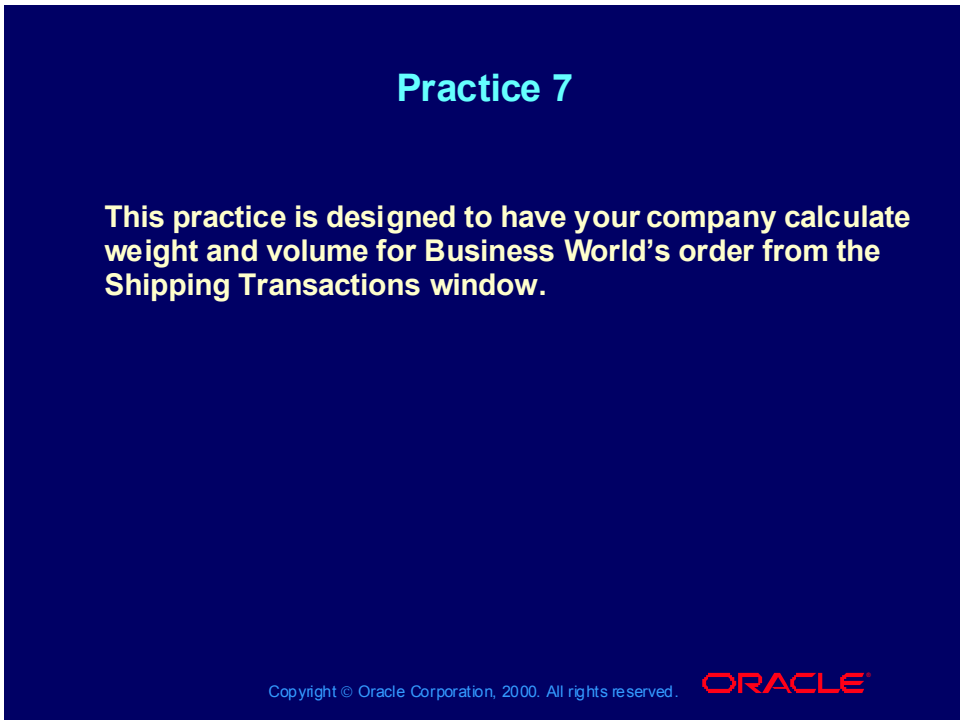

(N) Shipping > Transactions

1. Choose the Flash Light button from the Toolbar
2. Select delivery search
3. Select recorded delivery name (from guided practice 1)
4. Choose the Find button
5. Select the delivery by pressing the Ctrl and the Left Mouse buttons
6. Choose the Actions button
7. Select assign to trip
8. Choose the Go button
9. Select trip name from LOV (Trip created in previous practice)
10. Choose the OK button
11. Save your work

Calculating Weight and Volume for a Delivery

12. Choose the Actions button
13. Select calculate weight/volume
14. Choose the Go button

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The weight and volume is calculated and you can view the information using the scroll bar

(T) Lines/Containers

15. Save your work

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Shipping Exceptions

The shipping exceptions feature helps you identify and correct shipping exceptions that violate the requirements of your operation or that of your carriers and customers.

The shipping exceptions feature gives you the ability to define exceptions and the processes for handling them. You can record exceptions automatically from within Oracle Shipping Execution, or you can log exceptions manually through the user interface input window. You can initiate exception handling, and view and track the exceptions as you manage them to resolution.

APIs are provided that enable you, with some custom programming, to use third-party applications to log exceptions.

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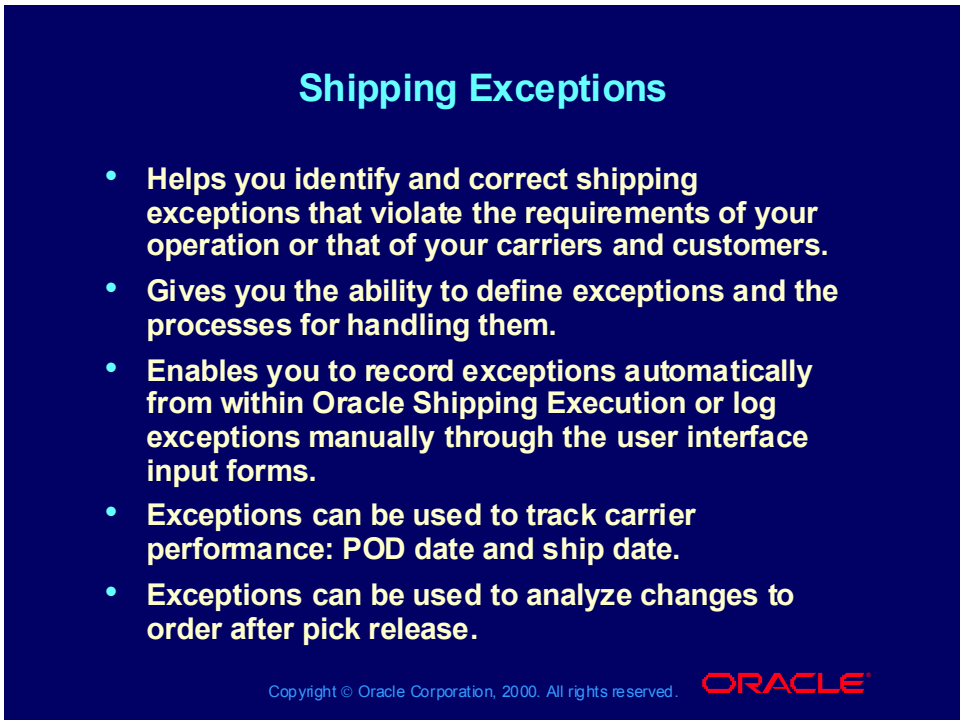

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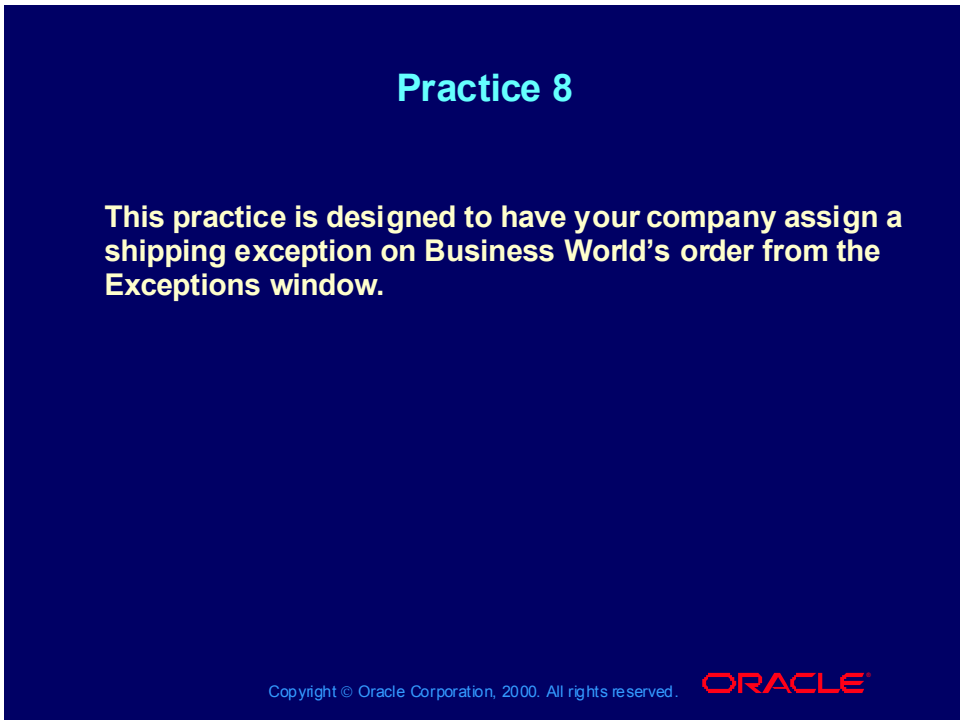

1. Query your trip
2. Choose tools from the Menu bar and select resolve exceptions, choose the New button
3. Select your exception name
4. Enter delivery was planned poorly, needs to be revised as the message Enter invalid trip planning as the name
5. Select shipper as the logging entity
6. Enter a logging entity number
7. Enter Seattle 950 for both the logged at location and exception location
7. Save your work

(T) Trip

8. Enter your exception name
9. Select your trip name
10. Save your work
11. Verify the exception in by viewing the trip details

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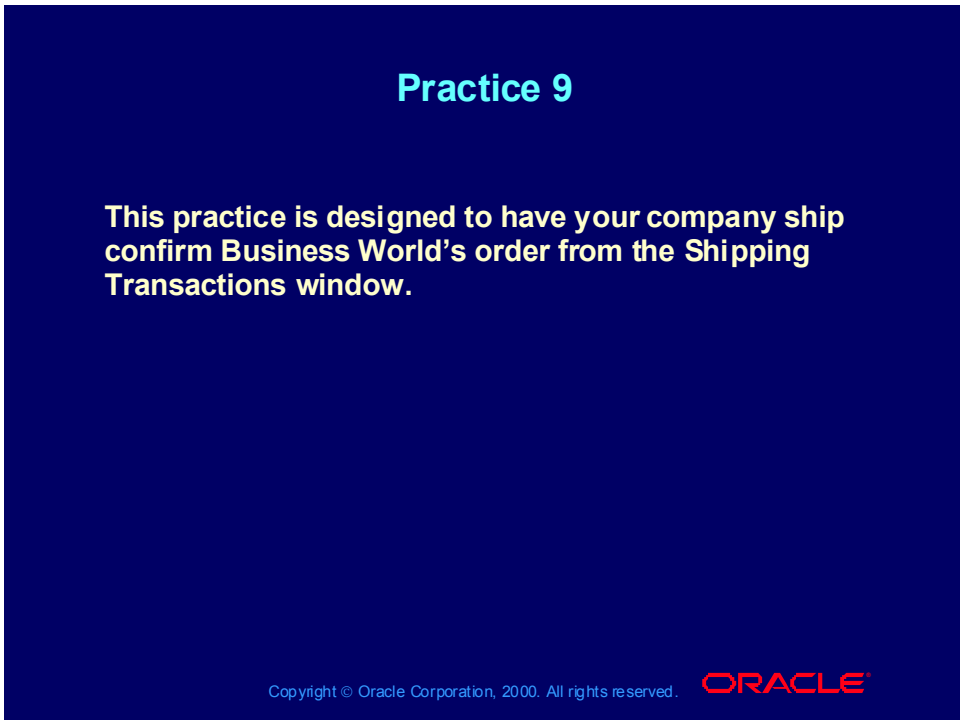

1. Re-query the delivery line

(T) Delivery

2. Select the delivery by pressing Ctrl left mouse button
3. Choose the Actions menu
4. Select ship confirm
5. Choose the Go button
6. Select ship all
7. Choose the OK button

(T) Path by Trip

8. Verify that a trip was auto created at ship confirm

(T) Path by Stop

9. Verify that a trip was auto created at ship confirm

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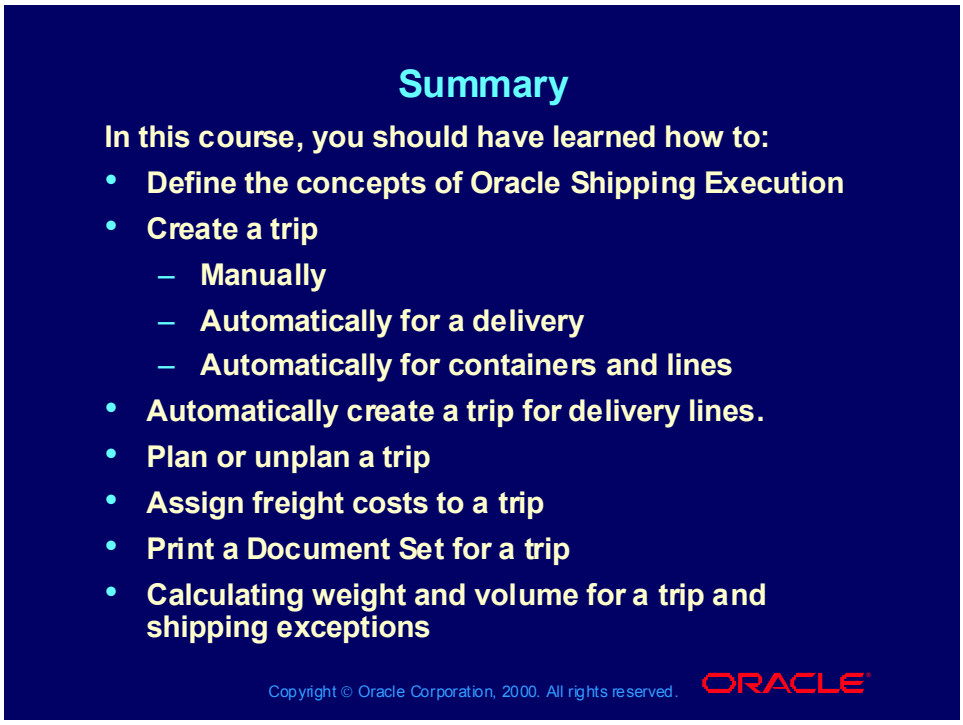

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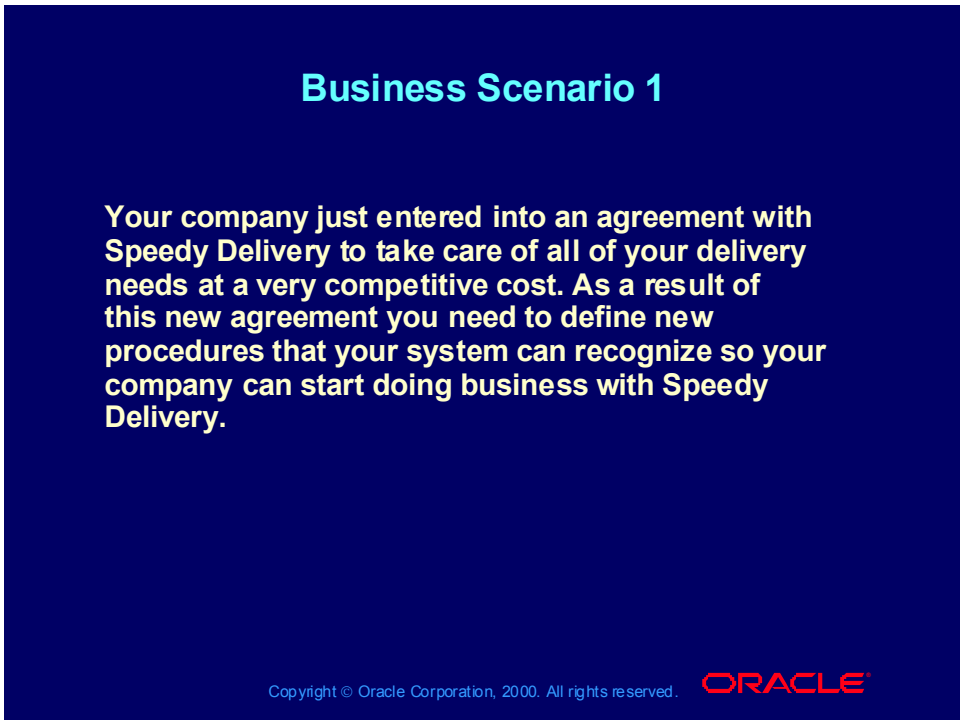

XX-Speedy Delivery has just entered into a partnership with you to receive and deliver all of your shipments in the United States at a fraction of the shipping rates of any of the other major carriers. They have agreed to pick up shipments daily from your M1 (Seattle warehouse every day at 4PM).

They have the following Services available West Coast delivery, Mountain Zone delivery, Central Zone delivery, Northeast Zone delivery, Southeast Zone delivery, and International delivery.

All packages delivered to the West Coast will have a base rate of $20, packages to the Mountain area will be $25, The Central Region $30, Northeast coast $35.00 and Southeast $40 International deliveries have a base charge of &75, along with an export fee of $45. You will have a special handling fee of $40 to apply as needed, just to pad your profit margins for the annual Christmas party.

Speedy delivery will fulfill all of your order deliveries on all days except Thanksgiving Day, Christmas Day, New Years Day, Labor Day, and Veterans Day, They also take June 3rd off every year for their President's birthday.

Speedy Delivery also has an partnership with XX-Euro Express. XX-Euro Express is located at XXX They will be responsible for all items forwarded to them by Speedy Delivery for their European delivery needs, and bill Speedy Delivery directly. All of the International shipments will be held at the Airport

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Export Holding Company located at 12457 South 129th Street Warf 33, Dock 6 New York, New York, 10101

Based upon this information, Define:

- XX-Speedy delivery as a carrier
- XX-Euro Express as a carrier
- Create a location for the Airport Export Holding Company
- The above mentioned shipping methods
- A pick slip grouping rule
- A release sequence rule
- Release rule for Speedy Deliveries for M1
- Freight Costs for West, Mountain, Central, Northeast, and Southeast regions.
- Freight charge for the special handling, and export fees
- Shipping calendar for Speedy Delivery including their calendar exceptions.

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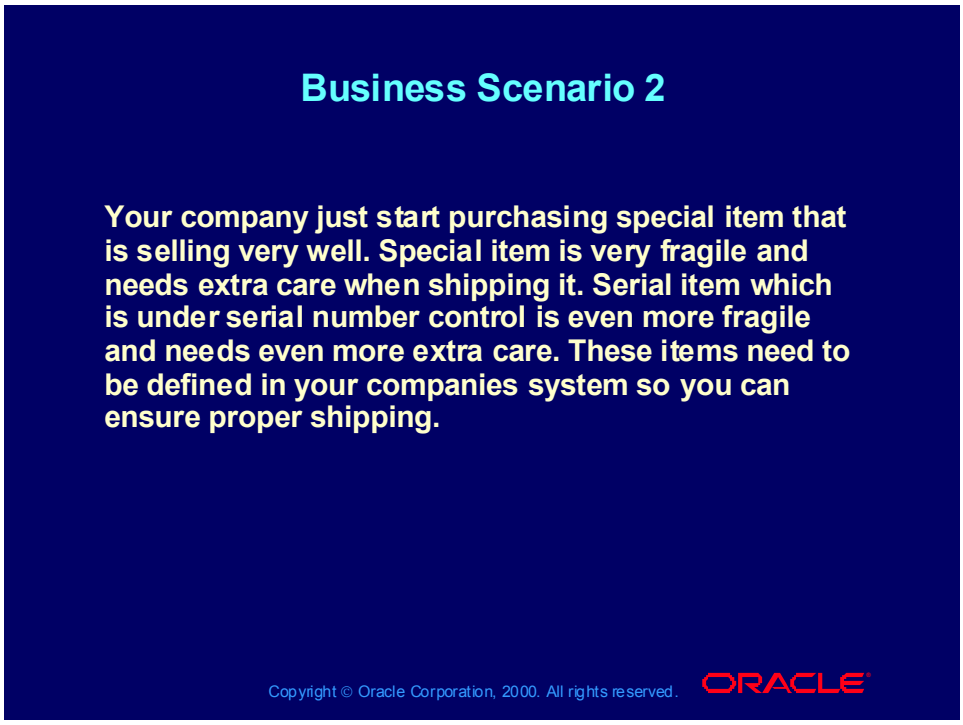
Business Scenario 2



You have just started purchasing a new product item XX-Special Item. To package it you needed to have a special box purchased for shipping. The box is 1 pound empty and has an interior volume of 2.5 cubic feet. You can fit 2 of the Special Item into this box snugly, however the preferred method is only 1 per box. The box might be packaged into a larger container that is 10 pounds empty and has an interior volume of 15 Cubic feet.

Another item you have just started to carry is XX-Serial Item which is under serial number controlled set in Seattle to be controlled at sales order issue. You can fit only 1 into the special Box you have just purchased.

Based upon this information, define:

- XX-Special Item
- XX- Serial Item
- XX-Box-1 for item CM65201 and CM65202
- XX-Container-1 and Container Load Relationships for CM65201 and CM65202

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R11i Oracle Shipping Execution: Transportation and Shipping Container Management

Chapter 5

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Objectives

After completing this course, you should be able to do the following:

- Define the concepts of Oracle Shipping Execution
- Create containers and utilize the item master
- Assign freight costs to containers
- Demonstrate you ability to use the packing workbench
  - Equally pack delivery lines into containers.
  - Sequentially pack delivery lines into containers
- Assign or unassign a container to/from a delivery
- Autopack delivery lines into containers

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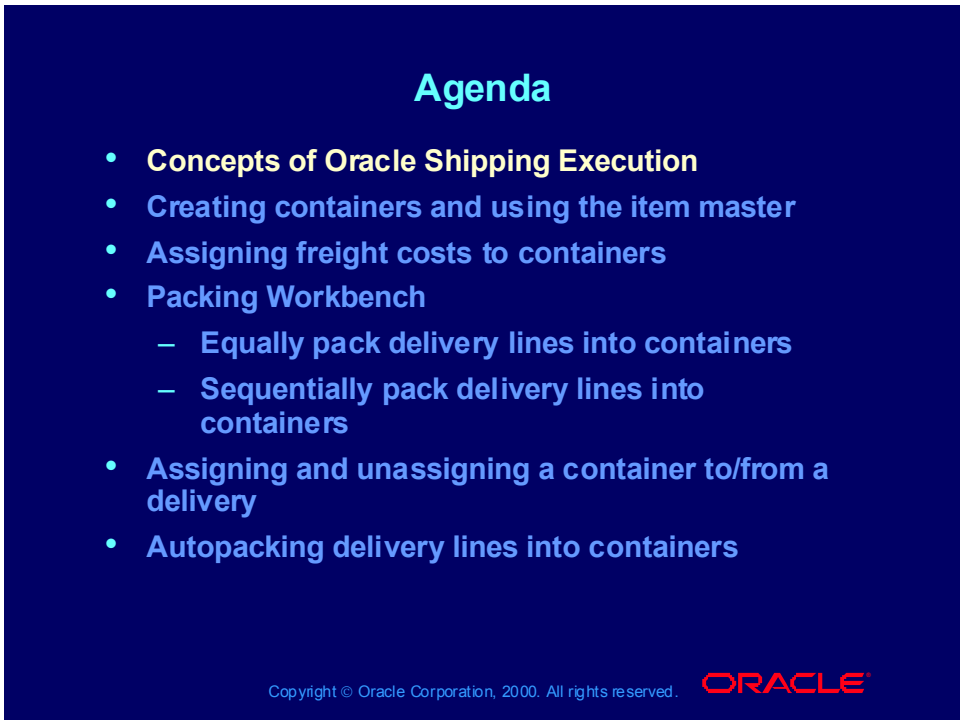

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These are the key concepts behind the application. Becoming familiar with these concepts will make learning the application much easier.

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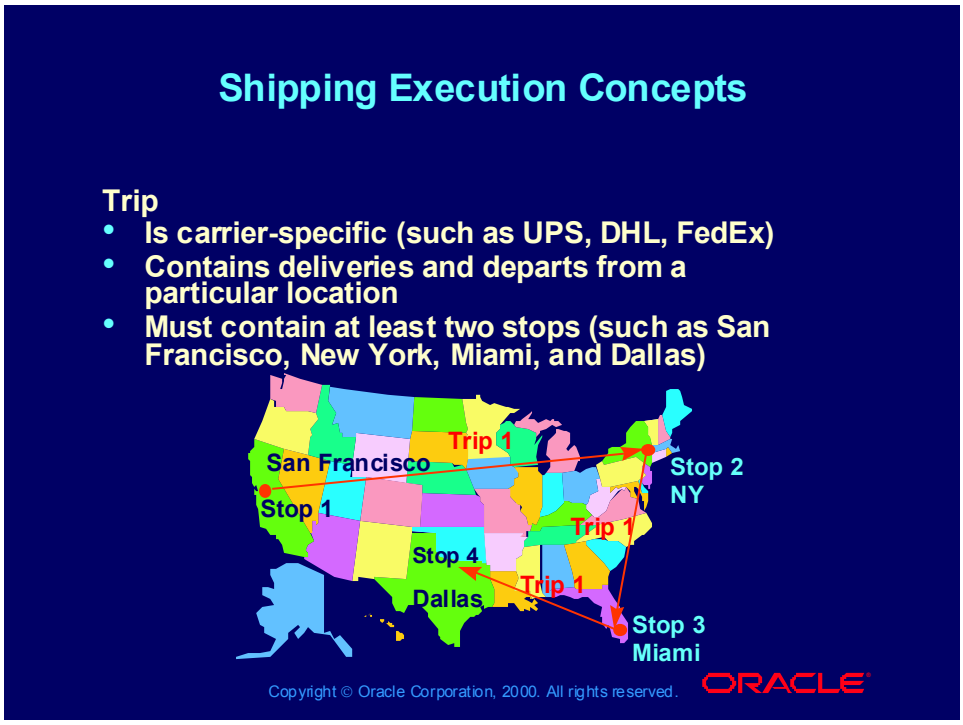

Trips

Trip 1

San Francisco to New York, New York to Miami, and Miami to Dallas.

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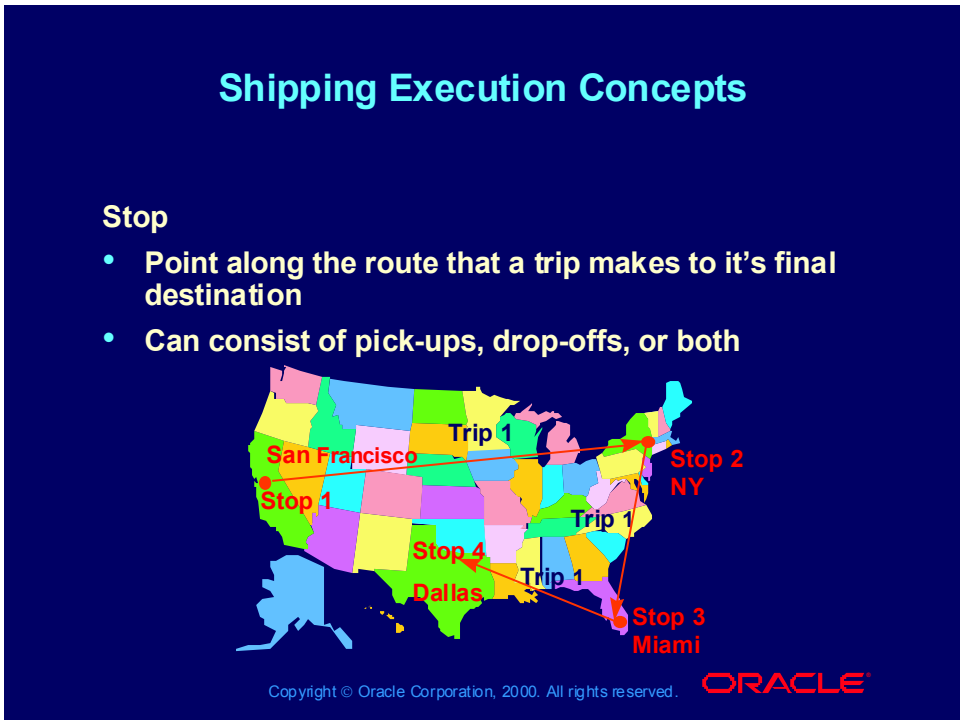

Stops

A Stop represents a point along the route that a trip makes to it's final destination e.g,. New York. This point may also have some activity associated with it. The activity might include picking up a new delivery, dropping off a delivery, or both.

Trip 1

San Francisco (stop 1) to New York (stop 2), New York to Miami (stop 3), and Miami to Dallas (stop 4).

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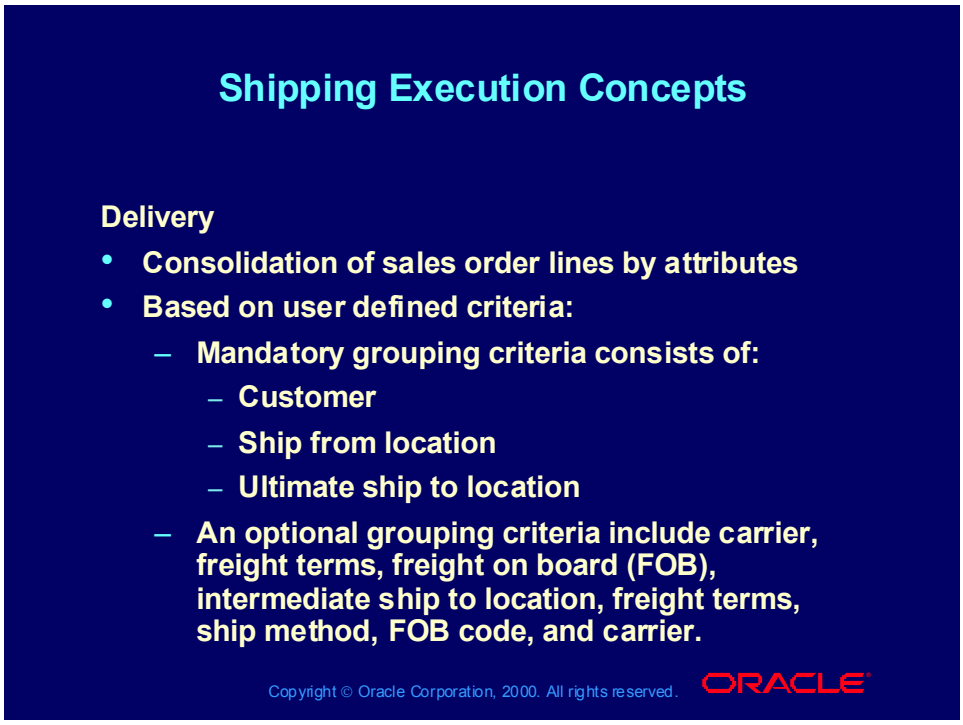

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Delivery Leg

A delivery leg consists of two stops where the delivery is picked up and dropped off respectively on the same trip. The delivery may travel through several legs to get to its final destination. A delivery leg is synonymous with the bill of lading.

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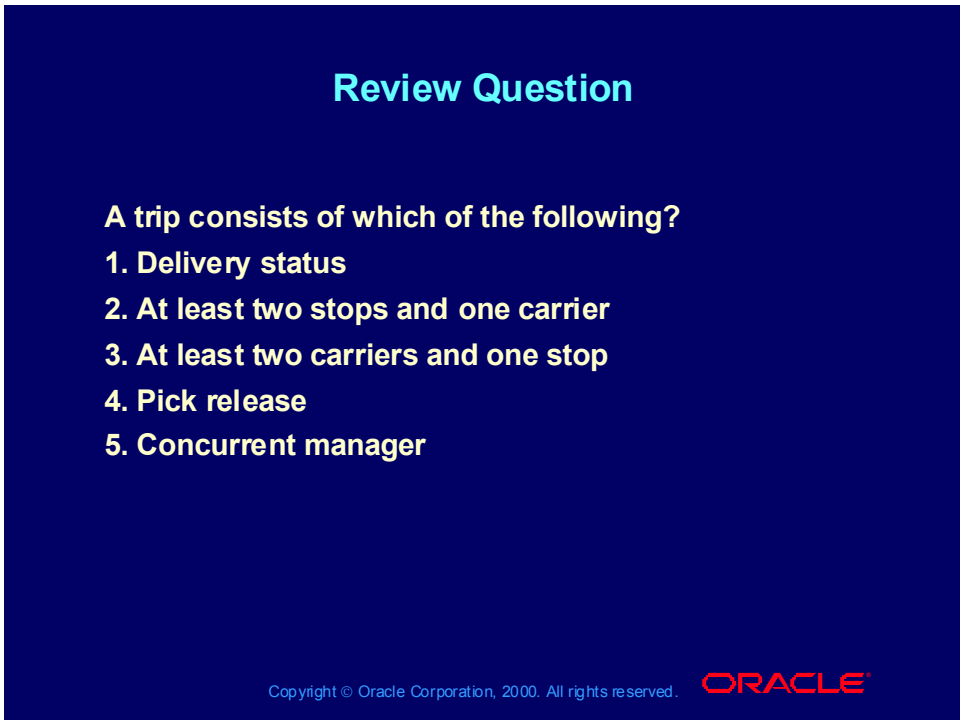

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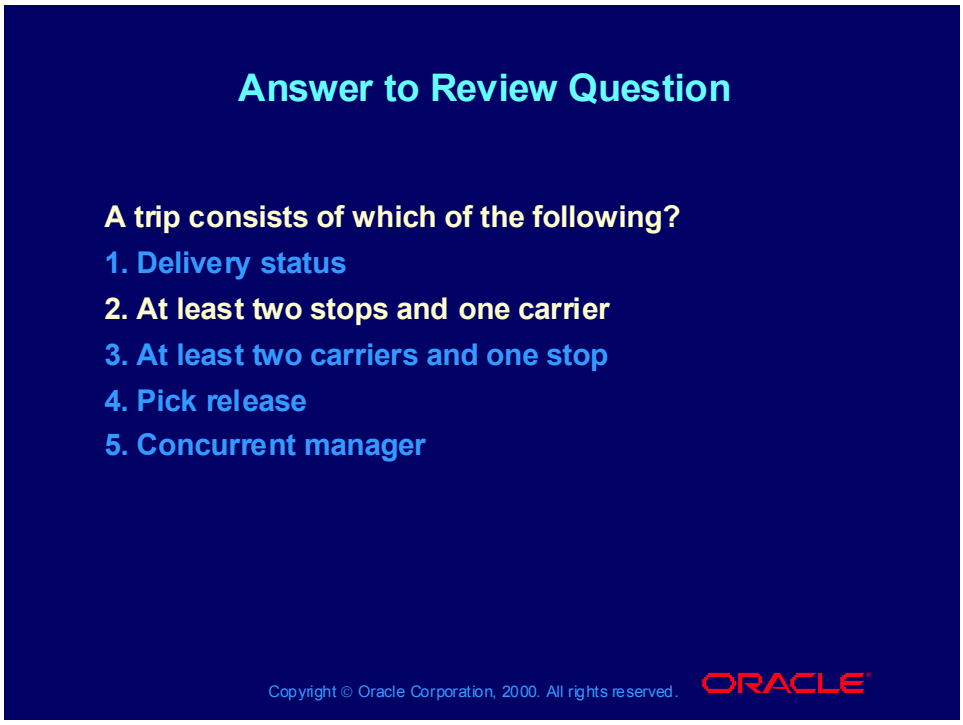

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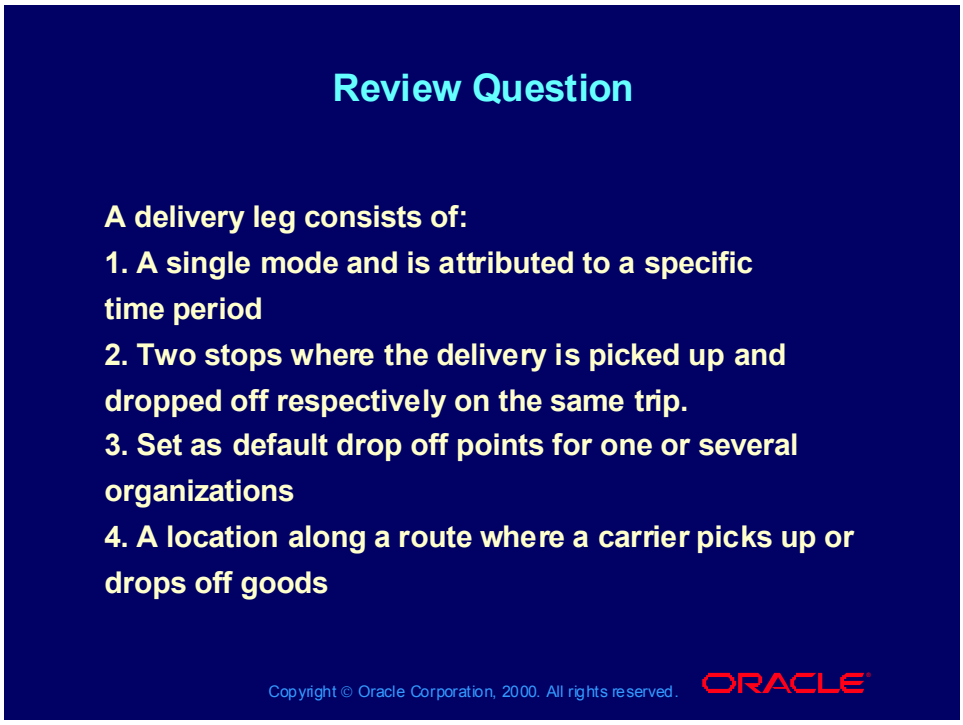

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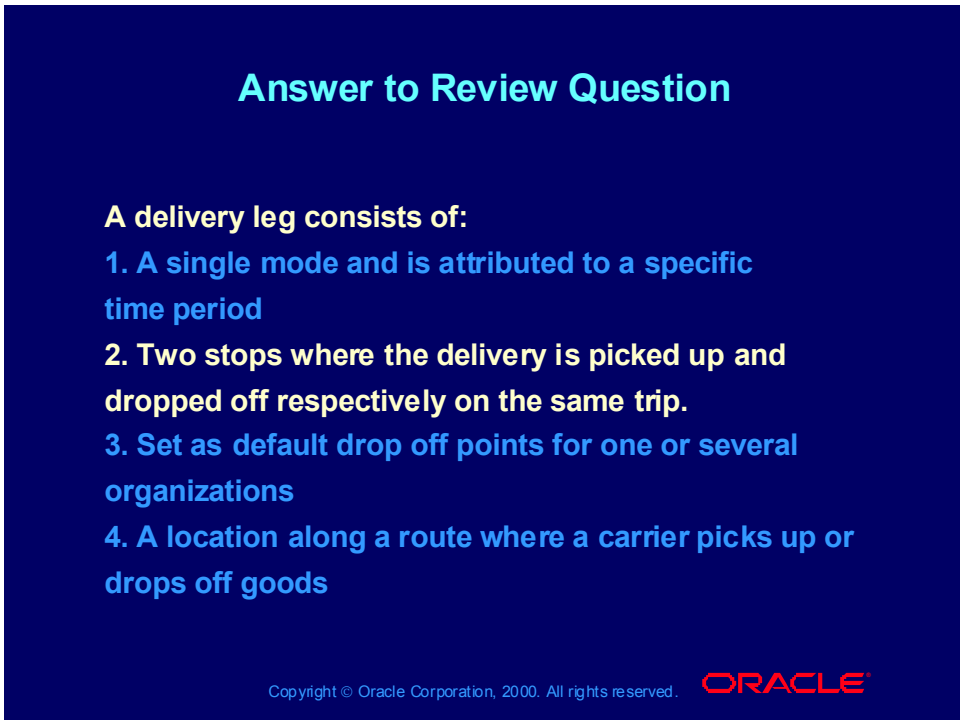

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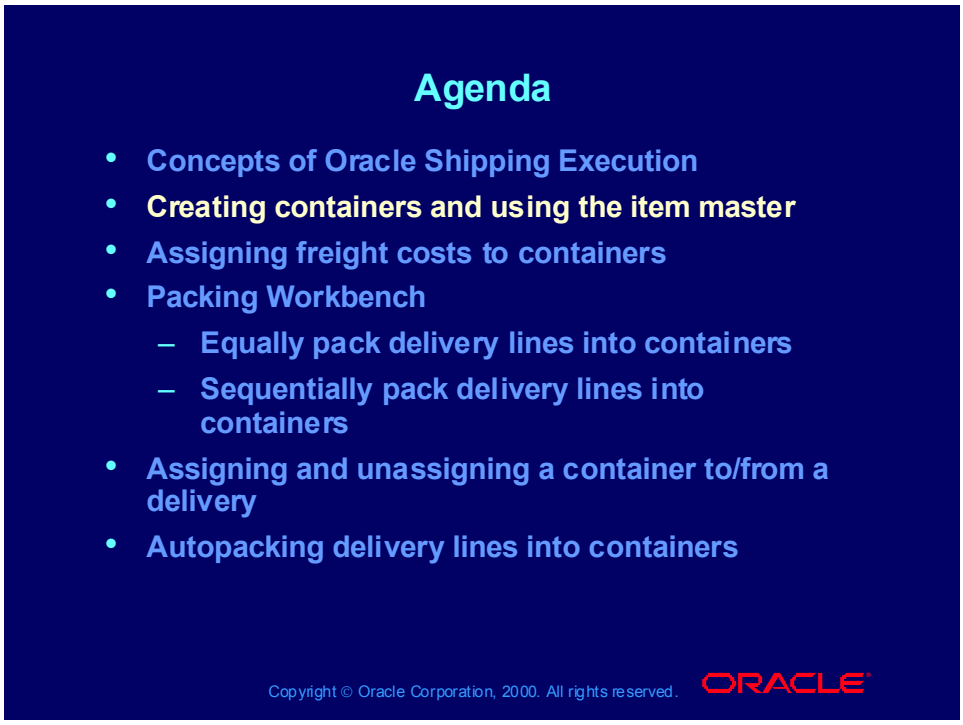

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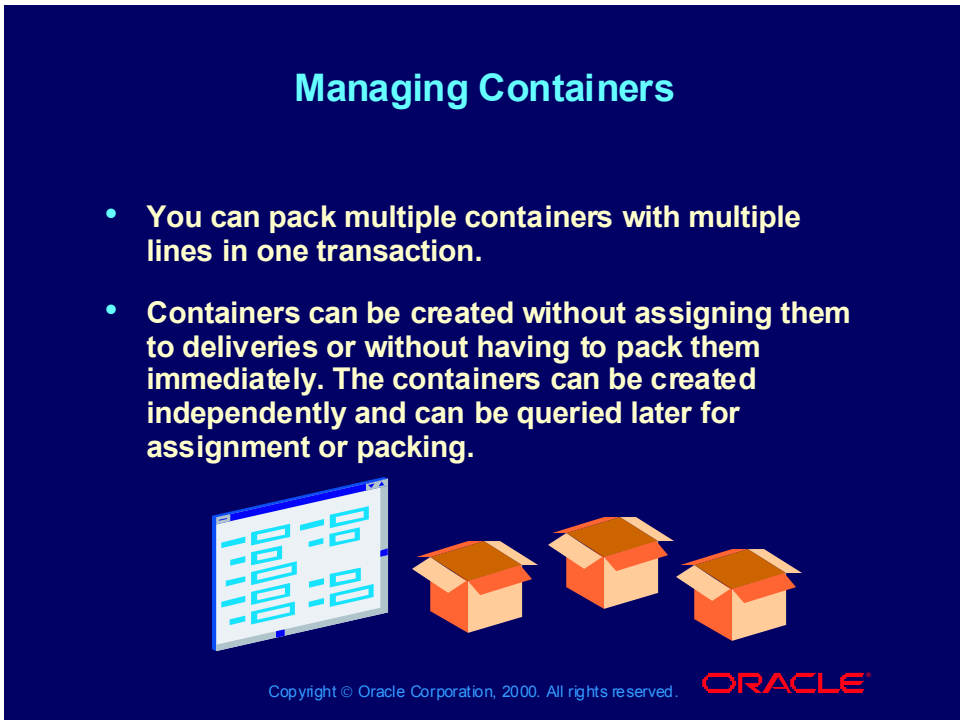

(N) Shipping > Transactions > Data Entry > Container Data Entry

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Containers > Creating Container

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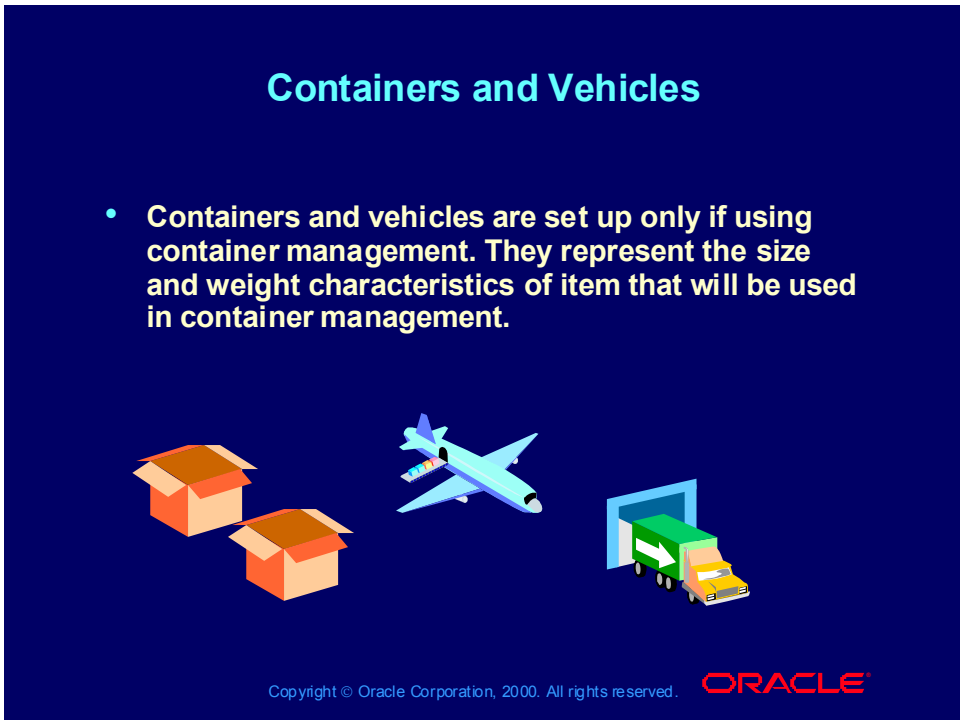
Containers and Vehicles



Containers and vehicles are set up similar to items in inventory.

The preferred checkbox represents the preferred container load combination that the system will use when calculating fill amounts automatically.

Purpose: Setting up containers and vehicles with this information allows full functionality of the containerization feature in Oracle Shipping Execution. Oracle Shipping Execution is not integrated with Inventory with regards to container management hens this set up step is purely for the purposes of using the physical attributes defined for the containers and vehicles to drive the container functionality in Oracle Shipping Execution.

In order to effect inventory controls for containers, additional item setup information would need to be completed including making the container OM transactable. The container item would then need to placed as a line on a Sales Order.

Physical Attribute tab

- Select container or vehicle
- Enter container type
- Enter the container's internal volume
- Enter the container's maximum load weight.
- Enter the container's minimum fill %
- Enter the container's weight.
  - This is the weight of the container empty

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Enter the container's volume.

- This is the total of the container's external volume.
- (N) Items > Inventory Items

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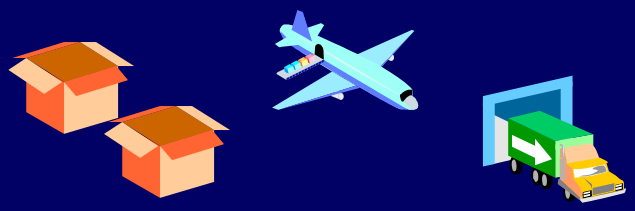
Containers Item Relationships

Containers Item Relationships

- Container Item relationships are set up only if using container management. They represent the amount of any given item that may fit into a specific container. They also can represent how many container that may fit into a master container.



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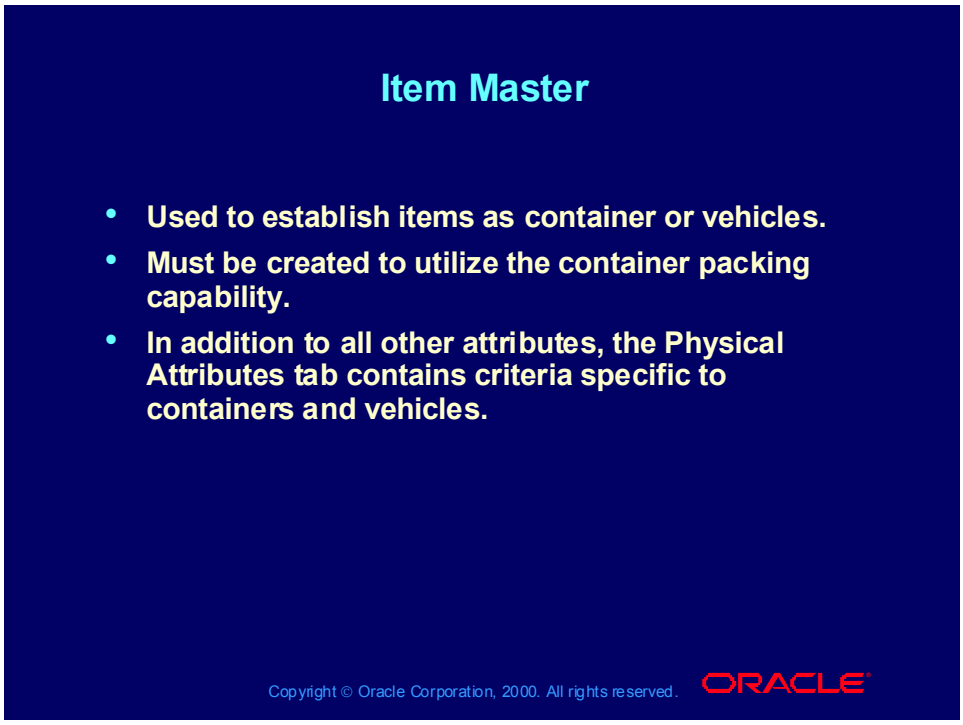

Physical Characteristics Tab

Weight Unit of Measure = Used for packing calculation

Unit Weight = Used for packing calculation

Volume Unit of Measure = Used for packing calculation

Unit Volume = Used for packing calculation

Container = Select Container to identify items that are containers used for shipping sales orders.

Vehicle= Select Vehicle to identify items that are vehicles used for shipping sales orders.

Container Type= For items identified as containers, enter the container type.

Internal Volume= Enter the internal volume of the container or vehicle in the same UOM as the Unit Volume. This attribute is used for packing calculation to calculate container capacity restrictions.

Maximum Load Weight = Enter the maximum load weight of the container or vehicle in the same UOM as the Unit Weight.

Minimum Fill Percentage=Enter the minimum fill percentage under which the container or vehicle should be used.

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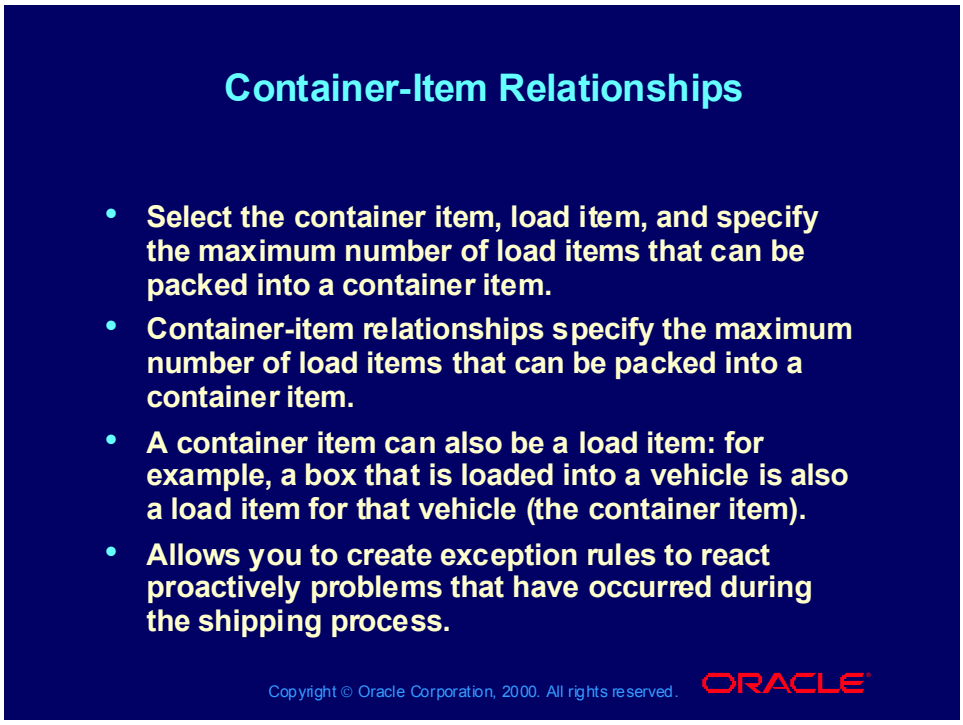
Container-Item Relationships



(N) Shipping > Setup > Container Load Details

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Setting Up > Defining Shipping Parameters > Defining Container-Item Relationships

You can track exceptions either manually or by a company created workflow. These exceptions can drive actions and notifications to be sent informing individuals that an action must be performed, or a shipping exceptions has occurred. They can also be used in conjunction with the shipping portal to track carrier performance via proof of deliveries (POD's)

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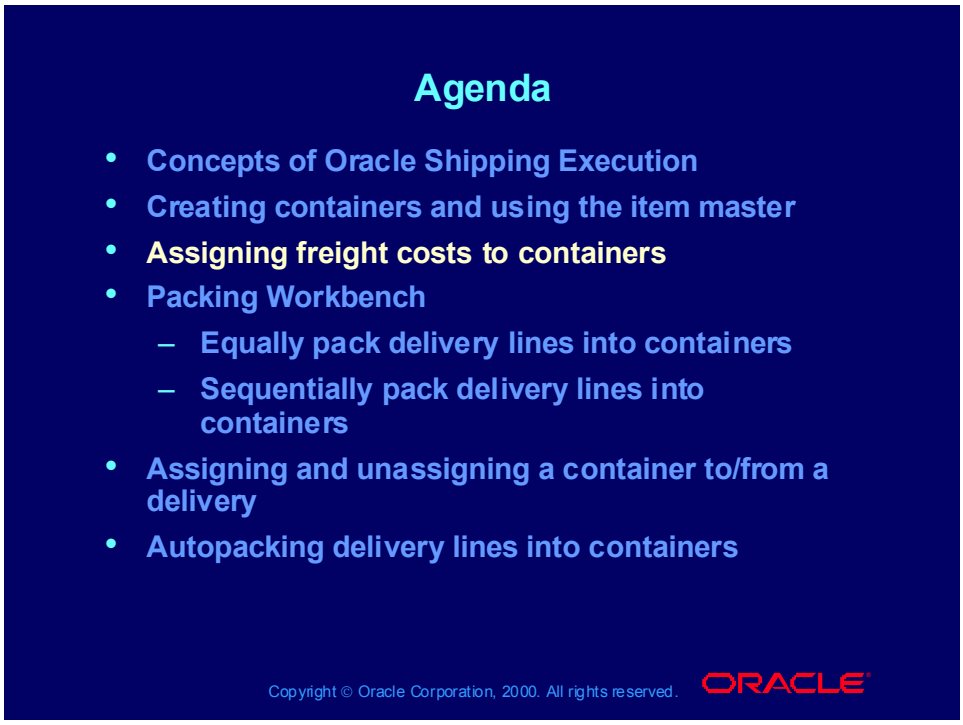

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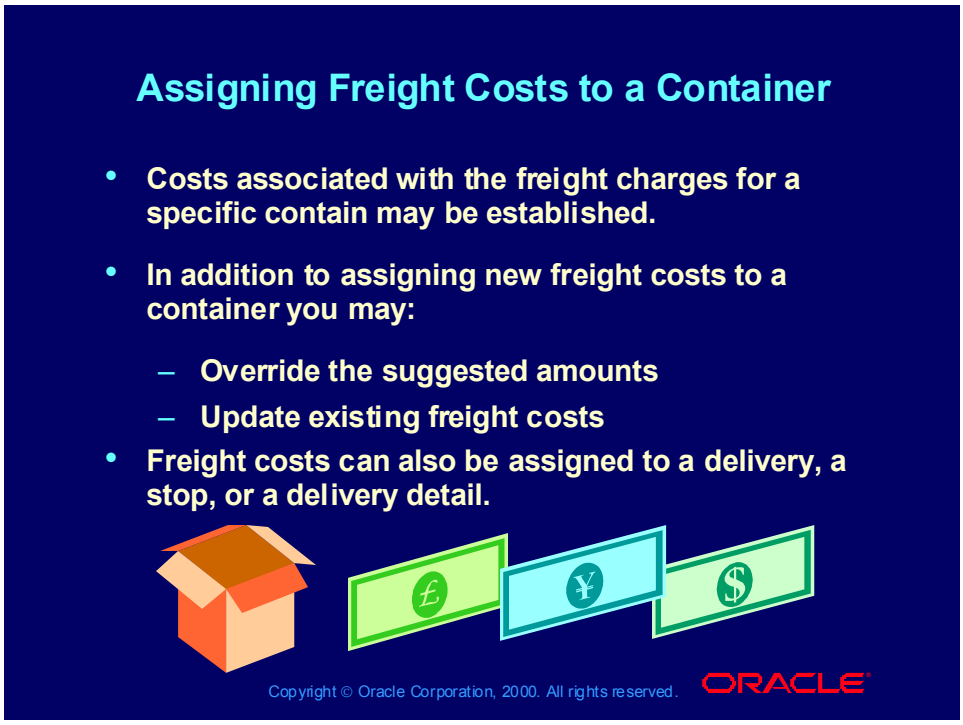
Assigning Freight Costs to a Container



(N) Shipping > Transactions (I) Flashlight Icon Search to find Containers (B) Actions (M) Freight Costs (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Containers > Assigning Freight Costs to Container

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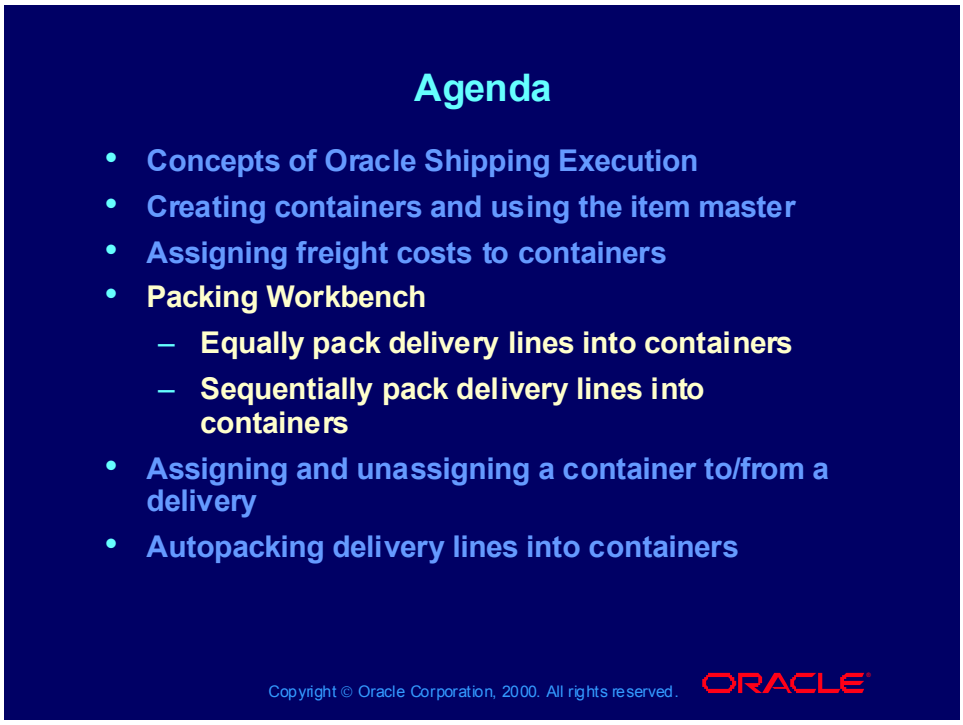

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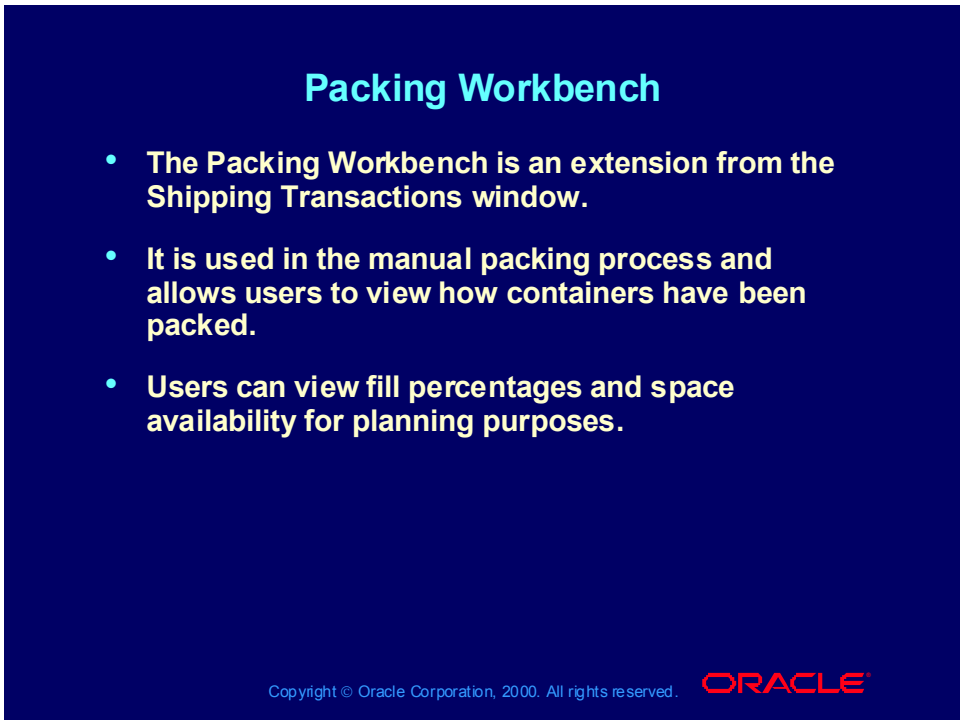

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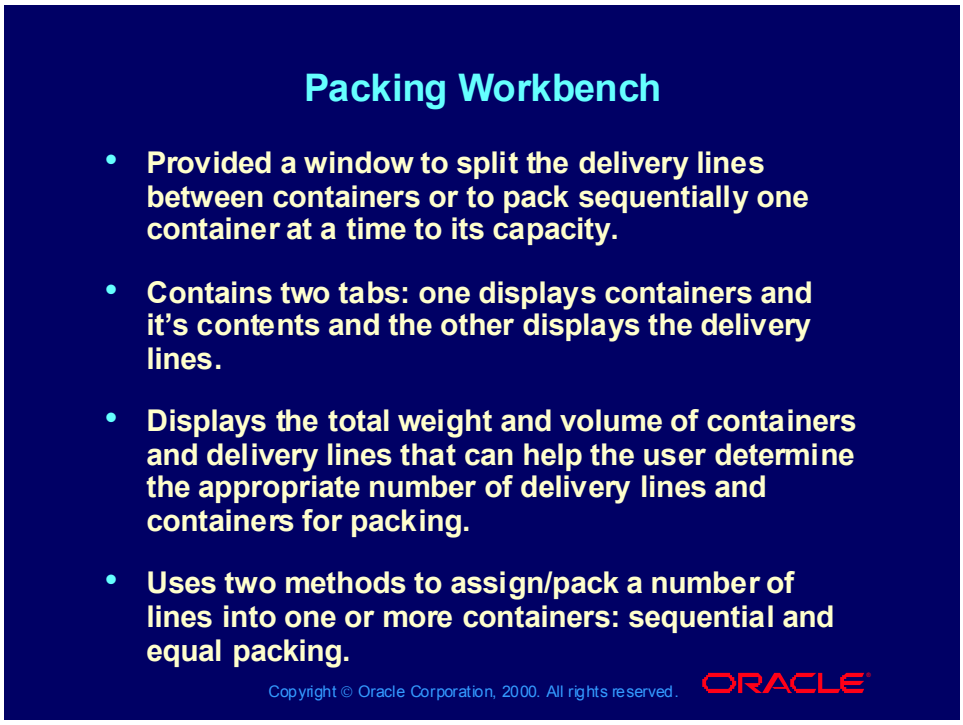
Packing Workbench



(N) Shipping > Transactions (I) Flashlight Icon Search to find Containers (B) Actions (M) Packing Workbench (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Containers > Packing Workbench

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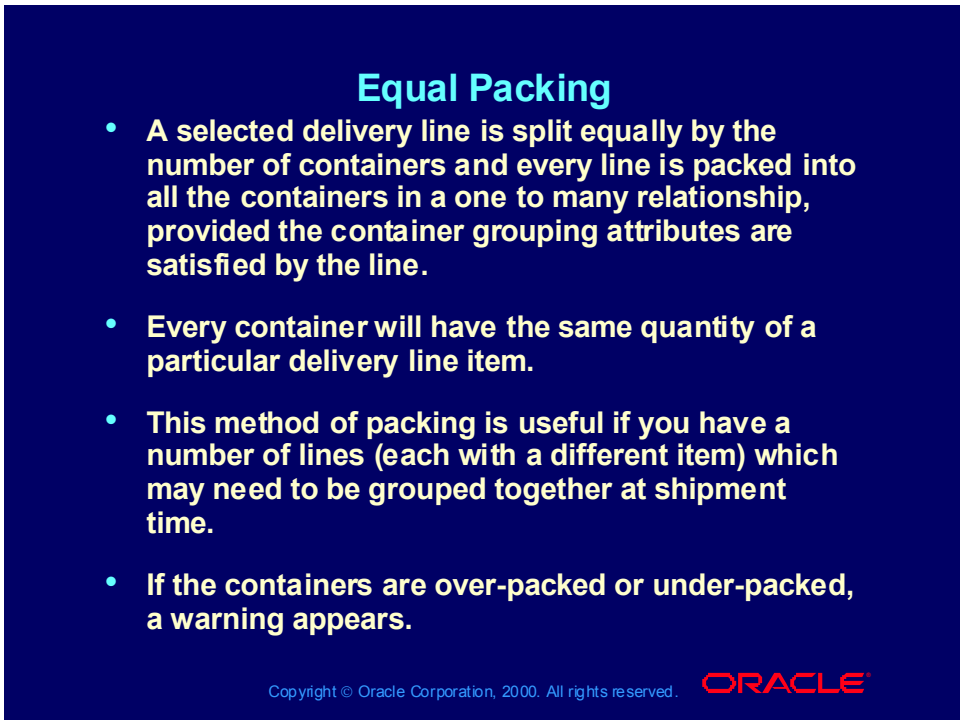
Equal Packing



(N) Shipping > Transactions (I) Flashlight Icon Search to find Containers (B) Actions (M) Packing Workbench (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Containers > Overview

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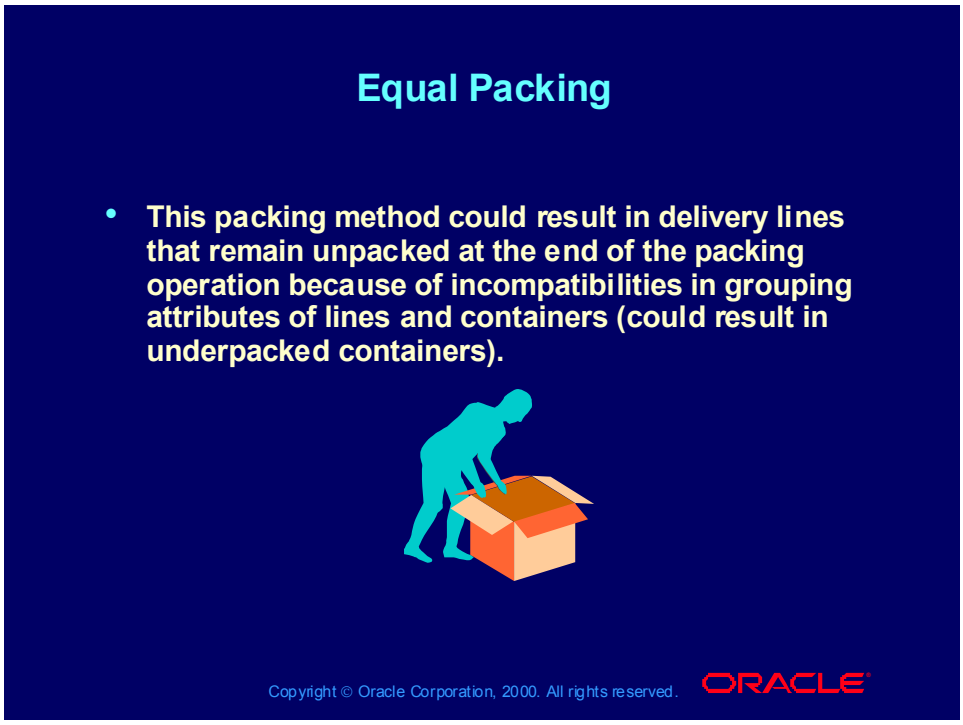
Equal Packing



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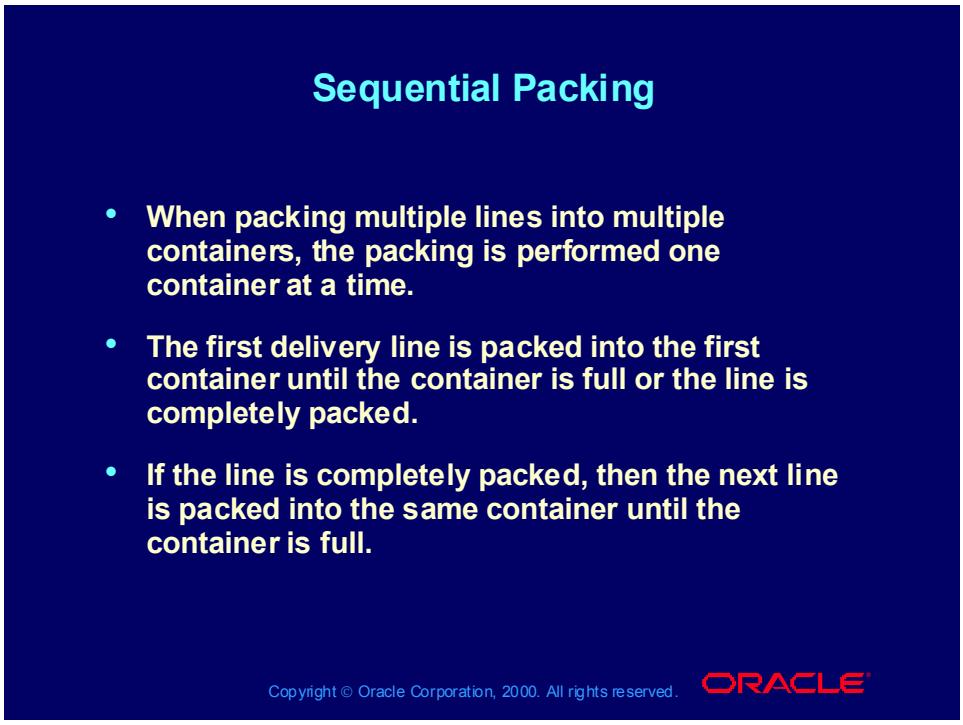
Sequential Packing



(N) Shipping > Transactions (I) Flashlight Icon Search to find Containers (B) Actions (M) Packing Workbench (B) Go

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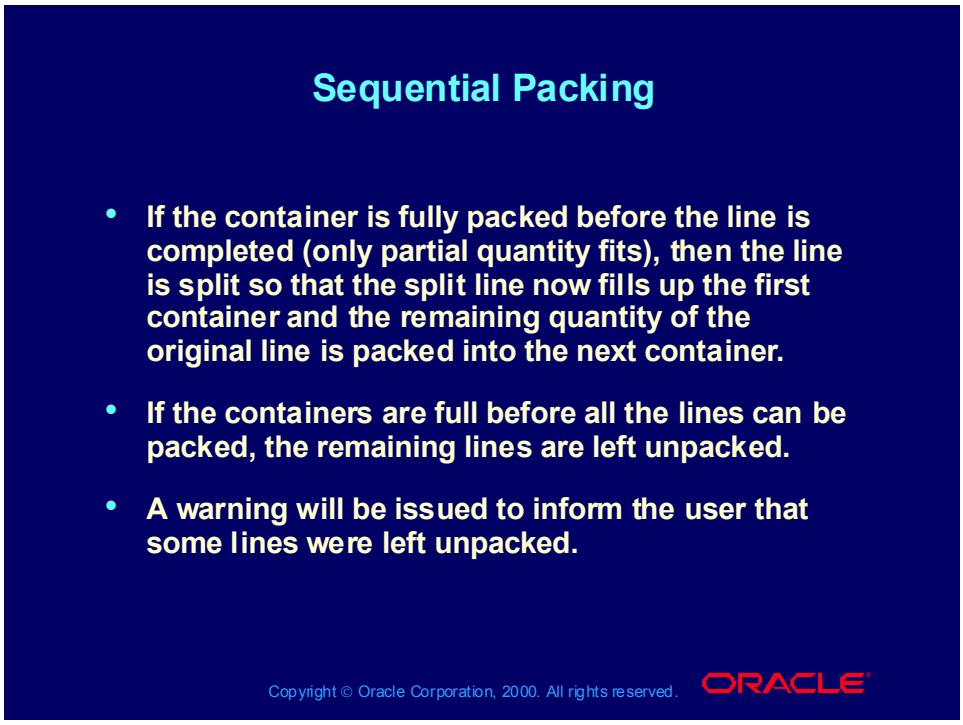
Sequential Packing



(N) Shipping > Transactions (I) Flashlight Icon Search to find Containers (B) Actions (M) Packing Workbench (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Containers > Overview

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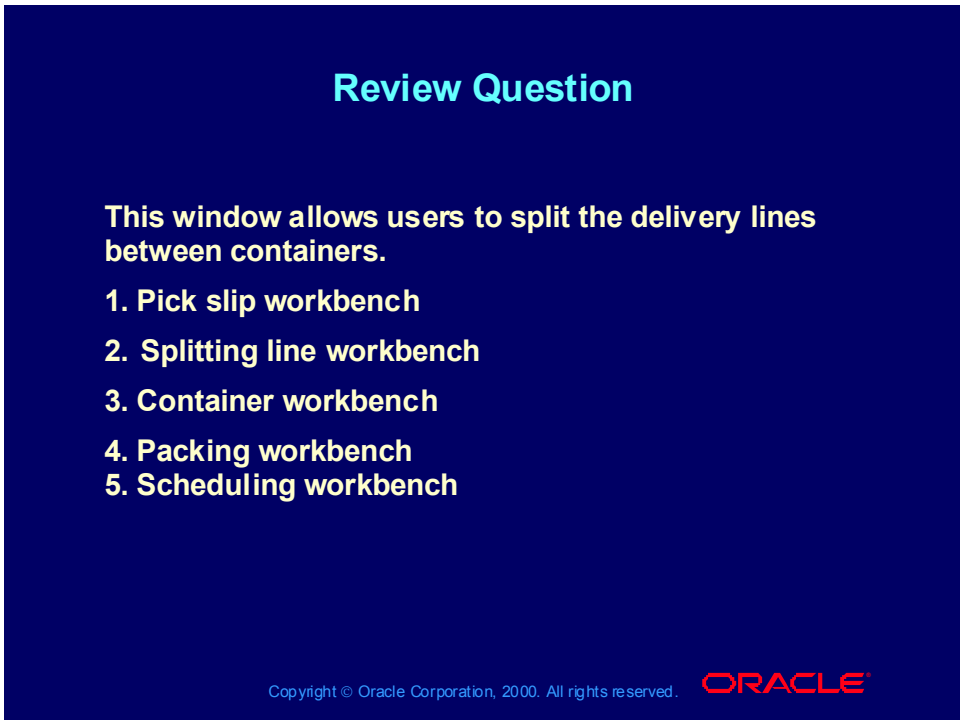

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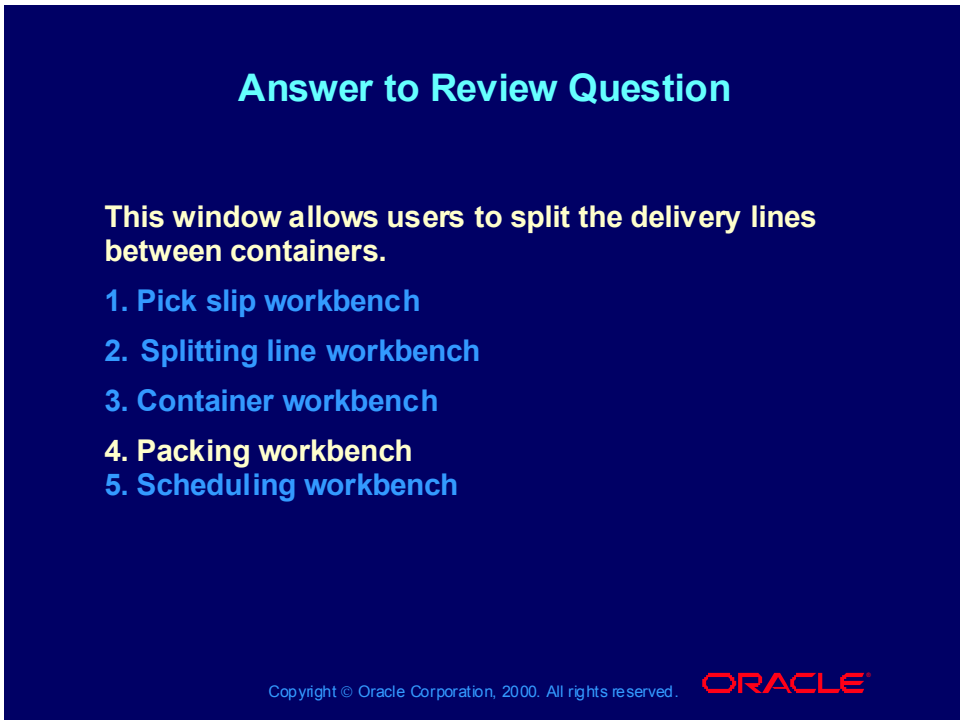

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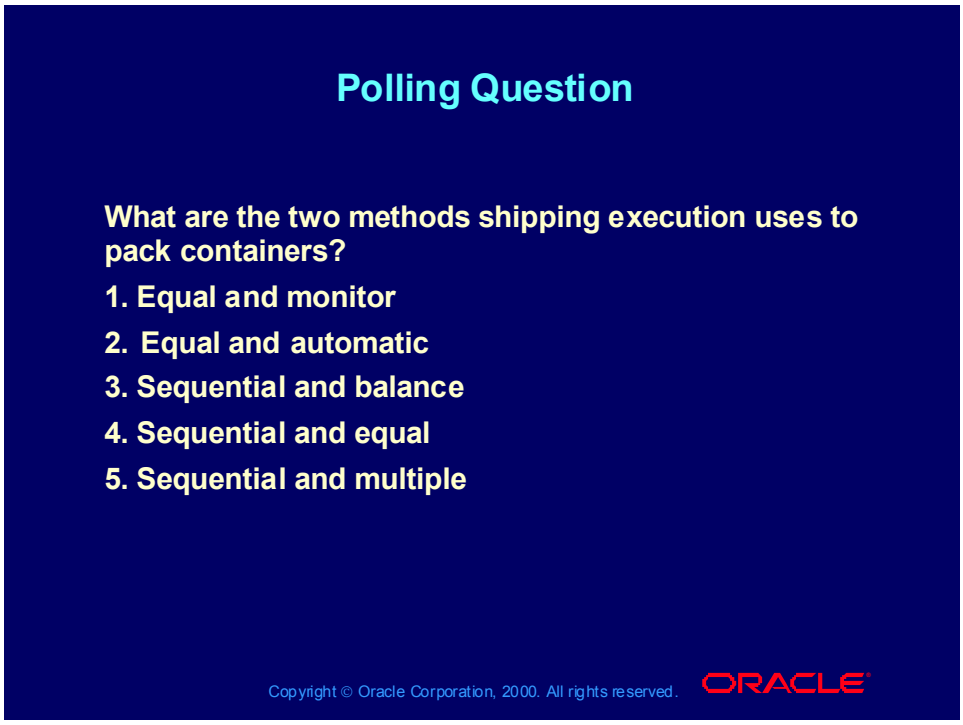

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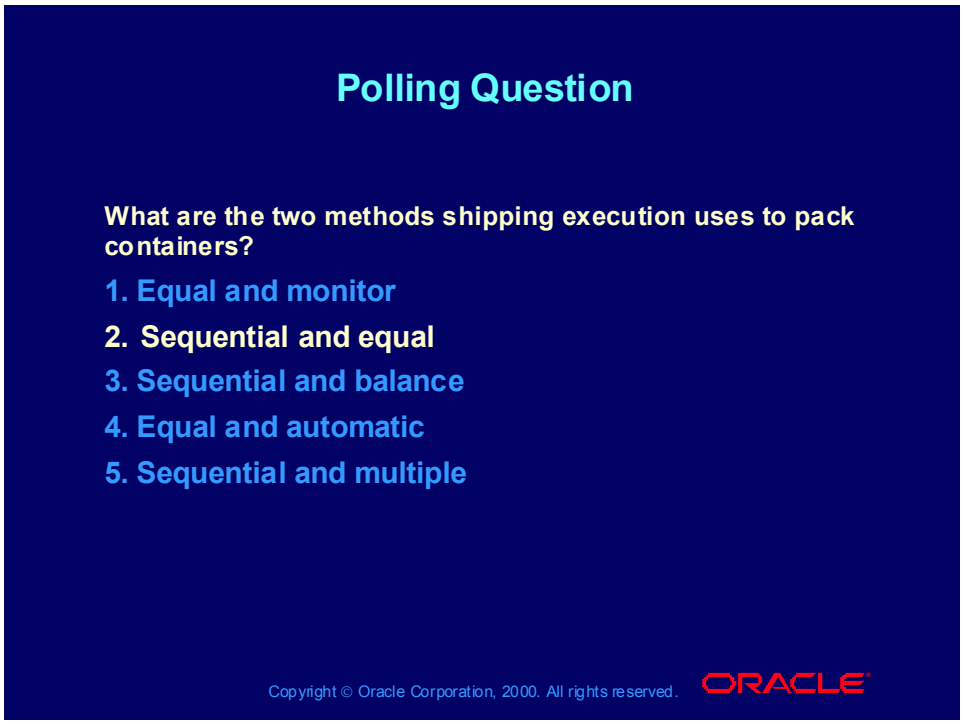

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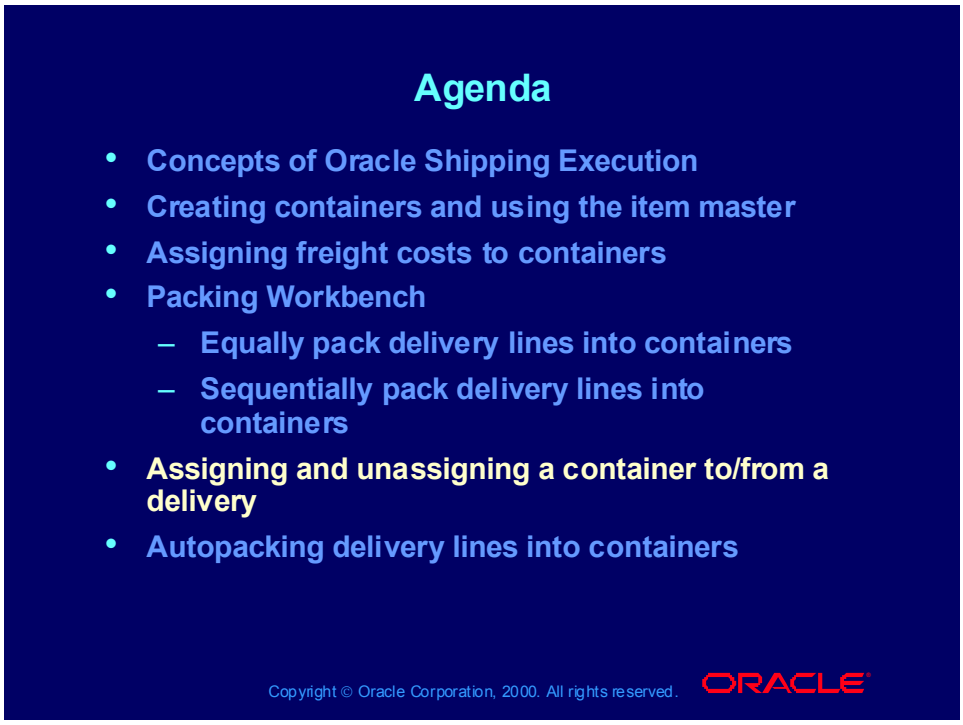

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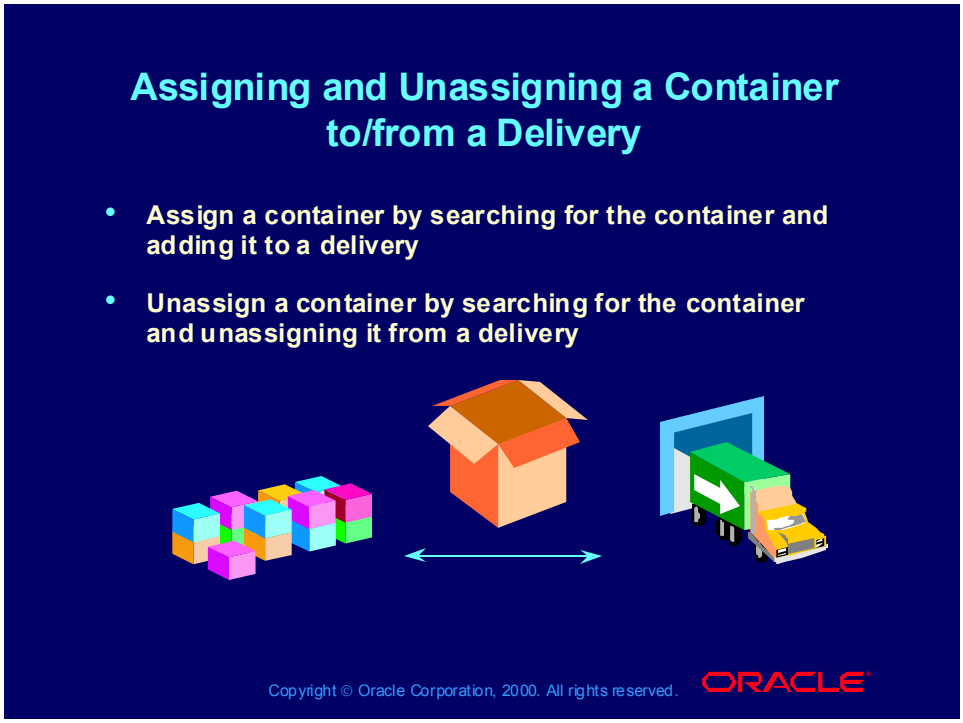
Assigning and Unassigning a Container to/from a Delivery



(N) Shipping > Transactions (I) Flashlight Icon Search to find Containers (B) Actions (M) Assign to Delivery Select the Deliveries (B) Go

(N) Shipping > Transactions (I) Flashlight Icon Search to find Containers (B) Actions (M) Unassign to Delivery (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Containers > Assigning a Container

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Containers > Unassigning a Container

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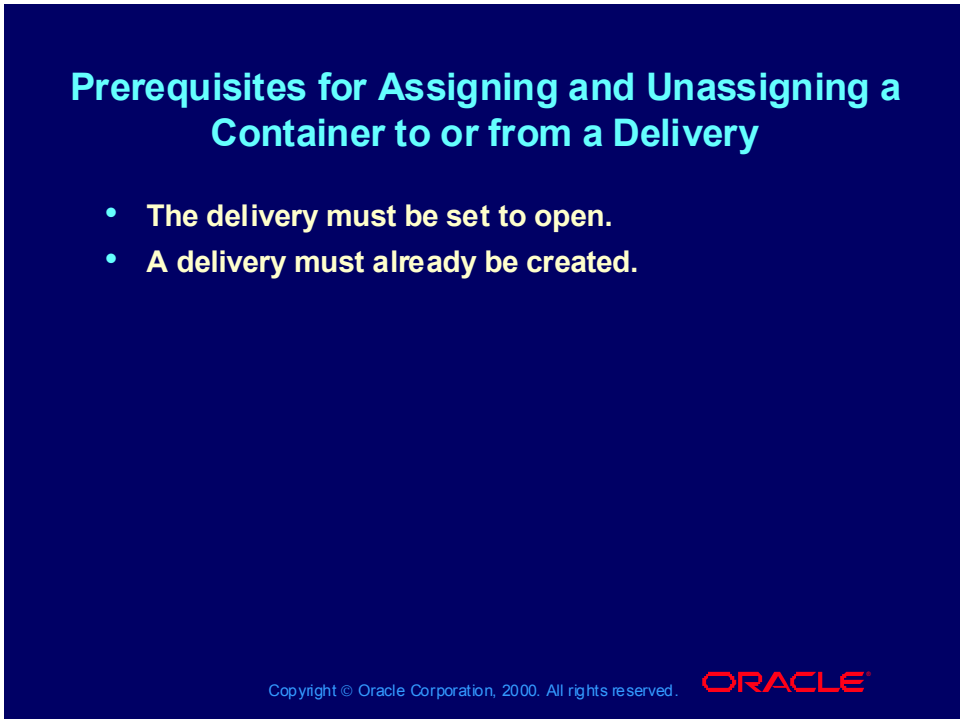
Prerequisites for Assigning and Unassigning a Container to or from a Delivery



(N) Shipping > Transactions (I) Flashlight Icon Search to find Containers (B) Actions (M) Assign to Delivery Select the Deliveries (B) Go

(N) Shipping > Transactions (I) Flashlight Icon Search to find Containers (B) Actions (M) Unassign to Delivery (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Containers > Assigning a Container

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Containers > Unassigning a Container

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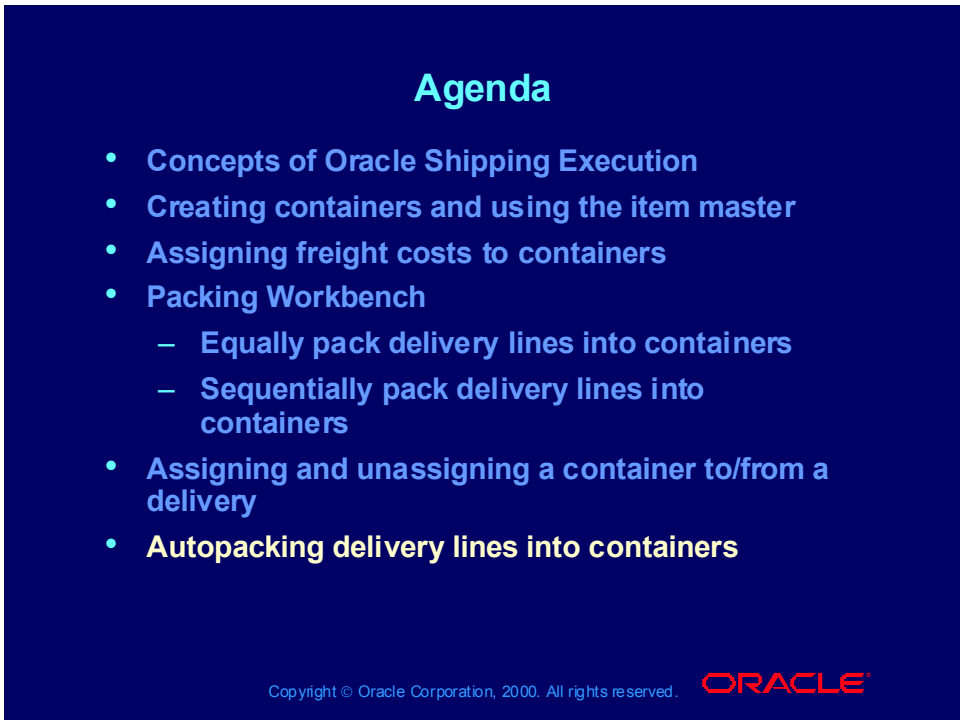

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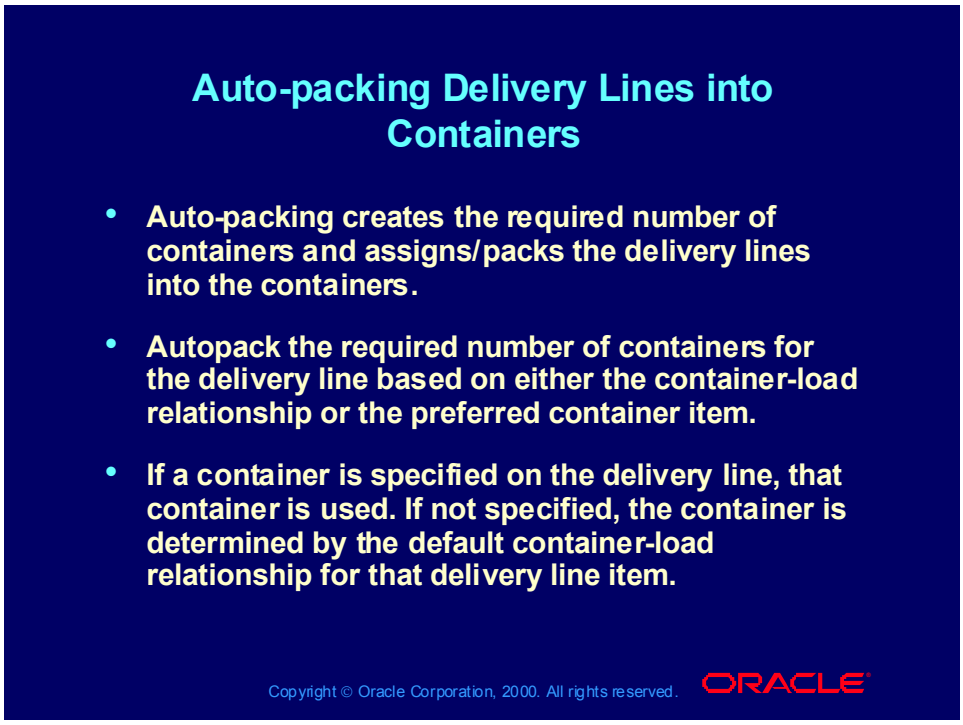
Auto-packing Delivery Lines into Containers



(N) Shipping > Transactions (I) Flashlight Icon Search to find the Delivery Lines Select one or more Lines (B) Actions (M) Auto-pack or Auto-pack master (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Containers > Auto-packing Delivery Lines into Containers

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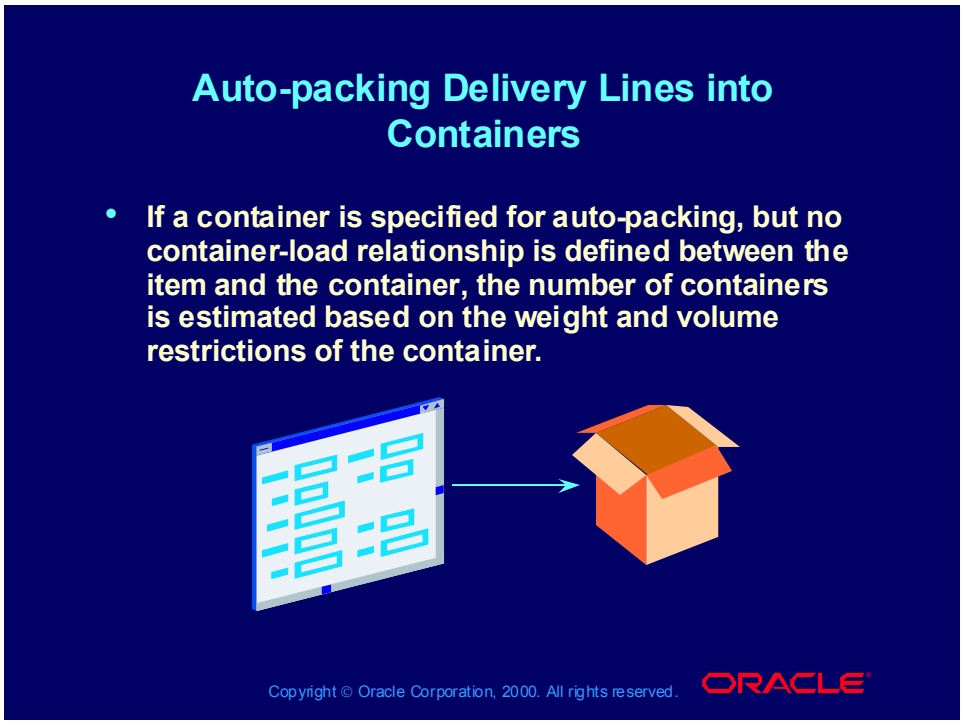
Auto-packing Delivery Lines into Containers



(N) Shipping > Transactions (I) Flashlight Icon Search to find the Delivery Lines Select one or more Lines(B) Actions (M) Auto-pack or Auto-pack master (B) Go

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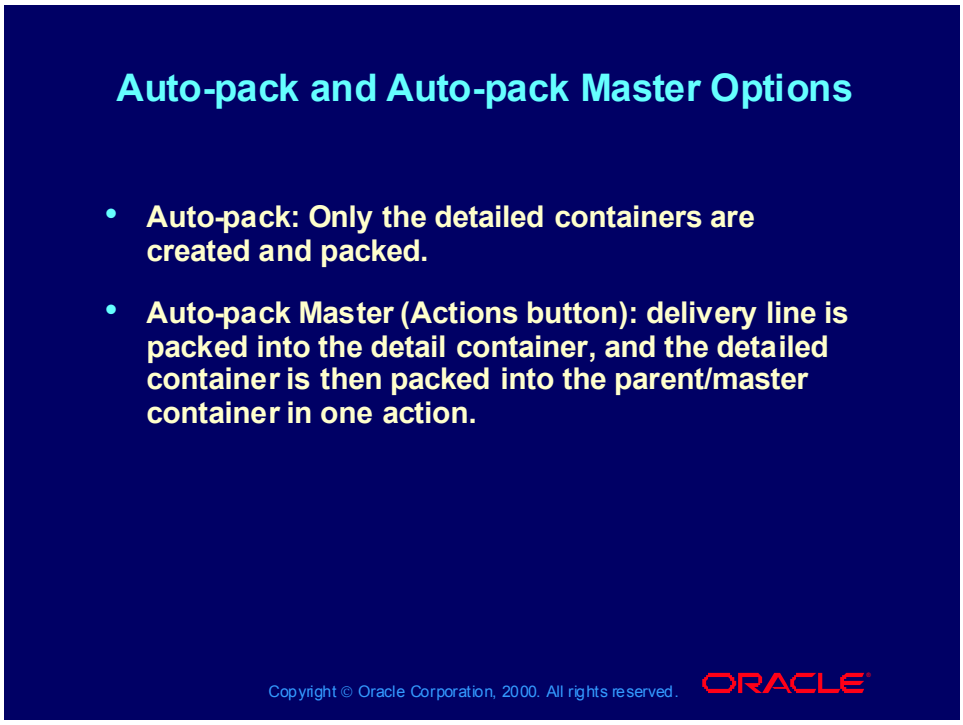
Auto-pack and Auto-pack Master Options



(N) Shipping > Transactions (I) Flashlight Icon Search to find the Delivery Lines Select one or more Lines(B) Actions (M) Auto-pack or Auto-pack master (B) Go

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Containers > Auto-packing Delivery Lines into Containers

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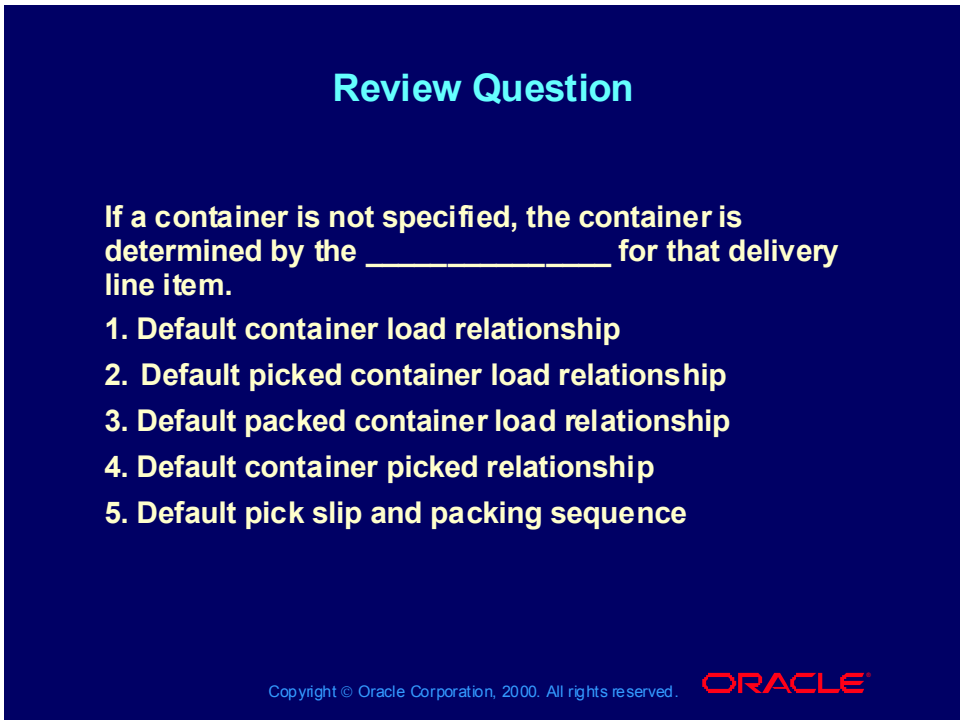

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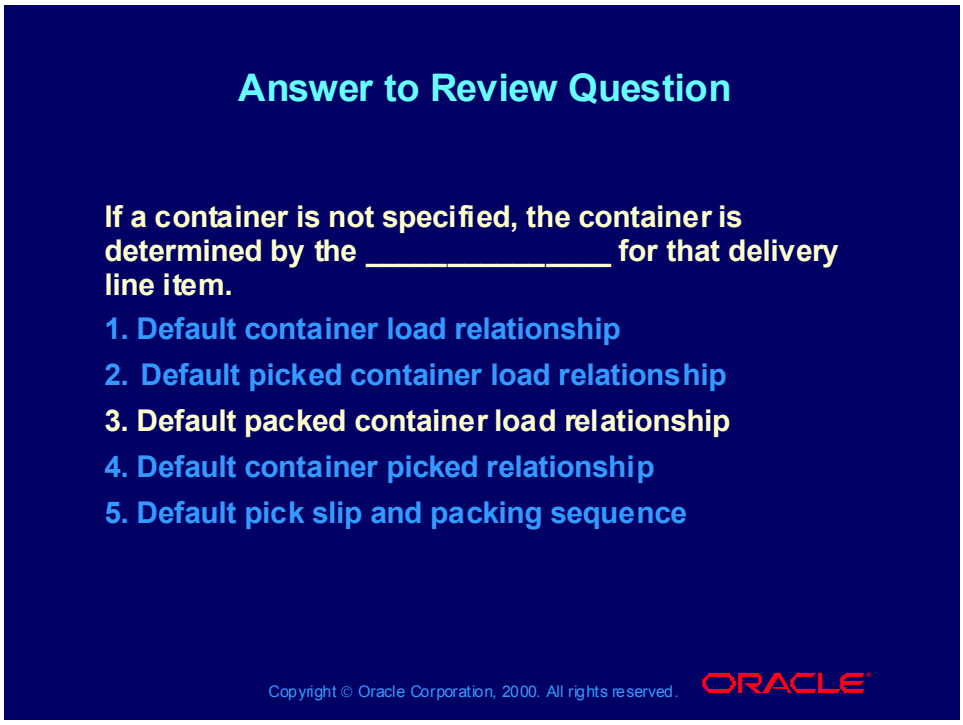

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Summary

In this course, you should have learned about:

- Concepts of Oracle Shipping Execution.
- Creating containers and use the item master
- Assigning freight costs to containers
- Packing Workbench
  - Equally pack delivery lines into containers
  - Sequentially pack delivery lines into containers
- Assigning and unassigning a container to/from a delivery
- Autopacking delivery lines into containers

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R11i Oracle Shipping Execution: Setup, Implementation and Upgrading

Chapter 6

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Objectives

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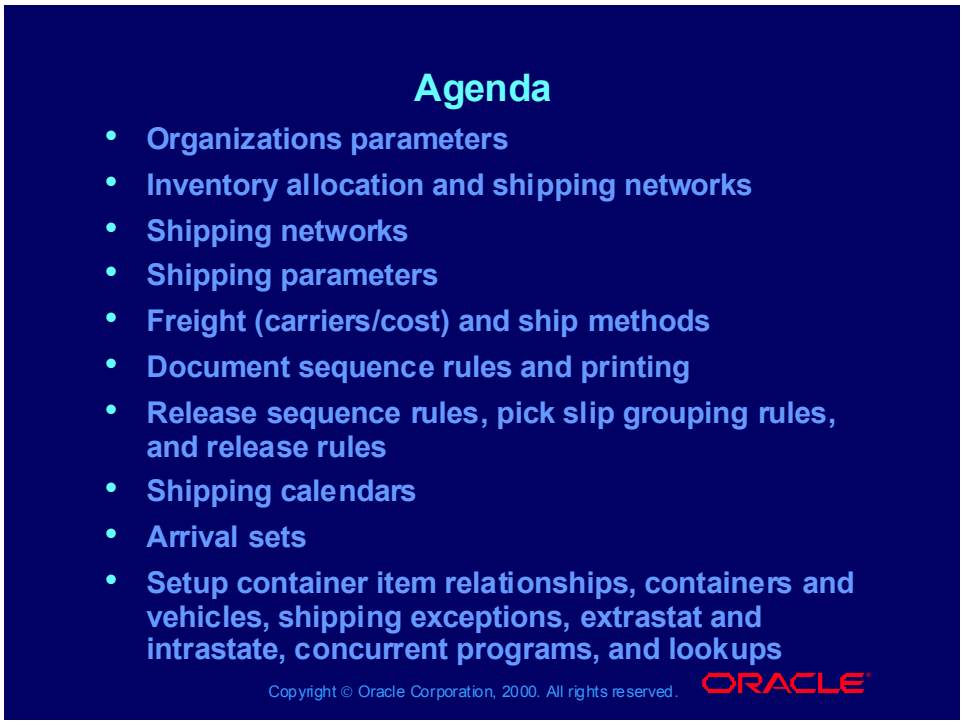
Agenda



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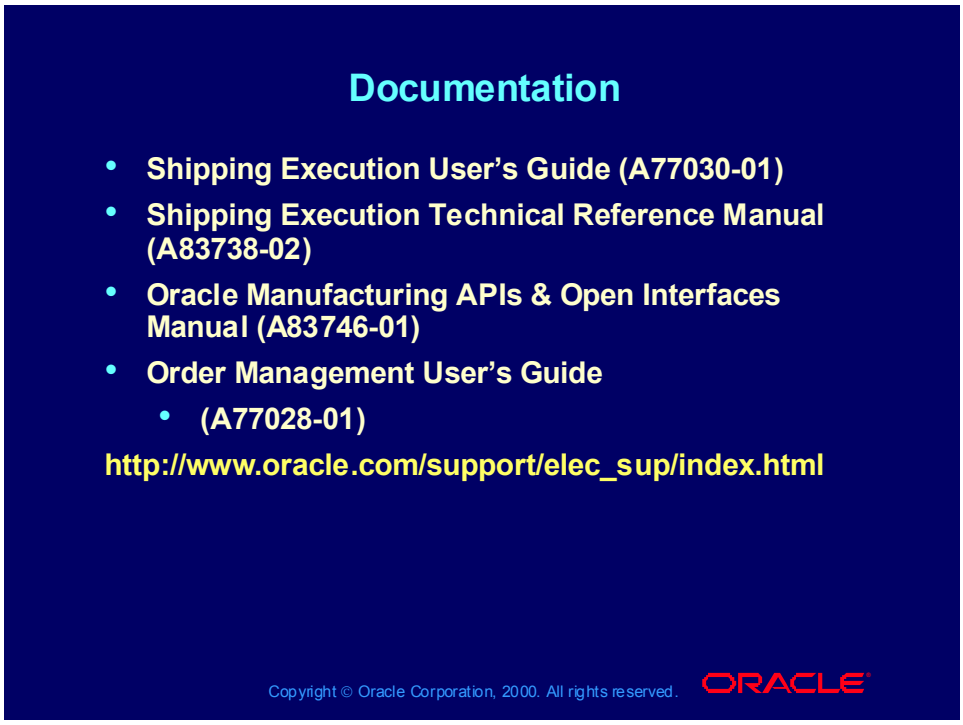

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Agenda

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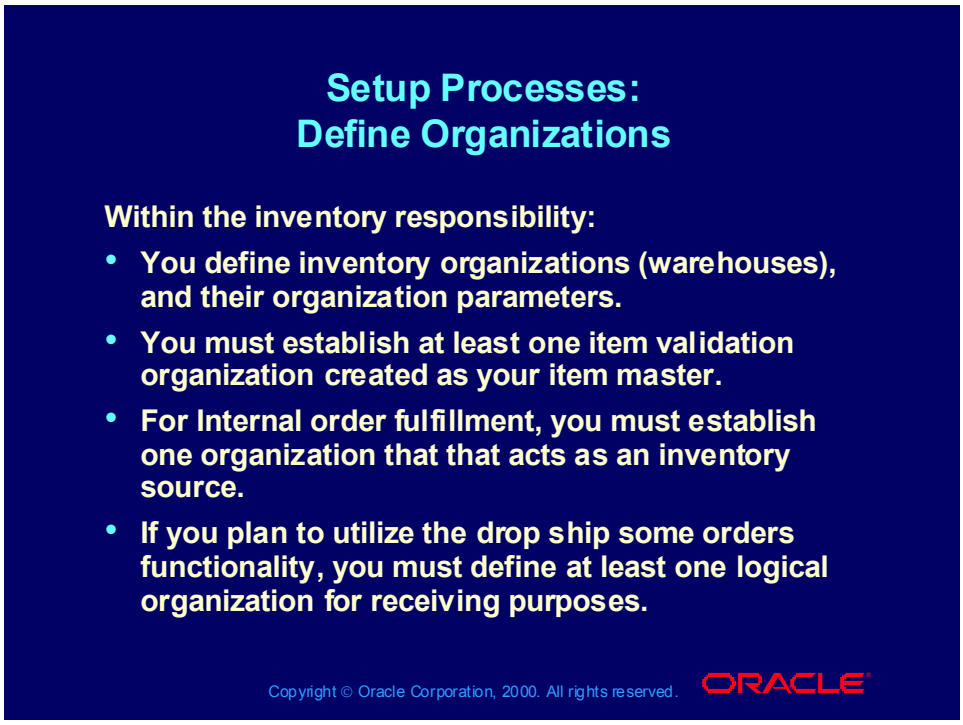

(N) Change Responsibility > Inventory > Setup > Organizations > Organization Parameters

(Help) Oracle Manufacturing Applications > Oracle Inventory > Setting Up > Inventory Structure > Defining Organization Parameters

Organizations are references as Shipping warehouses within the OM Suite of products. The are any organization that stores inventory and provide item transactions. They could be buildings, vehicles, or third party sites.

Each organization has tangent information that is tied to that Organization. They include: Set of Books, Legal Entity, Operating Unit, receiving Options, and Organization Parameters.

Every Organization is tied to an Item Master. The Item master is the organization that all items are created and maintained in.

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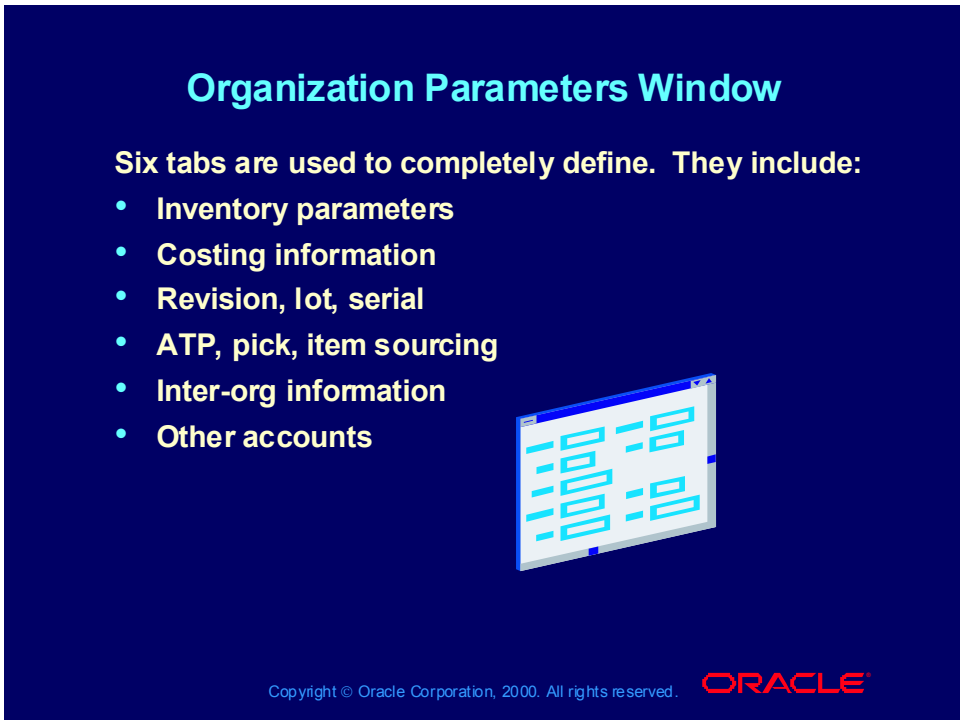
Organization Parameters Window



(N) Oracle Order Management > Shipping >Set up > Organization Parameters > ATP,Picking ,Item Sourcing tab

There is one setting within the Organization Parameters window that affects the behavior of the picking process in Oracle Shipping Execution.

That parameter is the “pick confirmation required” checkbox.

- If the “pick confirmation required” check box is checked in the ATP, Pick, Item Sourcing tab, the system requires that the user navigate to inventory forms to perform a manual pick confirmation of the move order that was generated as a result of the pick release process. The pick confirmation process acknowledges the transfer of the item being picked from its source location to the default staging location.
- If the “pick confirmation required” check box is unchecked (default) for new installs, the system performs the pick confirmation process automatically based on sourcing rules set up in Oracle Inventory.
- To emulate the picking processes from release 10.7 and 11.0, this check box should be unchecked.

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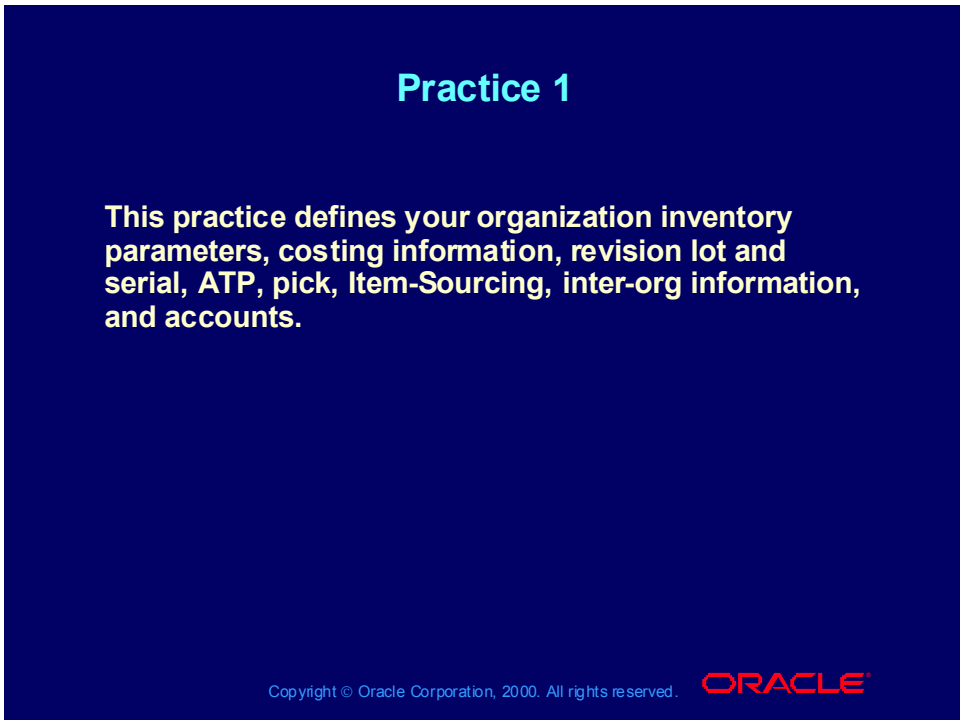

These setup steps may have already been defined for the vision database, but you need to confirm the correct settings. Make any of the required changes, but notify your system administrator that you have done so.

Note: XX is your initials

Define Organization Parameters

(N) Inventory > Setup > Organizations > Organizations

1. Enter XX as your organization name
2. Select plant as the type
3. Use the default date as the from
4. Select Calgary as the location
5. Use the default address
6. Save your work
7. In the organization classifications enter inventory organization as the name and make sure it is enabled
8. Save your work
9. Choose the Others button

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10. Select accounting information for the additional organization information from the LOV

11. Select Vision Operations for set of books, legal entity, and operating unit

12. Choose the Ok button

13. Save your work

14. Choose the Others button

10. Select inventory information for the additional organization information from the LOV

(T) Inventory Parameters

1. Enter XXas the organization code.

2. Select vision operations as the item master organization.

3. Select vision01 as the calendar.

4. Do not enable process.

5. Leave the demand class blank.

6. Enter 60 as the move order tmeout period.

7. Select approve automatically as the move order timeout action.

6. Select determined at subinventory level for locator control..

7. Enable allow negative balances.

(T) Costing Information

10. Cannot change the costing organization (controlled by costing attributes).

11. Verify that standard is the costing method.

12. Select summary as the transfer to GL.

13. Validation accounts region, select cash as the account alias then 01 (company)-000 (department)-1410 (account)-0000 (sub-account) 000 (product) as the material. Follow for 14-18)

14. Select 01-000-1450-0000-000 as the outside processing.

15. Select 01-000-1420-0000-000 as the material overhead.

16. Select 01-000-1430-0000-000 as the overhead.

17. Select 01-000-1440-0000-000 as the resource.

18. Select 01-520-7530-0000-000 as the expense.

(T) Revision, Lot, Serial

18.. Enter A as the starting revision.

19. Accept rest of the defaults

20. Enter 0001 is the starting serial number.

(T) ATP, Pick, Item-Sourcing

21. Select ATP, No DC as the rule in the ATP Defaults region.

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22. Select RevSub as the rule in the picking rules region.
23. Select supplier as the type in the item-sourcing detail region.

(T) Inter-Org Information

24. Enable predefined percent as 10%.
25. Select 01 (company)-520 (department)-5290 (account)-0000 (sub-account) -000 (product) as the transfer credit. Follow for 35-39)
26. Select 01-520-5210-0000-000 as the purchase price variance.
27. Select 01-000-1810-0000-000 as the receivable.
28. Select 01-000-2370-0000-000 as the payable.
29. Select 01-000-1460-0000-000 as the intransit inventory.

(T) Other Accounts

30. Select 01-520-5210-0000-000 as the purchase price variance.
31. Select 01-520-5220-0000-000 as the invoice price variance.
32. Select 01-000-2220-0000-000 as the inventory AP accrual.
33. Select 01-520-4110-0000-000 as the sales.
34. Select 01-520-5110-0000-000 as the cost of goods sold.
35. Save your work and close the window.
36. Choose the Others button.
37. Select receiving information.
38. Enter 5 as the days early.
39. Enter 5 as the days late.
40. Select warning as the action.
41. Enable all but allow blind receiving in the misc. region.
42. Select standard receipt as the receipt routing.
43. Select warning for both enforce ship to and ASN control action.
44. Enter 5 as the tolerance.
45. Select warning for the action.
46. Use the default action and type in the receipt number options region and enter 1001 as the next receipt number.
47. Enter 01.000.1410.0000.000 as the receiving inventory account.
48. Use the default account description.

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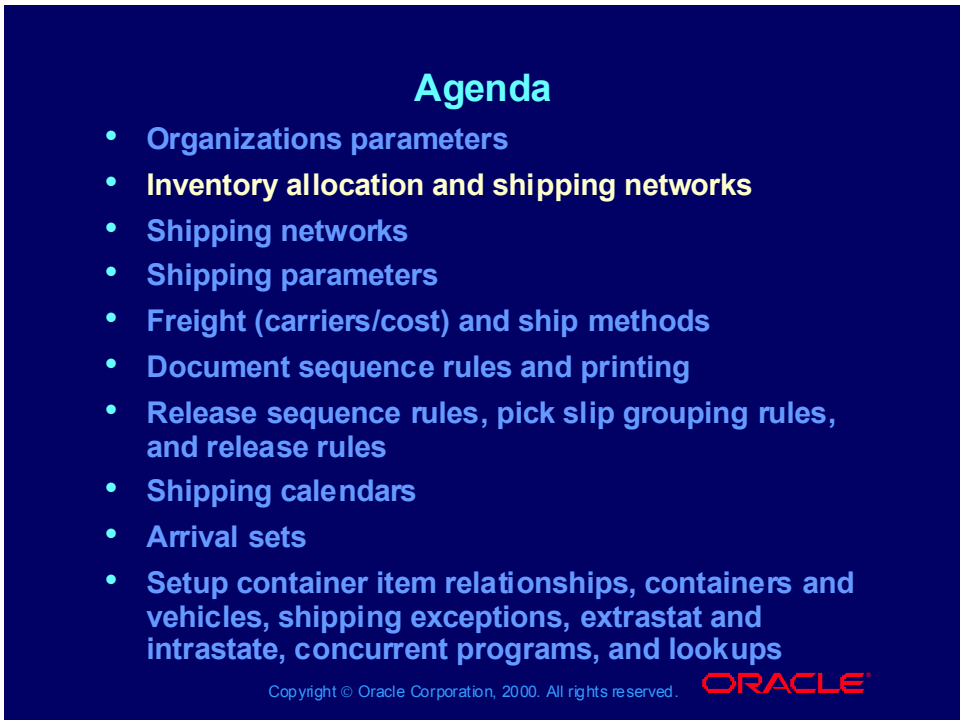
Agenda



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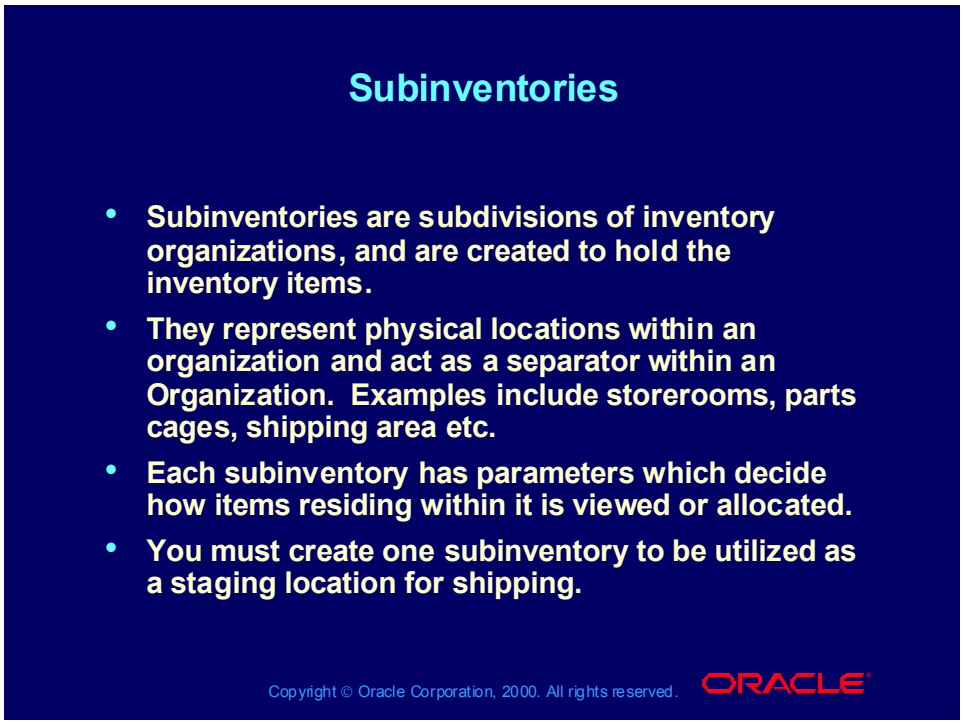
Subinventories



Specify characteristics about each subinventory.

Quantity Tracked Subinventory = Specify whether or not Oracle Inventory should store the quantity-on-hand information for the subinventory.

Asset Subinventory = Specify whether or not Oracle Inventory should include the subinventory items in valuation calculations.

Reservable Subinventory = Specify whether or not you can reserve items stored in the subinventory.

Nettable Subinventory = Specify whether or not Oracle Master Scheduling/MRP can include the subinventory items' on-hand balances as available inventory.

Include in ATP = Specify whether or not Oracle Inventory can include the subinventory items' on-hand balances in ATP calculations.

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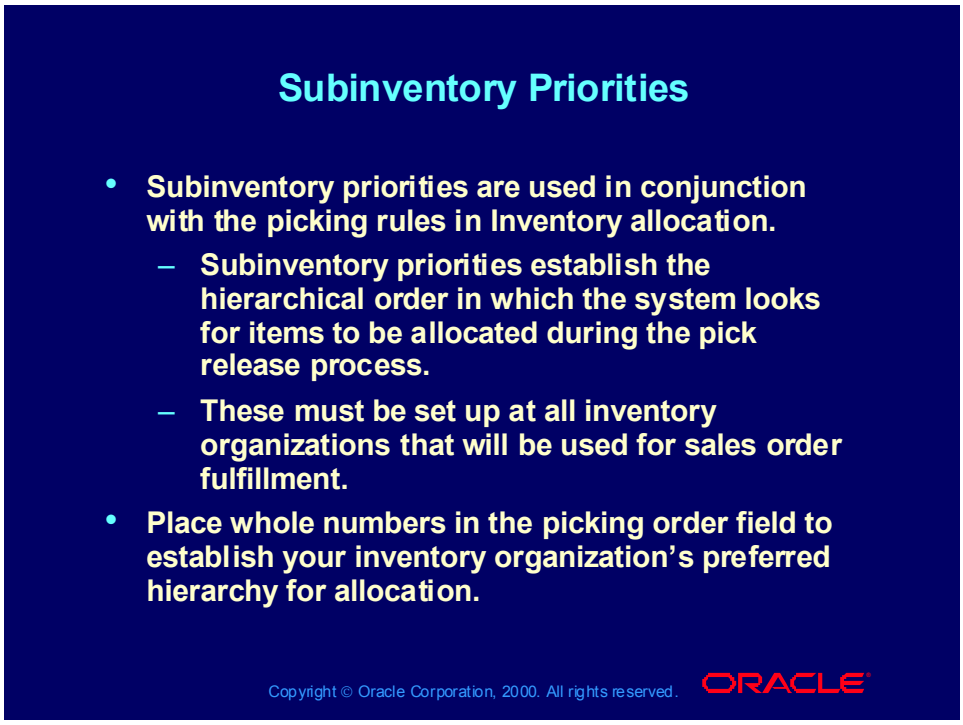
Subinventory Priorities



(N) Inventory > Setup > Organization> Subinventory

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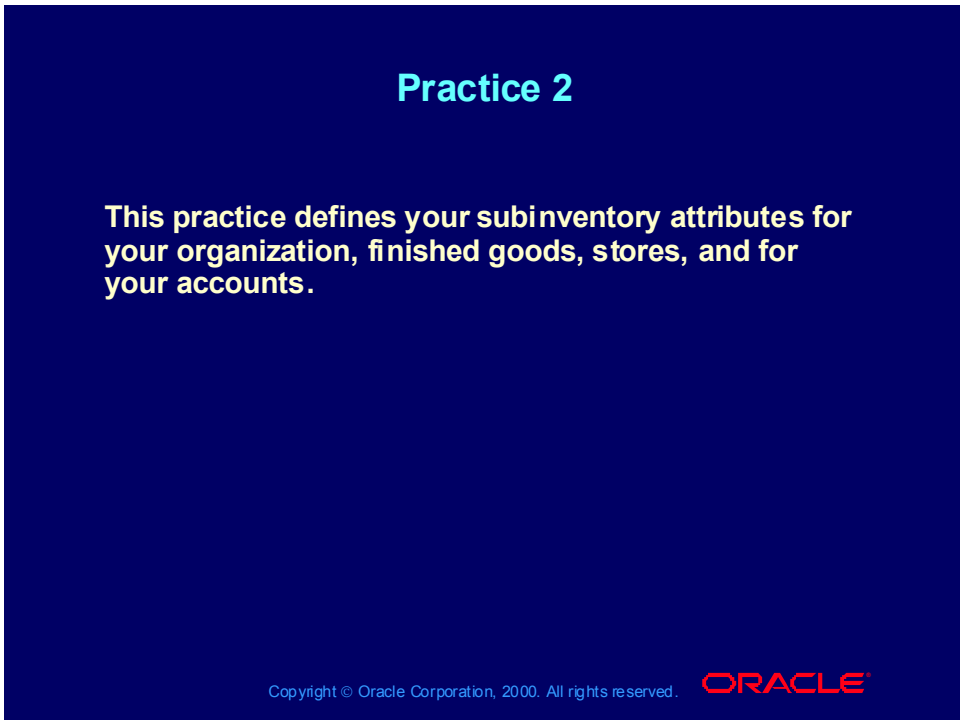

Define Subinventory

(N) Inventory > Setup > Organizations > Subinventories

1. Select XXas the organization.
2. Enter XX Finished Goods as the name.
3. Enter XX Finished Goods as the description.
4. Enter XXStores as the name.
5. Enter XXStores as the description.

(T) Main for XX Finished Goods.

6. Make sure the following is enabled: quantity tracked, asset subinventory, depreciable, include in ATP, allow reservation, and nettable.
7. Select none for locator control.
8. Enter 1 as the picking order.

(T) Main for XXStores

6. Make sure the following is enabled for both XXStores: quantity tracked, asset subinventory, include in ATP, allow reservation, and nettable.
7. Select none for locator control.

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8. Enter 2 as the picking order.

(T) Account for both XX Finished Goods and XXStores

Material	01.000.1410.0000.000	01.000.1410.0000.000
Outside Processing	01.000.1450.0000.000	01.000.1450.0000.000
Material Overhead	01.000.1420.0000.000	01.000.1420.0000.000
Overhead	01.000.1430.0000.000	01.000.1430.0000.000
Resource	01.000.1440.0000.000	01.000.1440.0000.000
Expense	01.520.7530.0000.000	01.520.7530.0000.000

10. Save your work

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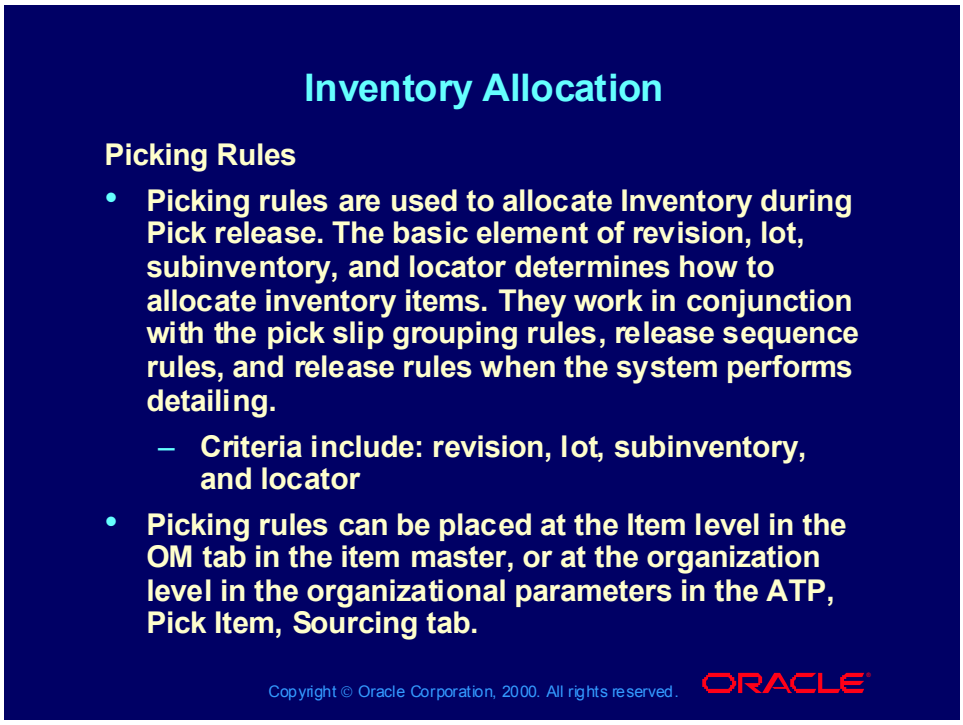

(N) Inventory > Setup > Rules > Picking

- Revision choices are revision, effective date, and none
- Lot choices include: none, expiration date, receipt date, and lot number
- Subinventory choices are: none, subinventory, and receipt date.
- Locator choices include: none, locator, and receipt date.

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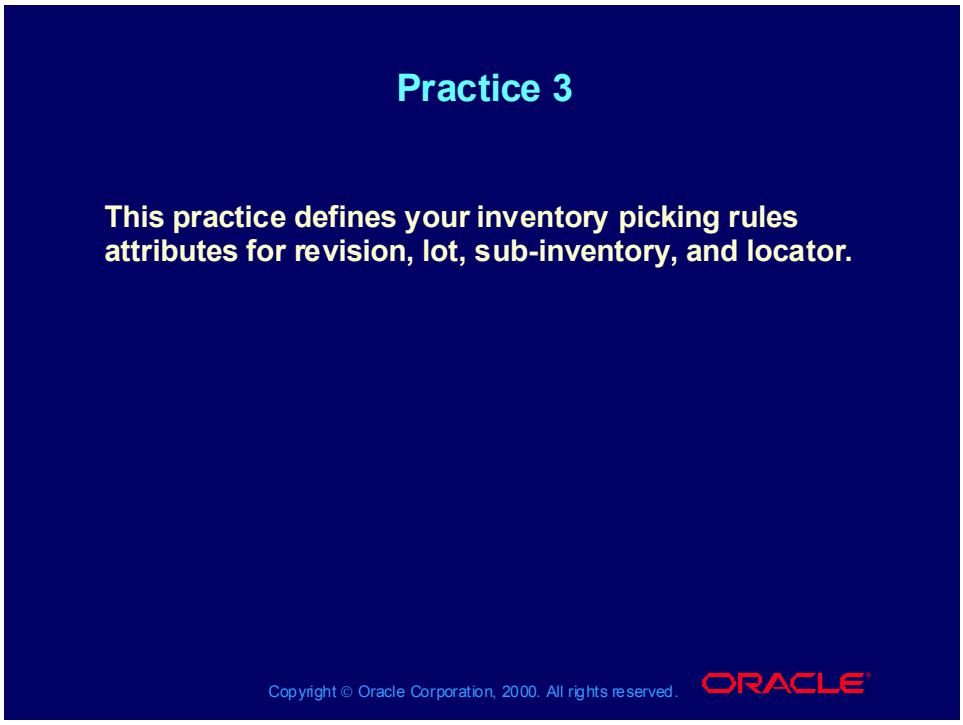

Define Picking Rules

(N) Inventory > Setup > Rules > Picking

1. Enter a name for your rule XX
2. Enter a description for your rule
3. Select revision for revision
4. Select none for lot
5. Select subinventory for subinventory
6. Select locator for none

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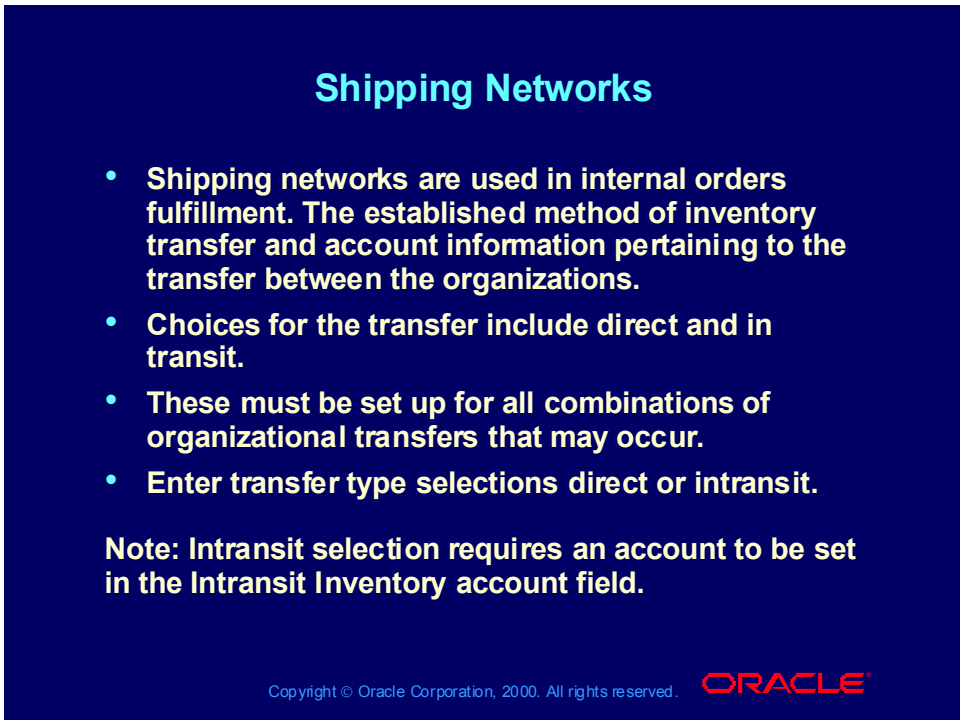

(N) Inventory > Setup > Organization > Shipping Networks

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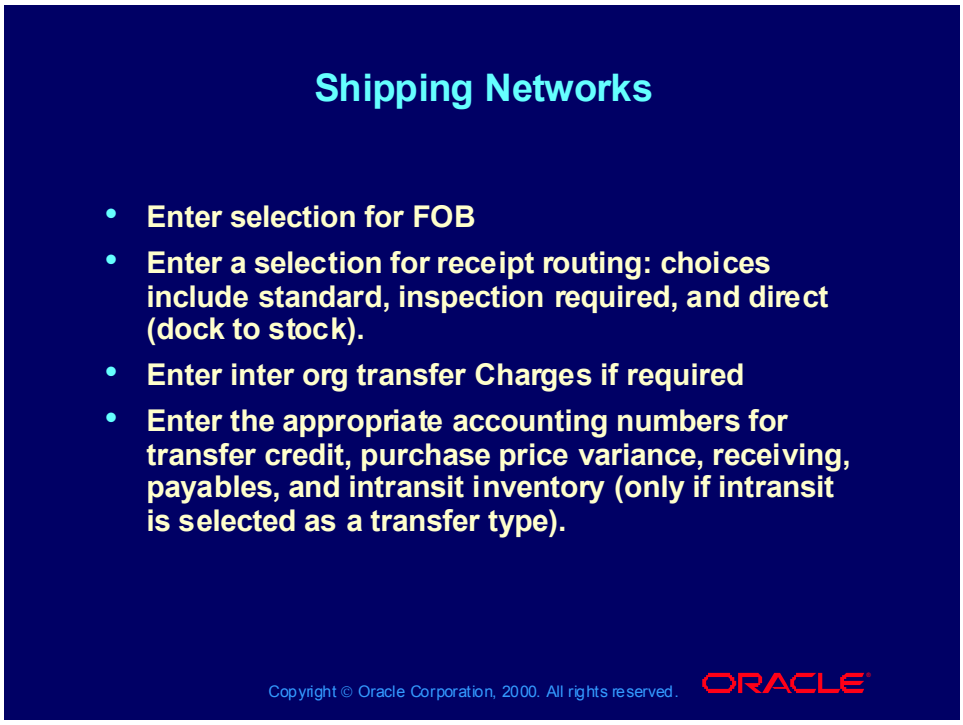

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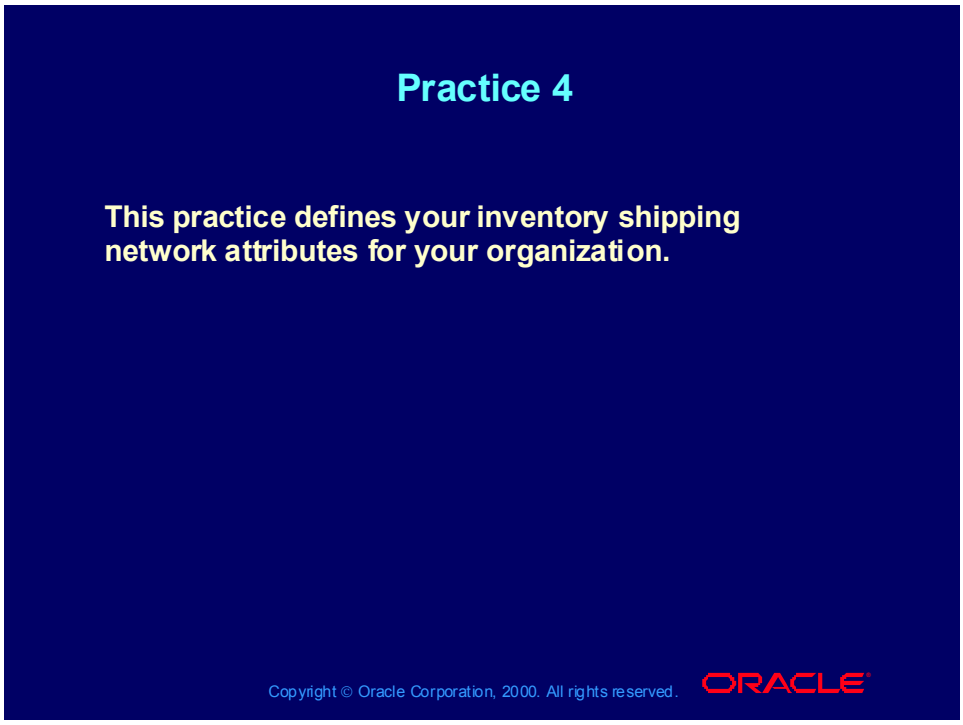

Define Shipping Networks

(N) Inventory > Setup > Organization > Shipping Networks

1. Select XXas the from organization.
2. Select M1 as the to organization.
3. Use the rest of the defaults.
4. Save your work.

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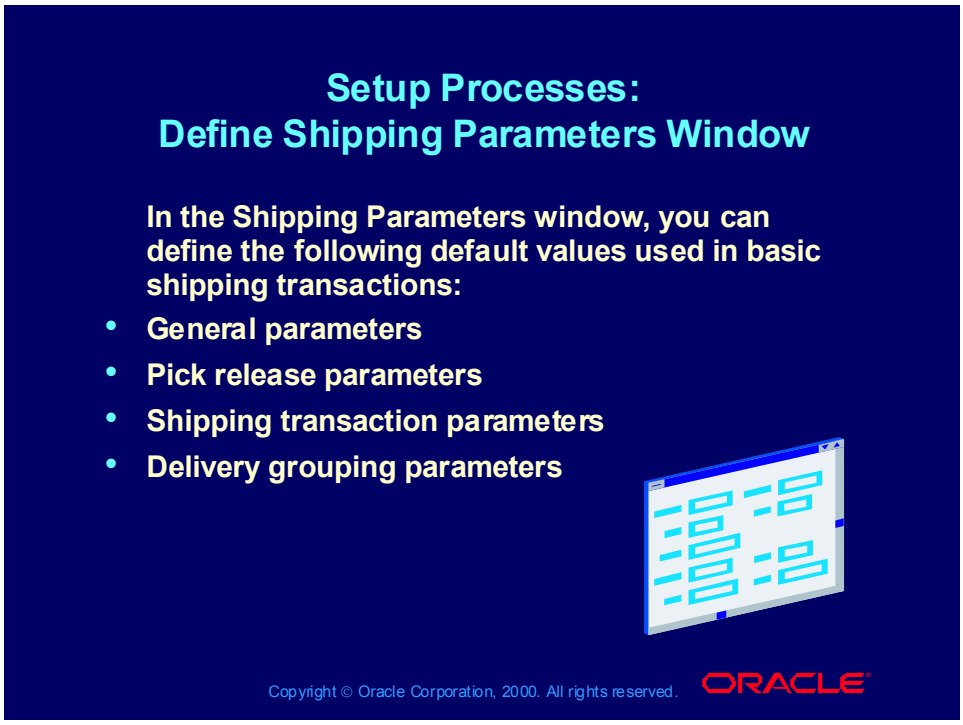
Setup Processes: Define Shipping Parameters Window



(N) Shipping > Setup > Shipping Parameters

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Setting Up > Defining Shipping Parameters

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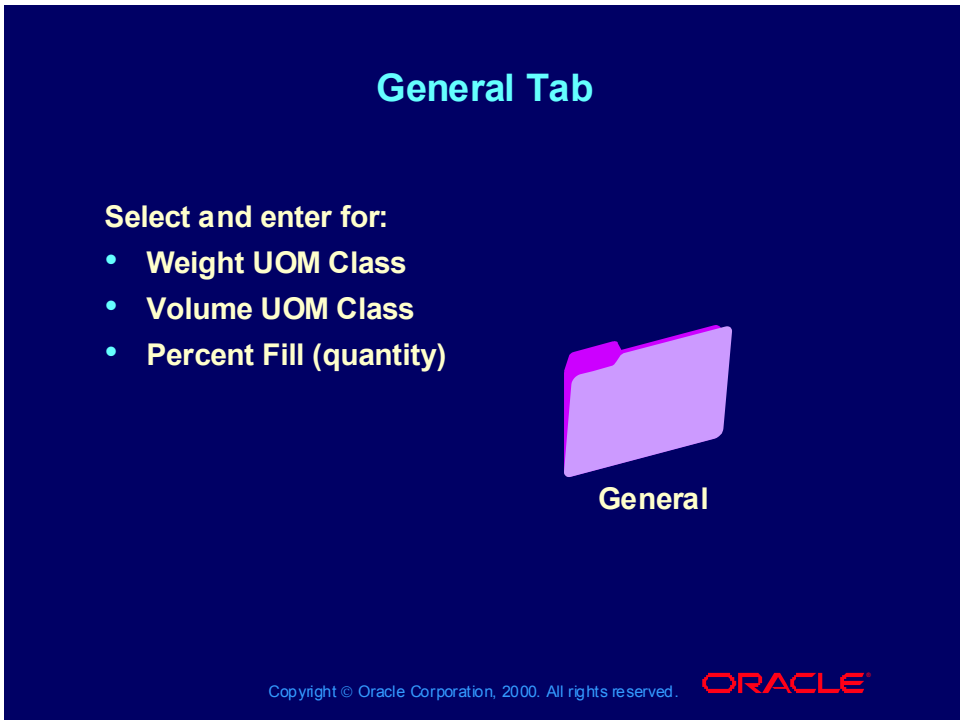
General Tab



(N) Shipping > Setup > Shipping Parameters

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Setting Up > Defining Shipping Parameters

Shipping parameters are specific to an organization. The General tab represents the parameters to be set for the organization related to UOM class for shipping attributes in the org and percent fill basis of containers used in the organization.

There are three parameters to be set on the tab.

1) Weight UOM class. The choices in the LOV are all the valid UOM classes that are set up in Oracle Inventory.

2) Volume UOM class. The choices in the LOV are all the valid UOM classes that are set up in Oracle Inventory.

3) Percent fill basis. The choices in the LOV are weight, volume or quantity.

- If weight or volume is chosen for this parameter, the calculation will be made from the item's and container's physical attributes set up in Oracle Inventory.
- If quantity is chosen for this parameter, the calculation is made based on the container load details set up from where a quantity is entered as the maximum amount that will fit into the container.

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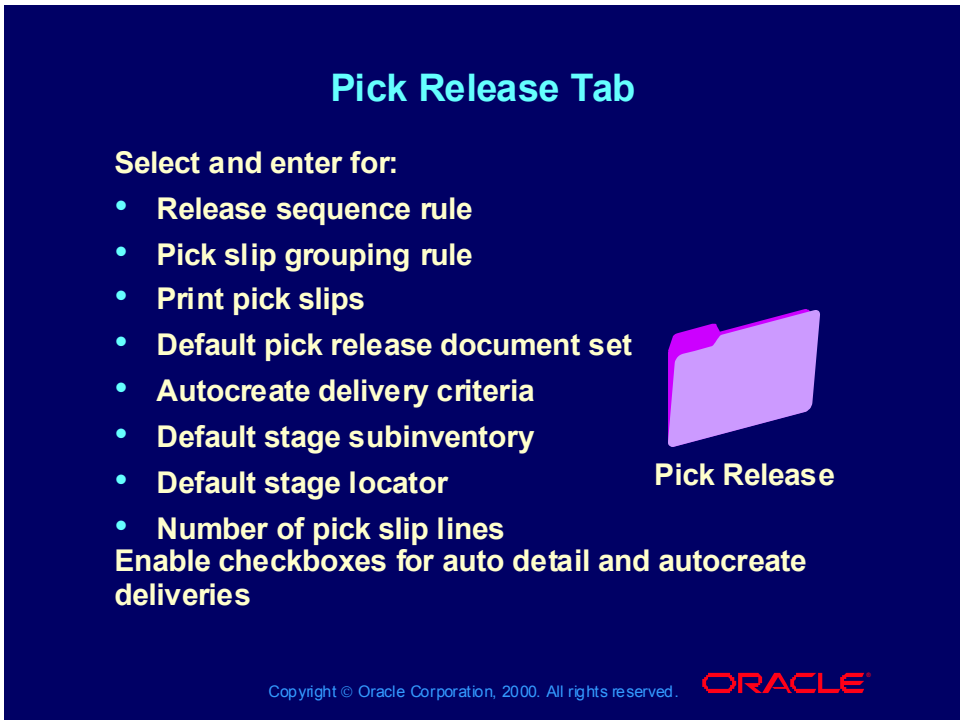
Pick Release Tab



(N) Oracle Order Management > Shipping >Set up > Shipping Parameters.

1) Release Sequence Rule: The choices in the LOV are all the valid release sequence rules that are set up in the organization. The chosen rule will appear as the default Release Sequence Rule in the Release Sales Order window. It is recommended that you use the release sequence rule that is most frequently used for this parameter setting. Though this is the default rule that populates the Release Sales Order window, the rule can be changed on the fly to accommodate the pick release process.

The Pick Release tab sets most of the parameters that relate to the pick release process. The following are the parameters are to be set in this window, their corresponding values and the meaning of those values.

2) Pick Slip Grouping Rule: The choices in the LOV are all the valid pick slip grouping rules that are set up in the organization. The chosen rule will appear as the default Pick Slip Grouping Rule in the Release Sales Order window. It is recommended that you use the Pick Slip Grouping rule that is most frequently used for this parameter setting. Though this is the default rule that populates the Release Sales Order window, the rule can be changed on the fly to accommodate the pick release process.

3) Print Pick Slip. The choices in the LOV are “At the End” or “Immediate”

- If “At the End” is chosen for this parameter, the system will wait for the all pick slips that were create from the pick release job to finish before sending them to a printer to be printed.

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- If “Immediate” is chosen for this parameter, the system will send a pick slip immediately to the printer regardless of whether more pick slips are in the pick release job to be completed.
- Instructor Note:

It is recommended that Immediate be chosen as it has less impact on system resources.

4) Default Pick Release Document Set: The choices in the LOV are all the document sets that have been set up. This is the document that will print resulting from any initiated pick release process.

5) Autocreate delivery within an order: The choices in the LOV are, “Within an Order” and “Across Orders”

- If “Within an Order” is chosen, the autocreate delivery process will create deliveries from the selected order lines or lines meeting the release criteria based on the order number and standard delivery grouping attributes. i.e. The system will automatically create a delivery for each order number released and only assign lines with that order number to that delivery.
- If “Across Order” is chosen, the autocreate delivery process will create deliveries from the selected order lines or lines meeting the release criteria based on the standard delivery grouping attributes. i.e., If multiple lines from multiple order numbers are all shipping to the same customer/ship to combination, the system will automatically create one delivery during the pick release process and assign all lines to that delivery.
- 6) Default Stage Subinventory: The choices in the LOV are all the valid subinventories within the inventory organization where you are working. This is the Sub inventory that an order line will reside in as a result of the manual or auto pick confirm process.
- 7) Default Stage Locator: The choices in the LOV are all the valid row, rack, bin locators within the inventory organization where you are working. This is the locator that an order line will reside in as a result of the manual or auto pick confirm process.
- 8) Number of Pick Slip Lines: This parameter allows the user to determine the number of lines that will print on each pick slip. This is a free window field where the user can enter any number. This parameter should be used in conjunction with the Print Pick Slip Immediately parameter to get the Pick Slip document prior to the pick slip job completing.
- 9) Auto Detail Check box:
- When this box is checked: The system automatically creates a move order and details that move order immediately after it is created. “Detailing” is the process of creating a high level (organization level) Reservation on the material if no Reservations previously existed.
- When this box is unchecked: The system automatically creates a move order but postpones the detailing process. This is referred to as “manual-detailing” where the user will need to navigate to Oracle Inventory forms to complete the transaction.

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- Instructor's Note:

To emulate the pick release process from Release 10.7 and 11.0 this check box should be checked.

10) Auto Create Deliveries Check box:

- When this box is checked: the system automatically creates deliveries and assigns them to selected lines from the same organization the parameter represents. When launching pick release from the Shipping Transaction window, the system checks this parameter. When releasing lines from the Release Sales Order window, the Auto Create Deliveries check box in the window will default to the parameter setting as soon as a warehouse is entered in the inventory tab. If a warehouse is not entered, the system will look at the warehouse on the line to determine behavior.
- When this box is unchecked: the system will not automatically create deliveries for selected lines that are releasing from the organization the parameter represents.

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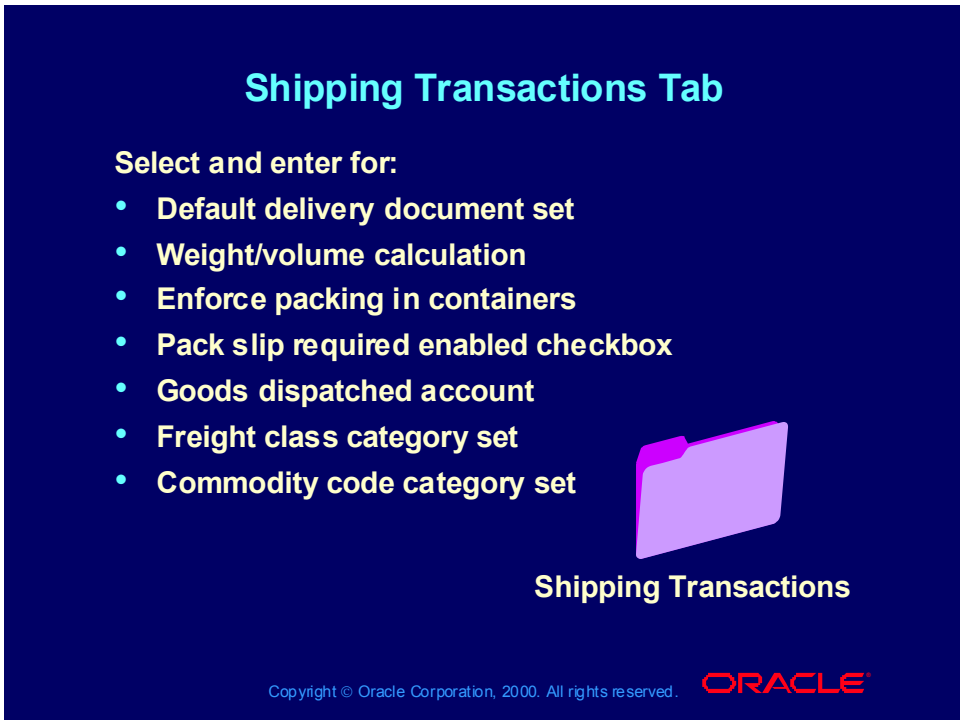
Shipping Transactions Tab



(N) Oracle Order Management > Shipping >Set up > Shipping Parameters.

The Shipping Transaction tab sets the parameters that relate to the functionality in the Shipping Transaction window. The following are the parameters to be set in this window, their corresponding values and the meaning of those values.

1) Default Delivery Document Set: The choices in the LOV are all the valid Delivery Document sets. This is the document set that will print as a result of shipment confirmation. It usually consists of the bill of lading, Packing List, and if it is an international shipment, commercial invoice.

2) Weigh /volume calculation : The choices in the LOV are “automatic” and “manual”

- If “automatic” is chosen, the weight and volume will be automatically calculated when a delivery status is set to confirmed.
- If “manual” is chosen, the weight and volume for a delivery can only be calculated from the action menu. Instructor Note

3) Enforce Packing in Containers: The choices in the LOV are “yes” and “no”.

- If “Yes” is chosen, an warning message will appear during ship confirmation if any item in a delivery is not assigned to a container. This message can be bypassed to complete the shipment if necessary.
- If “No” is chosen, the system will not check to see that all items in a delivery are assigned to a container.

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4) Container Inventory Control: This is a non-operational parameter that has no impact to container functionality. It is intended to support future functionality.

5) Pack Slip Required Check Box.

- If this box is checked, the system checks to see that a pack slip is printed for the delivery. An error message will appear if a packing slip is not created.
- If this box is unchecked, the system will not check to see that a packing slip has been generated.

6)Goods Dispatched Account: This is also known as the Cost of Goods Sold Account to use for this organization and is used if the OM workflow cannot determine one for the sales order issue transaction.

7) Freight Class Category Set: This parameter has no functionality in the current release.

8) Commodity Code Category Set: This parameter has no functionality in the current release.

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Delivery Grouping Tab

Delivery Grouping Tab

Enable checkboxes for:

- **Ship from location**
- **Customer**
- **Freight terms**
- **FOB code**
- **Ship to location**
- **Intermediate ship to location**
- **Ship method #**
- **Carrier**

Delivery Grouping

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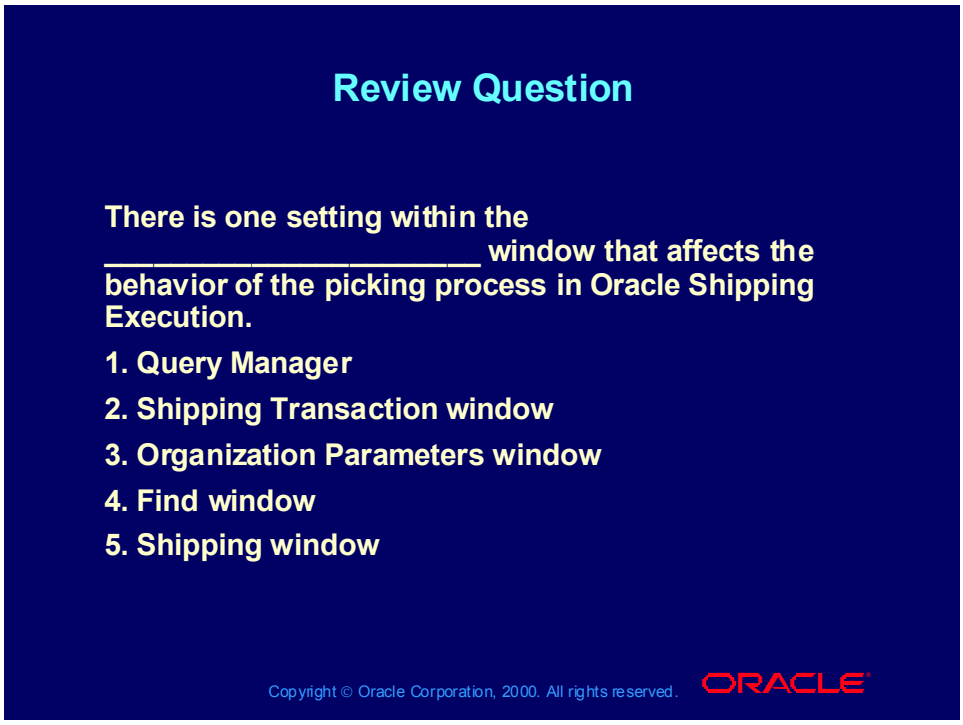

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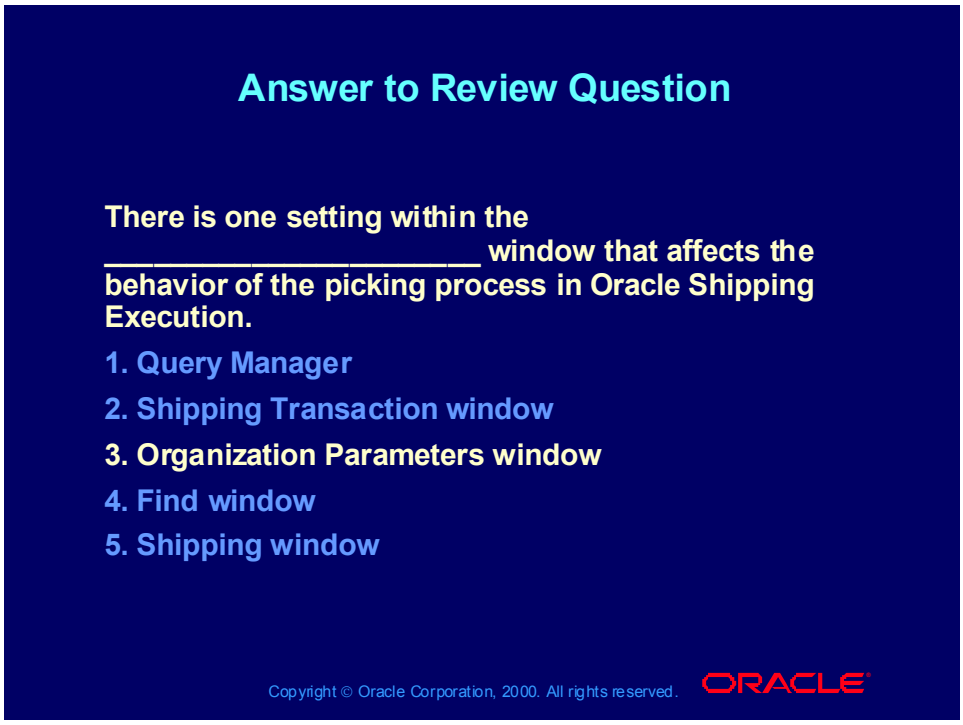

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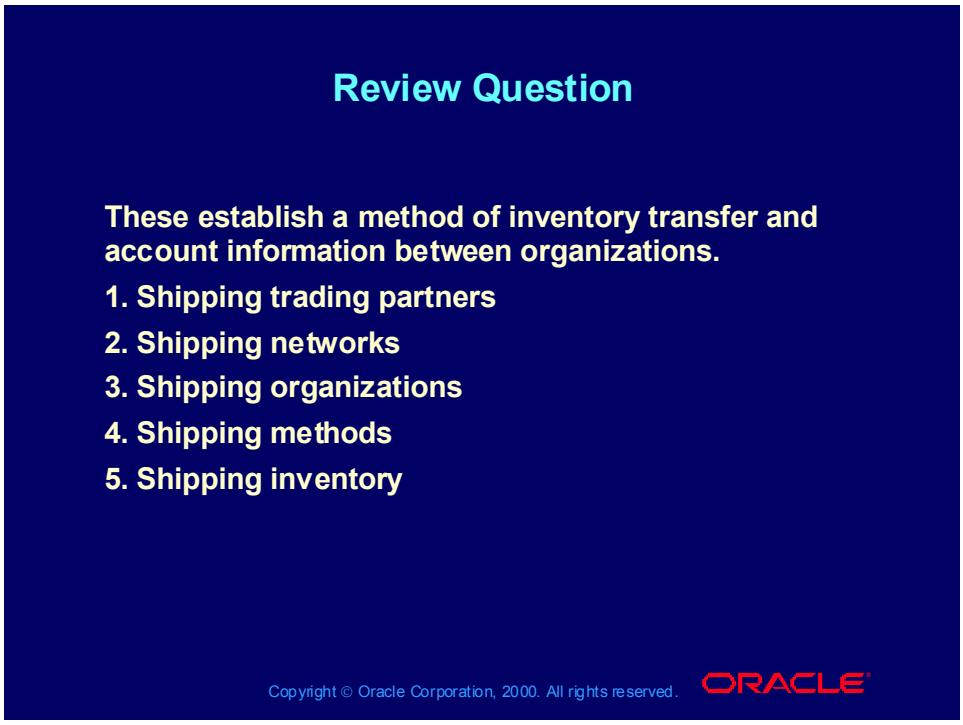

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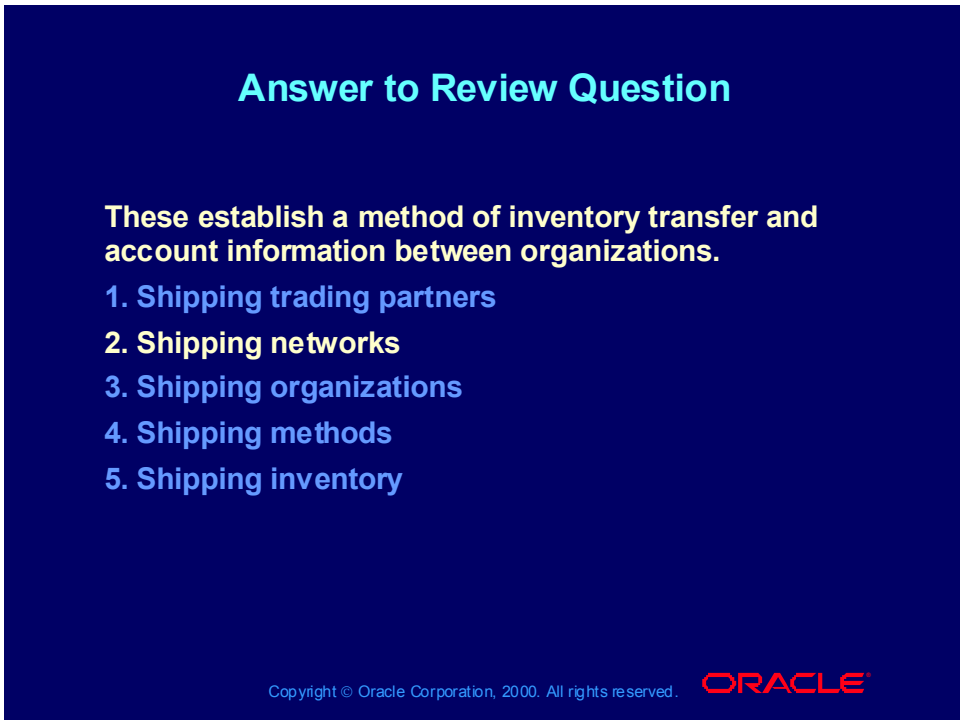

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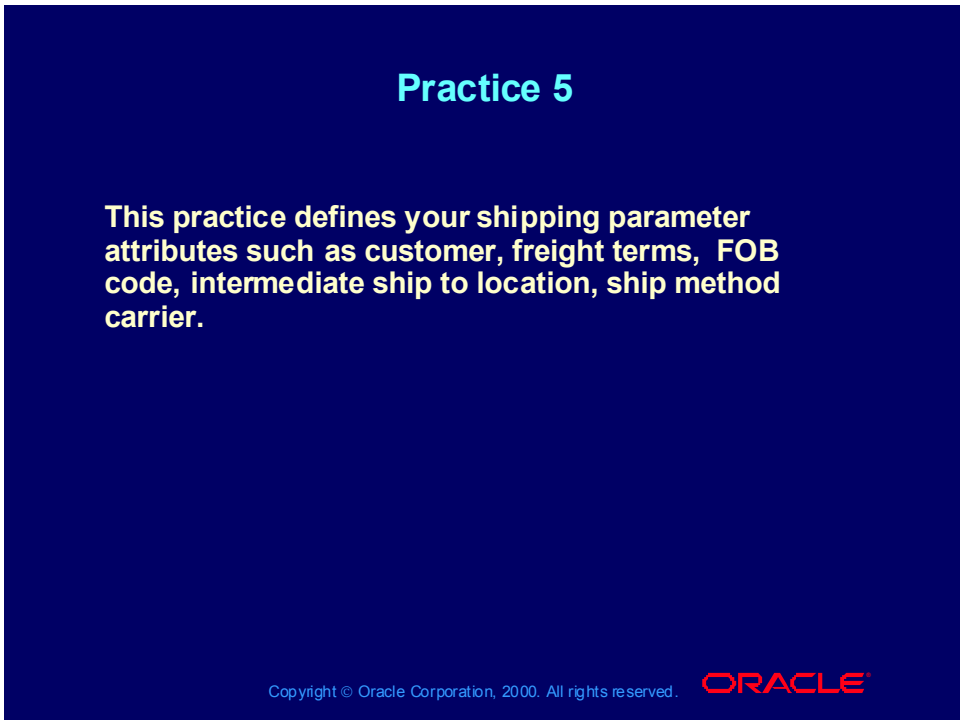

(N) Oracle Order Management > Shipping >Set up > Shipping Parameters.

The Delivery Grouping tab sets all the parameters that relate to the criteria for grouping lines into deliveries. Mandatory grouping criteria consists of Ship from Location and Ship to Location. The system looks at this parameter when autocreating deliveries and assigning lines to them and when a user is manually assigning lines to deliveries. Additional criteria consists of:

1) Customer

2) Freight Terms

3) FOB Code

4) Intermediate Ship To Location

5) Ship Method

7) Carrier

Note: These should not be changed if there are any deliveries that are not ship confirmed. This might cause some problems with the unshipped deliveries. Currently, there is no validation to prevent this.

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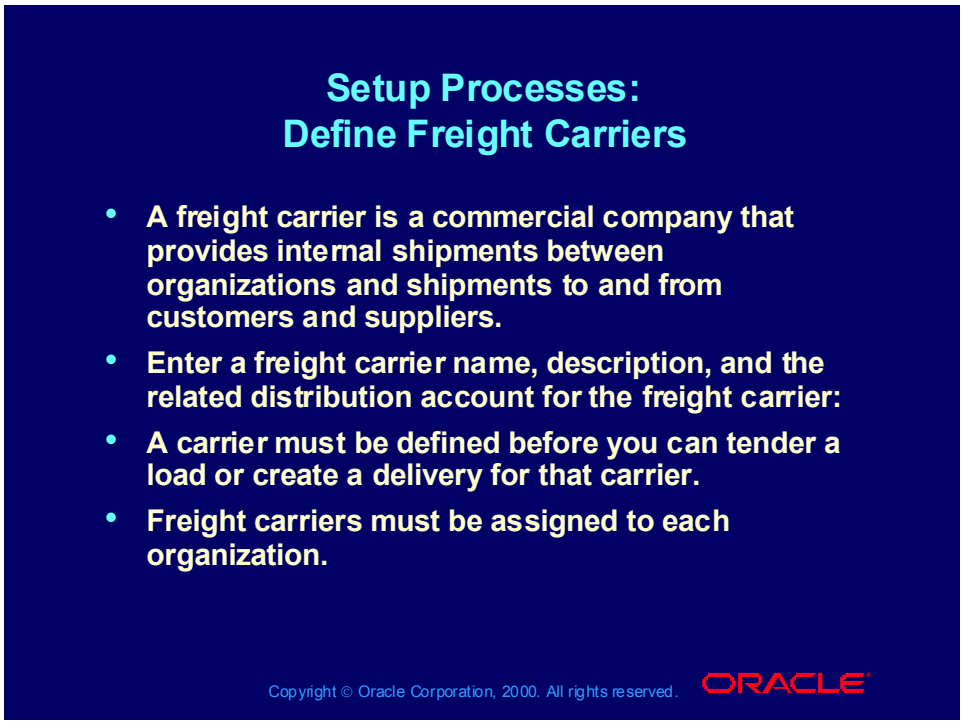
Setup Processes: Define Freight Carriers



(N) Shipping > Setup > Freight > Define Freight Carriers

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Setting Up > Defining Shipping Parameters > Defining Freight Carriers

Currently the applications product captures the ship method code in two different places (both as lookups in Order Management and Inventory). These are going to be standardized to one lookup. The application also supports organization specific freight carriers which are validated as freight codes which store the distribution account for invoicing.

- Click on + key to create a new line (alternatively, go to the File menu and choose New)
- Enter Name of the freight carrier
- Enter Description of the freight carrier
- Enter Distribution Account Number
- If applicable, enter Inactive after date

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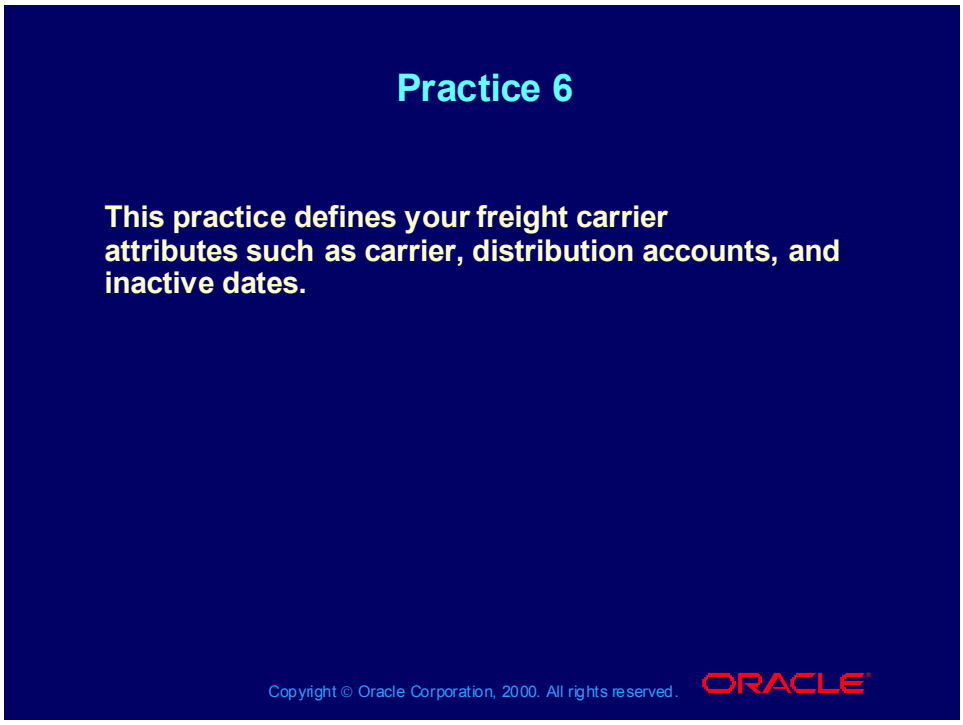

Define Freight Carriers

(N) Shipping > Setup > Freight > Define Freight Carriers

1. Enter freight carriers name e.g., UPS, DHL.
2. Enter a description for the carrier.
3. Select 01-000-1460-0000-000 as the distribution account.
4. Leave inactive after date blank.
5. Save your work.

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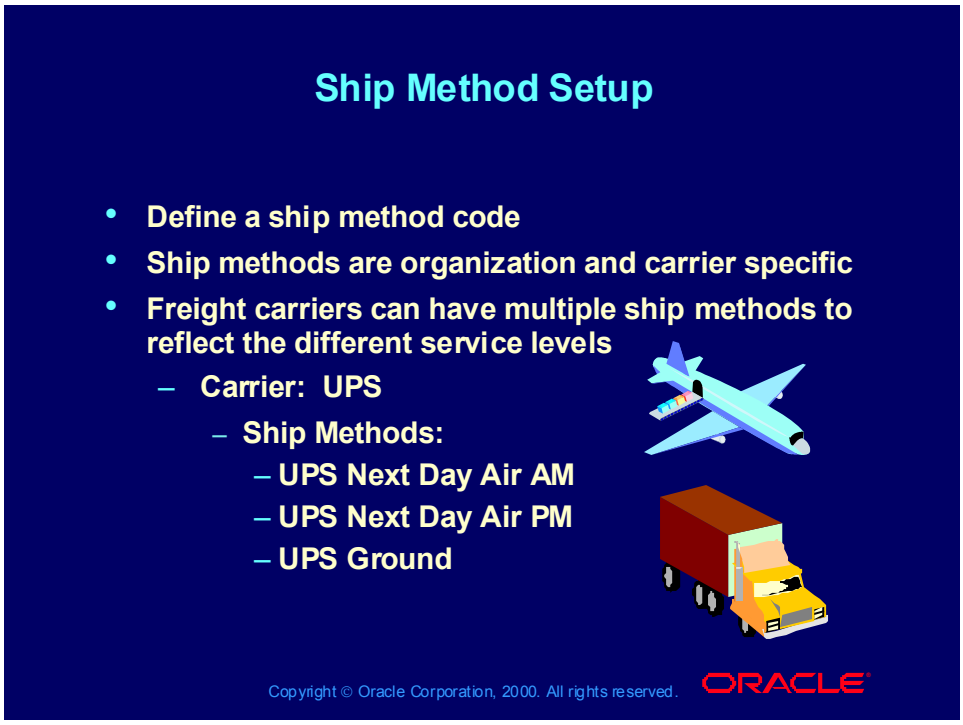
Ship Method Setup



There is a need to provide a mechanism to determine valid freight codes from ship methods. Order Management will capture the ship methods from which the appropriate freight code can be determined by shipping and subsequently used in invoicing. A given ship method for an organization must map to one freight code for the same organization.

The Carrier Ship Method Setup window allows users to enter data to define what kind of ship method the carrier will provide.

Establish mapping relationship between freight carriers, ship methods and vendors (carriers) for their organizations.

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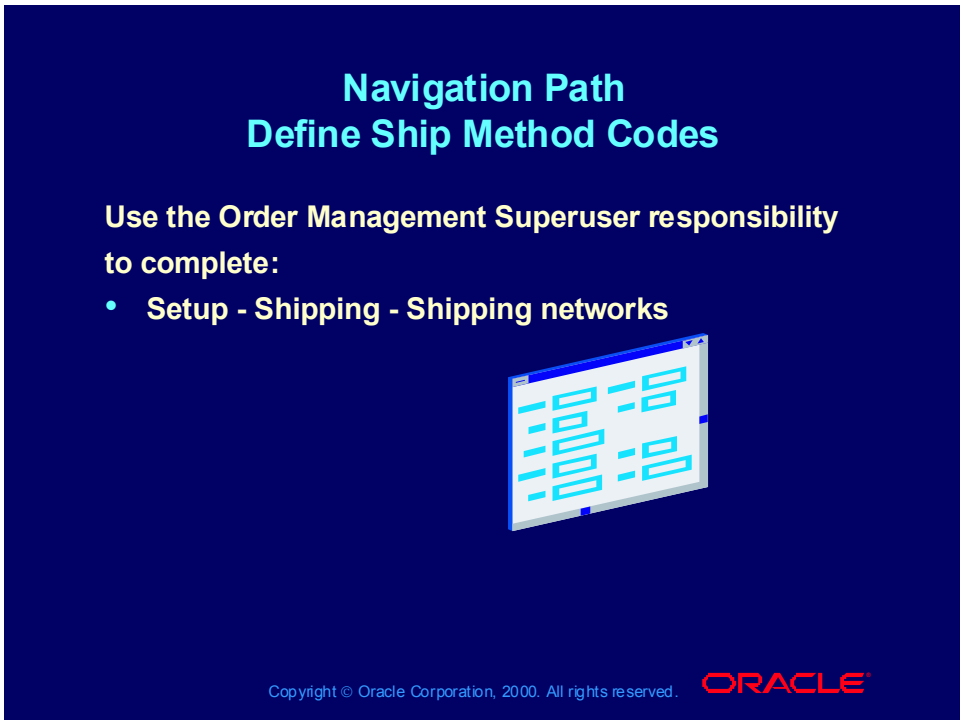
Navigation Path Define Ship Method Codes



Application Utilities: Ship Method Lookup

- Click on + key to create a new line (alternatively, go to the File menu and choose New)
- Enter name of the Ship Method Code
- Enter Meaning of the Ship Method Code
- Enter Description of the Ship Method
- If applicable, enter End Effectivity Date

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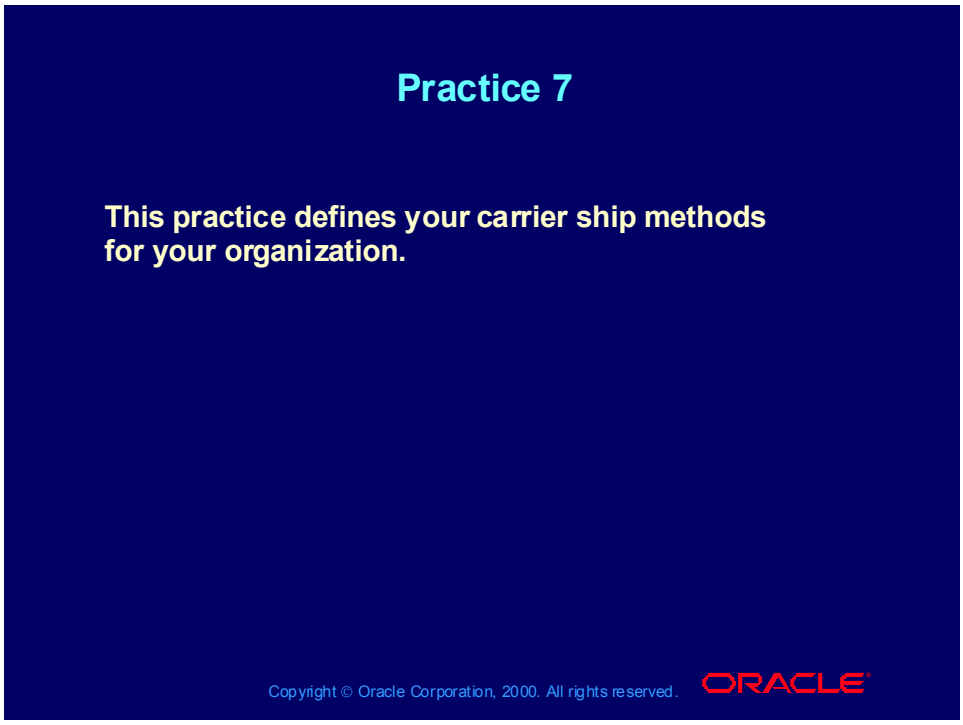

Define Freight Carrier Ship Method

(N) Shipping > Setup > Freight > Define Carrier Ship Methods

1. Select truck as the ship method
2. Select XXas the organization
3. Select UPS as the freight carrier
4. Enable entry
5. Save your work

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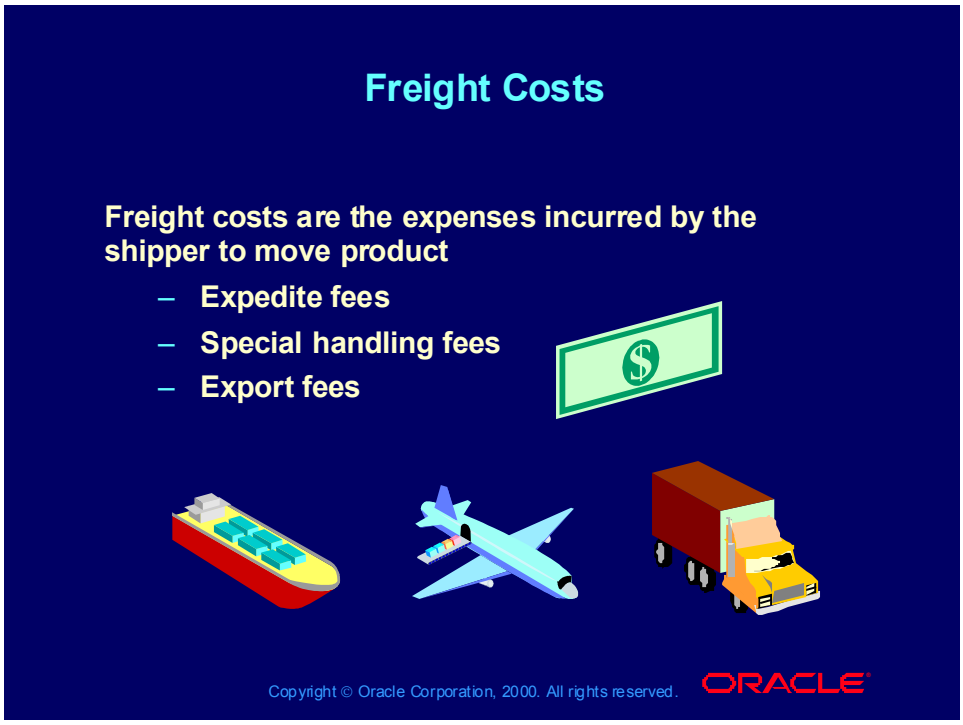

Define Freight Costs

(N) Shipping > Setup > Freight > Define Freight Cost Types

1. Enter XX as a charge name
2. Select a Freight Cost type from the LOV. (These are creates by Lookup = FREIGHT_COST_TYPE
3. Select USD as the currency
4. Amount = Default value to be used
5. Map to Charge= establishes weather or not this cost will be mapped to freight charges that are defined as modifiers with in Oracle Pricing

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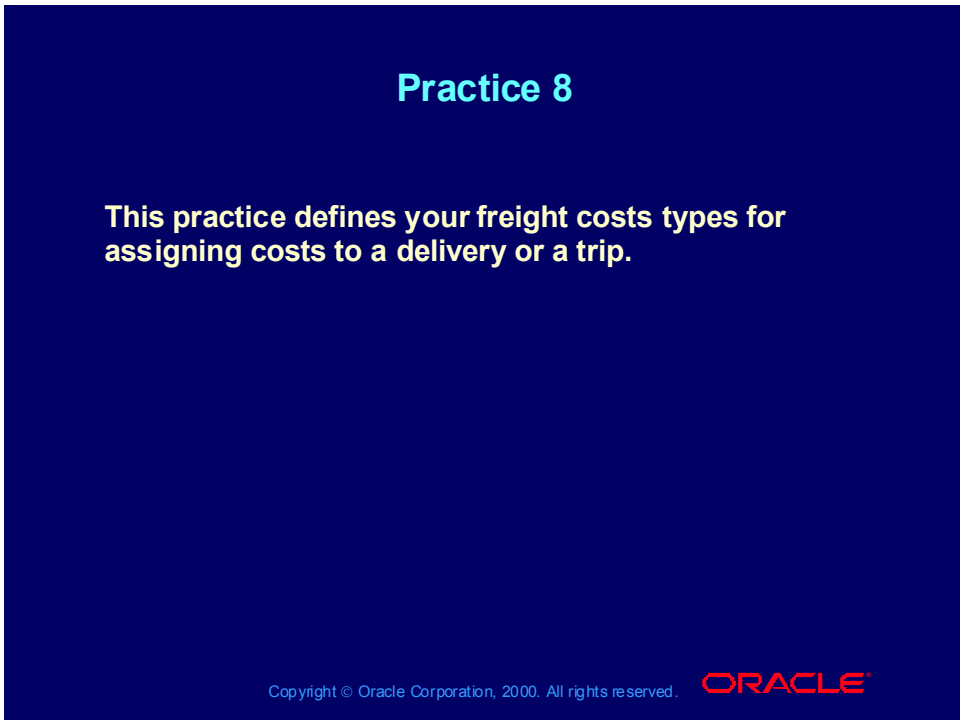

Define Freight Costs

(N) Shipping > Setup > Freight > Define Freight Cost Types

(Also referenced in Trip, Delivery, and Container Management courses)

Enter the following data for freight costs

Name	Type (LOV)	Currency (LOV	Amount
AGI	Insurance	USD	100
Customs duty	Duty Fees	USD	100
Admin	Admin Fees	USD	100

Enable map to charge and save you work.

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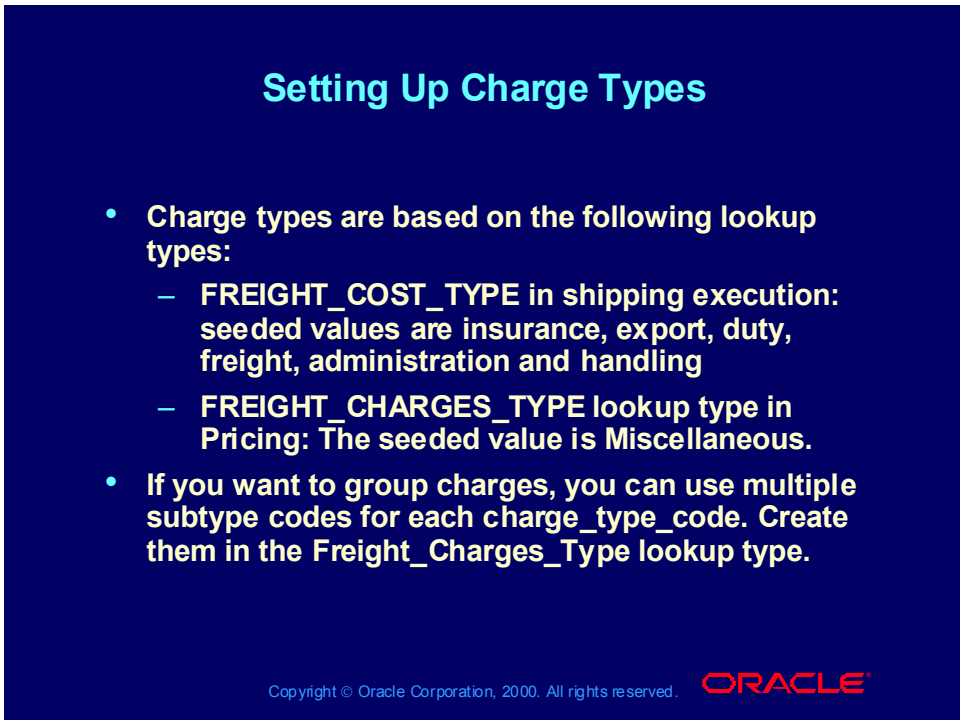

Order Management shares freight cost types with shipping for the cost to charge conversion. You cannot define subtypes for these charge types.

The MISCELLANEOUS FREIGHT_CHARGES_TYPE has the seeded subtypes of MISC, PENALTY, RESTOCKING and RETURN FEES.

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Agenda

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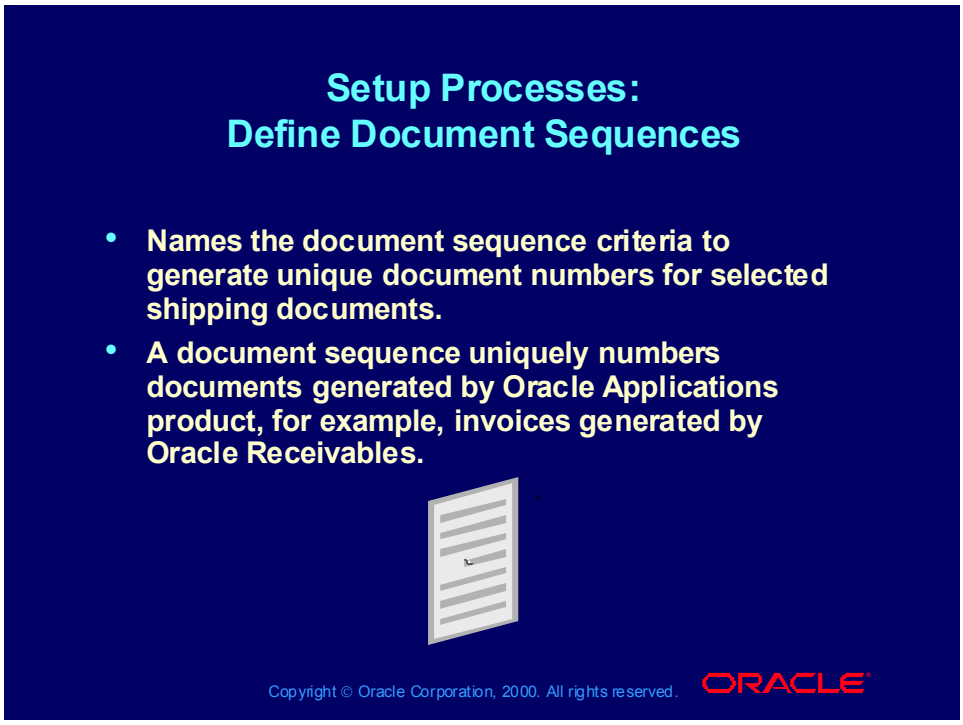
Setup Processes: Define Document Sequences



(N) Shipping > Setup > Documents > Document Sequences

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Setting Up > Defining Shipping Parameters > Defining Document Sequences

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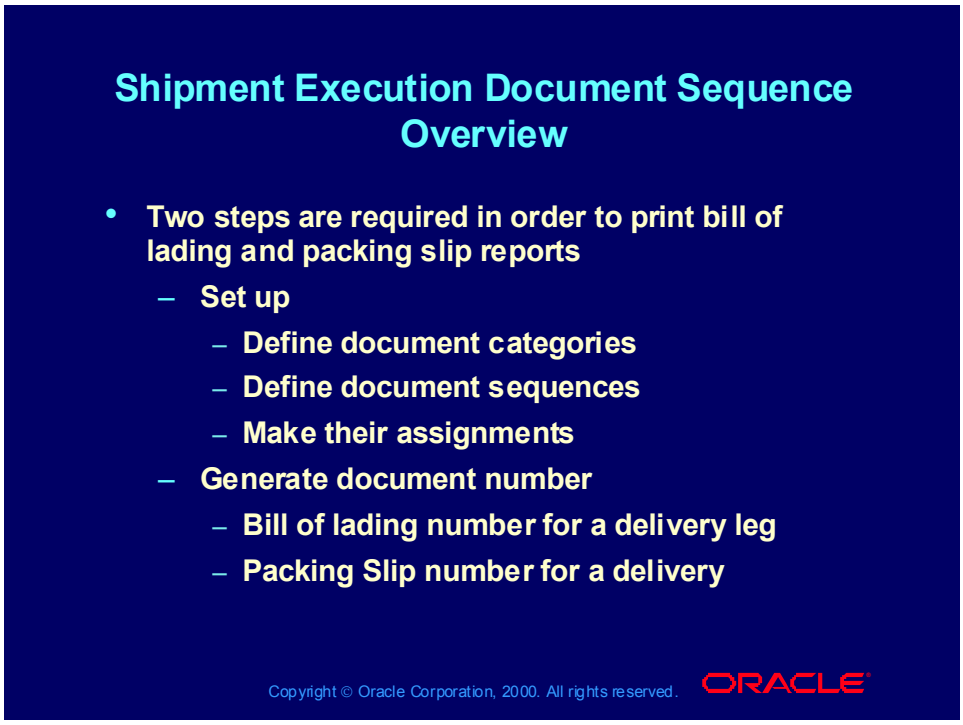

(N) Oracle Order Management > Shipping > Setup >Documents

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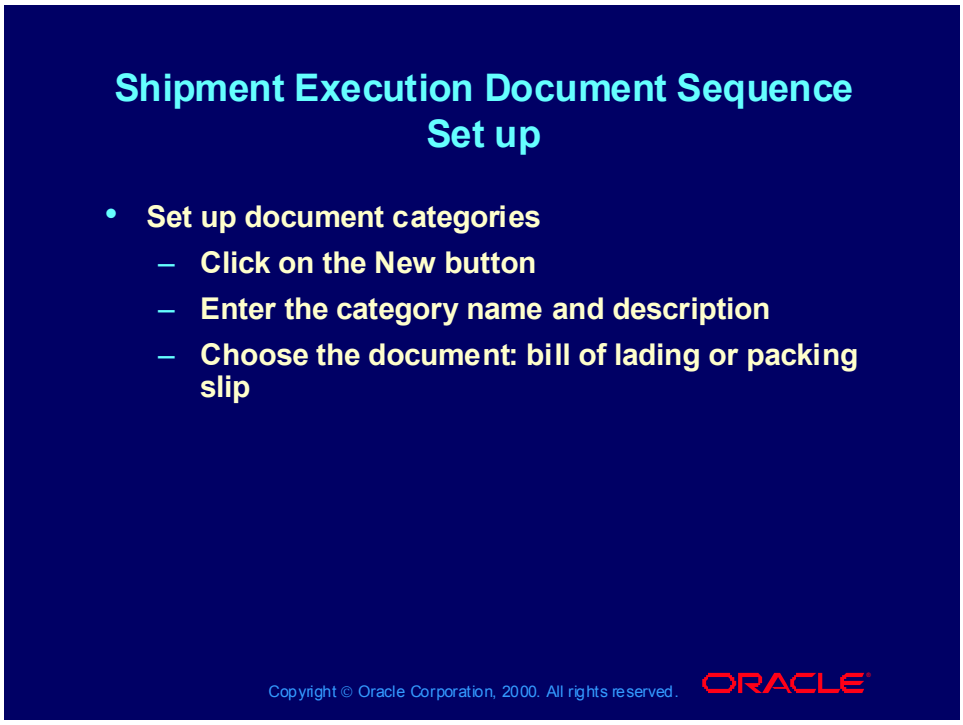

Document Categories (Concept)

(N) Shipping > Setup > Documents > Document Categories

A category must be defined for each bill of lading and packing slip you wish to create. You can create a bill of lading category for each Ship Method/Carrier you use or define one bill of lading category for all Ship Methods/Carriers.

The advantage to having a different bill of lading sequence for each carrier is that you could easily identify the carrier by looking at the Bill of lading number.

In addition to creating document categories by Ship Method/Carrier, you can tie a category to a specific location. This provides the opportunity to have a different bill of lading sequence for the same carrier departing from a different location. An example of this would be:

For a Viking Freight shipment departing from warehouse 1 the Bill of lading number could look like this: WH1-Viking-12345

For a Viking Freight shipment departing from warehouse 2 the Bill of lading number could look like this: WH2-Viking-54321

When defining a document sequence for the packing slip, you can create a category for every location or one category for all locations.

The document category is specific to a document type and location.

The document category is also specific to the application /responsibility from which you accessed the window. This means that if you created a document category called Viking bill of lading for WH1 under the responsibility Oracle

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Order Management Super User, you must be logged on as Oracle Order Management Super User to have visibility to Viking bill of lading for WH1 when assigning a sequence to a category.

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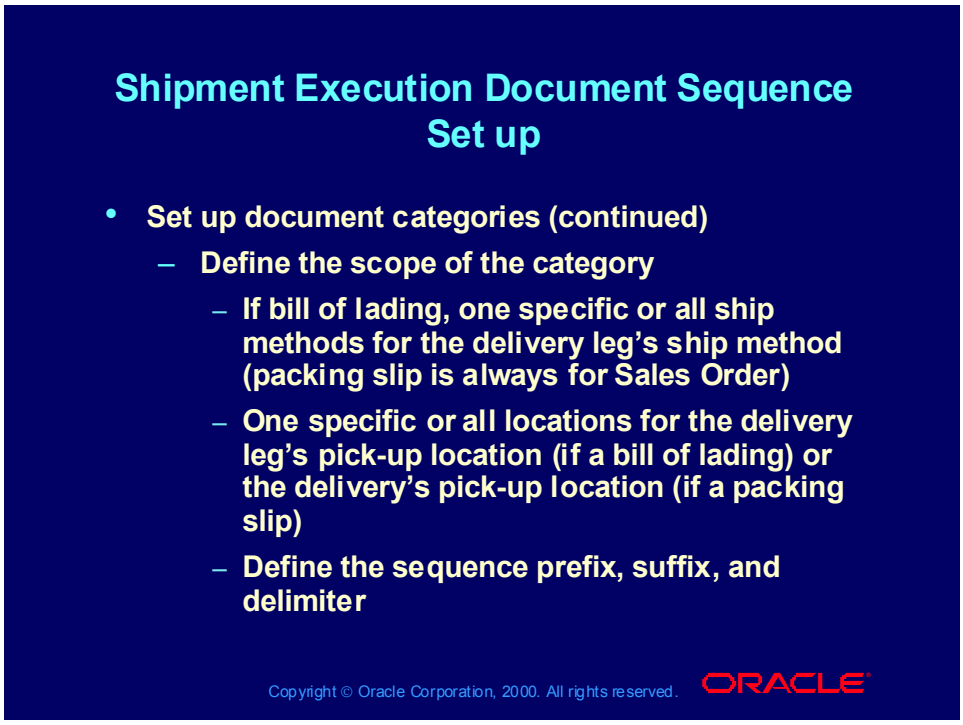

Information pertaining to the fields in the Document Category definition window are as follows:

Category Name: This is a free window field used to enter the name of the category you are defining. This is the name that will appear in the list of values when assigning the category to a sequence.

Description: Enter text that describes the category you are defining. An example might be, bill of lading for Viking Freight from Whse V1.

Document: From the list of values select the document type the document category will apply to.

Ship Methods/ Document Types: If in the previously described document field you select bill of lading, the prompt for this field will be Ship Method. You can define the document category you're defining for a specific carrier by clicking the "One" radio button and selecting the carrier from the LOV that you want the document category to be applied to. Clicking the "All" radio button would result in the document category being applied to all carriers. If you select packing slip or Advanced Shipment Notice for the document field, the prompt for this field will be "Document Type". For release 11i "Customer Orders" is the only sub-type supported and should be the only choice in the list of values. Future development could include document sub-types of Contract Orders, OSP Orders, MRO Orders etc.

Locations: As stated earlier the document category you are defining can be applied to on location or all locations. This is the field where this is determined. Selecting the "All" radio button indicates the document category applies to all

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locations. Selecting the “One” radio button allows you to select a specific location from the LOV that you wish the document category to apply.

Sequence: You can define a Prefix, Suffix and delimiter to the document category. The Prefix and Suffix fields are free window and any alpha numeric combination can be entered. Typical use of these fields are something that represents an identity to the location, carrier, date etc. in which document is generated. The delimiter can also be any character and simply separates the prefix and suffix from the actual generated number. The default appearance shows the user what the bill of lading, packing slip, or ASN number will look like when it is generated

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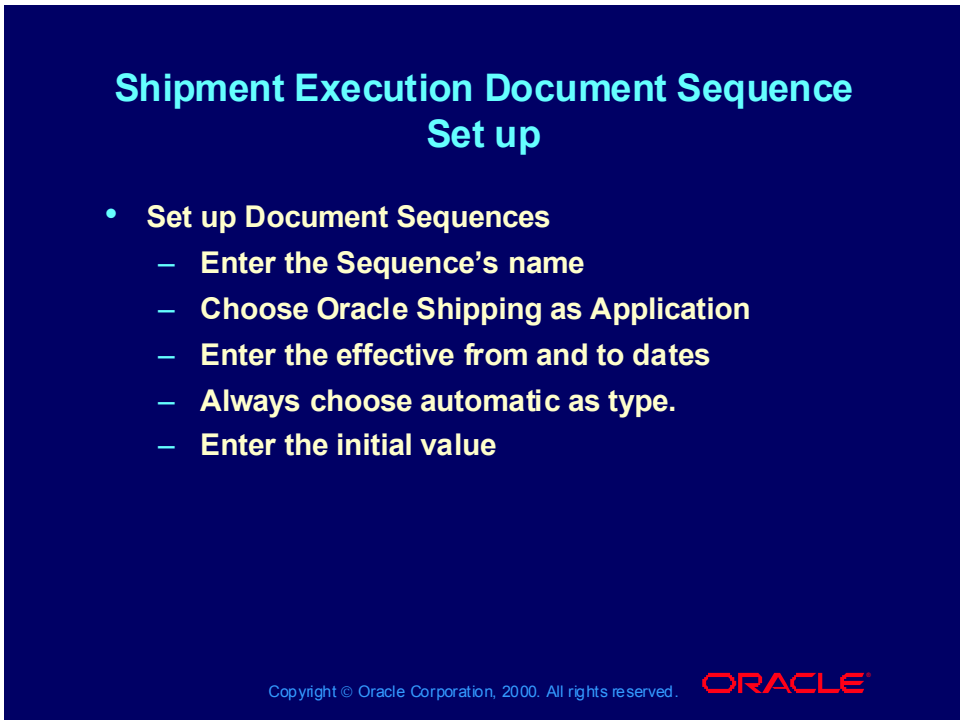

(N) Shipping > Setup > Documents > Document Sequences

Information pertaining to the fields in the Document Sequences definition window are as follows:

Name: Enter a name for the sequence you are creating. This will be a unique name that will identify this sequence in the application defined for a specific duration.

Application: From the list of values, choose Oracle Shipping.

Effective, From and To: Enter the first date you want the document sequence to become effective by clicking on the calendar LOV in the "From" field. Enter the date you want the document sequence to end by clicking on the calendar LOV in the "To" field.

Type: The available types for this field are Automatic, Manual and Gapless.
Automatic sequentially assigns, by date and time of creation, a unique number to each document as it is generated.
Manual numbering requires a user to assign a number to each document before it is generated. You must enter unique values. However, please note that numerical ordering and completeness is not enforced..
Gapless numbering type is valid only in the context of certain localizations. We recommend that you choose this type only after consulting with Worldwide Support, as it may affect the performance of your system..

Message: Check the Message check box if you want each document to display a message (in the message line near the bottom of the screen) informing the user of the sequence name and value (number). This check box only applies to

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sequences with the automatic type of numbering. Messages appear only on window displays, and are not written to a request's log file.

Once a sequence is defined, the message choice cannot be changed.

Initial Value: The initial value indicates the numeric value in which you wish to use when the first document is created. Enter a value for the first document in your sequence. This field only applies to sequences with automatic or gapless numbering type. The maximum sequence value is 1.0e+27.

If you leave this field blank, the first document is automatically assigned a value of "1". Once a sequence is defined, this initial value cannot be changed. For example if you select 1 as the initial value, the first document that is created will consist of the prefix you defined in the document category, the delimiter you defined, the numeric value 0000001, and the suffix you defined.

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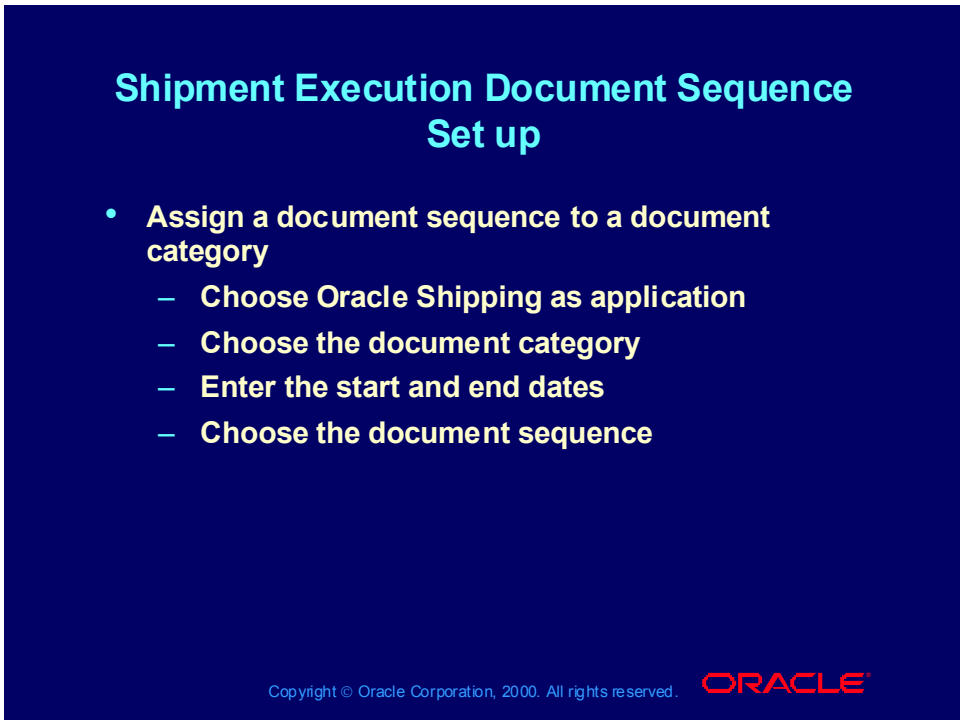

(N) Shipping > Setup > Documents > Assign Sequences

Once you have defined a document category and a document sequence, the final step before you create a bill of lading or packing slip is to assign a document sequence to a document category. A document sequence must be assigned to a document category. The assign sequence window is also application and category specific.

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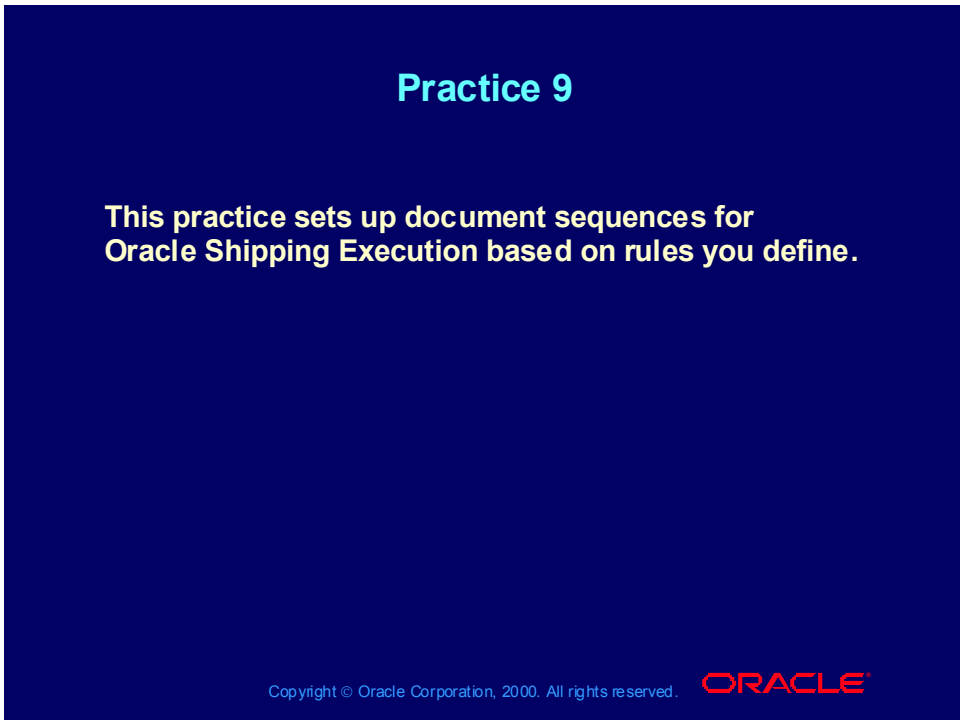

Define Document Sequences

(N) Shipping > Setup > Document > Document Sequences

1. Enter XXas for your document sequence
2. Select Oracle Shipping as the application
3. Use the default effective date
4.Select automatic for the type
5. Save you work

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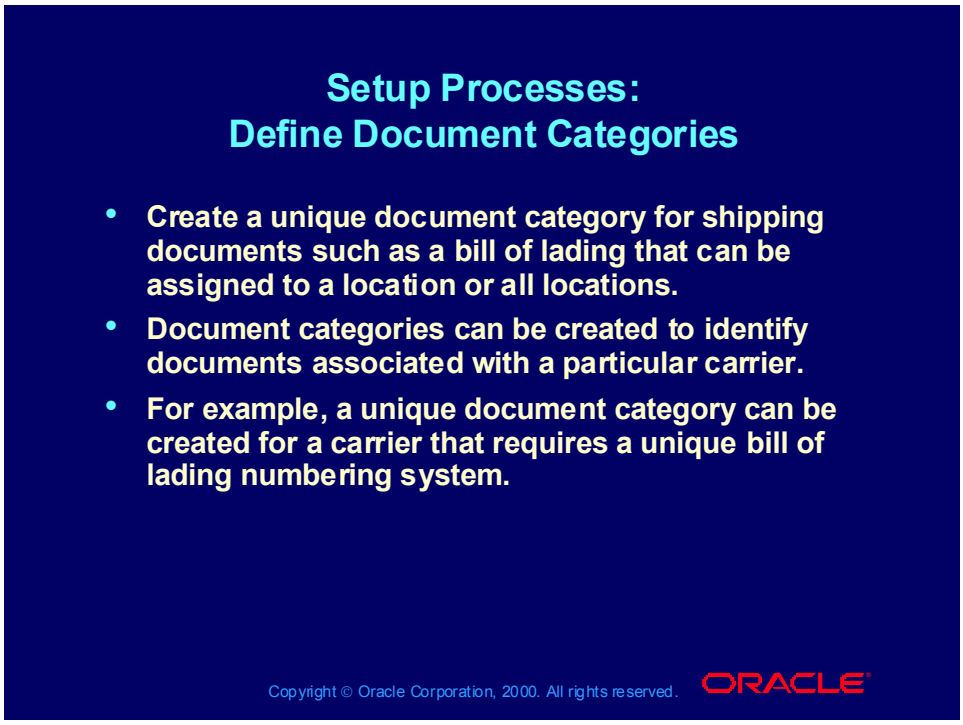
Setup Processes: Define Document Categories



(N) Shipping > Setup > Documents > Document Categories

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Setting Up > Defining Shipping Parameters > Defining Document Categories

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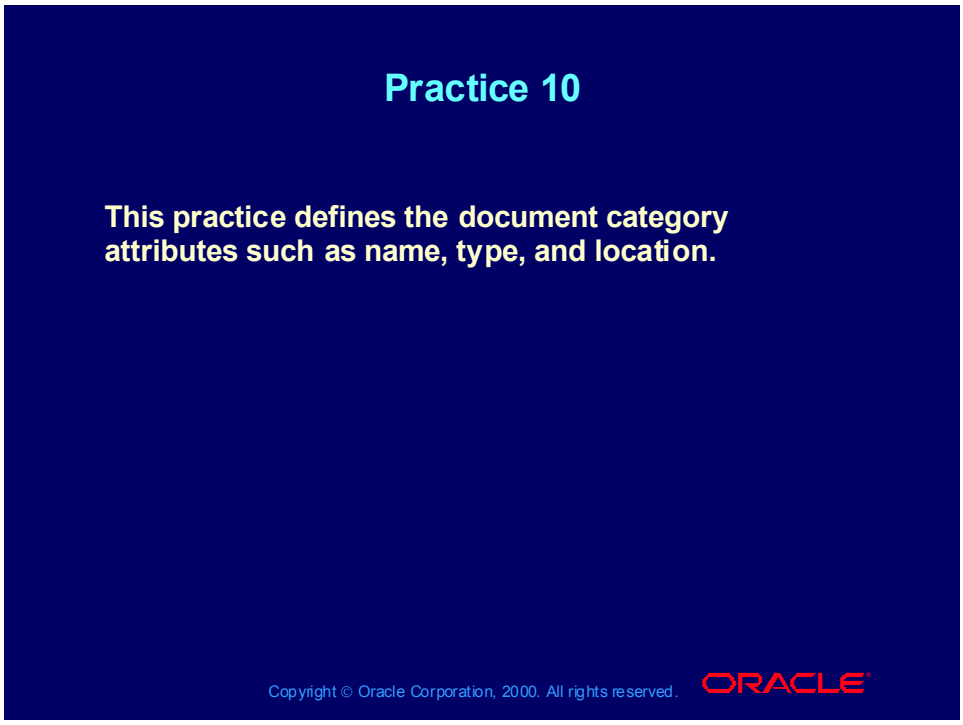

Define Document Categories

(N) Shipping > Setup > Document > Document Categories

1. Choose the New or Open button.
2. Enter XXas a name for your document category.
3. Verify enabled is checked.
4. Optionally enter a description.
5. Select a document either bill of lading or packing slip.
6. In the category includes region verify all is enabled for both the document types and locations.
7. Verify that the prefix, suffix, and delimiter are blank.
8. Save you work.

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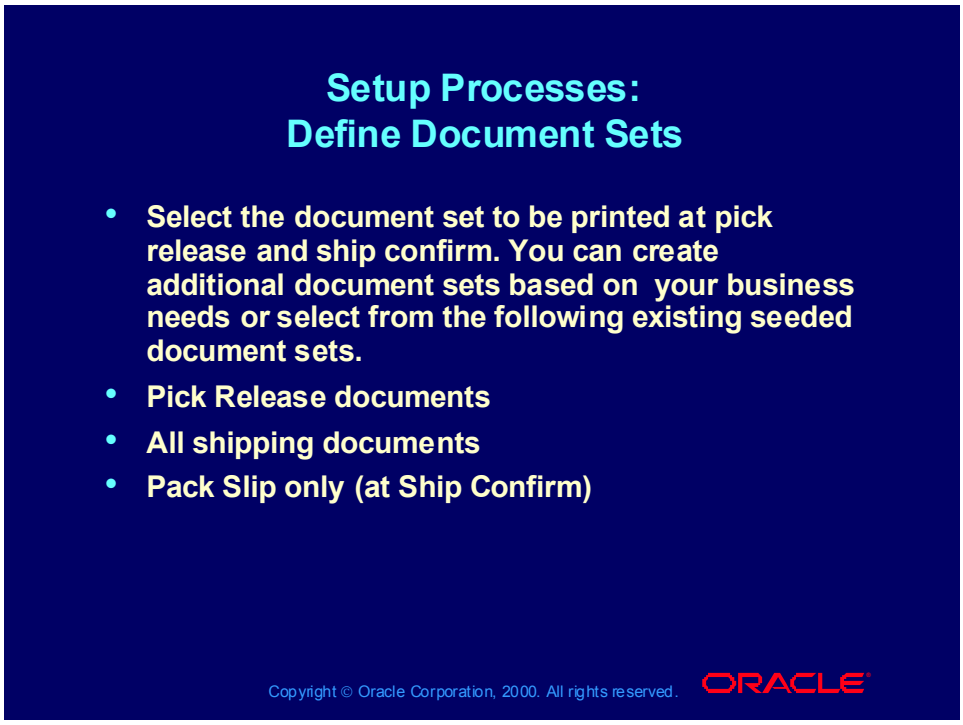
Setup Processes: Define Document Sets



(N) Shipping > Setup > Documents > Document Sets

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Setting Up > Defining Shipping Parameters > Defining Document Sets

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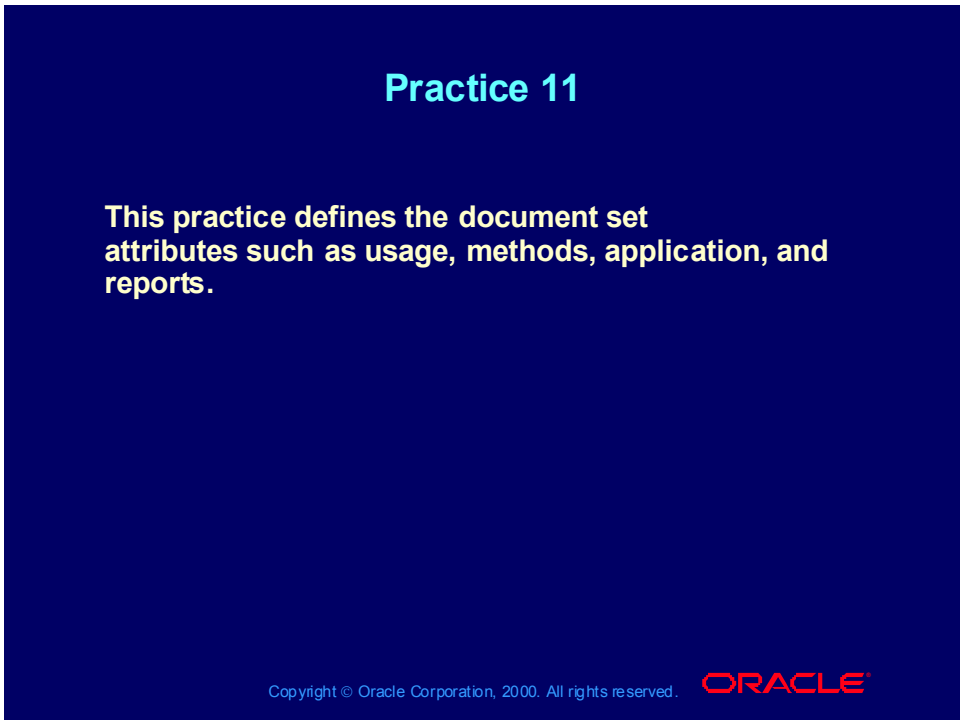

Define Document Sets

(N) Shipping > Setup > Document > Document Sets

1. Enter XXfor your document set
2. Enter a description
3. Select pick release for usage
4. In the effective dates region, verify a default from date and leave the to field blank
5. In the printing method region, verify that parallel is enabled
5. In the documents region enter a number that prioritizes the printing order within a document set for sequence
6. Select Oracle Shipping as the application
7. Select pick slip report as report name.
8. Save you work.

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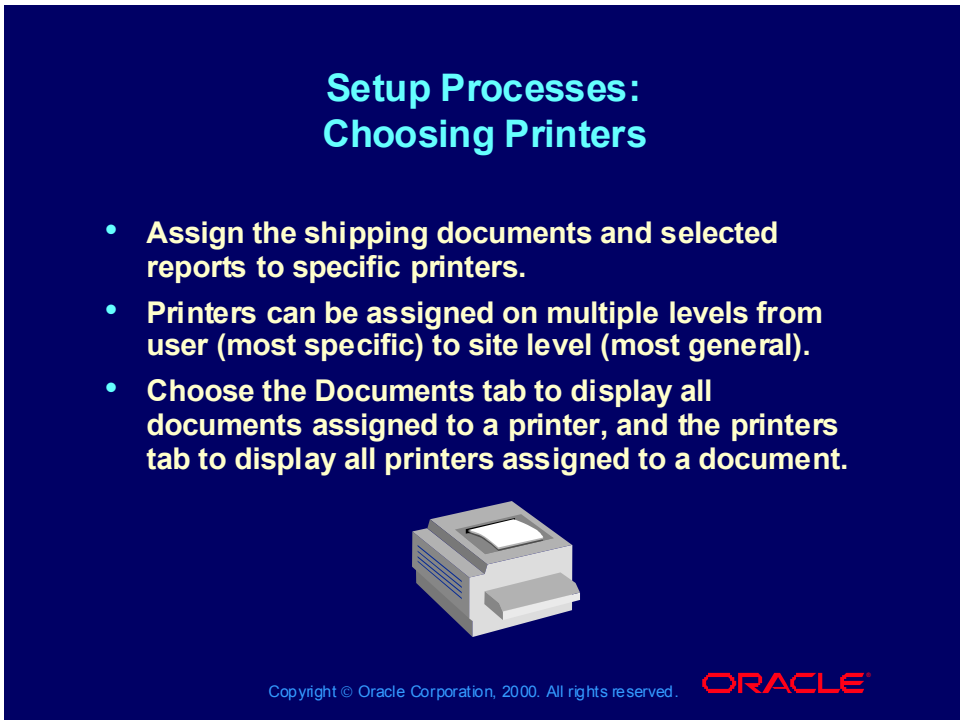
Setup Processes: Choosing Printers



(N) Shipping > Setup > Documents > Choose Printers

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Setting Up > Defining Shipping Parameters > Choosing Printers for Shipping

Printers must first be enabled within Oracle. Once enabled they now can become a source for printing shipping documents.

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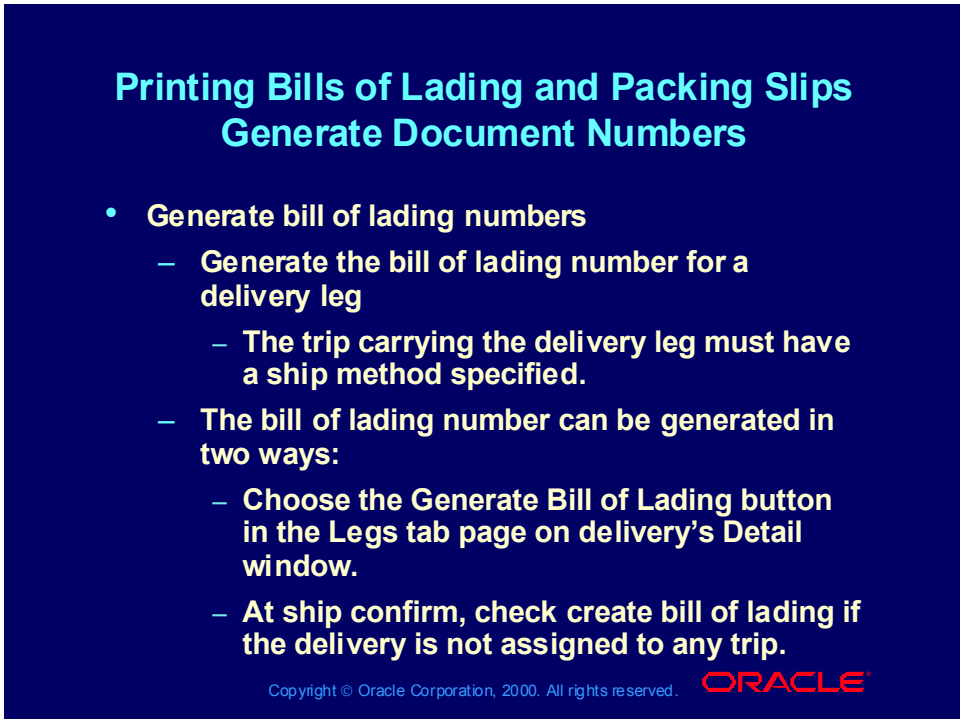
Printing Bills of Lading and Packing Slips Generate Document Numbers



When the set up processes have been completed, the user can create a Bill of Lading and or packing slip for a delivery. Both documents can be generated as part of a document set that can be run at the completion of ship confirmation, or the documents can be created individually from the document request menu . A delivery must meet the following prerequisites in order for a bill of lading to be created.

The delivery must have a ship method.

The delivery must be assigned to a trip.

The delivery must have a waybill number.

To create and print a bill of lading, simply query the delivery for which you want to print a bill of lading in the Shipping Transaction window. Click on the Details button to invoke the delivery details window.

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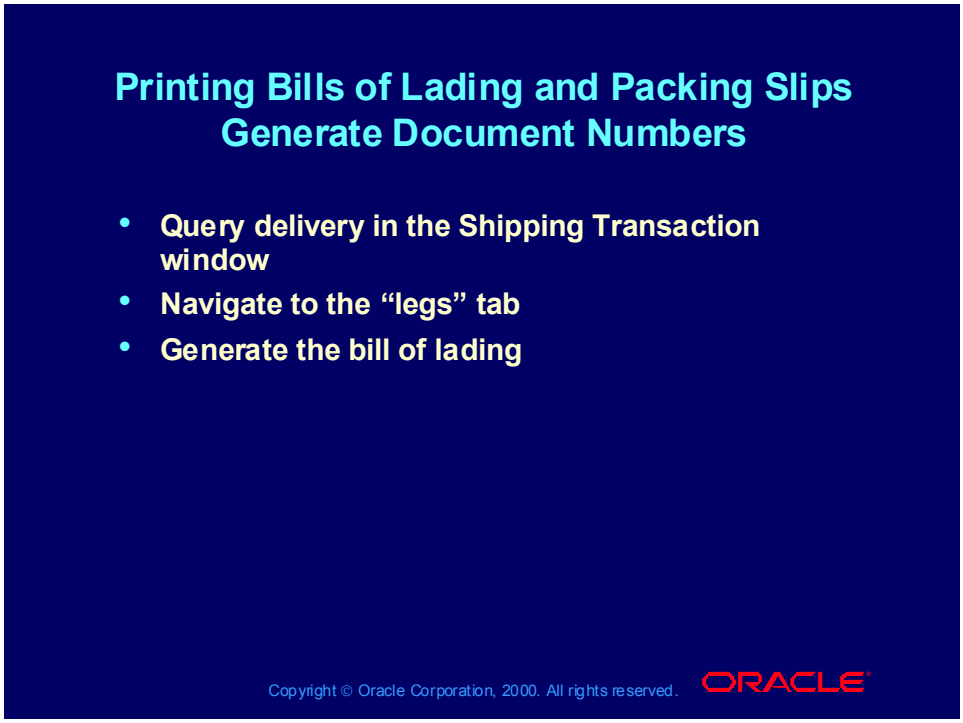
Printing Bills of Lading and Packing Slips Generate Document Numbers



From the Delivery Details window, click on the Legs tab. This will open a window that displays all the information pertaining to the Leg of the delivery. Click on the generate bill of lading button and the system will create a bill of lading number based on the document category/sequence that it has been assigned. You will be able to see the bill of lading number dynamically populate in the field on the window. At this point you can print the individual bill of lading by navigating to the Reports and Documents window and select the individual bill of lading to print.

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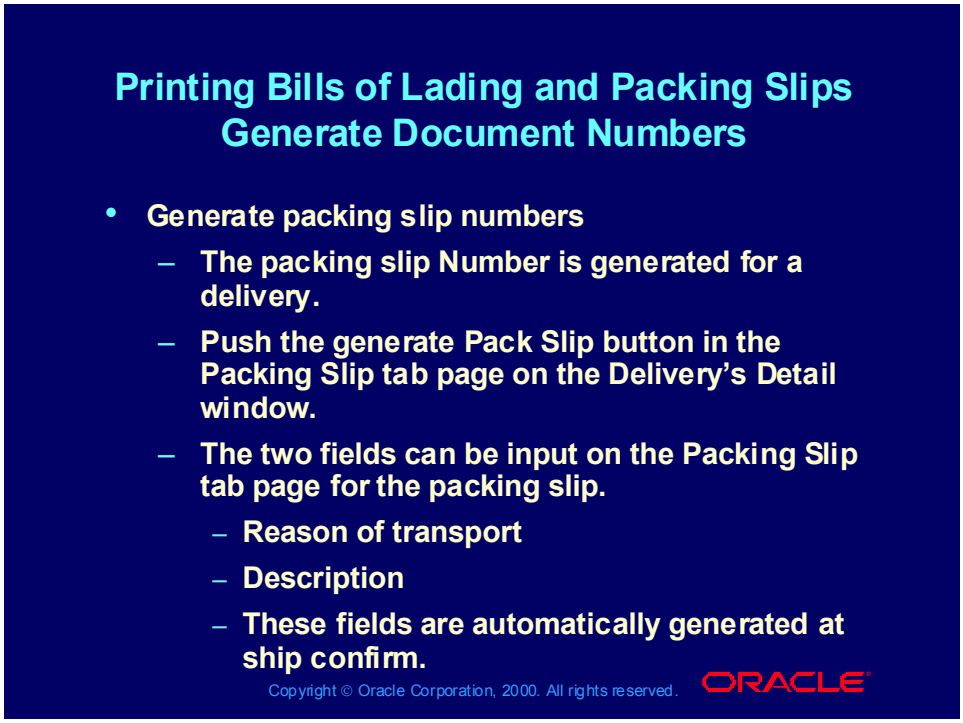
Printing Bills of Lading and Packing Slips Generate Document Numbers



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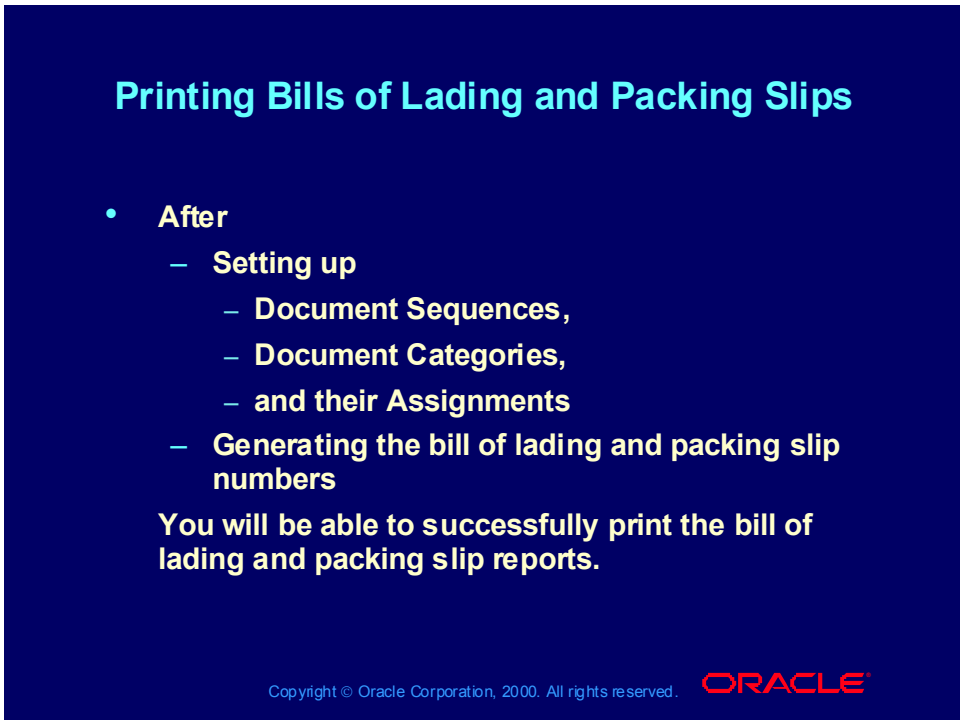

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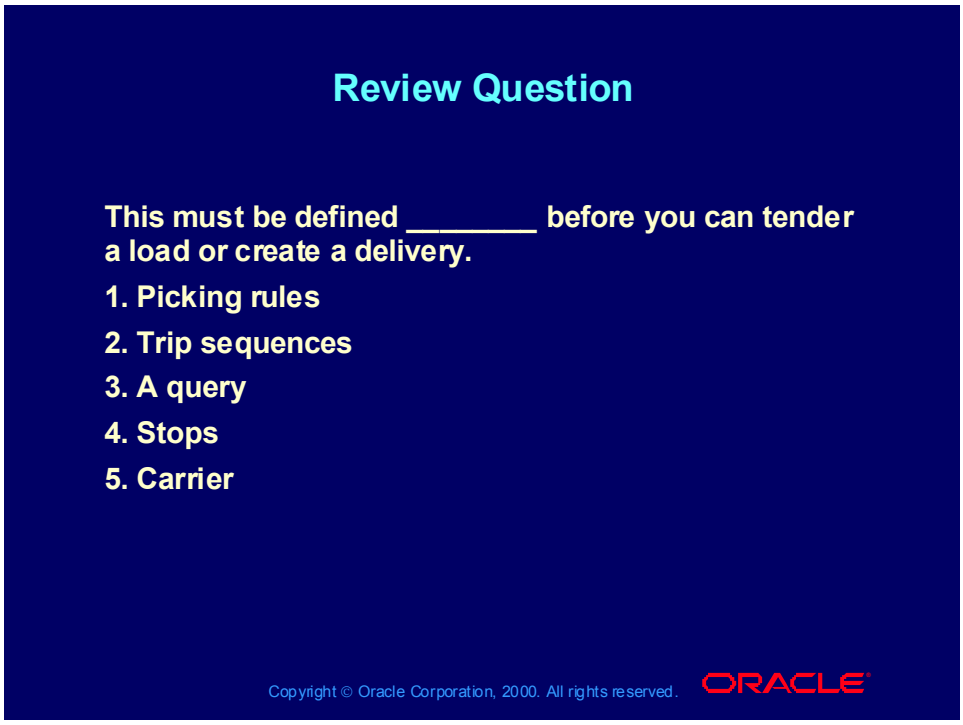

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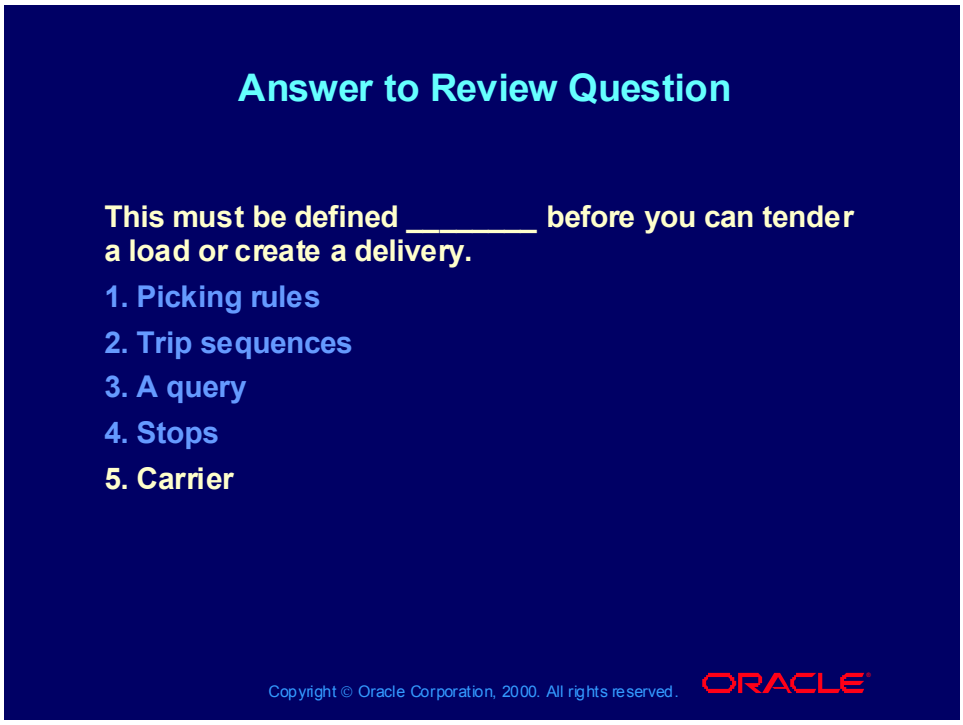

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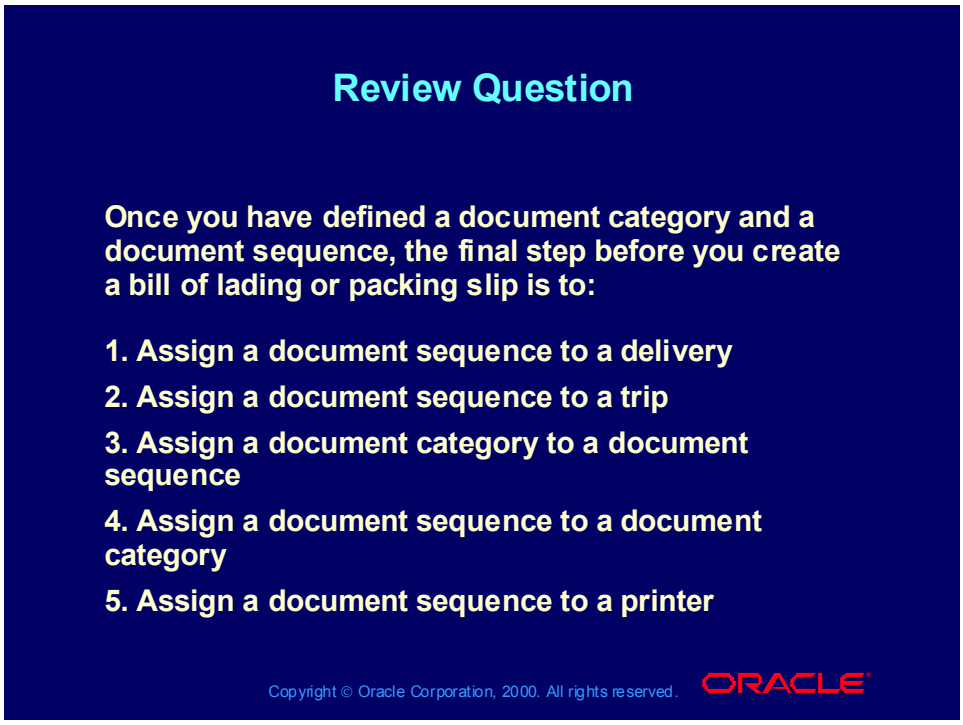

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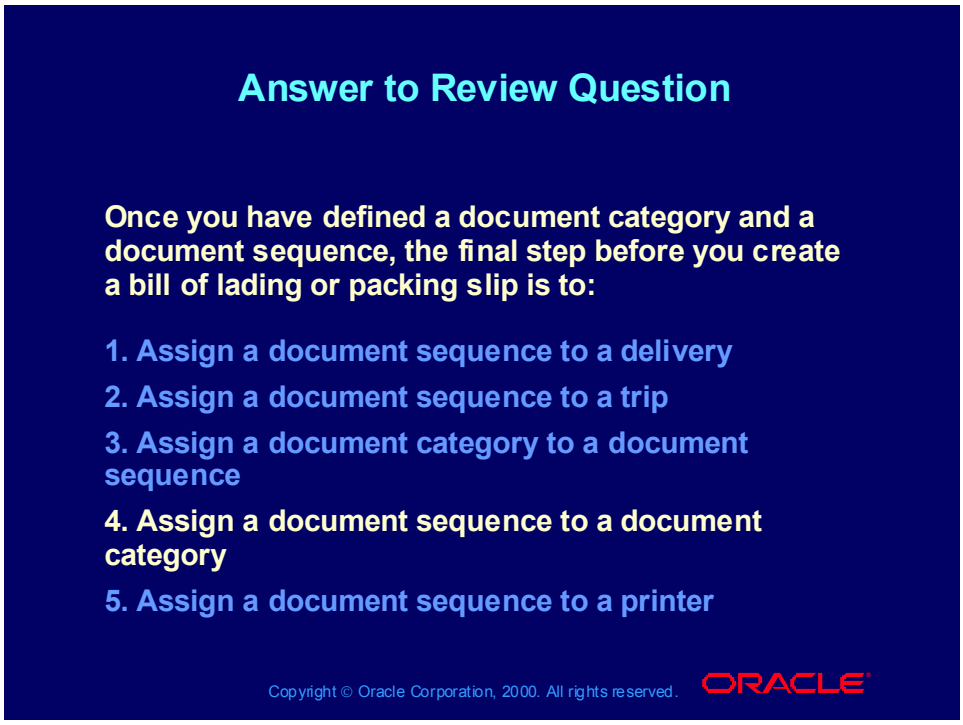

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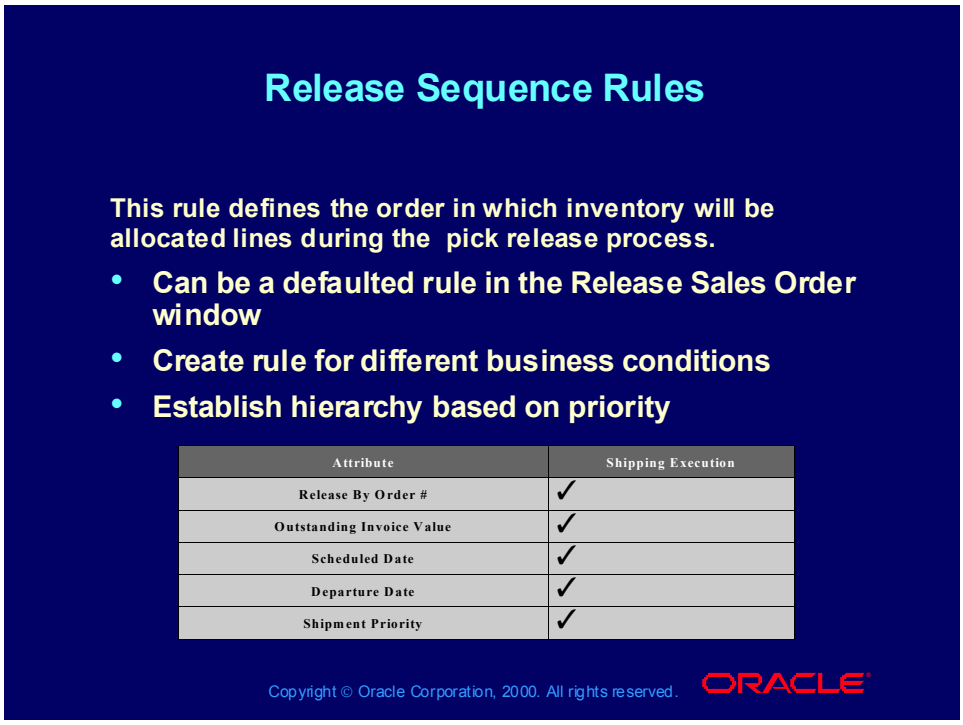
Release Sequence Rules



(N) Order Management > Shipping > Setup > Picking > Define Release Sequence Rules

This rule is used at pick release to determine the sequence in which inventory is allocated to orders lines. Rules can be defined to sequence release by order, outstanding invoice value, schedule date, departure date and shipping priority. Results of the allocation sequence can be applied in ascending or descending order. A release rule defined using outstanding invoice value is mutually exclusive. A release sequence rule can be defined to have multiple release sequence priorities. For example, a rule can be defined with shipping priority the number 1 priority descending and schedule date the number 2 priority ascending. The result would be that the highest priority orders with the earliest scheduled date would be released first. You can define as many release sequence rules as necessary.

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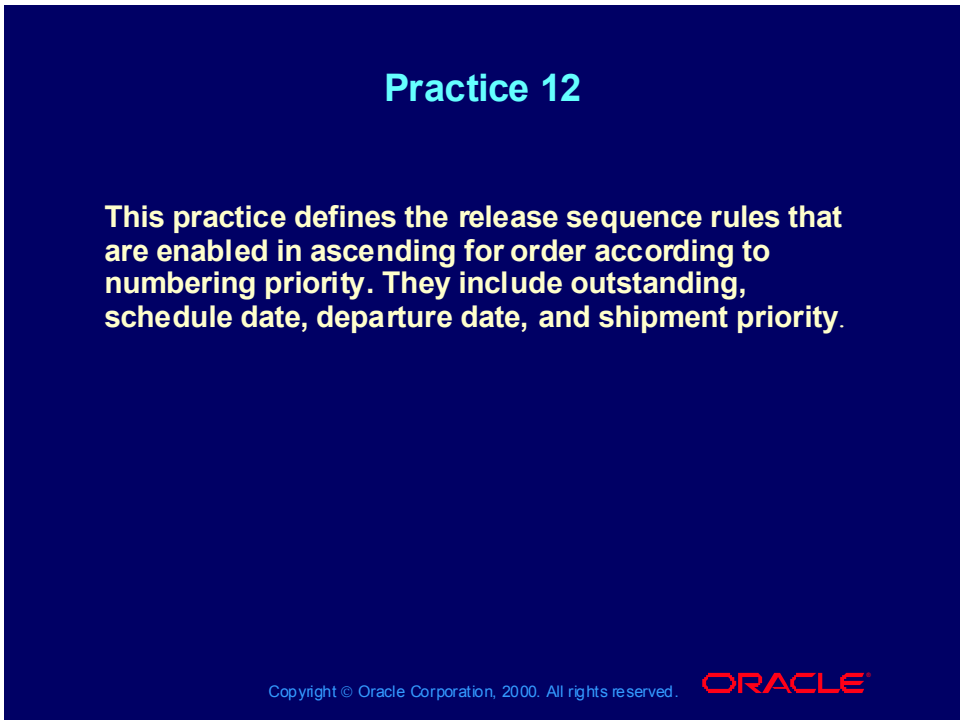

Define Release Sequence Rules

(N) Shipping > Setup > Picking > Define Release Sequence Rules

1. Enter XXfor a name.
2. Optionally enter a description
3. Enable ascending for order, outstanding, schedule date, departure date, and shipment priority. Provide a numbering priority.
4. Save you work

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Pick Slip Grouping Rules

(N) Order Management > Shipping > Setup>Picking> Define Pick Slip Grouping Rules

When pick release is run, Pick Slip Grouping Rules determine how the pick slips are grouped. Rules can be defined to group pick slips by order number, sub inventory, customer , ship to, carrier, delivery, shipping priority, item, location. lot, revision or any combination. An example of a pick slip grouping rule is group by customer and sub inventory. The grouping rules makes picking more efficient by putting logical lines to be picked on one pick slip.

Note: WMS = Warehouse Management System. This new product will be available a in future point release.

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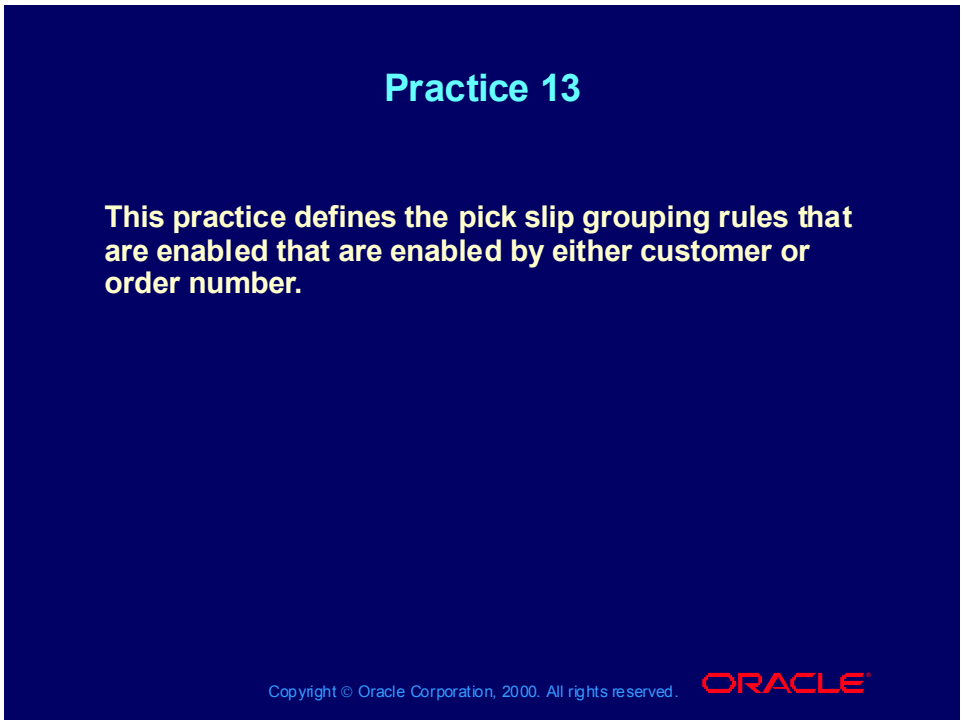

Define Pick Slip Grouping Rules

(N) Shipping > Transactions > Setup > Picking > Define Pick Slip Grouping Rules

1. Enter XXfor a name.
2. Optionally enter a description
3. Enable customer for group by order number.
4. Save you work

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Release Rules

(N) Order Management > Shipping > Setup >Picking > Define Release Rules

The Release Rule window allows the user to set up picking rules that define criteria for what lines are going to be released to the warehouse on a specific pick release job.

A Release rule is required if you are scheduling pick release as SRS process. A Release Rule can be used when running non SRS pick release jobs by selecting a defined rule in the “Based on Rule” field in the Release Sales Order window.

Release rules can be created based on criteria represented in three different tabs:

- Order tab - criteria = order type, order number, customer, item, unreleased/backordered/all, ship set # , scheduled ship dates from and to, request dates from/to.
- Shipping tab - criteria = carrier, ship from, shipment priority, release sequence rule, auto create delivery, shipment priority
- Inventory tab - criteria = warehouse, pick slip grouping rule, auto allocate, auto pick confirm

Note: In Inventory tab, when a warehouse is selected, other criteria is defaulted.

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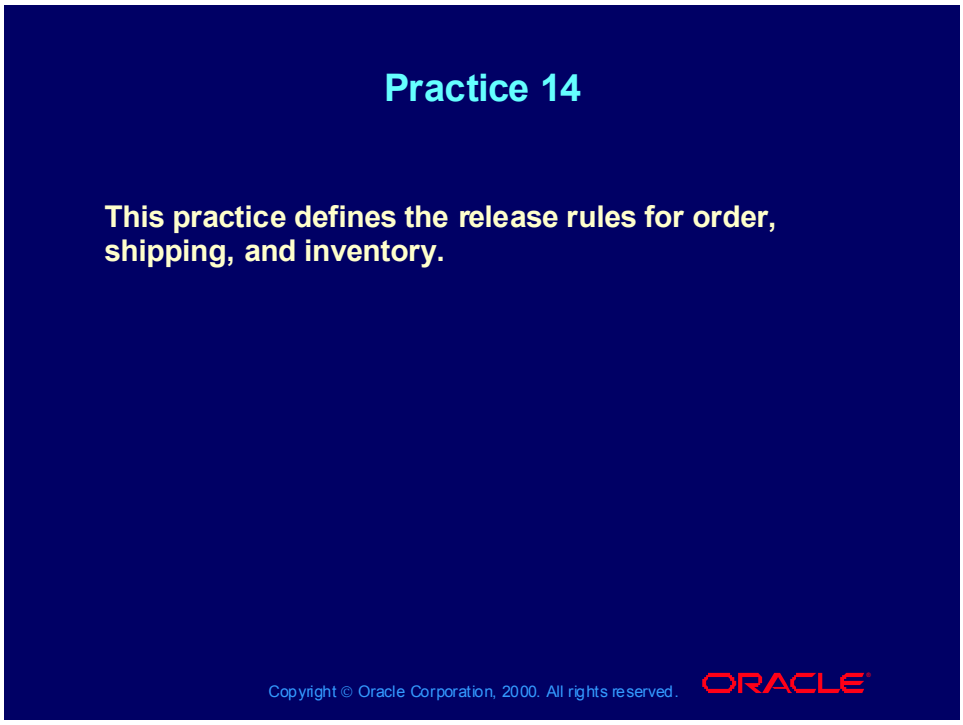

Define Release Rules

(N) Shipping > Setup > Picking > Define Release Rules

(T) Order
1. Enter a rule name
2. Select mixed order as the order type.
3. Select unreleased as the orders

(T) Shipping
4. Select truck as the carrier.

(T) Inventory
5. Select yes for auto pick confirm.
6. Select XXas the warehouse
7. Save you work

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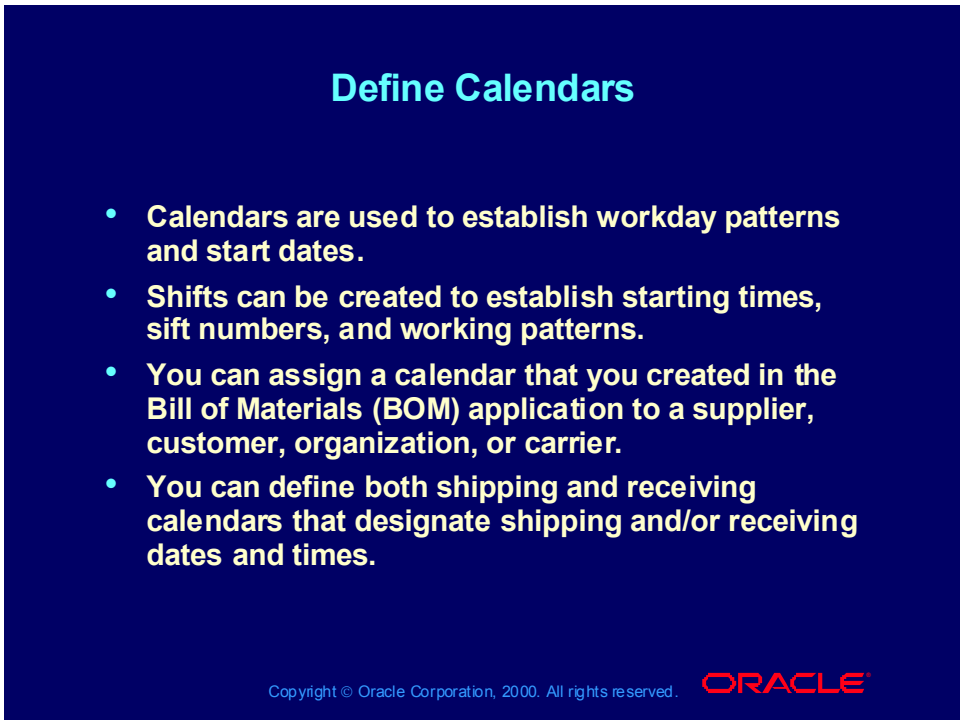
Define Calendars



Calendars can be used to leverage for shipment planning for your warehouse along with the schedules of you shipping carriers, customers, suppliers and all of your trading partners.

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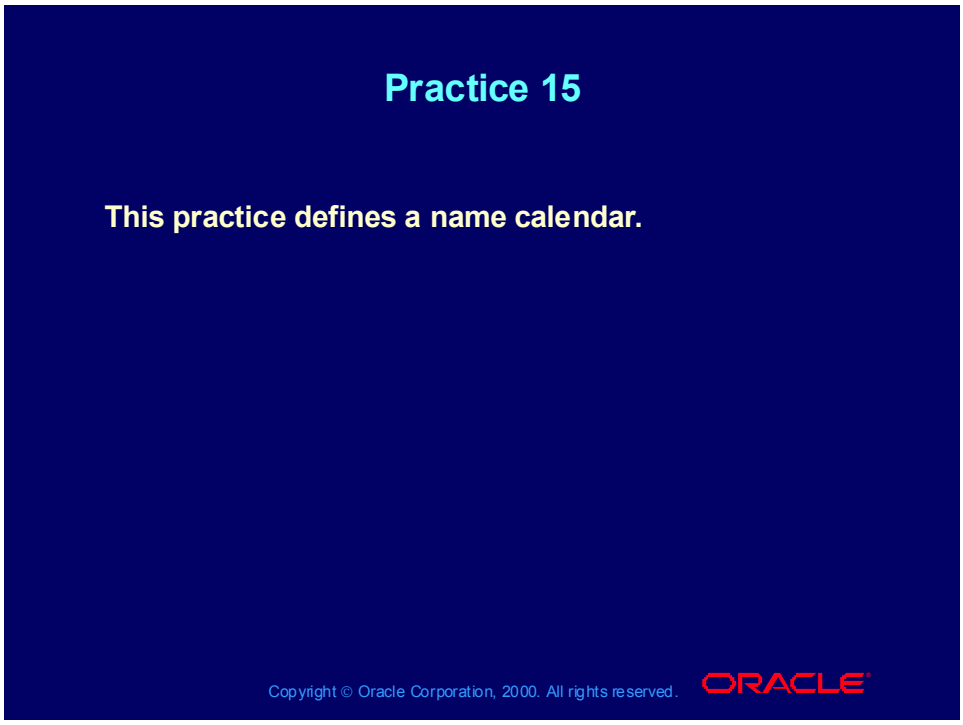

Define Calendars

(N) Inventory > Setup > Calendars > Enter

1. Enter XXas the name for your calendar
2. Enter a description
3. Accept rest of the defaults
4. Save your work

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Transportation Calendar

(N) Shipping > Setup > Calendars > Assign

(Associate a calendar to a Supplier, Customer, Organization or Carrier)

A calendar function has been added that you can apply to shipping schedules for the shipper, receiver and carrier. The Transportation Calendar defines the valid shipping days and hours for a shipper, receiver or carrier and consists of a repeating pattern of days on and days off as well as exceptions to that pattern. For example, you could define a work week consisting of five shipping days followed by two non-shipping days for a standard work week. You can also designate holidays.

You can define both shipping and receiving calendars designating when your customers, customer sites, suppliers, supplier sites, and internal organizations can ship and/or receive.

You can also define calendars for your carriers. These calendars allow you to define the dates when a given carrier is able to pick up and deliver items.

For example, if you are shipping a delivery on Tuesday at 2 p.m..... that will arrive at your customer's warehouse on Wednesday at 9 Am.., the system will validate that your warehouse is able to ship product on Tuesday at 2, that your customer can receive product on Wednesday at 9, and that your carrier will be able to pick up and drop off the delivery on those days.

This is used when planning a delivery and only validated at Ship Confirm. BOM calendars that have been defined for an organization are the basis for the assignment of the transportation calendars.

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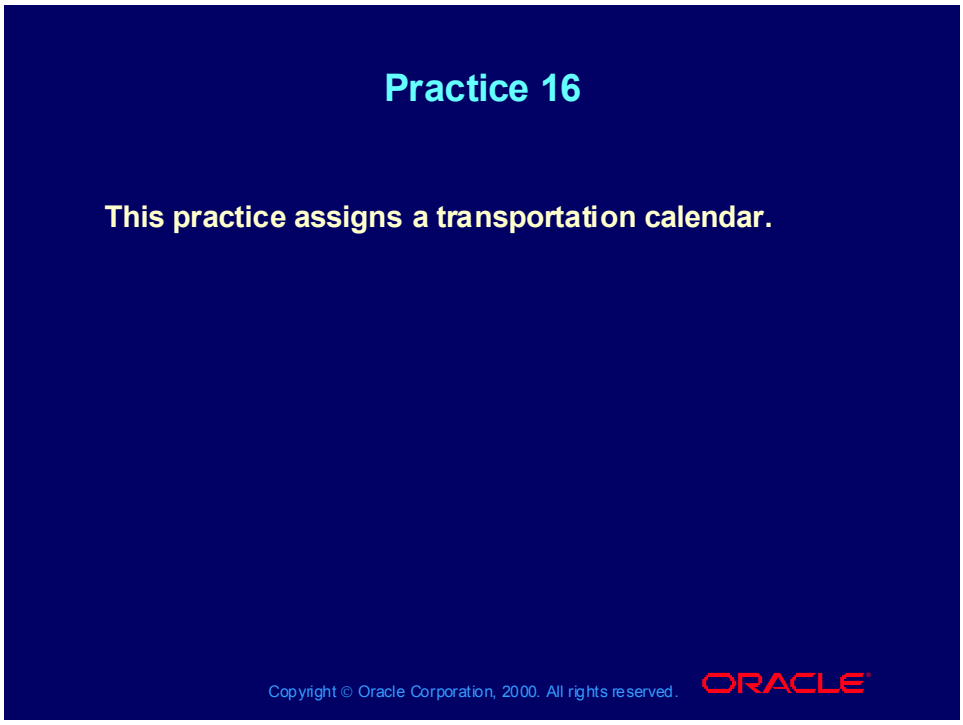

Transportation Calendars

(N) Inventory > Setup > Calendars > Assign

1. Enable carrier as a trading partner
2. Select UPS as a trading partner name
3. Select calendar usage
4. Select XXas the default calendar code
5. Choose the show candidates button
6. Select the enabled box to activate
7. Save your work

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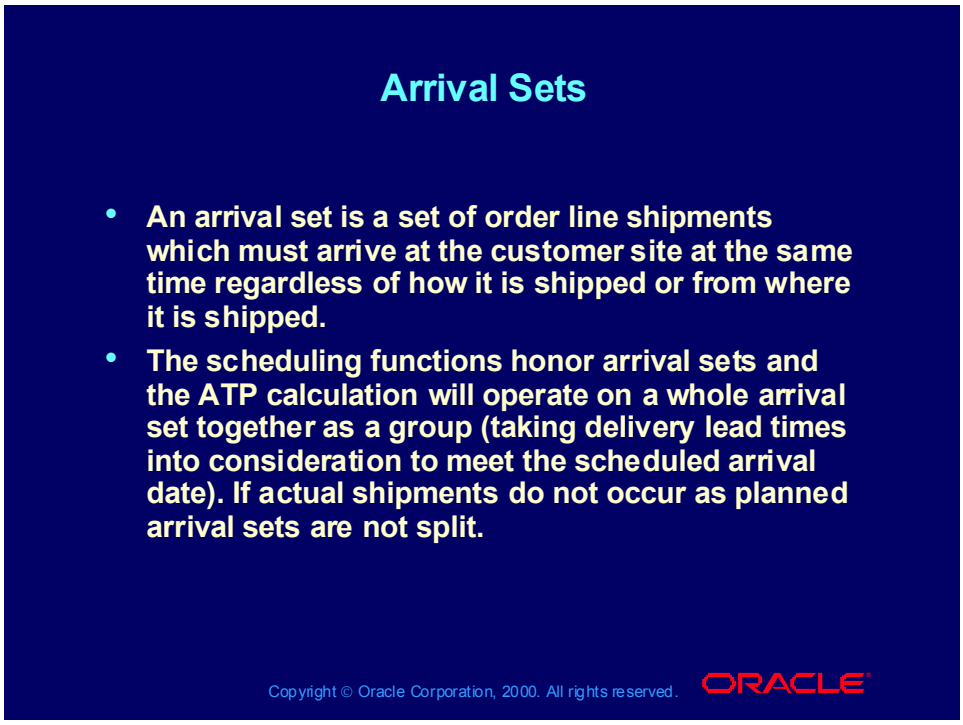

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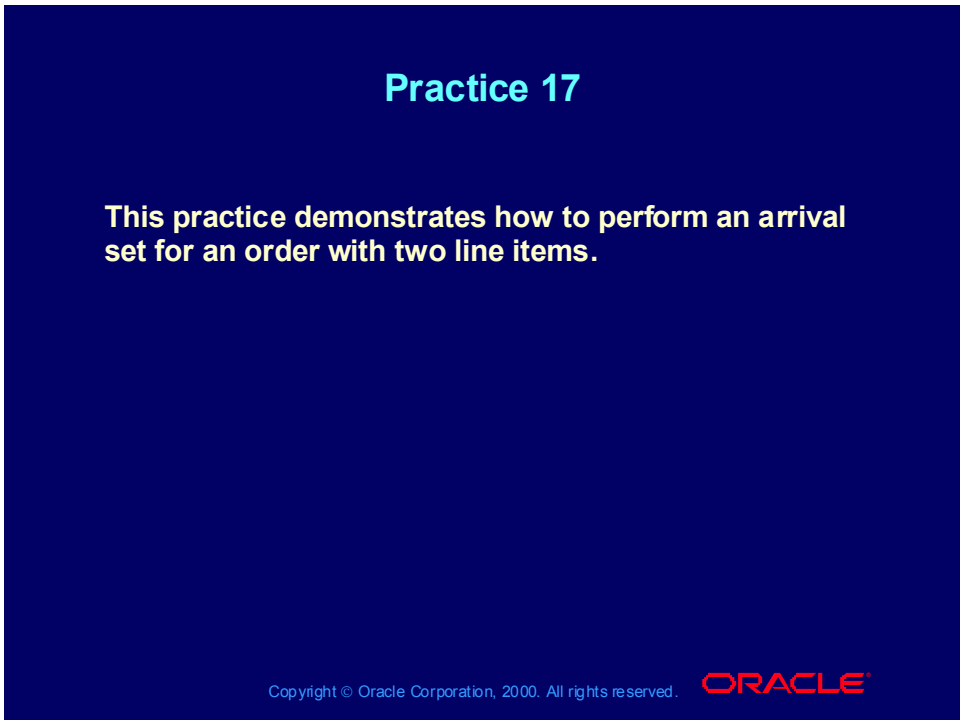

(N) Order Management > Orders, Returns > Sales Orders

1.Select Customer Business World from LOV
Address defaults
2. Mixed order defaults as the order type
3. Corporate defaults as the Price List
4. Howard Sprague defaults as the Sales Person

(T) Line Items

5. Select AS54888 as the Item from LOV
6. Enter the Qty: 10
7. UOM = Ea
8. Select AS18947 for your second ordered item
9. Enter the Qty of 5
10. UOM = Ea
11. Howard Sprague defaults as the Sales Person
12. Assign these lines to two arrival sets 1 and 2. To assign a line to an arrival set, navigate to the ordered item field on that line, right click and choose sets/new/arrival Set.

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13. Choose the Book Order button and record the order number.

14. While the cursor is on a line belonging to arrival set 1, click on the Availability' button to perform an ATP for the Arrival Set 1.

15. Pick Release all Lines corresponding to arrival set 1 only

16. In the Lines/Containers tab, multi-select the lines corresponding to arrival set 1 and choose 'launch Pick Release'. Press 'Go' and record the concurrent request number.

17. Choose Details button from the Message window (record request ID)

18. From the View menu select requests

19. Choose the Find button

20. Find your ID # for the "Pick Selection List Generation" request. Record the status of the request and close the window

21. Concurrent request should read completed normal

22. View the Pick Status of the delivery lines.

Click on the Flashlight icon, enter the order number and click the Find button. In the Lines/Containers tab, use the horizontal scroll bar and scroll to the right to see the pick status of the delivery lines and record the status.

23. Create the delivery in the Lines/Containers tab, multi-select the 'Released' lines and choose auto-create deliveries and press 'Go'.

24. Ship confirm the delivery in the Lines/Containers Tab. Using the horizontal scroll bar, scroll to the right and enter the Shipped Qty for the lines of arrival set 1 choose on the Delivery tab. Highlight your delivery. Using the horizontal scroll bar, scroll to the right and enter a waybill. Choose ship confirm. Press 'Go'. Check the status of the delivery by moving the horizontal scroll bar to the right in the Delivery tab and record the results.

(N) Receivables Manager Interfaces >AutoInvoice

25. Run AutoInvoice by selecting AutoInvoice Master Program.

Enter the Parameters:

Invoice Source = Order Entry

Default Date = Today's Date

Sales Order Number (Low) = Order # A

Sales Order Number (High) = Order # A

26. Select OK and Submit the Request and Record the request ID #.

27. View your request

(N) Transactions > Transactions

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28. View the Invoice. Query the Invoice created by using the sales order as the reference. Verify that only the lines belonging to Arrival Set 1 have been invoiced by clicking on the Line Items button.

(N) Order Management > Order Organizer

29. Insert a line having the same attributes as arrival Set 1 into arrival set 1

You should not be able to add a line to a closed arrival set. You should get a message “Set processing completed with errors”

Process arrival set 2 i.e. repeat steps 12-29 for the line belonging to arrival set 2. Add a line to the closed arrival set.

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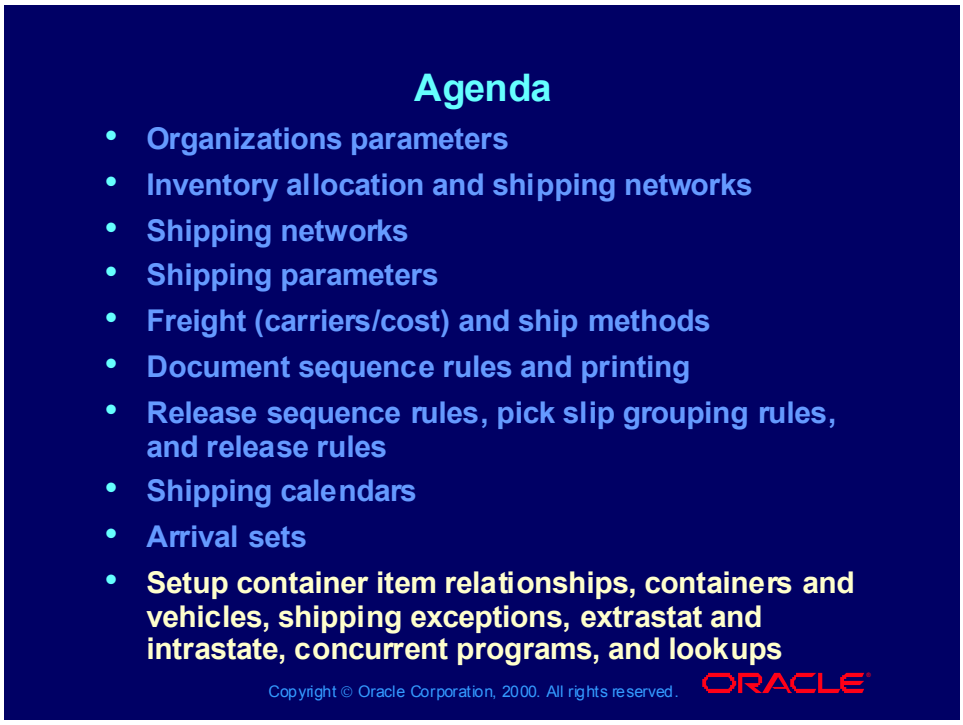

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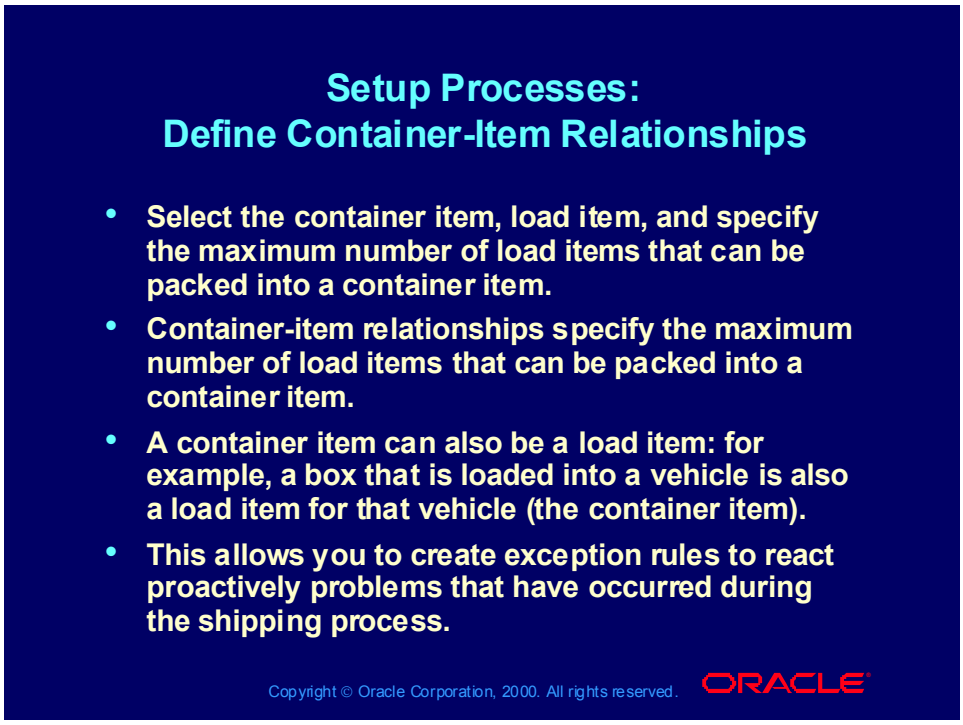

(N) Shipping > Setup > Container Load Details

(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Setting Up > Defining Shipping Parameters > Defining Container-Item Relationships

You can track exceptions either manually or by a company created workflow. These exceptions can drive actions and notifications to be sent informing individuals that an action must be performed, or a shipping exceptions has occurred. They can also be used in conjunction with the shipping portal to track carrier performance via proof of deliveries (POD's).

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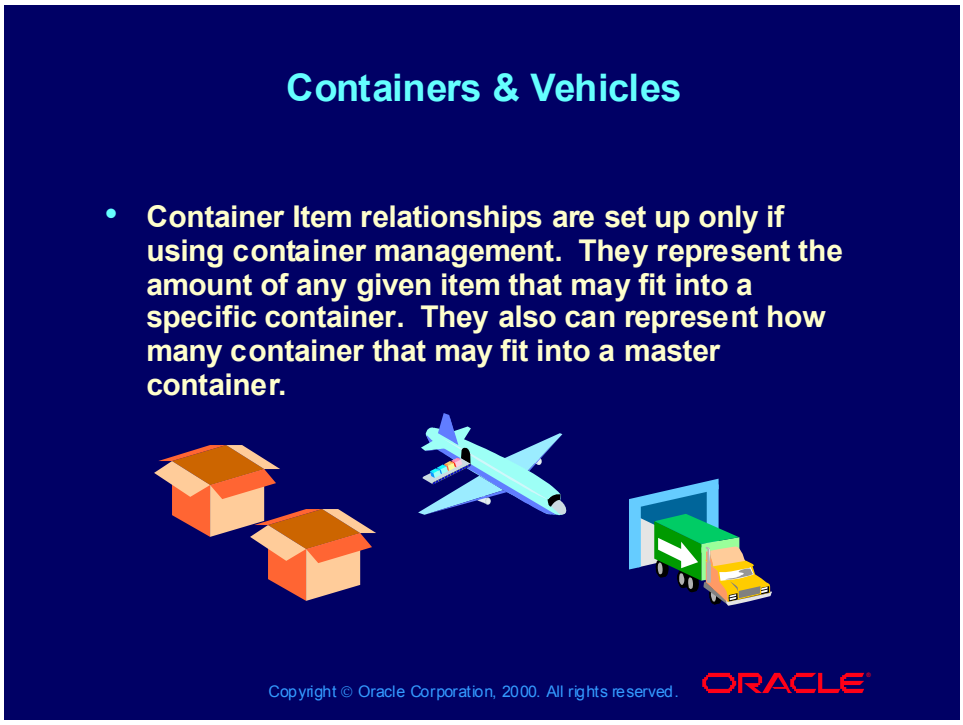
Containers & Vehicles



Containers and vehicles are set up similar to items in inventory.

The preferred checkbox represents the preferred container load combination that the system will use when calculating fill amounts automatically.

Purpose: Setting up containers and vehicles with this information allows full functionality of the containerization feature in Oracle Shipping Execution. Oracle Shipping Execution is not integrated with Inventory with regards to container management hens this set up step is purely for the purposes of using the physical attributes defined for the containers and vehicles to drive the container functionality in Oracle Shipping Execution.

In order to effect inventory controls for containers, additional item setup information would need to be completed including making the container OM transactable. The container item would then need to placed as a line on a Sales Order.

Physical Attribute tab

- Select container or vehicle
- Enter container type
- Enter the container's internal volume
- Enter the container's maximum load weight.
- Enter the container's minimum fill %
- Enter the container's weight
  - This is the weight of the container empty

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Enter the container's volume.

- This is the total of the container's external volume.
- **(N) Items > Inventory Items**

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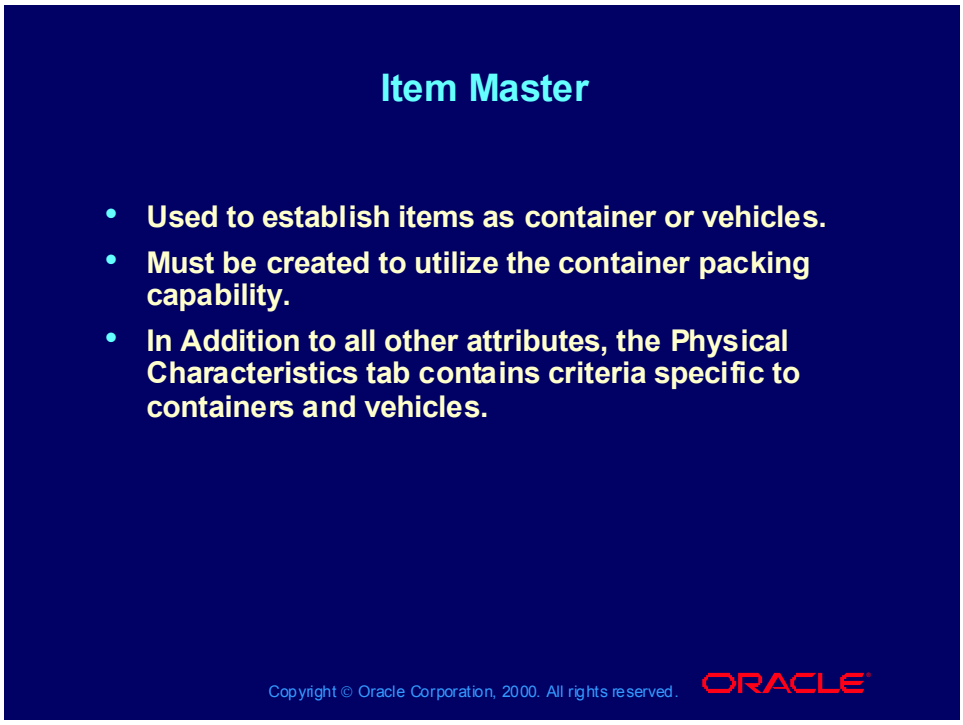

Physical Characteristics Tab

Weight Unit of Measure = Used for packing calculation

Unit Weight = Used for packing calculation

Volume Unit of Measure = Used for packing calculation

Unit Volume = Used for packing calculation

Container = Select Container to identify items that are containers used for shipping sales orders.

Vehicle= Select Vehicle to identify items that are vehicles used for shipping sales orders.

Container Type= For items identified as containers, enter the container type.

Internal Volume= Enter the internal volume of the container or vehicle in the same UOM as the Unit Volume. This attribute is used for packing calculation to calculate container capacity restrictions.

Maximum Load Weight = Enter the maximum load weight of the container or vehicle in the same UOM as the Unit Weight.

Minimum Fill Percentage=Enter the minimum fill percentage under which the container or vehicle should be used

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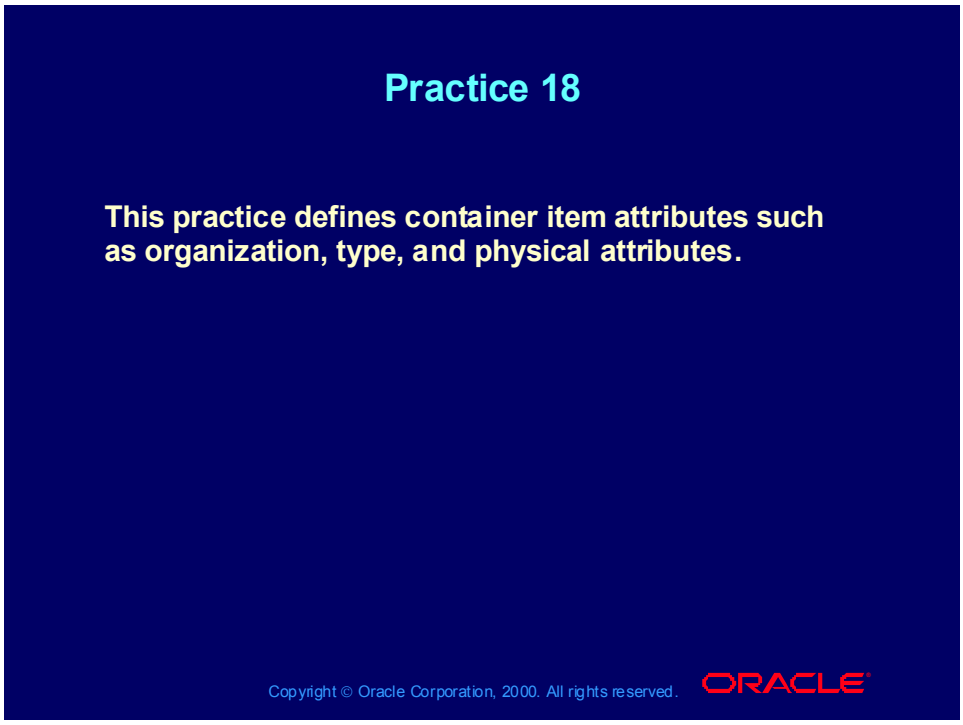

Creating Container Items

(N) Inventory > Items > Master Items

1. Select XX as the organization
2. Enter container as the item name in the item field
3. Enter a description with XX domestic airline container to describe your container

(T) Main

3. Enter a user item type as a container

(T) Physical attributes

Weight region

4. Enter pounds as the UOM
5. Enter 1000 as the unit weight

Volume region

6. Enter cubic feet as the UOM
7. Enter 425 as the unit volume

Container region

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8. Enable container checkbox
9. Enter domestic airline container as the container type
10. Enter 393 as the internal volume
11. Enter 13300 as the maximum load weight
12. Enter 75 as the minimum fill percent
13. Select the organization you want the container to be active for
14. Save your work

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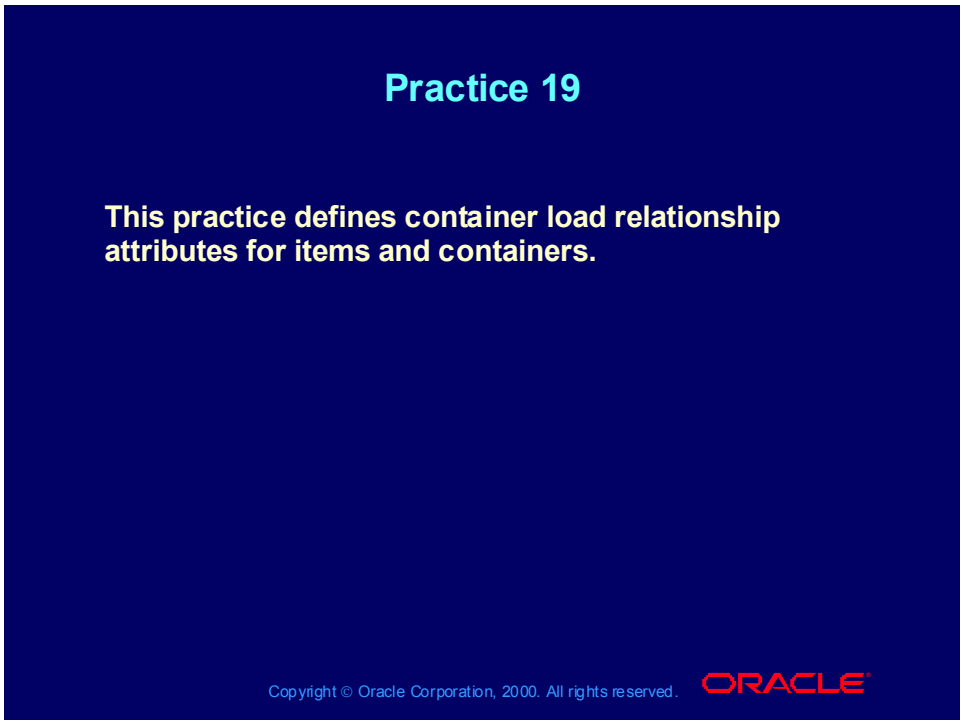

Container Load Relationships

(N) Shipping > Setup > Container Load Details

1. Select XX as the organization
2. Select the container item AS54888 as the item under item and COR-4-CU as the container with a maximum quantity as 4
3. Select the container item AS54888 as the item under item and COR-4-CU as the container with a maximum quantity as 3 and enable the preferred flag
4. Save your work

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Shipping Exceptions

The Shipping Exceptions feature helps you identify and correct shipping exceptions that violate the requirements of your operation or that of your carriers and customers.

The Shipping Exceptions feature gives you the ability to define exceptions and the processes for handling them. You can record exceptions automatically from within Oracle Shipping Execution, or you can log exceptions manually through the user interface input forms. You can initiate exception handling, and view and track the exceptions as you manage them to resolution.

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Shipping Exceptions

APIs are provided that enable you, with some custom programming, to use third-party applications to log exceptions.

During the shipping and transpiration of goods, unforeseen shipping exceptions can occur that conflict with the actual requirements of the shipper, transportation carrier, or the customer, for example, if the customer is sent the wrong goods.

If these exceptions are not handled promptly or properly, it could result in reduced customer satisfaction and loss of business and revenue for a company. Tracking exceptions can also be helpful to identify and correct defects in the business process.

You can define exceptions, define processes for exception handling and relate them to appropriate exceptions, log exceptions, associate status to to exceptions at various stages in the logging and handling process, start exception handling, and view and track exceptions.

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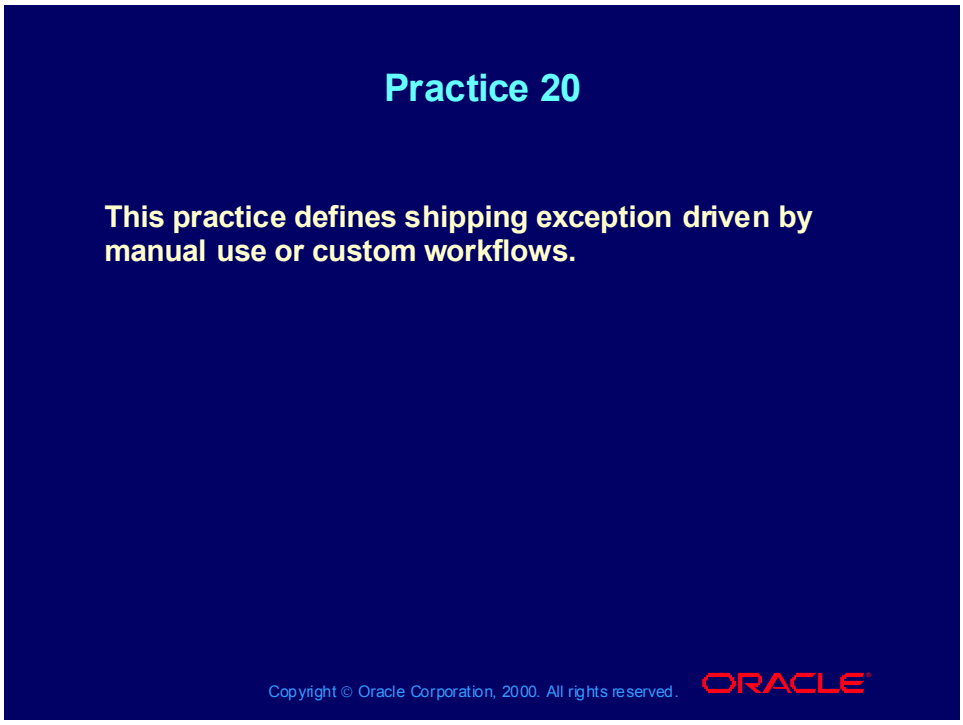

(N) Shipping > Shipping Exceptions

1.Enter XX as the name

2.Enter a description of the exception

3.Select the exception such as delivery exception

4. .Select one of the following default severity settings:

High: The exception must be handled before the task can be completed.

Medium: The exception must be handled before the task can be completed. However, the manager can override it and the task can be completed.

Low: A warning is given but the task can be completed.

5.Choose one of the following exception handling methods:

Manual: To manually correct the exception and close the exception status.

Workflow: To use a workflow for exception notification and exception handling.

No Action Required: No exception handling method is required.

6.Enter the workflow item type

7.Enter the workflow process

8.Optionally, enable the Workflow Process to enable the exception

9.Save your work

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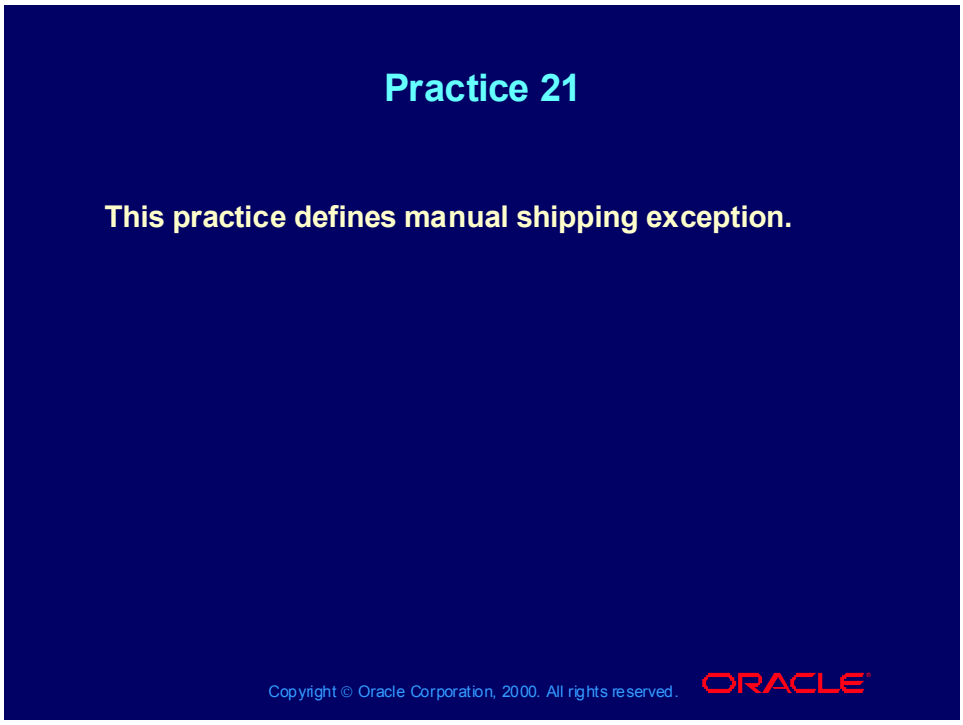

(N) Shipping > Setup > Define Exceptions

1. Enter invalid trip as the exception name
2. Enter a description
3. Select trip exception as the exception type
4. Select medium as the default severity
5. Save your work

(N) Shipping > Shipping Exceptions

1. Choose the New button
2. Enter invalid delivery planning as the name
3. Enter shipper as the logging entity
4. Enter Seattle 950 for both the logged at location and exception location
5. Enter delivery was planned poorly, needs to be revised as the message
6. Save your work

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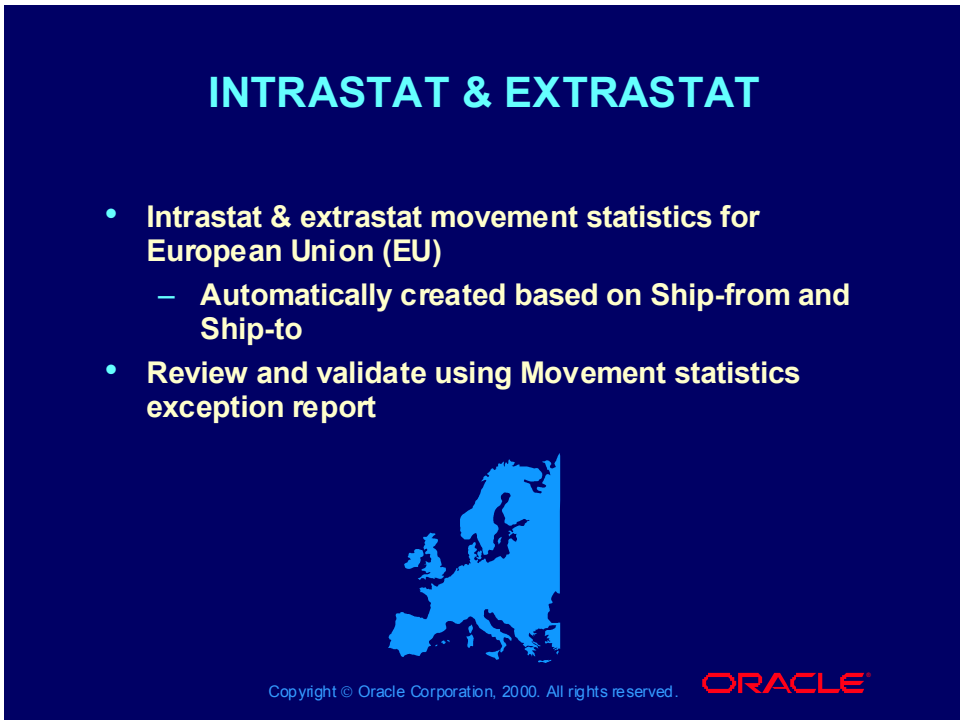

Oracle Purchasing, Order Management, and Inventory now provide you with the ability to support the automatic creation of the intrastat and extrastat movement statistics declarations to governmental authorities.

You can compile all of the material receipt (arrival) and shipment (dispatch) transactions for the given period and automatically create the intrastat records.

You can then review and validate the data using the movement statistics exception report, update the information using the Movement Statistics window, and run the standard movement statistics declaration report.

In addition the Oracle e-Commerce Gateway now supports the outbound EDIFACT INSTAT and EXSTAT transactions for electronic reporting to governmental authorities.

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Global Packing Slip

The packing slip report is a shipping document that lists all the goods that are transported between two points. The transport of goods can be related to sales, outside processing, drop-shipments, consigned inventory, returns to suppliers, internal movements and shows that the goods do not belong to the carrier.

In many countries, the packing slip is a common business practice, while in others, it is a mandatory business requirement to issue a shipping document for any shipment that leaves a company to a destination.

The packing slip report prints the following information: the customer's name with both the ship-to and bill-to addresses, ship date, freight and payment terms, order date, and salesperson. Also included are the waybill number, freight type, freight amount, FOB point, freight carrier, and unit of measure.

The packing slip lists each ordered item including the line level ship-to contact or order level contact, the purchase order number, the unit of measure, and the quantities ordered, shipped, stockkeeping unit (SKU) of items shipped, and backordered.

Among the options when generating a packing slip report the user can cancel, edit, re-print, sort, and sequence packing slip.

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For internal sales orders, shipping execution defaults the internal sales order number and requestor name to the Packing Instructions column.

Note: The Packing Slip Report meets EMEA requirements.

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Concurrent Programs

Import Delivery Lines

This program can be used to import delivery lines into shipping. At this time it supports importing 'Order Management' lines. Normally, this is not required as they get automatically imported into shipping when the workflow reaches the 'Awaiting shipping' activity, but this program is useful for CTO environments as well as debugging import failures (when the automatic mechanism fails)

Inventory Interface - SRS

This program is run to update inventory with the ship confirmation information. Inventory balances are decremented and reservations relieved. This program always spawns the Order Management Interface - SRS program. It is very important in the process flow that the the Inventory Interface complete before the Order Management Interface to ensure the integrity of the reservation information.

Order Management Interface - SRS

This program is run to update order management with the ship confirmation information. Order line shipped quantities will be updated. This program always spawns the Departure Ship Notice Outbound program.

Departure Ship Notice Outbound

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This program triggers the EDI DSNO process. It first verifies that EDI is installed and DSNO transaction profile is enabled before triggering the DSNO concurrent program.

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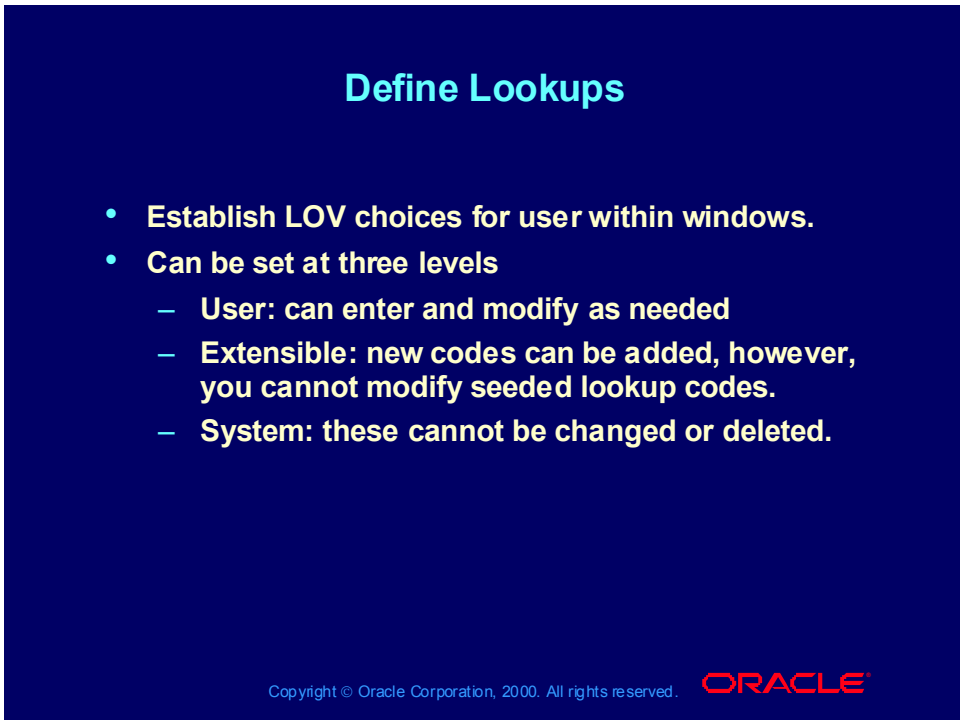
Define Lookups



(N) Shipping > Setup > Lookups

Examples of system level lookups include:

Delivery status
Exception severity
Exception status
Logging entity
Pack mode
Trip status

Examples of user level include:
Freight cost type: admin, duty, export, handling
Load tender status: accepted, rejected, tendered, not tendered
Supported carrier: (API interfaced) UPS, Fedex, DHL
WSHRDBDR: sorting criterias for backorder detail report: customer, warehouse, order number

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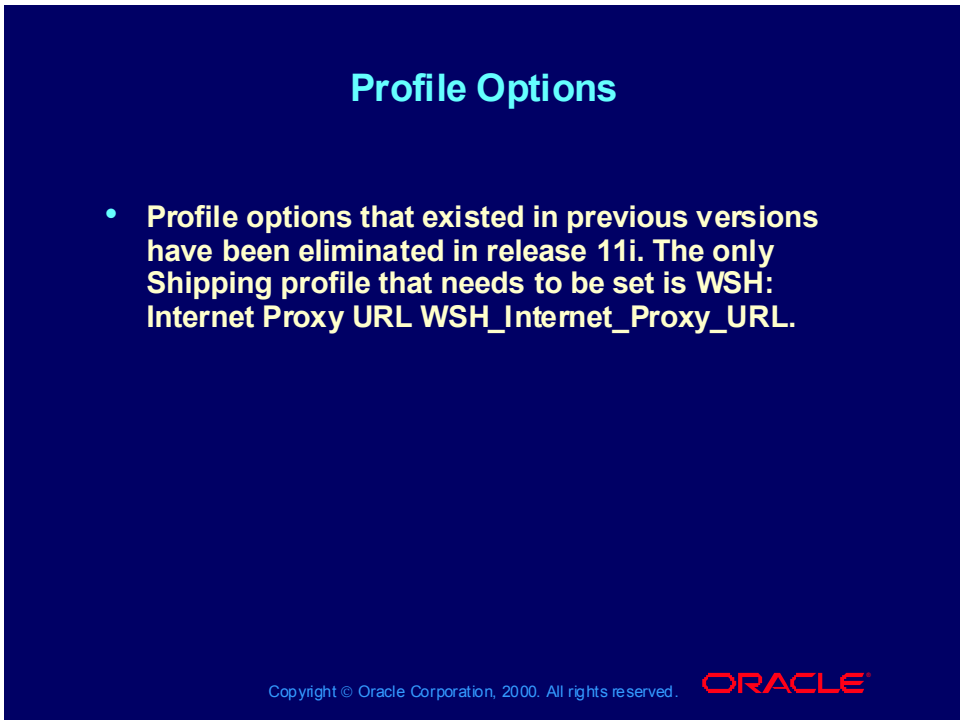

This profile is required for the shipper to use the UPS API's. To enable this functionality, enter the address of the user's proxy server. i.e.. www-proxy.us.oracle.com

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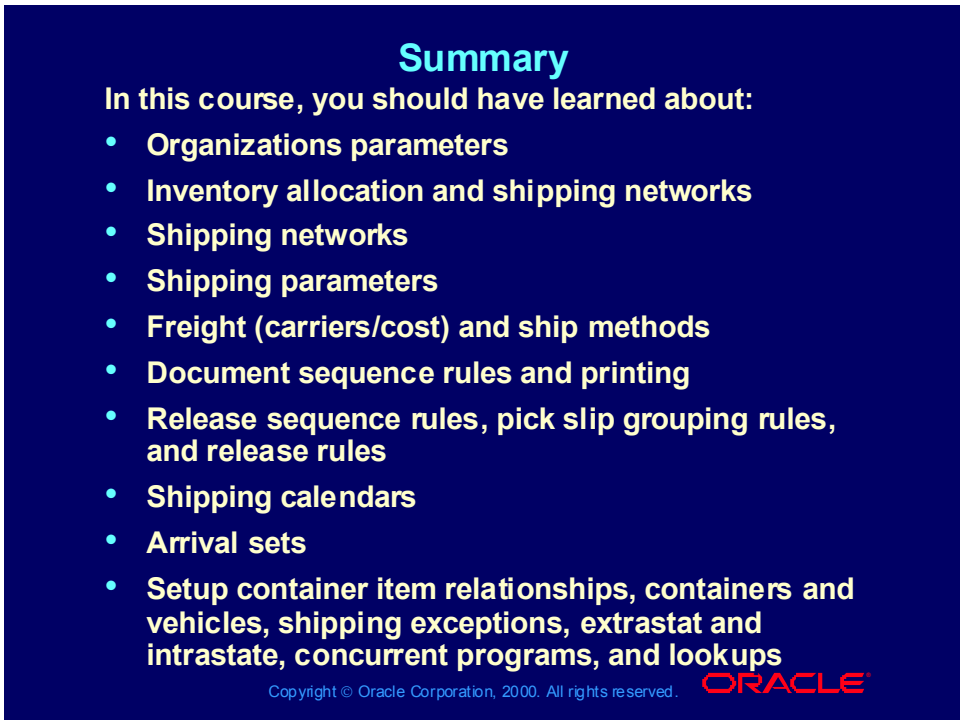
Summary



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