

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.

Related Publications

Oracle Publications

Additional Publications

- System release bulletins
- Installation and user's guides
- *read.me* files
- *Oracle Magazine*

Typographic Conventions

Typographic Conventions in Text

Convention	Element	Example
Bold italic	Glossary term (if there is a glossary)	The <i>algorithm</i> 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: <code>debug.set ('I', 300);</code> Directory: <code>bin (DOS), \$FMHOME (UNIX)</code> Filename: Locate the <code>init.ora</code> file. Password: User <code>tiger</code> as your password. Pathname: Open <code>c:\my_docs\projects</code> URL: Go to <code>http://www.oracle.com</code> User input: Enter <code>300</code> Username: Log on as <code>scott</code>
Initial cap	Graphics labels (unless the term is a proper noun)	Customer address (<i>but</i> Oracle Payables)
Italic	Emphasized words and phrases, titles of books and courses, variables	Do <i>not</i> save changes to the database. For further information, see <i>Oracle7 Server SQL Language Reference Manual</i> . Enter <code>user_id@us.oracle.com</code> , where <i>user_id</i> 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.

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 <i>role</i>
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

(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.

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.

R11i Oracle Shipping Execution: Overview of Picking and Staging

Chapter 1

R11i Oracle Shipping Execution: Overview of Picking and Shipping

R11i Oracle Shipping Execution: Overview of Picking and Shipping

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Objectives

Objectives

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

- Demonstrate knowledge of the shipping execution architecture, order process business flow, and APIs
- Define the concepts of Oracle Shipping Execution
- Demonstrate knowledge of the move order concepts
- Describe the shipping configuration process (four steps)
 - Pick release
 - Detailing
 - Pick confirmation
 - Ship confirmation
- Navigate through the Shipping Transaction window
 - Managing and querying data
 - Shipping exceptions

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Agenda

Agenda

- **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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Shipping Execution Architecture

- **New UI**
 - **Multirecord folders**
 - **Trips, stops, and deliveries**
 - **Lines and containers**
- **Shipping execution architecture schema**
- **Order business process flow**
- **Open APIs**

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Shipping Execution User Interface

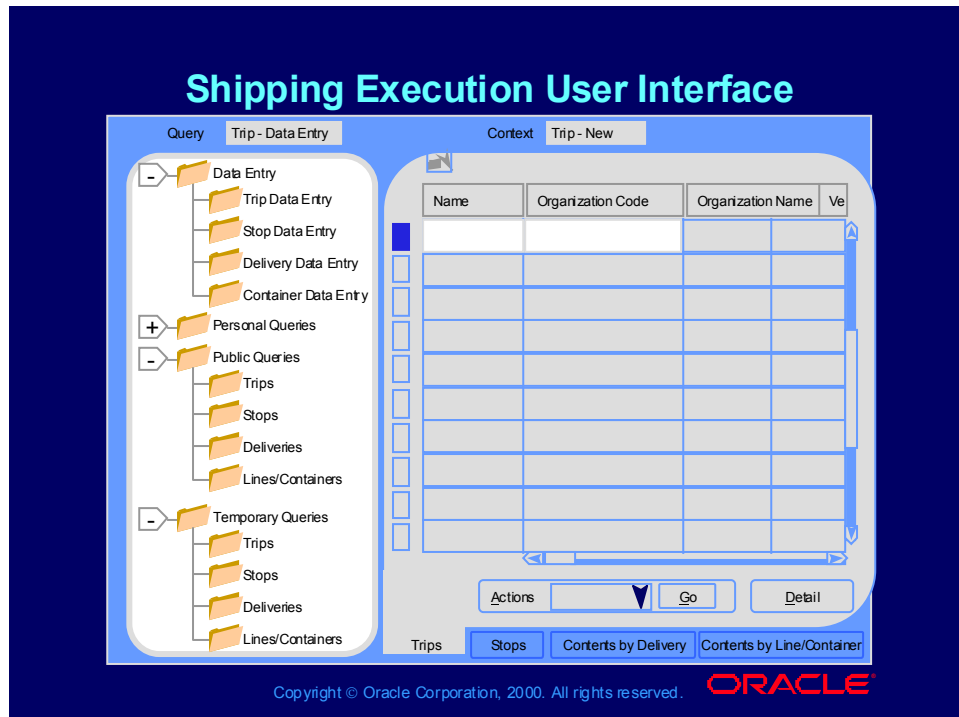
The Shipping User Interface allows for extensive use of Oracle Folder and Tree capabilities. With this you can:

- Create and save queries in folders for quick retrieval of data
- Move fields to view only the data you require to see
- Modify tabs within tabs
- Perform multiple tasks in a single window
- Utilize Right mouse button functions

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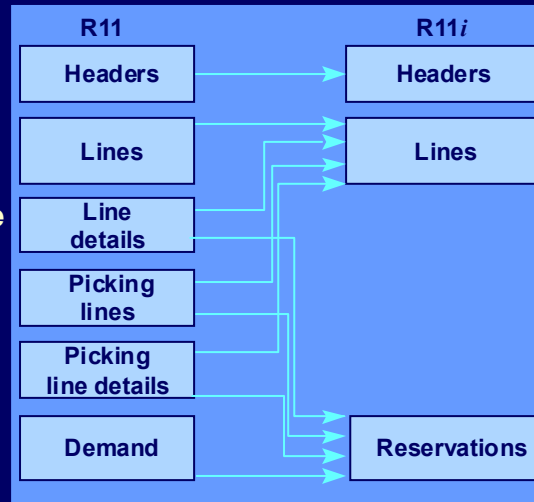
Shipping Execution User Interface



Shipping Execution Architecture: Schema

Shipping Execution Architecture: Schema

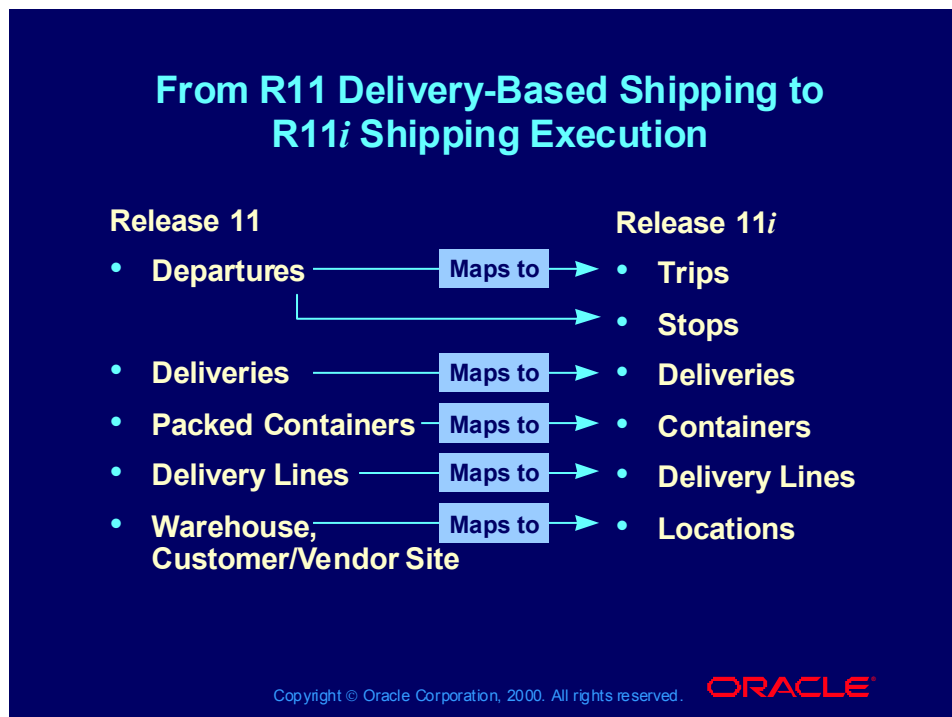
- New simple schema
- Streamlined for superior performance
- Easier to extend



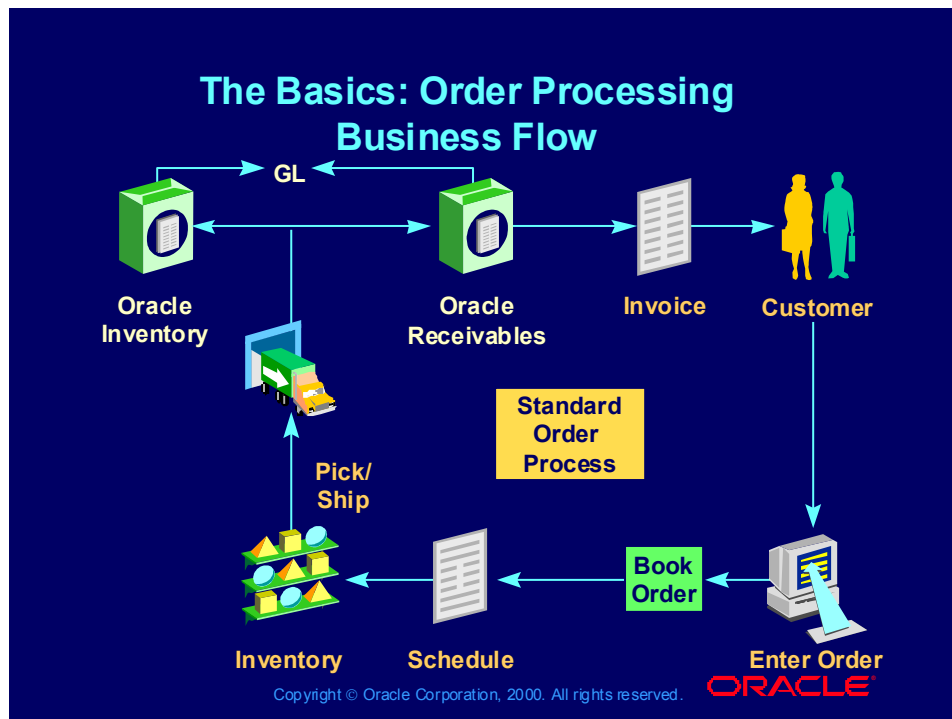
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From R11 Delivery-Based Shipping to R11i Shipping Execution

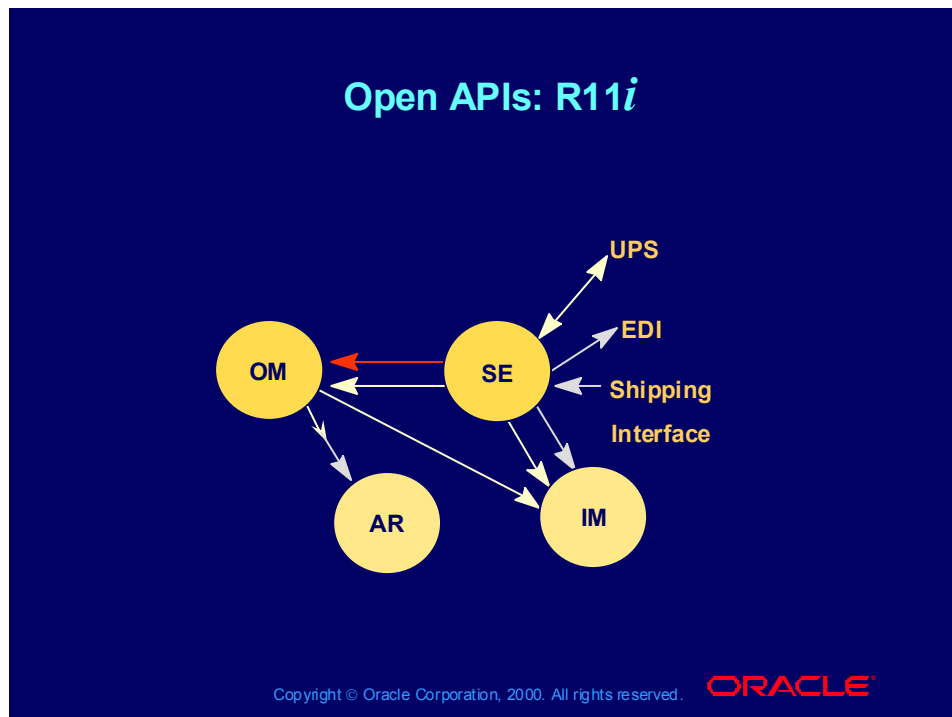


The Basics: Order Processing Business Flow



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.



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 through 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.

Review Question

Review Question

The Oracle Shipping Execution Architecture is designed to allow for:

- 1. Enhanced planning of distribution networks**
- 2. Greater visibility to shipping transactions**
- 3. Close modeling of a shipping business**
- 4. Ease of use for shipping personnel**
- 5. All of the above**

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Answer to Review Question

The Oracle Shipping Execution Architecture is designed to allow for:

1. Enhanced planning of distribution networks
2. Greater visibility to shipping transactions
3. Close modeling of a shipping business
4. Ease of use for shipping personnel
5. All of the above

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Review Question

Review Question

Which of the following is not part of the user interface?

- 1. Folders and collapsing trees**
- 2. Rotating function**
- 3. Move fields to find information more quickly**
- 4. Tabs within tabs**
- 5. Creating and saving queries**

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Answer to Review Question

Which of the following is not part of the user interface?

1. Folders and collapsing trees
2. Rotating function
3. Move fields to find information more quickly
4. Tabs within tabs
5. Creating and saving queries

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Agenda

Agenda

- 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 form
 - Managing and querying data
 - Shipping exceptions

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Shipping Execution Concepts

Shipping Execution Concepts

- Trips
- Stop
- Delivery
- Delivery leg

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

Shipping Execution Concepts

Shipping Execution Concepts

Trip

- Is carrier-specific (such as UPS, DHL, FedEx)
- Contains deliveries and departs from a particular location
- Must contain at least two stops (such as San Francisco, New York, Miami, and Dallas)



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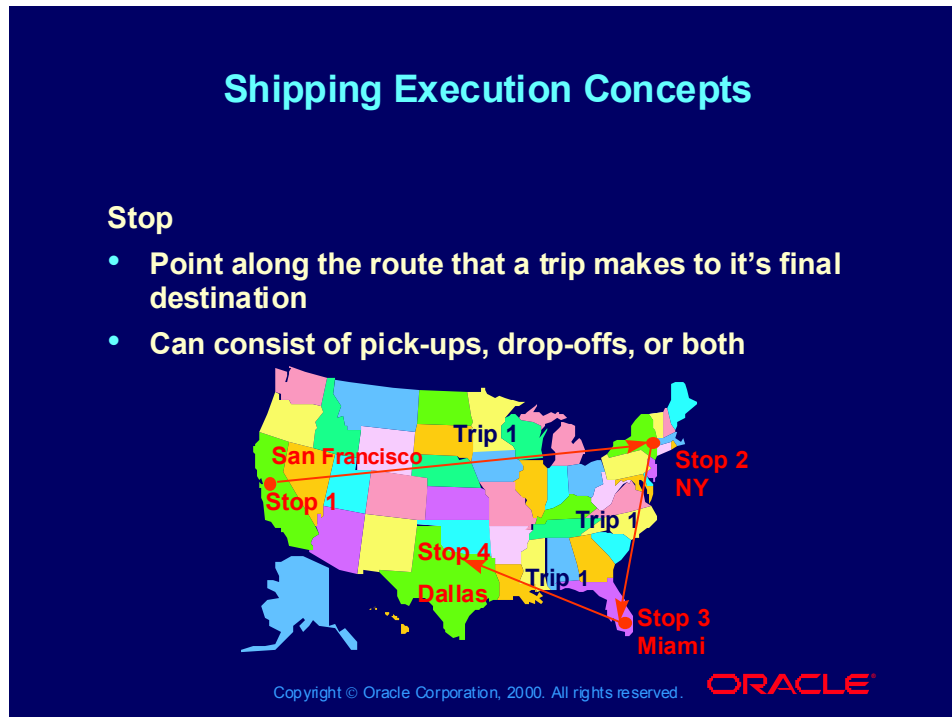
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Trips

Trip 1

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

Shipping Execution Concepts



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).

Shipping Execution Concepts

Delivery

- Consolidation of sales order lines by attributes
- Based on user defined criteria:
 - Mandatory grouping criteria consists of:
 - Customer
 - Ship from location
 - Ultimate ship to location
 - An optional grouping criteria include carrier, freight terms, freight on board (FOB), intermediate ship to location, freight terms, ship method, FOB code, and carrier.

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Shipping Execution Concepts



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.

Review Question

Review Question

A trip consists of which of the following?

- 1. Delivery status**
- 2. At least two stops and one carrier**
- 3. At least two carriers and one stop**
- 4. Pick release**
- 5. Concurrent manager**

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Answer to Review Question

A trip consists of which of the following?

1. Delivery status
2. At least two stops and one carrier
3. At least two carriers and one stop
4. Pick release
5. Concurrent manager

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Review Question

Review Question

Stops consists of:

- 1. Pick-ups**
- 2. Drop-offs**
- 3. Pick-ups and/or drop-offs**
- 4. Just pick-ups**
- 5. Just drop-offs**

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Answer to Review Question

Stops consists of:

1. Pick-ups
2. Drop-offs
3. Pick-ups and/or drop-offs
4. Just pick-ups
5. Just drop-offs

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Agenda

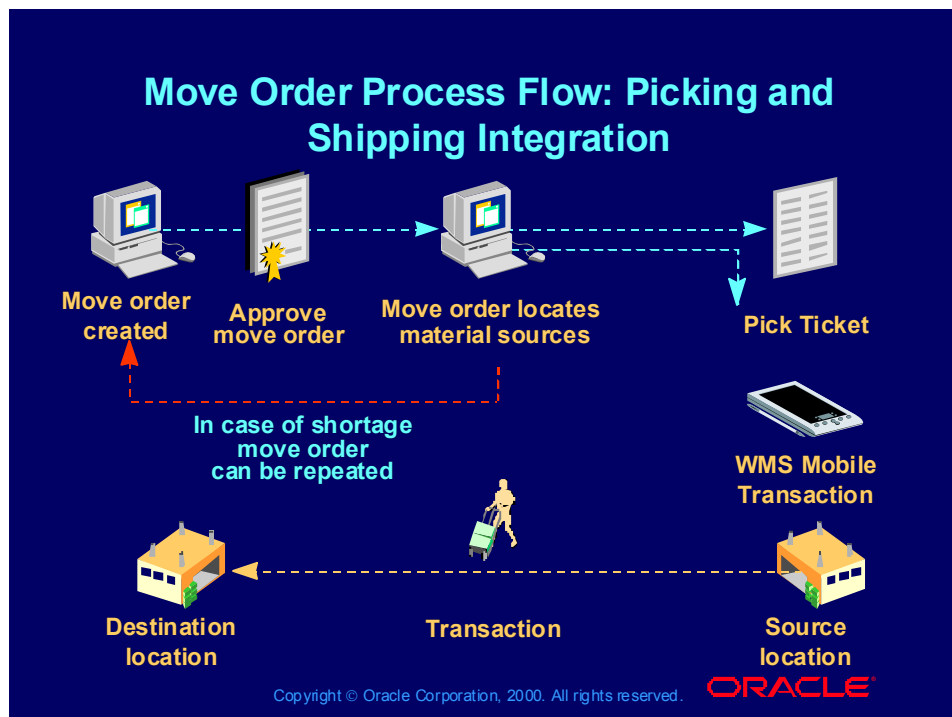
Agenda

- 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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Move Order Process Flow: Picking and Shipping Integration

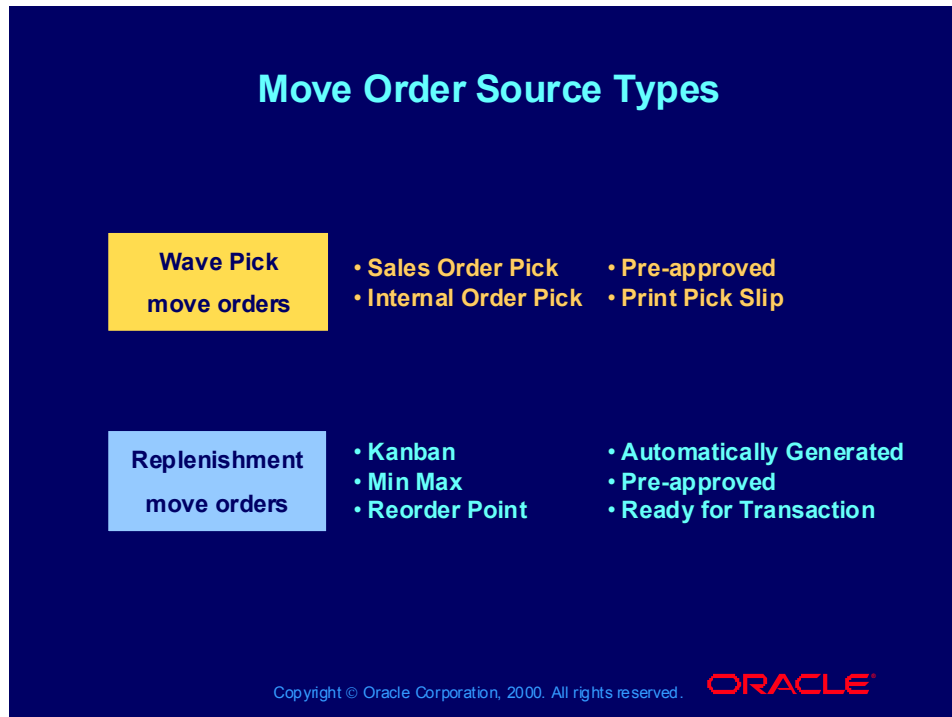


Procedural Flow for Material Picking Move Orders.

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.

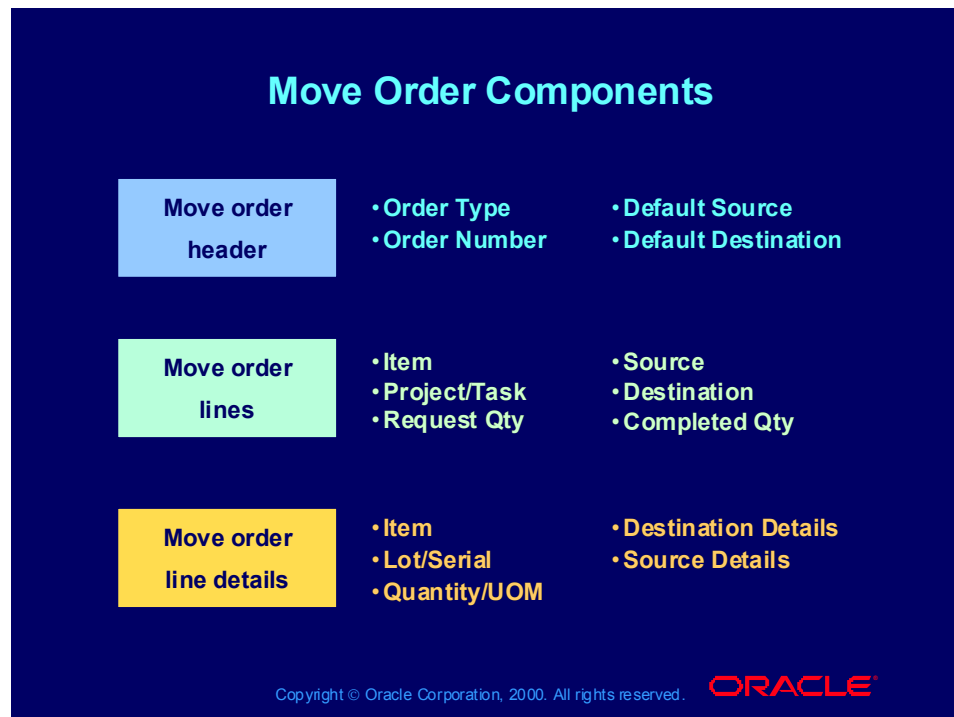
Move Order Source Types



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.

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.

Review Question

Review Question

_____ and _____ are move order source types.

1. Staging and confirmation
2. Inventory and material
3. Approved and transactions
4. Wave pick and replenishments
5. Departure % fill and volume

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Answer to Review Question

_____ and _____ are move order source types.

1. Staging and confirmation
2. Inventory and material
3. Approved and transactions
4. Wave pick and replenishments
5. Departure % fill and volume

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Review Question

Review Question

The components of a move order are:

- 1. Header, lines, and details**
- 2. Routes, lanes, and stops**
- 3. Rules, transactions, and setups**
- 4. Carriers, departures, and deliveries**
- 5. Locations, legs, and picking**

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Answer to Review Question

The components of a move order are:

- 1. Header, lines, and details**
- 2. Routes, lanes, and stops**
- 3. Rules, transactions, and setups**
- 4. Carriers, departures, and deliveries**
- 5. Locations, legs, and picking**

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Agenda

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- Shipping execution architecture, order process business flow, and APIs
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 - Ship confirmation
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 - Shipping exceptions

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Material Picking (Pick Release)

Material Picking (Pick Release)

- **Material picking waves**
 - **Manage staging locations**
 - **Report inventory shortages**
 - **Take advantage of cross-docking opportunities**
 - **Configurable process(four steps)**
 - 1. Pick release**
 - 2. Move order line detailing***
 - 3. Move order line pick confirmation***
 - 4. Ship confirmation**
- * May be automated**

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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.

Pick Release

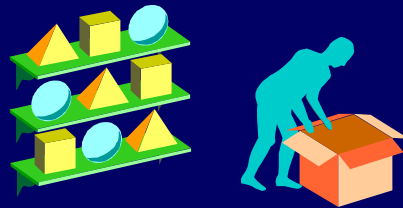
- **Pick release finds and releases eligible order lines that meet the release criteria; creates move orders that move the inventory to staging areas; and optionally, calls inventory pick release to reserve items and print the pick slips.**
- **Three methods for pick release are:**
 - **Online**
 - **Concurrent**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



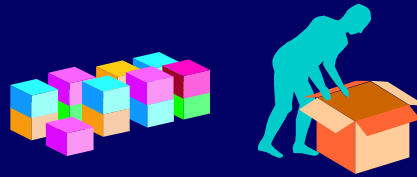
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Standard Report Submission (SRS) Pick Release

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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Review Question

Review Question

From the Release Sales Orders for Picking window, you would navigate to the _____ to define attributes for SRS.

1. Query manager
2. Delivery window
3. Parameters window
4. Trip window
5. Stop window

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Answer to Review Question

From the Release Sales Orders for Picking window, you would navigate to the _____ to define attributes for SRS.

1. Query manager
2. Delivery window
3. Parameters window
4. Trip window
5. Stop window

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Review Question

In the Parameters Window, what are the two required entries in SRS?

- 1. Order and shipment**
- 2. Release rules name and name**
- 3. Currency and containers**
- 4. Trips and stops**
- 5. Lines and containers**

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Answer to Review Question

In the Parameters Window, what are the two required entries in SRS?

1. **Order and shipment**
2. **Release rules name and name**
3. **Currency and containers**
4. **Trips and stops**
5. **Lines and containers**

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Detailing

Detailing

- To release the Move Order lines created at pick release to the warehouse and to print pick slips, the lines must be detailed.
- Picking engine creates move order:
 - Must detail to print pick slips or move to mobile devices
 - Creates reservation from Org, item, and Qty
- Auto Detailing
 - Suggest sourcing for material immediately based on established picking rules
 - Set as default in the Organization Shipping Parameters window

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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.

Pick Confirmation

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:

- **Transacts move order details to staging subinventory**
- **Transfers reservation to staging location:**
 - Can report discrepancies
 - Can change detail
- **Auto pick confirm**
 - Set as default in the Organization Parameters window
 - Can be overridden at 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.

Staging Locations

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:

- **Destination subinventory of pick wave move**
- **Same location for each batch created**
- **Specified in shipping execution organization parameters**
- **Can be changed at pick release**

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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.

Ship Confirmation

The material picking process ends when the items are ship confirmed out of inventory. Ship-confirming the items removes the existing reservations and performs the sales order issue transaction:

- A new ship confirm field for actual departure date in auto-create trip options provides flexibility of specifying the stop departure date (which is used to update Inventory).
- Ship confirm now splits stage quantities on each line. If a nonzero stage quantity exists on a line, this is split off from the line and become unassigned from the delivery.

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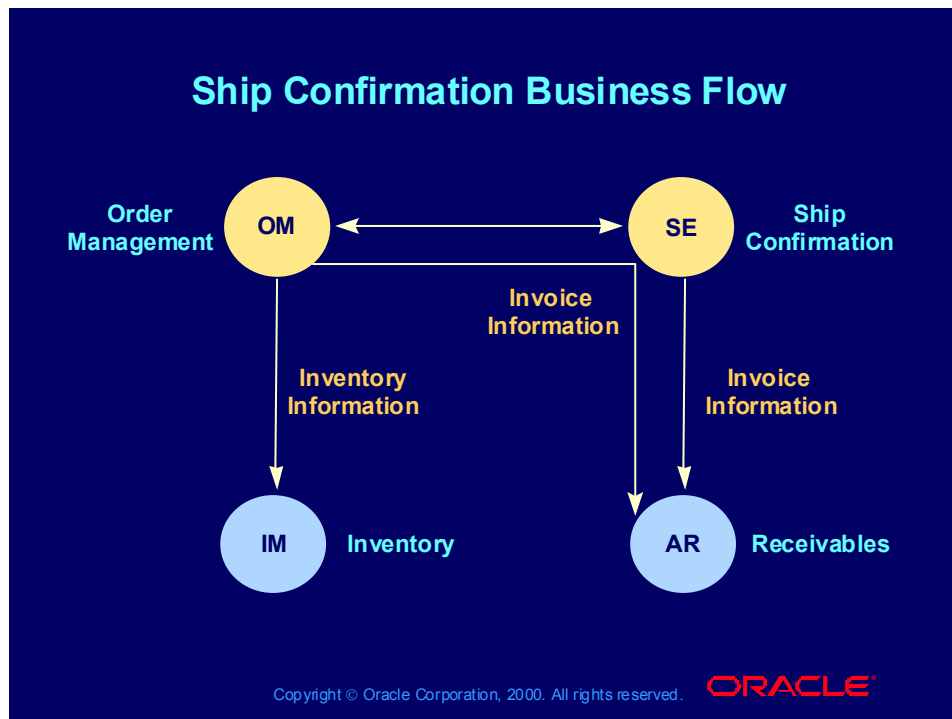
Ship Confirmation

- A new check box for creating a delivery with split-off staged quantities provides the ability to group all staged lines together in a new delivery.
- A delivery can be completely backordered, creating move orders for each backordered line and closing the delivery.
- Application of special charges (freight costs, expedite fee, special handling) is included
- UPS Tracking Integration capability is also included

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Ship Confirmation Business Flow



Agenda

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 - Pick confirmation
 - Ship confirmation
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 - Managing and querying data
 - Shipping exceptions

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Shipping Transaction Window

Shipping Transaction Window

- **Data Manager**
Modify data (plan trips, stops, deliveries, and lines and containers)
- **Query Manager**
 - Find entities
 - Define and save queries
- **Verify arrival and departure of deliveries and stops**
- **Support multi-leg shipments**
- **Explode and enter sourcing material information for lines**
- **Execute pick release and ship confirmation from the same window**

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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.

Data Manager

- Enables you to find and change data easily
- Plans trips, stops, deliveries, and delivery lines and containers
- Confirms a shipment or delivery
- Tracks single-leg shipments
- Tracks shipping containers
- Handles over- and under-shipments
- Meets intrastat shipping requirements

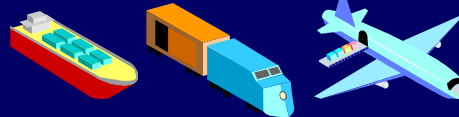
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Creating Trips

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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Creating Deliveries

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

- **Consignee and freight terms**
- **Ship method**
- **FOB and location**
- **Weight and volume**
- **Load sequence**
- **Actions button for further options**

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Lines and Containers

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

- **Container**
- **Seal code**
- **Tracking number**
- **Weight: Gross, tare, net, and unit of measurement (UOM)**
- **Volume: volume and UOM**
- **Fill percentage**
- **Actions button for further options**

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Review Question

Review Question

The Shipping Transaction window can:

- 1. Handle over- and under-shipments**
- 2. Track shipments**
- 3. Modify data**
- 4. Plan trips, stops, deliveries, and delivery lines and containers**
- 5. All of the above**

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Answer to Review Question

The Shipping Transaction window can:

1. Handle over- and under-shipments
2. Track shipments
3. Modify data
4. Plan trips, stops, deliveries, and delivery lines and containers
5. All of the above

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Query Manager

- Query manager tracks information related to trips, stops, deliveries, lines and containers, containers, and delivery lines entities
- The query manager provides you with the ability to perform simple to advanced queries based on criteria you define
- You can save and share queries by name and description

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Query Manager

The screenshot shows the Oracle Query Manager application window. The title bar reads "Query Manager". Inside the window, there are two tabs: "Lines" (selected) and "Additional".

Search for:

- ☐ Trips
- ☐ Stops
- ☐ Deliveries
- ☐ Lines and Containers
- ☐ Containers
- ☒ Lines

Saved Query:

Name:
Description:
Owner:
☐ Share

Lines:

Organization:
Consignee:
Ship Method:
Ship From:
Ship To:
Dates Scheduled:

Containers:

Assigned: Packed:
Released:
Order Numbers:
Order Type:
Order Lines:

Assigned: Packed:
Names:
Item:

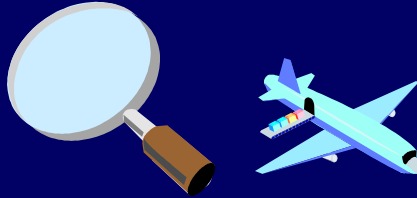
Buttons at the bottom: Open... Save Copy Delete Clear Find...

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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



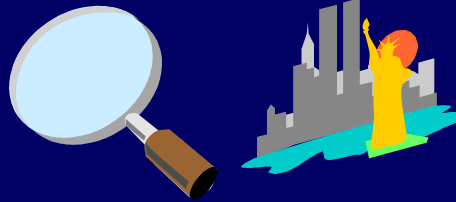
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Query Stops

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

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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Query Lines and Containers

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

- Assigned, packed, and released
- Order numbers
- Order type
- Order lines
- Organization

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Query Lines and Containers

- **Consignee**
- **Ship method**
- **Ship from and to**
- **Shipment priority**
- **Dates scheduled**

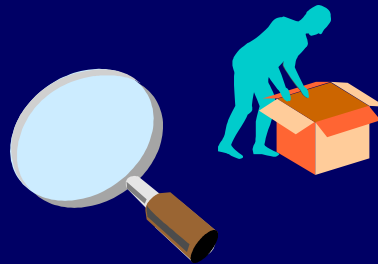
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Query Containers

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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Query Lines

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

- **Assigned, packed, and released**
- **Order numbers**
- **Order type**
- **Order lines**
- **Organization**

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Query Lines

- **Consignee**
- **Ship method**
- **Ship from and to**
- **Shipment priority**
- **Dates scheduled**

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Review Question

The Query Manager:

1. Is accessed at pick release only during trip planning
2. Permits shipping clerks to cancel deliveries
3. Performs simple to advanced searches based on criteria that you define
4. Must be used when creating a trip, stop, delivery, and delivery lines and containers
5. None of the above

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Answer to Review Question

The Query Manager:

1. Is accessed at pick release only during trip planning
2. Permits shipping clerks to cancel deliveries
3. Performs simple to advanced searches based on criteria that you define
4. Must be used when creating a trip, stop, delivery, and delivery lines and containers
5. None of the above

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Review Question

The Query Manager can search by which of the following entities?

- 1. Ship confirm, percentage of lines, UOM, descriptions, and trips**
- 2. Shipments, vehicles, processes, and transactions**
- 3. Freight costs, pick waves, currency, and containers**
- 4. Trips, stops, delivery legs, and departures**
- 5. Trips, stops, deliveries, lines and containers, containers, and delivery lines**

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Answer to Review Question

The Query Manager can search by which of the following entities?

1. Ship confirm, percentage of lines, UOM, descriptions, and trips
2. Shipments, vehicles, processes, and transactions
3. Freight costs, pick waves, currency, and containers
4. Trips, stops, delivery legs, and departures
5. Trips, stops, deliveries, lines and containers, containers, and delivery lines

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Shipping Exceptions

Use the Shipping exceptions feature to:

- **Define exceptions per business requirements**
- **Define handling processes for exceptions (through Workflow)**
- **Record shipping exceptions during shipment process**
- **Initiate exception handling**
- **View and track exceptions**

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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.

Shipping Exceptions

- Helps you identify and correct shipping exceptions that violate the requirements of your operation or that of your carriers and customers.
- Gives you the ability to define exceptions and the processes for handling them
- Enables you to record exceptions automatically from within Oracle Shipping Execution or log exceptions manually through the user interface input forms.
- Can be used to track carrier performance: POD date and ship date
- Can be used to analyze changes to order after pick release

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Summary

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

R11i Oracle Shipping Execution: Picking and Staging

R11i Oracle Shipping Execution: Picking and Staging

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Objectives

Objectives

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

- Setup release sequence rules, pick slip grouping rules, and release rules.
- Pick release an order:
 - Online
 - Concurrent
 - Standard Report Submission (SRS)
- Setup move orders
- Detail an order
- Pick confirm an order
- Ship confirm an order

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Agenda

Agenda

- Release sequence rules, pick slip grouping rules, and release rules
- Pick releasing an order:
 - Online
 - Concurrent
 - SRS
- Move orders
- Detailing an order
- Pick confirming an order
- Ship confirming an order

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Release Sequence Rules

Release Sequence Rules

This rule defines the order in which eligible sales order lines are released and allocated to inventory items during the pick release process.

- Can be a defaulted rule in the release sales order window.
- Create rules for different business conditions.
- Establish hierarchy based on priority

Attribute	Shipping Execution
Release By Order #	✓
Outstanding Invoice Value	✓
Scheduled Date	✓
Departure Date	✓
Shipment Priority	✓

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(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.

Pick Slip Grouping Rules

Pick Slip Grouping Rules

This rule defines how release lines will be grouped on to pick slips.

- Can be set as default rule in the release sales order window.
- Create rule for different business conditions.
- Establish hierarchy based on priority

Attribute	Shipping Execution
Group by Order #	✓
Group by Sub Inventory	✓
Group by Customer	✓
Group by Carrier	✓
Group by Delivery /Trip Stop	✓
Group by Ship To	✓
Group by Shipment Priority	✓
Group By Item	✓ (Only when WMS Installed)
Group By Location	✓ (Only when WMS Installed)
Group By Lot/Revision	✓ (Only when WMS Installed)

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(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.

Release Rules

Release Rules

This rule defines and saves picking criteria that can be used when running pick release.

- Create release rules for pickslips to print based upon specific business need
- Run release rules on specific organizations or on multiple organizations
- Required when running pick release as an SRS process
- Using current date defaults sys date in rule
- Create rule for order, shipping or inventory information

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(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

Review Question

Review Question

This window allows the user to set up picking rules:

- 1. Pick Rules window**
- 2. Pick Rule Marks window**
- 3. Release Rule window**
- 4. Move Order window**
- 5. Ship workbench window**

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Answer to Review Question

This window allows the user to set up picking rules:

1. Pick Rules window
2. Pick Rule Marks window
3. Release Rule window
4. Move Order window
5. Ship workbench window

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Review Question

What would be the advantage of creating a pick slip grouping rule by customer and sub-inventory?

- 1. All logical lines to be picked are on one pick slip.**
- 2. The ship to, carrier, and departure points are one pick slip.**
- 3. The delivery and shipment priority are one pick slip.**
- 4. The line items, trips, and stops are one pick slip.**
- 5. The inventory customer, ship from, and org are one pick slip.**

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Answer to Review Question

What would be the advantage of creating a pick slip grouping rule by customer and sub-inventory?

- 1. All logical lines to be picked are on one pick slip.**
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- 3. The delivery and shipment priority are one pick slip.**
- 4. The line items, trips, and stops are one pick slip.**
- 5. The inventory customer, ship from, and org are one pick slip.**

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Agenda

Agenda

- Release sequence rules, pick slip grouping rules, and release rules
- **Pick releasing an order:**
 - Online
 - Concurrent
 - SRS
- Move orders
- Detailing an order
- Pick confirming an order
- Ship confirming an order

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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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Pick Release

You can have pick release create move orders that transfer inventory to a staging location.

- Pick release is normally performed to meet your business requirements based upon criteria established with a set-up step called release rules.
- You can manually enter pick release criteria if release rules have not been created to support your business need.



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

Material Picking

Material Picking

- **Material picking waves**
 - Manage staging locations
 - Report inventory shortages
 - Take advantage of cross docking opportunities



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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.

Picking and Staging

- **Configurable process (5 steps)**
 - 1. Setup
 - 2. Pick release
 - 3. Move order line detailing*
 - 4. Move order line pick confirmation*
 - 5. Ship confirmation
- * May be automated

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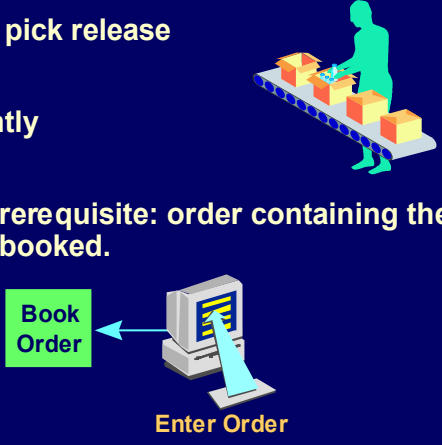
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**(Help) Oracle Manufacturing Applications > Oracle Shipping
Execution > Managing Pick Release > Move Orders**

Pick Release

Pick Release

- 3 Methods for pick release
 - Online
 - Concurrently
 - SRS
- Pick release prerequisite: order containing the lines must be booked.



The diagram illustrates the pick release process. On the right, a person is shown picking items from a conveyor belt. On the left, a computer monitor displays a screen with a green button labeled 'Book Order' and a blue arrow pointing to it. Below the monitor, the text 'Enter Order' is displayed.

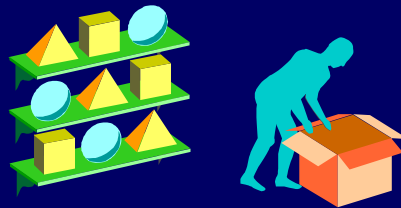
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(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Managing Pick Release > Overview

Online Pick Release

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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Two places to run online:

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

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

Practice 1

Practice 1

Business world places several orders with your company to buy two items that are serial number controlled. After you have entered your orders you will perform on-line pick release from the tools menu enabling auto-detail and auto pick confirm. You will then submit your request to be processed.

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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

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.

Practice 2

Practice 2

This practice is design to have your company pick release Business World's second order from the Actions Menu in Shipping Transaction window. You will then submit your request to be processed.

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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.

Practice 3

Practice 3

This practice is design to have your company pick release Business World's your third order from the Release Sales Order window using auto detail and auto pick confirm. You will then submit your request to be processed.

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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

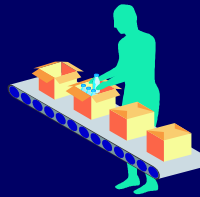
3. Select Order Number as the Release Sequence Rule from LOV.

(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.

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)



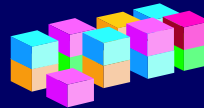
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Standard Report Submission (SRS) Pick Release

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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Review Question

What would be the advantage of running concurrent pick release?

- 1. Able to process multiple stops simultaneously**
- 2. Able to pick confirm multiple orders simultaneously**
- 3. Able to book multiple orders simultaneously**
- 4. Able to run other processes simultaneously**
- 5. Able to process multiple trips simultaneously**

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Answer to Review Question

What would be the advantage of running concurrent pick release?

1. Able to process multiple stops simultaneously
2. Able to pick confirm multiple orders simultaneously
3. Able to book multiple orders simultaneously
4. **Able to run other processes simultaneously**
5. Able to process multiple trips simultaneously

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Review Question

What must first be done in order to run SRS pick release?

- 1. Transaction rules must be defined**
- 2. Pick wave move orders must be defined**
- 3. Release rules must be defined**
- 4. Trips must be defined**
- 5. Stops must be defined**

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Answer to Review Question

What must first be done in order to run SRS pick release?

1. Transaction rules must be defined
2. Pick wave move orders must be defined
- 3. Release rules must be defined**
4. Trips must be defined
5. Stops must be defined

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Agenda

Agenda

- Release sequence rules, pick slip grouping rules, and release rules
- Pick releasing an order:
 - Online
 - Concurrent
 - SRS
- Move orders
- Detailing an order
- Pick confirming an order
- Ship confirming an order

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Move Orders

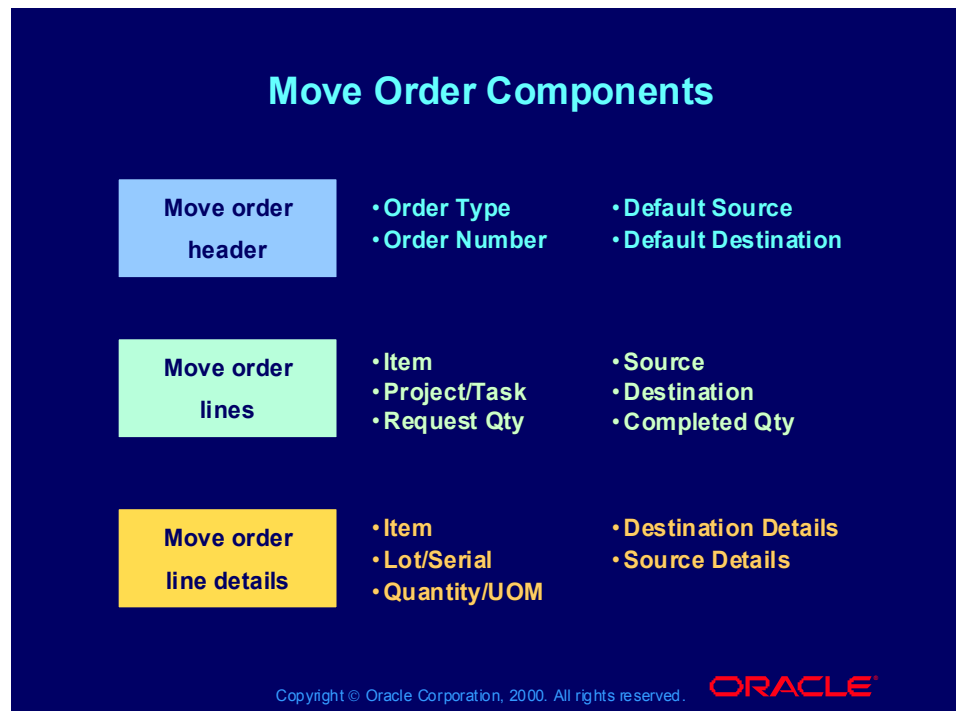
- Pick release finds and releases eligible delivery lines that meet the release criteria, and creates move orders. Move orders create a reservation, determine the source, and transfer the inventory to staging areas.
- Pick slips can be created after the detailing process completes, and the quantity and source can be manually verified at pick confirm. Detailing and pick confirmation can be manually transacted through inventory or set up in shipping parameters to occur automatically at pick release.
- New staging sub-inventory must be created to support move order functionality

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

Move Order Components



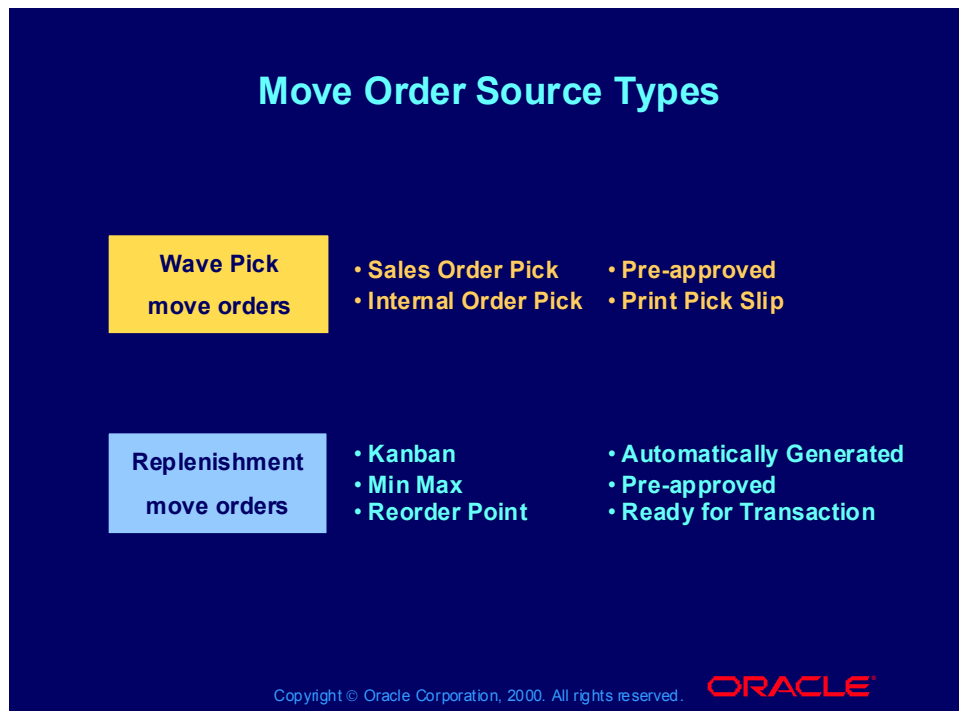
Anatomy of a Move Order

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 known, 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.

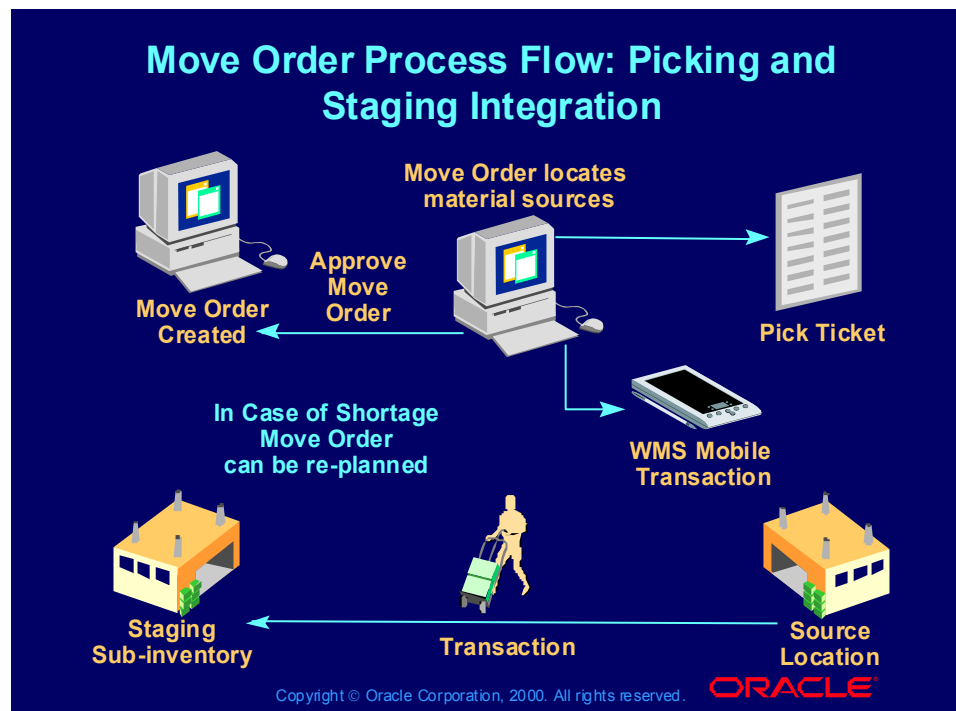
Move Order Source Types



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.

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.

Detailing

- **Process of sourcing the request for inventory material. The request is issued from the pick release and must be detailed.**
- **Picking engine creates move order.**
 - **Must detail to print pick slips or move to mobile devices**
 - **Creates soft allocation within the inventory organization**
- **Auto Detailing**
 - **Suggest sourcing for material immediately based on established picking rules**
 - **Maybe set as default in the release rules or the organization shipping parameters window**

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

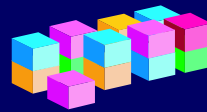
Pick release creates move order lines. In order to release those lines to the warehouse and print pick slips the lines must be detailed. The process by which the picking engine generates transaction line suggestions is called “detailing”. The detailing process for a pick wave move order line also creates 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.

Staging Locations

Staging Locations

- The destination sub-inventory on the pick wave move order is the staging location where the picked material should be deposited.
- Each organization should designate at least one staging sub-inventory.
- The destination sub-inventory of pick wave move order should be the same location for each batch created, and specified in the organization parameters.
- Can be changed at pick release



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(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.

Agenda

Agenda

- Release sequence rules, pick slip grouping rules, and release rules
- Pick releasing an order:
 - Online
 - Concurrent
 - SRS
- Move orders
- Detailing an order
- Pick confirming an order
- Ship confirming an order

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Pick Confirmation

Pick Confirmation

- **Pick confirmation is the actual movement of inventory from the source location to the staging sub-inventory. This process can be done manually or automatically.**
- **Transfers reservation to staging location**
 - Can report discrepancies
 - Can change detail
- **Auto pick confirm**
 - Can be set as default in the release rules or organization parameters form.
 - Default at inventory organization parameter
 - Can be overridden at pick release



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(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.

- 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.

Over/Under-Shipments

Over/Under-Shipments

- **Tolerance % for over and under-shipments**
- **Set at customer, site, item, customer/item or global level**
- **Shipping can override tolerances**
- **Sales order line automatically closes if within under-ship tolerance**
- **Option to invoice sales order line for quantity overshipped**

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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

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

Ship Confirmation

Ship Confirmation

- The material picking process ends when the items are ship confirmed out of inventory. Ship confirm removes the existing reservations, and performs the sales order issue transaction.
- We have various options to confirm ship quantity levels. They include:
 - Ship entered quantities
 - Ship unspecified
 - Full
 - Back ordered
 - Staged
 - Ship all
 - Back order all

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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

Ship Confirmation

Ship Confirmation

- New ship confirm field for actual departure date in auto-create trip options. This provides flexibility of specifying the stop departure date (which is used to update inventory).
- Ship confirm now splits stage quantities for partial shipments on each line. If a nonzero stage quantity exists on a line this will be split off from the line and becomes unassigned from the delivery.
- A checkbox is available for creating a delivery with split-off staged quantities. This provides the ability to group all staged lines together in a new 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

Ship Confirmation

Ship Confirmation

- A delivery can be backordered completely, creating move orders for each backordered line and closing the delivery.
- Application of special charges (freight costs, expedite fee, special handling).

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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

Ship Confirmation

- **Ship confirm one or more deliveries by enabling the set delivery in-transit and close trip fields in the Confirm Delivery window:**
 - **Set delivery in-transit:** creates trips and stops for the delivery. Closes first stop of the delivery, but leaves second stop open. Sets status of the delivery to in-transit and initiates Oracle Order Management (OM) and Inventory interfaces.
 - **Close Trip:** creates a trip and stops for the delivery. closes trip, all stops, and the delivery.

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Practice 4

Practice 4

This practice is design to have your company pick release Business World's order and perform a manual move order for inventory allocation. You will then submit your request to be processed and it ends by having you ship confirm your created sales order.

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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

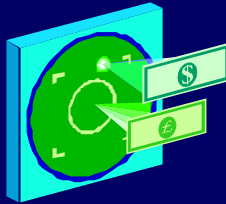
10. Select lines search.

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.

Tracking Freight Costs

Tracking Freight Costs

- Define freight cost types
- Define freight costs
- Interface to OM based on percentage of weight, volume or quantities
- Modify costs after ship confirm



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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.

Shipping Exceptions

Shipping Exceptions

- Define exceptions per business requirements
- Define handling processes for exceptions (via Workflow)
- Record shipping exceptions during shipment process
- Initiate exception handling
- View and track exceptions

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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.

Intrastat

- **Intrastat and extrastat movement statistics for European Union (EU)**
 - Automatically created based on ship-from and ship-to
- **Review and validate using movement statistics exception report**



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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.

Global Packing Slip

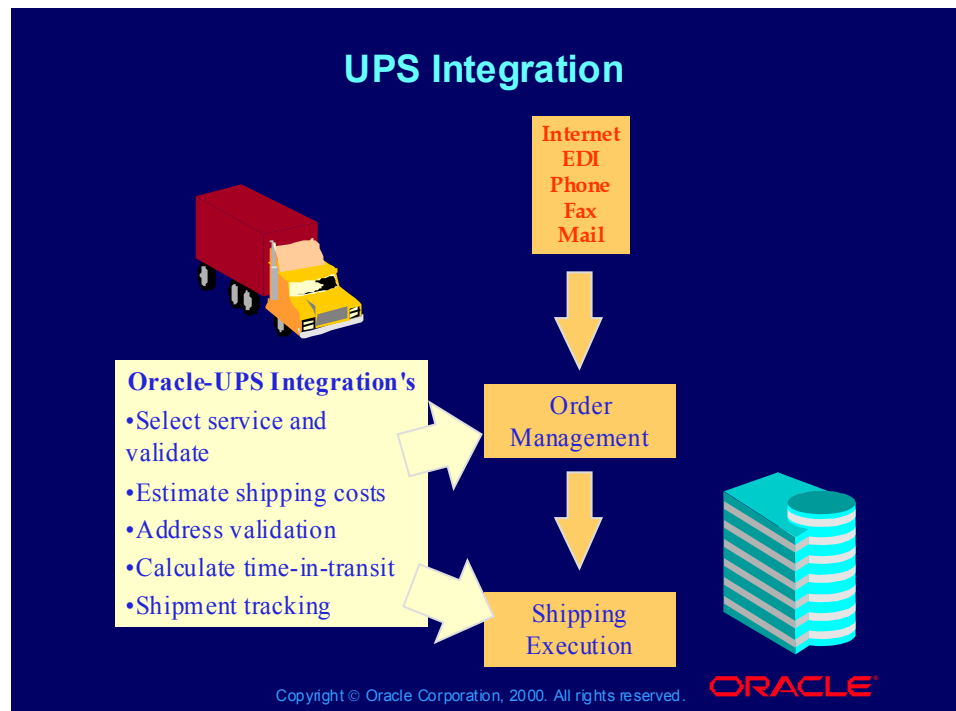
- **Packing slip**
 - **Print prior to ship confirmation.**
 - **Reprint packing slip**
 - **Sequence packing slip**
 - **Draft and final versions**
 - **Final designation freezes, but allows subsequent reprint**
 - **Sort by inventory item or by customer item**
 - **Allow alphanumeric prefix/suffix**



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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.

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.

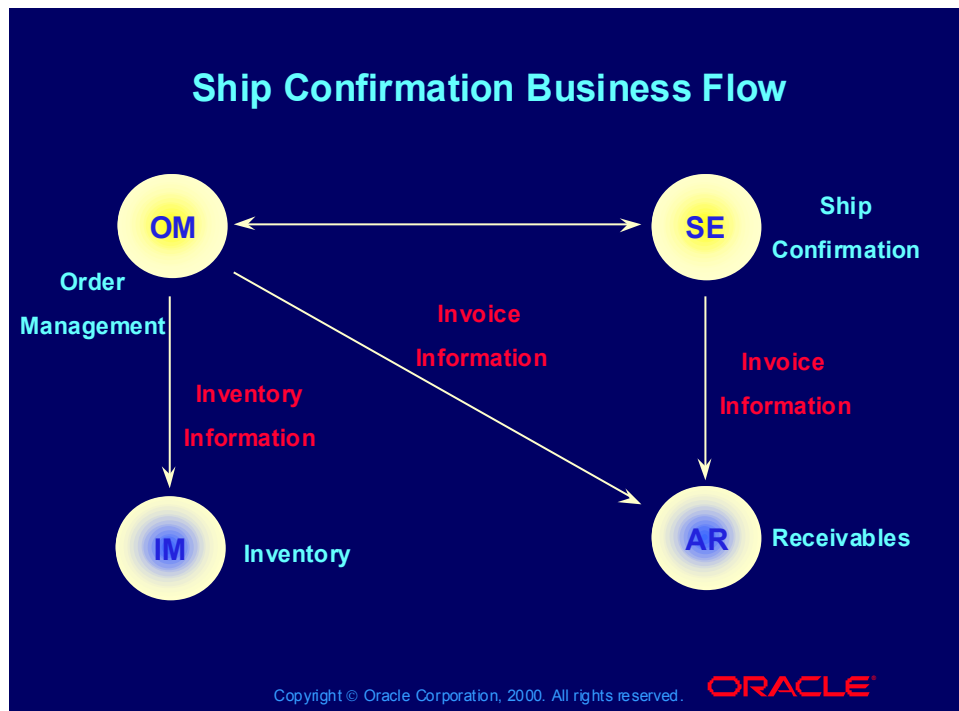
Oracle-UPS APIs will be used throughout the Oracle ERP Application Suite. OM and Customer Relationship Management (CRM) Applications will use these APIs to verify address and postal code and to provide customers with shipping service selection while taking orders. Shipping execution will use these APIs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

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

Ship Confirmation Business Flow



Review Question

Review Question

The procedural flow for material picking move orders is:

1. The move order is created by the pick release engine, entered and booked, queried, and assigned to a trip.
2. The move order is created by the pick release engine, order is detailed, and transact the move order to confirm the pick.
3. The move order is detailed, transact the move order to confirm the pick, and then, created by the pick release engine.
4. The move order is transacted to confirm the pick, created, and then detailed.

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Answer to Review Question

The procedural flow for material picking move orders is:

- 1. The move order is created by the pick release engine, entered and booked, queried, and assigned to a trip.**
- 2. The move order is created by the pick release engine, order is detailed, and transact the move order to confirm the pick.**
- 3. The move order is detailed, transact the move order to confirm the pick, and then, created by the pick release engine.**
- 4. The move order is transacted to confirm the pick, created, and then detailed.**

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Review Question

What is the reason for ship confirm?

- 1. Creates sub-inventory tagging, and confirmation**
- 2. Removes the existing reservations, and performs the wave pick move order**
- 3. Removes the existing trips, and performs the pick release**
- 4. Removes the existing reservations, and performs the sales order issue transaction**
- 5. For importing a flat file that can perform move orders**

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Answer to Review Question

What is the reason for ship confirm?

1. Creates sub-inventory tagging, and confirmation
2. Removes the existing reservations, and performs the wave pick move order
3. Removes the existing trips, and performs the pick release
4. Removes the existing reservations, and performs the sales order issue transaction
5. For importing a flat file that can perform move orders

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Summary

Summary

In this lesson, you have learned about:

- **Release sequence rules, pick slip grouping rules, and release rules**
- **Pick releasing an order:**
 - **Online**
 - **Concurrent**
 - **SRS**
- **Move orders**
- **Detailing an order**
- **Pick confirming an order**
- **Ship confirming an order**

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Business Scenario Practice

Business Scenario Practice

Business world places an order with your company to buy two items. The company requests specific delivery and packing instructions. You will pick release the items and ship confirm.

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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

You 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.

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.

R11i Oracle Shipping Execution: Transportation and Shipping Delivery Management

Chapter 3

R11i Oracle Shipping Execution: Transportation and Shipping Delivery Management

R11i Oracle Shipping Execution: Transportation and Shipping Delivery Management

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Objectives

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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Objectives

- Pack or unpack delivery lines for a delivery
- Assigning freight costs to a delivery and split delivery lines
- Calculate weight and volume for a delivery
- Generate a loading sequence for delivery lines in a delivery
- Print a document set for a delivery
- Assign or unassign deliveries to/from a trip
- Close and re-open a delivery
- Ship confirm a delivery

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Agenda

Agenda

- **Concepts of Oracle Shipping Execution**
- **Creating a delivery**
 - **Manually**
 - **Automatically**
- **Automatically create deliveries for a delivery lines.**
- **Automatically pack delivery lines assigned to deliveries into containers**
- **Assigning or unassigning delivery lines to a delivery**

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Agenda

Agenda

- Planing or unplanning a delivery
- Packing or unpacking delivery lines for a delivery
- Assigning freight costs to a delivery and split delivery lines
- Calculating weight and volume for a delivery
- Generating a loading sequence for delivery lines in a delivery
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- Closing and re-opening a delivery
- Ship confirming a delivery

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Shipping Execution Concepts

Shipping Execution Concepts

- Trips
- Stop
- Delivery
- Delivery leg

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

Shipping Execution Concepts

Shipping Execution Concepts

Trip

- Is carrier-specific (such as UPS, DHL, FedEx)
- Contains deliveries and departs from a particular location
- Must contain at least two stops (such as San Francisco, New York, Miami, and Dallas)



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Trips

Trip 1


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

Shipping Execution Concepts

Shipping Execution Concepts

Stop

- Point along the route that a trip makes to it's final destination
- Can consist of pick-ups, drop-offs, or both



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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).

Shipping Execution Concepts

Delivery

- Consolidation of sales order lines by attributes
- Based on user defined criteria:
 - Mandatory grouping criteria consists of:
 - Customer
 - Ship from location
 - Ultimate ship to location
 - An optional grouping criteria include carrier, freight terms, freight on board (FOB), intermediate ship to location, freight terms, ship method, FOB code, and carrier.

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Shipping Execution Concepts



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.

Review Question

The mandatory grouping criteria for a delivery is:

- 1. Single, specific time/place, and carrier**
- 2. Customer, ship from location, and ultimate ship to location**
- 3. Drop off points, pick up/drop off, and regions**
- 4. Routes, lanes, and vessels**
- 5. Stops, trips, and carriers**

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Answer to Review Question

The mandatory grouping criteria for a delivery is:

- 1. Single, specific time/place, and carrier**
- 2. Customer, ship from location, and ultimate ship to location**
- 3. Drop off points, pick up/drop off, and regions**
- 4. Routes, lanes, and vessels**
- 5. Stops, trips, and carriers**

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Review Question

Review Question

A delivery leg is represented by the:

- 1. Material transactions with pick slips**
- 2. Bill of lading**
- 3. Ship from/to**
- 4. Move order lines**
- 5. Invoice of sale**

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Answer to Review Question

A delivery leg is represented by the:

- 1. Material transactions with pick slips**
- 2. Bill of lading**
- 3. Ship from/to**
- 4. Move order lines**
- 5. Invoice of sale**

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Agenda

Agenda

- Concepts of Oracle Shipping Execution
- **Creating a delivery**
 - **Manually**
 - **Automatically**
- **Automatically create deliveries for a delivery lines**
- **Automatically pack delivery lines assigned to deliveries into containers**
- **Assigning or unassigning delivery lines to a delivery**

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Agenda

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- Planing or unplanning a delivery
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- Assigning or unassigning deliveries to/from a trip
- Closing and re-opening a delivery
- Ship confirming a delivery

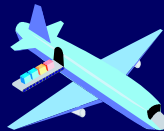
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Creating Deliveries: Options

Creating Deliveries: Options

- **Manually:** deliveries can be created in the Delivery window.
- **Automatically:** created at pick release by selecting auto-create deliveries as the default in the Release Sales Order window (shipping or organization parameters).
- Utilizing the auto-create trip function



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

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

Manually Creating A Delivery

- Trip name and criteria are created in the Shipping Transaction window
- Sales order release lines can then attached to the manually created delivery
- Mandatory groupings for delivery
 - Same customer
 - Same address location
 - Ship from the inventory organization
- All release lines must meet this criteria to be assigned to a delivery


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Auto-creating Deliveries

Auto-creating Deliveries

- Deliveries can be auto-created for delivery lines that have not been previously assigned to a delivery
- If using the auto-create functionality one or more deliveries will be created based upon the delivery grouping criteria.
- Some examples include:
 - Ship from/to
 - Carrier
 - Customer
 - FOB



The illustration shows a person at a computer with a cloud above them. A yellow arrow points from the computer to a green truck, and another yellow arrow points from the truck to a blue airplane. A magnifying glass icon is also present near the truck.

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(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.

Agenda

Agenda

- 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
- Assigning or unassigning delivery lines to a delivery

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Agenda

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- Planing or unplanning a delivery
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- Closing and re-opening a delivery
- Ship confirming a delivery

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Auto-creating Deliveries for Delivery Lines

Auto-creating Deliveries for Delivery Lines

- Automatically create deliveries for delivery lines that have been successfully released for shipment
- Lines are grouped into deliveries based on the grouping attributes specified in the Shipping Parameters window

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(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

Practice 1

Practice 1

Business world places several orders with your company to buy an item. After you have entered your orders you will perform on-line pick release from the Shipping Transaction window and automatically create a delivery.

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(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

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

Practice 2

Practice 2

This practice is designed to have your company manually create a delivery for Business World's order from the Shipping Transaction window.

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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

Agenda

Agenda

- 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
- Assigning delivery lines to a delivery

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- Planing or unplanning a delivery
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- Assigning freight costs to a delivery and split delivery lines
- Calculating weight and volume for a delivery
- Generating a loading sequence for delivery lines in a delivery
- Printing a document set for a delivery
- Assigning or unassigning deliveries to/from a trip
- Closing and re-opening a delivery
- Ship confirming a delivery

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Auto-packing Delivery Lines assigned to Deliveries into Containers

Auto-packing Delivery Lines assigned to Deliveries into Containers

- When auto-packing a delivery, the delivery lines are grouped together by shared attributes such as the ship to location, and are packed into containers based on the grouping and container type.
- If you are not ready to ship confirm the delivery, the delivery lines can be grouped as an intermediate step if the delivery lines are assigned to containers. The delivery must be pick released and no delivery lines details are required.
- Containers can be pick released

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(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

Auto-packing Delivery Lines assigned to Deliveries into Containers

Auto-packing Delivery Lines assigned to Deliveries into Containers

- Once a delivery is packed, you cannot change any delivery lines unless you unpack the delivery.
- If the weight/volume calculation in shipping parameters is set to automatic, the weight and volume is calculated when the delivery is packed.

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(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.

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

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

- All delivery lines must be assigned to a delivery.
- A container-item relationship must defined for the delivery line and container item.

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(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

Agenda

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- Concepts of Oracle Shipping Execution
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 - Automatically
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- Assigning and unassigning delivery lines to a delivery

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Assigning and Unassigning Delivery Lines to/from a Delivery

Assigning and Unassigning Delivery Lines to/from a Delivery

- Assigning and unassigning to/from an existing delivery
- For manually adding delivery lines to a pre-defined delivery:
 - Select the desired lines
 - Choose assign to delivery action

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(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

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

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

- **Assigning**
 - The delivery lines cannot be assigned to an existing delivery
- **Unassigning**
 - The delivery lines must be assigned to an existing delivery

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(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

Practice 3

Practice 3

This practice is designed to have your company assign delivery lines to a delivery for Business World's 2nd order from the Shipping Transaction window.

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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

Agenda

Agenda

- 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
- Assigning and unassigning delivery lines to a delivery

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Agenda

Agenda

- **Planing or unplanning a delivery**
- **Packing or unpacking delivery lines for a delivery**
- **Assigning freight costs to a delivery and split delivery lines**
- **Calculating weight and volume for a delivery**
- **Generating a loading sequence for delivery lines in a delivery**
- **Printing a document set for a delivery**
- **Assigning or unassigning deliveries to/from a trip**
- **Closing and re-opening a delivery**
- **Ship confirming a delivery**

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Planning a Delivery

Planning a Delivery

- Plan deliveries once delivery lines have been assigned to the delivery. Planning a delivery prevents changes from being made to the delivery.
- Before you can make any changes to a planned delivery, you must first unplan it.



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(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

Prerequisites For Planning a Delivery

Prerequisites For Planning a Delivery

- At least one delivery line must be assigned to the delivery.
- The delivery status must be open.

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(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

Unplanning a Delivery: Results

Unplanning a Delivery: Results

- Deletes any container information for the delivery
- Sets the status of the delivery to open



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(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

Prerequisites For Unplanning a Delivery

Prerequisites For Unplanning a Delivery

- The delivery cannot be closed or canceled.
- All delivery lines assigned to the delivery must be available to release.

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(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

Practice 4

Practice 4

This practice is designed to have your company plan a delivery for Business World's 2nd order from the Shipping Transaction window.

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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

Agenda

Agenda

- Concepts of Oracle Shipping Execution
- Creating a delivery
 - Manually
 - Automatically
- Automatically create deliveries for a delivery lines
- Automatically pack delivery lines assigned to deliveries into containers
- Assigning and unassigning delivery lines to a delivery

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Agenda

Agenda

- Planing or unplanning a delivery
- **Packing or unpacking delivery lines for a delivery**
- Assigning freight costs to a delivery and split delivery lines
- Calculating weight and volume for a delivery
- Generating a loading sequence for delivery lines in a delivery
- Printing a document set for a delivery
- Assigning or unassigning deliveries to/from a trip
- Closing and re-opening a delivery
- Ship confirming a delivery

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Pack/Unpack Delivery Lines for a Delivery

Pack/Unpack Delivery Lines for a Delivery

- **Packing delivery lines confirms that the delivery lines are packed into containers, and prevents changes to containers/lines assigned to containers within the delivery.**
- **Once a delivery is packed, you cannot change any delivery lines unless you unpack the delivery. If weight/volume calculation in shipping parameters is set to automatic, the weight and volume is calculated when the delivery is packed.**

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

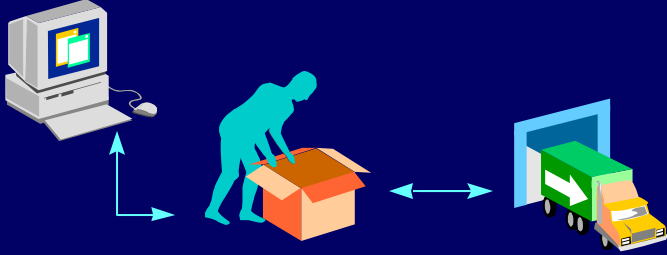
(N) Shipping > Transactions > Ship Confirm > Search for the Delivery (B) Find (B) Actions (M) Unpack (B) Go

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

Pack/Unpack Delivery Lines for a Delivery

Pack/Unpack Delivery Lines for a Delivery

- The delivery must be open.
- At least one delivery line must be assigned to the delivery you want to pack.
- All delivery lines in the delivery must be packed into containers.



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(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

Pack/Unpack Delivery Lines for a Delivery

Pack/Unpack Delivery Lines for a Delivery

- **Packing delivery lines confirms that the delivery lines are packed into containers, and prevents changes to containers/lines assigned to containers within the delivery.**
- **Once a delivery is packed, you cannot change any delivery lines unless you unpack the delivery. If weight/volume calculation in the shipping parameters is set to automatic, the weight and volume is calculated when the delivery is packed.**

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(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.

Review Question

Review Question

Where do you define weight/volume calculation to be automatic?

1. Containers window
2. Shipping Parameters window
3. Shipping Transactions window
4. Query Manager
5. Organization Parameters window

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Answer to Review Question

Where do you define weight/volume calculation to be automatic?

1. Containers window
2. Shipping Parameters window
3. Shipping Transactions window
4. Query Manager
5. Organization Parameters window

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Review Question

Review Question

Which of the following is the criteria for packing delivery lines for a delivery.

- 1. All delivery lines must be close out item, with the proper discount, and assigned to the delivery you want to pack.**
- 2. All delivery lines must be sales orders, taken from customers with good credit, and be easy to ship.**
- 3. All delivery lines in the delivery must be packed into containers, delivery must be open, and At least one delivery line must be assigned to the delivery you want to pack.**
- 4. All delivery lines must be pick released, closed, and unassigned to the delivery you want to pack.**
- 5. All delivery lines must go through organization parameters.**

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Answer to Review Question

Answer to Review Question

Which of the following is the criteria for packing delivery lines for a delivery.

1. All delivery lines must be close out item, with the proper discount, and assigned to the delivery you want to pack.
2. All delivery lines must be sales orders, taken from customers with good credit, and be easy to ship.
3. All delivery lines in the delivery must be packed into containers, delivery must be open, and At least one delivery line must be assigned to the delivery you want to pack.
4. All delivery lines must be pick released, closed, and unassigned to the delivery you want to pack.
5. All delivery lines must go through organization parameters.

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Agenda

Agenda

- Concepts of Oracle Shipping Execution
- Creating a delivery
 - Manually
 - Automatically
- Automatically create deliveries for a delivery lines
- Automatically pack delivery lines assigned to deliveries into containers
- Assigning and unassigning delivery lines to a delivery

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- Planing or unplanning a delivery
- Packing or unpacking delivery lines for a delivery
- **Assigning freight costs to a delivery and split delivery lines**
- Calculating weight and volume for a delivery
- Generating a loading sequence for delivery lines in a delivery
- Printing a document set for a delivery
- Assigning or unassigning deliveries to/from a trip
- Closing and re-opening a delivery
- Ship confirming a delivery

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Assigning Freight Costs to Delivery Lines

Assigning Freight Costs to Delivery Lines

- Shipment related costs
 - Insurance
 - Duty fee
 - Special Handling
 - Priority service
- Can be assigned at any time
 - Even after ship confirm, but not passed onto Order Management.
 - Passed to Oracle Order Management through process order API (usually run at time of ship confirm)



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(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

Assigning Freight Costs to Delivery Lines

Assigning Freight Costs to Delivery Lines

- Can be defined in any currency
- Only the currency that is defined is displayed
- When costs are passed to Oracle Order Management, the currency is converted to the order header currency.

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(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

Splitting Delivery Lines: Scenarios

Splitting Delivery Lines: Scenarios

- If a customer wants part of the ordered quantity delivered on a different date or to a different location the original shipment can be split into two to meet the required changes
- If a stock picker finds only a partial quantity when picking inventory to fill a given order line, the delivery lines could be split so that the partially processed part can progress further through the order process.

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(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

Practice 5

Practice 5

This practice is designed to have your company calculate weight and volume for Business World's 2nd order from the Shipping Transaction window.

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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

Agenda

Agenda

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Agenda

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- Planing or unplanning a delivery
- Packing or unpacking delivery lines for a delivery
- Assigning freight costs to a delivery and split delivery lines
- **Calculating weight and volume for a delivery**
- Generating a loading sequence for delivery lines in a delivery
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- Ship confirming a delivery

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Calculating Weight and Volume for a Delivery: Two Options

Calculating Weight and Volume for a Delivery: Two Options

- Calculation of weight and volume is dependent on the default setup
 - Manually
 - Automatically: Calculated automatically when the status of the trip is packed, ship confirmed or the status changes to planned.



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(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

Calculating Weight and Volume for a Delivery: What happens?

Calculating Weight and Volume for a Delivery: What happens?

- Calculates the weight, volume, and fill percentage of each open delivery and adds the values to the trip's current weight, volume, and fill percentage.
- Validates that the maximum load weight, the maximum internal volume, and the maximum fill percentage are not exceeded.
- Validates that the minimum fill percentage requirements are attained. The actual fill percentage can only be calculated if you have specified a vehicle for the trip.

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(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

Prerequisites For Calculating Weight and Volume for a Delivery

Prerequisites For Calculating Weight and Volume for a Delivery

- All delivery lines must be assigned to deliveries.
- The delivery status must be set to open.
- The volume and weight unit of measure fields must be defined for the delivery.

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(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

Calculating Weight and Volume for a Delivery: Automatically

Calculating Weight and Volume for a Delivery: Automatically

- Select automatic in the weight/volume calculation field in the Shipping Parameters window, the calculation is done automatically and does not require you to manually calculate the values.

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**(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**

Practice 6

Practice 6

This practice is designed to have your company calculate weight and volume for Business World's 2nd order from the Shipping Transaction window.

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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

Agenda

Agenda

- Concepts of Oracle Shipping Execution
- Creating a delivery
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 - Automatically
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- Automatically pack delivery lines assigned to deliveries into containers
- Assigning and unassigning delivery lines to a delivery

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Agenda

Agenda

- Planing or unplanning a delivery
- Packing or unpacking delivery lines for a delivery
- Assigning freight costs to a delivery and split delivery lines
- Calculating weight and volume for a delivery
- **Generating a loading sequence for delivery lines in a delivery**
- Printing a document set for a delivery
- Assigning or unassigning deliveries to/from a trip
- Closing and re-opening a delivery
- Ship confirming a delivery

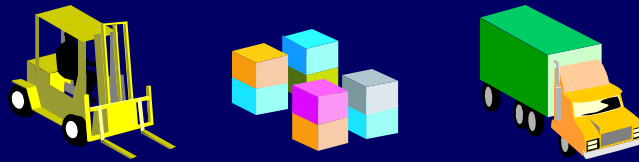
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Generating a Loading Sequence for Delivery Lines in a Delivery

Generating a Loading Sequence for Delivery Lines in a Delivery

- Defines the order in which the delivery lines are loaded into containers or vehicles
- Updates loading sequence information for a delivery with an existing loading sequence defined
- The loading sequence applies to the lowest level of packing (loading).



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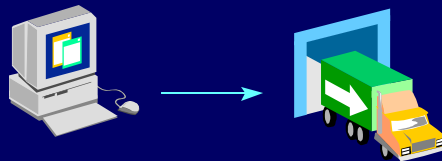
(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery containing the Delivery Lines for which you want to generate a loading sequence (B) Find (T) Delivery tab > Select the order (B) Actions (M) Generate Loading Sequence (B) Go

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

Generating a Loading Sequence for Delivery Lines in a Delivery

Generating a Loading Sequence for Delivery Lines in a Delivery

- If an item is loaded into a container first and then into a vehicle, a loading sequence will not be available for the container. However, the loading sequence of the containers can be derived by reviewing the vehicle load sheet, which prints the loading sequence in the correct order.
- Master serial validation



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(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

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

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

- The status of the delivery must be open.
- The lines loading (located on the Delivery tab) must be defined for the delivery. The customer production sequence number (located on the lines/containers tab) must be defined for the delivery lines assigned to the delivery.
- You must assign containers to each of the delivery line items.
- You must calculate the weight and volume of the delivery and/or trip.
- The volume and weight unit of measure fields must be defined for the trip and/or delivery.

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(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

Example of Loading Sequence Generation

Example of Loading Sequence Generation

Line Number	1	2	3	4
Container	1	1	2	2
Load Order: Forward	1	2	3	4
Load Order: Reverse	4	3	2	1
Load Order: Forward-Inverted	2	1	4	3
Load Order: Reverse-Inverted	3	4	1	2

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(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.

Agenda

Agenda

- Concepts of Oracle Shipping Execution
- Creating a delivery
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- Automatically pack delivery lines assigned to deliveries into containers
- Assigning and unassigning delivery lines to a delivery

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Agenda

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- Planing or unplan a delivery
- Packing or unpacking delivery lines for a delivery
- Assigning freight costs to a delivery and split delivery lines
- Calculating weight and volume for a delivery
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- **Printing a document set for a delivery**
- Assigning or unassign deliveries to/from a trip
- Closing and re-opening a delivery
- Ship confirming a delivery

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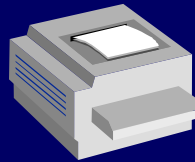
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Printing a Document Set for a Delivery

Printing a Document Set for a Delivery

Document set is a collection of documents to be used for a specific delivery. They may include, but are not limited to:

- Pick slip
- Pack slip
- Commercial invoice
- Bill of lading
- Mailing labels



You will decide the combination of document set that will be printed out for the delivery.

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(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

Practice 7

Practice 7

This practice is designed to have your company print a document set for a delivery for Business World's 2nd order from the Shipping Transaction window.

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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

Agenda

Agenda

- Concepts of Oracle Shipping Execution
- Creating a delivery
 - Manually
 - Automatically
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- Automatically pack delivery lines assigned to deliveries into containers
- Assigning and unassigning delivery lines to a delivery

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- **Assigning or unassigning deliveries to/from a trip**
- Closing and re-opening a delivery
- Ship confirming a delivery

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Assigning Deliveries to a Trip

Assigning Deliveries to a Trip

- Assign an existing delivery to a trip
- Assign deliveries to an existing in-transit trip provided that the stops selected for the assignment are in open or arrived status
- If a delivery is manually or automatically assigned to a trip, the Shipping Transactions window creates a delivery leg.
- If a trip for the delivery is created during ship-confirmation, a delivery leg is created using the sourcing warehouse as the initial pick-up and the ultimate destination as the drop-off.

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(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

Prerequisites for Assigning Deliveries to a Trip

Prerequisites for Assigning Deliveries to a Trip

- The status for the trip must be open.
- The status for the delivery must be open.

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(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

Unassigning Deliveries to a Trip

Unassigning Deliveries to a Trip

- Unassigning a delivery from a trip requires that a delivery was already assigned to a trip
- You can reassign it from one trip and assign it to another.

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(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

Prerequisites for Unassigning Deliveries to a Trip

Prerequisites for Unassigning Deliveries to a Trip

- The trip status for the delivery you want to unassign must be open.
- The delivery status must be open.

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(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

Review Question

Review Question

These are used to specify deliveries:

- 1. Truck invoices**
- 2. Entries in the Shipping Transaction window**
- 3. Document sets**
- 4. Commercial invoices**
- 5. Bill of sales**

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Answer to Review Question

These are used to specify deliveries:

1. **Truck invoices**
2. **Entries in the Shipping Transaction window**
3. **Document sets**
4. **Commercial invoices**
5. **Bill of sales**

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Review Question

Review Question

If a delivery is manually or automatically assigned to a trip, the:

1. Load Detail window creates a delivery leg
2. Shipping Transactions window creates a delivery leg
3. Trip window creates a delivery leg
4. Stop window creates a delivery leg
5. Query manager creates a delivery leg

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Answer to Review Question

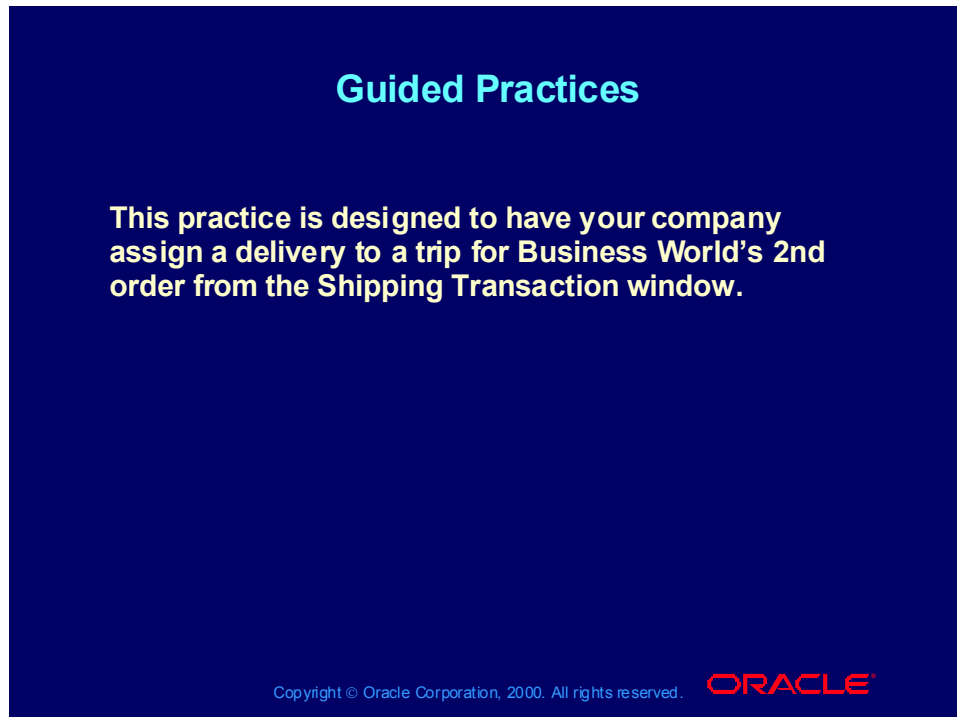
If a delivery is manually or automatically assigned to a trip, the:

1. Load Detail window creates a delivery leg
2. Shipping Transactions window creates a delivery leg
3. Trip window creates a delivery leg
4. Stop window creates a delivery leg
5. Query manager creates a delivery leg

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Guided Practices



Guided Practices

This practice is designed to have your company assign a delivery to a trip for Business World's 2nd order from the Shipping Transaction window.

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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

Agenda

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- **Closing and re-opening a delivery**
- Ship confirming a delivery

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Closing a Delivery

Closing a Delivery

- When you close a delivery, shipping execution sets the status of the delivery to closed.
- Once a delivery is closed, no further actions can be performed on the delivery.

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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

Re-opening a Delivery

Re-opening a Delivery

- Re-opening a ship-confirmed delivery (as long as the stop containing the delivery is still open) to modify details for the delivery.
- Modify and re-ship confirm the delivery

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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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Agenda

Agenda

- Planing or unplanning a delivery
- Packing or unpacking delivery lines for a delivery
- Assigning freight costs to a delivery and split delivery lines
- Calculating weight and volume for a delivery
- Generating a loading sequence for delivery lines in a delivery
- Printing a document set for a delivery
- Assigning or unassigning deliveries to/from a trip
- Closing and re-opening a delivery
- **Ship confirming a delivery**

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Ship Confirmation

The material picking process ends when the items are ship confirmed out of inventory. Ship-confirming the items removes the existing reservations and performs the sales order issue transaction:

- A new ship confirm field for actual departure date in auto-create trip options provides flexibility of specifying the stop departure date (which is used to update Inventory).
- Ship confirm now splits stage quantities on each line. If a nonzero stage quantity exists on a line, this is split off from the line and become unassigned from the delivery.

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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

Ship Confirmation

Ship Confirmation

- A new check box for creating a delivery with split-off staged quantities provides the ability to group all staged lines together in a new delivery.
- A delivery can be completely backordered, creating move orders for each backordered line and closing the delivery.
- Application of special charges (freight costs, expedite fee, special handling) is included
- UPS tracking integration capability is also included

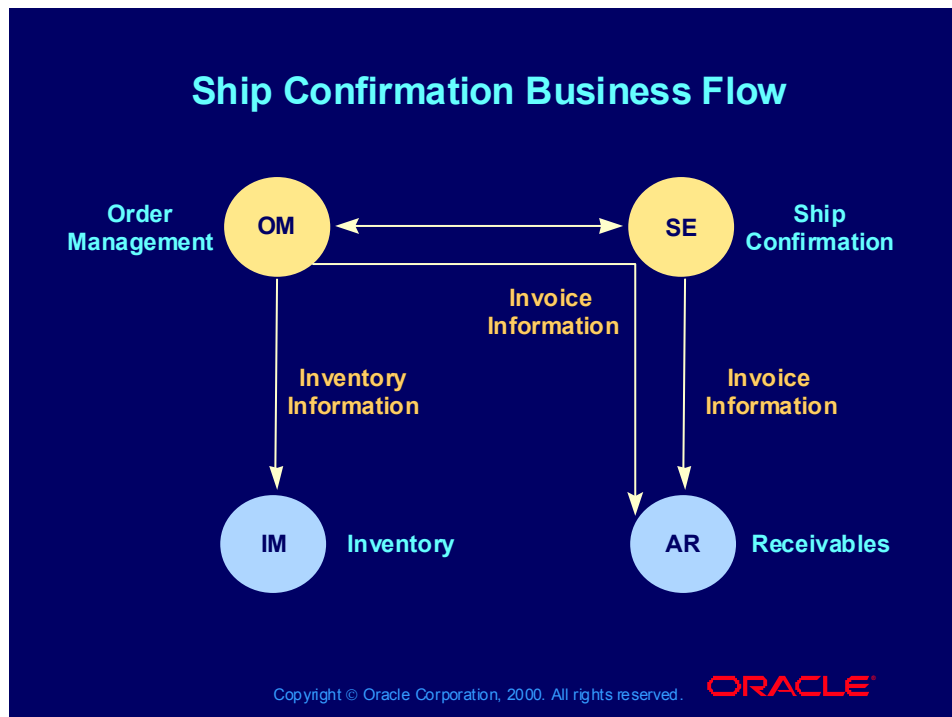
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(N) Shipping > Transactions (I) Flashlight Icon Search for the Delivery (B) Find (B) Actions (M) Ship Confirm (B) Go

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

Ship Confirmation Business Flow



Prerequisites for Ship Confirmation

Prerequisites for Ship Confirmation

- The delivery lines must be released.
- The delivery must be open or packed.
- At least one delivery line must be assigned to the delivery.

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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

Summary

In this lesson, you should have learned about:

- **Creating a Delivery**
 - **Manually**
 - **Automatically**
- **Automatically creating deliveries for a delivery lines**
- **Automatically packing delivery lines assigned to deliveries into containers**
- **Assigning and unassigning delivery lines to a delivery**
- **Plan or unplaning a delivery**

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Summary

- Pack or unpacking delivery lines for a delivery
- Assign freight costs to a delivery and split delivery lines
- Calculating weight and volume for a delivery
- Generating a loading sequence for delivery lines in a delivery
- Printing a document set for a delivery
- Assign or unassigning deliveries to/from a trip
- Close and re-opening a delivery
- Ship confirming a delivery

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R11i Oracle Shipping Execution: Transportation and Shipping Trip Management

Chapter 4

R11i Oracle Shipping Execution: Transportation and Shipping Trip Management

R11i Oracle Shipping Execution: Transportation and Shipping Trip Management

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Objectives

Objectives

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

- Define the concepts of Oracle Shipping Execution
- Create a trip
 - Manually
 - Automatically for a delivery
 - Automatically for containers and lines
- Automatically create a trip for delivery lines
- Plan or unplan a trip
- Assign freight costs to a trip
- Print a document set for a trip
- Calculate weight and volume for a trip
- Perform shipping exceptions

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Agenda

Agenda

- **Concepts of Oracle Shipping Execution**
- **Creating a trip**
 - **Manually**
 - **Automatically for a delivery**
 - **Automatically for containers and lines**
- **Automatically create a trip for delivery lines.**
- **Planing or unplanning a trip**
- **Assign freight costs to a trip**
- **Printing a document Set for a trip**
- **Calculating weight and volume for a trip and shipping exceptions**

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Shipping Execution Concepts

Shipping Execution Concepts

- Trips
- Stop
- Delivery
- Delivery leg

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

Shipping Execution Concepts

Shipping Execution Concepts

Trip

- Is carrier-specific (such as UPS, DHL, FedEx)
- Contains deliveries and departs from a particular location
- Must contain at least two stops (such as San Francisco, New York, Miami, and Dallas)



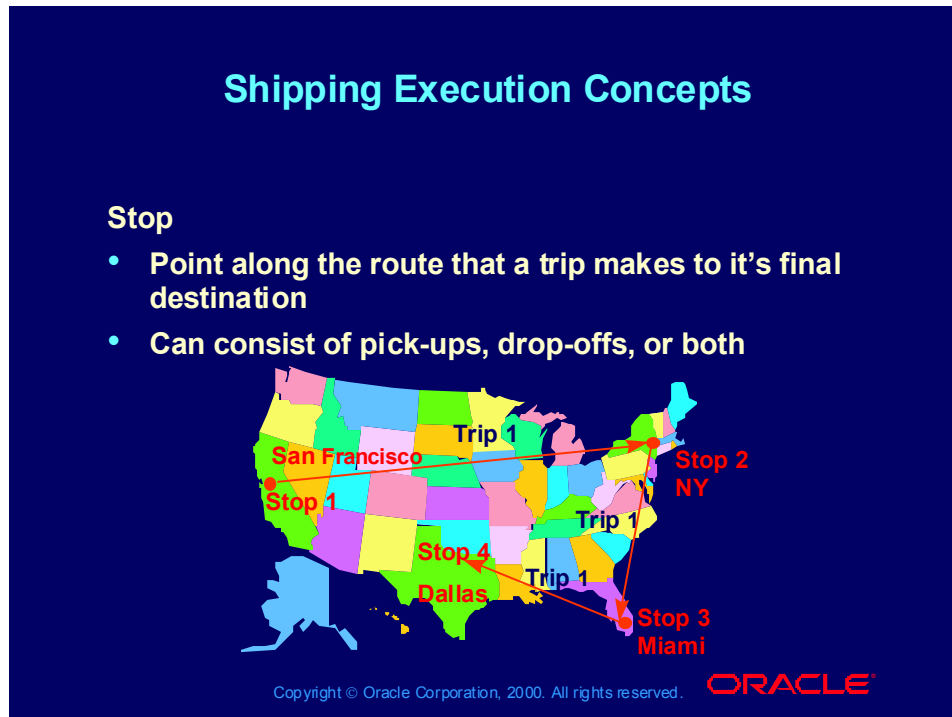
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Trips

Trip 1

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

Shipping Execution Concepts



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).

Shipping Execution Concepts

Delivery

- Consolidation of sales order lines by attributes
- Based on user defined criteria:
 - Mandatory grouping criteria consists of:
 - Customer
 - Ship from location
 - Ultimate ship to location
 - An optional grouping criteria include carrier, freight terms, freight on board (FOB), intermediate ship to location, freight terms, ship method, FOB code, and carrier.

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Shipping Execution Concepts



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.

Review Question

Review Question

A trip consists of which of the following?

- 1. Delivery status**
- 2. At least two stops and one carrier**
- 3. At least two carriers and one stop**
- 4. Pick release**
- 5. At least two stops and one pick slip**

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Answer to Review Question

A trip consists of which of the following?

1. Delivery status
2. At least two stops and one carrier
3. At least two carriers and one stop
4. Pick release
5. At least two stops and one pick slip

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Review Question

A delivery is defined as:

- 1. A single mode and is attributed to a specific time period.**
- 2. A rule based consolidation of delivery lines for goods that share the same ship from/to combination.**
- 3. Set as default drop off points for one or several organizations.**
- 4. A location along a route where a carrier picks up or drops off goods.**
- 5. A pick up and a drop off.**

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Answer to Review Question

A delivery is defined as:

1. A single mode and is attributed to a specific time period.
2. A rule based consolidation of delivery lines for goods that share the same ship from/to combination.
3. Set as default drop off points for one or several organizations.
4. A location along a route where a carrier picks up or drops off goods.
5. A pick up and a drop off.

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Agenda

Agenda

- Use and search Oracle Applications Help to perform support needs
- Concepts of Oracle Shipping Execution
- **Creating a trip**
 - **Manually**
 - **Automatically for a delivery**
 - **Automatically for containers and lines**
- Automatically create a trip for delivery lines
- Planing or unplanning a trip
- Assigning freight costs to a trip
- Printing a document Set for a trip
- Calculating weight and volume for a trip and shipping exceptions

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Creating a Trip: Three Options

Creating a Trip: Three Options

- **Manually: assign stops, deliveries, and delivery lines to that trip.**
- **Auto-creating a trip for a delivery: query the delivery lines you want to ship and then autocreate the deliveries, trips, and stops.**
- **Auto-creating a trip for containers and lines: query the lines and containers you want to ship and then autocreate a trip.**

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(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

Practice 1

Practice 1

Business world places several orders with your company to buy an item. After you have entered your orders you will perform on-line pick release from the Shipping Transaction window and verify that the delivery was auto created.

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(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)

Practice 2

Practice 2

This practice is designed to have your company manually create a trip for Business World's order. You will select a ship method, organization, vehicle as an item type, and any routing instructions.

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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

Practice 3

Practice 3

This practice is designed to have your company assign a delivery to a trip Business World's order from the Shipping Transactions window.

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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

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

(T) Lines/Containers

15. Save your work

Agenda

Agenda

- Concepts of Oracle Shipping Execution
- Creating a trip
 - Manually
 - Automatically for a delivery
 - Automatically for containers and lines
- **Automatically create a trip for delivery lines**
- Planing or unplanning a trip
- Assigning freight costs to a trip
- Printing a document Set for a trip
- Calculating weight and volume for a trip and shipping exceptions

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Auto-creating a Trip for Delivery Lines

Auto-creating a Trip for Delivery Lines

Auto-creating trips automatically creates a trip, stops, deliveries and delivery legs for selected delivery lines.

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(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

Prerequisites For Auto-creating a Trip for Delivery Lines

Prerequisites For Auto-creating a Trip for Delivery Lines

- The delivery lines cannot be assigned to an existing delivery or trip.
- The order must be scheduled.
- The order must be imported into Oracle Shipping Execution.
- The items must be shippable.

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(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

Agenda

Agenda

- Use and search Oracle Applications Help to perform support needs
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- Assigning freight costs to a trip
- Printing a document set for a trip
- Calculating weight and volume for a trip and shipping exceptions

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Planning/Unplanning a Trip

Planning/Unplanning a Trip

- For a trip to be planned, deliveries and delivery lines have been assigned to a trip.
- Changes can't be made unless you unplan the trip.
- Planning a trip, shipping execution validates:
 - The sequence numbers between the deliveries of the trip are unique for containers within the deliveries.
 - The weight, volume, and fill percentage do not exceed their maximums of containers in the delivery.
 - The minimum fill percentage is met.
 - The planned trip date is not in the past.

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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**

Planning/Unplanning a Trip

Planning/Unplanning a Trip

- At least two stops must be assigned to the trip.
- At least one delivery must be assigned to the trip.
- At least one delivery line must be assigned to each delivery on the trip.
- All delivery lines for the trip must be assigned to a delivery.

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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**

Planning/Unplanning a Trip

Planning/Unplanning a Trip

- To make changes
 - Adding additional delivery lines
 - Unassign delivery lines from a delivery within a trip
- Unplanning a trip:
 - Sets the status of all deliveries in the trip to open

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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**

**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.**

Prerequisites For Unplanning a Trip

Prerequisites For Unplanning a Trip

- Trip status must be set to planned.
- Trip status for all deliveries must be set to planned.

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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**

Review Questions

Review Questions

For a trip to be planned, _____ and _____
have been assigned to a trip.

1. Lanes and pick slips
2. Stops and goods
3. Deliveries and delivery lines
4. Containers and mailing labels
5. Pick slips and a staging subinventory

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Answer to Review Questions

For a trip to be planned, _____ and _____
have been assigned to a trip.

1. Lanes and pick slips
2. Stops and goods
3. Deliveries and delivery lines
4. Containers and mailing labels
5. Pick slips and a staging subinventory

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Review Question

Review Question

You need to navigate to this window to search for the lines and containers you want to ship and then autocreate a trip.

1. Split lines window
2. Ship confirm window
3. Lines and containers window
4. Query manager window
5. Picking rules window

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Answer to Review Question

You need to navigate to this window to search for the lines and containers you want to ship and then autocreate a trip.

1. Split lines window
2. Ship confirm window
3. Lines and containers window
4. Query manager window
5. Picking rules window

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Practice 4

Practice 4

This practice is designed to have your company plan a trip for Business World's order from the Shipping Transactions window.

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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

Agenda

Agenda

- Use and search Oracle Applications Help to perform support needs
- Concepts of Oracle Shipping Execution
- Creating a trip
 - Manually
 - Automatically for a delivery
 - Automatically for containers and lines
- Automatically create a trip for delivery lines
- Planing or unplanning a trip
- **Assigning freight costs to a trip**
- Printing a document set for a trip
- Calculating weight and volume for a trip and shipping exceptions

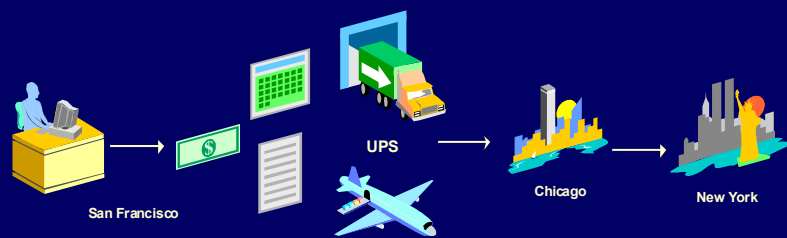
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Assigning Freight Costs to a Trip

Assigning Freight Costs to a Trip

- When assigning freight costs to a trip users can:
 - Assign new freight costs to a trip
 - Override suggested freight costs
 - Update existing freight costs



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(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

Practice 5

Practice 5

This practice is designed to have your company assign freight costs to a trip for Business World's order from the Shipping Transactions window.

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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

Agenda

Agenda

- Use and search Oracle Applications Help to perform support needs
- Concepts of Oracle Shipping Execution
- Creating a trip
 - Manually
 - Automatically for a delivery
 - Automatically for containers and lines
- Automatically create a trip for delivery lines
- Planing or unplanning a trip
- Assigning freight costs to a trip
- **Printing a document set for a trip**
- Calculating weight and volume for a trip and shipping exceptions

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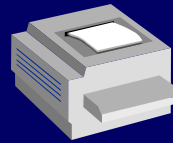
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Printing a Document Set for a Trip

Printing a Document Set for a Trip

A Document set is a collection of documents to be used for a specific trip. They may include, but are not limited to:

- Pick slip
- Pack slip
- Commercial invoice
- Bill of lading
- Mailing labels



You decide the combination of document set that will be printed out for the trip.

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**(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.

Practice 6

Practice 6

This practice is designed to make sure your companies system printers have been enabled within Oracle Application.

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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

Agenda

Agenda

- Use and search Oracle Applications Help to perform support needs
- Concepts of Oracle Shipping Execution
- Creating a trip
 - Manually
 - Automatically for a delivery
 - Automatically for containers and lines
- Automatically create a trip for delivery lines
- Planning or unplanning a trip
- Assigning freight costs to a trip
- Printing a document set for a trip
- Calculating weight and volume for a trip and shipping exceptions

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Calculating Weight and Volume for a Trip: Two Options

Calculating Weight and Volume for a Trip: Two Options

- **Manually:** From the Actions menu
- **Automatically:** When the status of the trip is changed to packed, planned or ship confirmed.
 - The automatic calculation determines if the minimum fill percentages are met.
 - If they are low, the system will prompt you that you have not met the minimum fill percentages.
 - These can be overridden.
- Automatic calculation will only be available only when prerequisite setup steps have been completed.

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**(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**

Calculating Weight and Volume for a Trip: What happens?

Calculating Weight and Volume for a Trip: What happens?

- The system calculates the weight, volume, and fill percentage of each open delivery and adds the values to the trip's current weight, volume, and fill percentage.
- The system validates that the maximum load weight and the maximum internal volume.
- The system validates that minimum fill percentage requirements are attained.
- The system estimates the number of containers for each delivery line based predefined on container/load relationships.

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**(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.

Prerequisites For Calculating Weight and Volume for a Trip

Prerequisites For Calculating Weight and Volume for a Trip

- All delivery lines must be assigned to deliveries
- Trip and/or delivery status must be set to open
- Volume and weight unit of measures must be defined.
- In setup the following must be defined:
 - Items in the item master
 - Container item master
 - Vehicles
 - Container load relationships must be established

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(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

Calculating Weight and Volume for a Trip: Automatically

Calculating Weight and Volume for a Trip: Automatically

To calculate automatically, select automatic in the weight/volume calculation field in the Shipping Parameters window.



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**(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**

Practice 7

Practice 7

This practice is designed to have your company calculate weight and volume for Business World's order from the Shipping Transactions window.

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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

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

(T) Lines/Containers

15. Save your work

Shipping Exceptions

Use the Shipping exceptions feature to:

- **Define exceptions per business requirements**
- **Define handling processes for exceptions (through Workflow)**
- **Record shipping exceptions during shipment process**
- **Initiate exception handling**
- **View and track exceptions**

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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.

Shipping Exceptions

- Helps you identify and correct shipping exceptions that violate the requirements of your operation or that of your carriers and customers.
- Gives you the ability to define exceptions and the processes for handling them.
- Enables you to record exceptions automatically from within Oracle Shipping Execution or log exceptions manually through the user interface input forms.
- Exceptions can be used to track carrier performance: POD date and ship date.
- Exceptions can be used to analyze changes to order after pick release.

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Practice 8

Practice 8

This practice is designed to have your company assign a shipping exception on Business World's order from the Exceptions window.

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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

Practice 9

Practice 9

This practice is designed to have your company ship confirm Business World's order from the Shipping Transactions window.

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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

Summary

Summary

In this course, you should have learned how to:

- Define the concepts of Oracle Shipping Execution
- Create a trip
 - Manually
 - Automatically for a delivery
 - Automatically for containers and lines
- Automatically create a trip for delivery lines.
- Plan or unplan a trip
- Assign freight costs to a trip
- Print a Document Set for a trip
- Calculating weight and volume for a trip and shipping exceptions

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Business Scenario 1

Business Scenario 1

Your company just entered into an agreement with Speedy Delivery to take care of all of your delivery needs at a very competitive cost. As a result of this new agreement you need to define new procedures that your system can recognize so your company can start doing business with Speedy Delivery.

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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.

Business Scenario 2

Business Scenario 2

Your company just start purchasing special item that is selling very well. Special item is very fragile and needs extra care when shipping it. Serial item which is under serial number control is even more fragile and needs even more extra care. These items need to be defined in your companies system so you can ensure proper shipping.

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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

R11i Oracle Shipping Execution: Transportation and Shipping Container Management

Chapter 5

R11i Oracle Shipping Execution: Transportation and Shipping Container Management

R11i Oracle Shipping Execution: Transportation and Shipping Container Management

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Objectives

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 your 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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Agenda

Agenda

- **Concepts of Oracle Shipping Execution**
- **Creating containers and using 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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Shipping Execution Concepts

Shipping Execution Concepts

- Trips
- Stop
- Delivery
- Delivery leg

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

Shipping Execution Concepts

Shipping Execution Concepts

Trip

- Is carrier-specific (such as UPS, DHL, FedEx)
- Contains deliveries and departs from a particular location
- Must contain at least two stops (such as San Francisco, New York, Miami, and Dallas)



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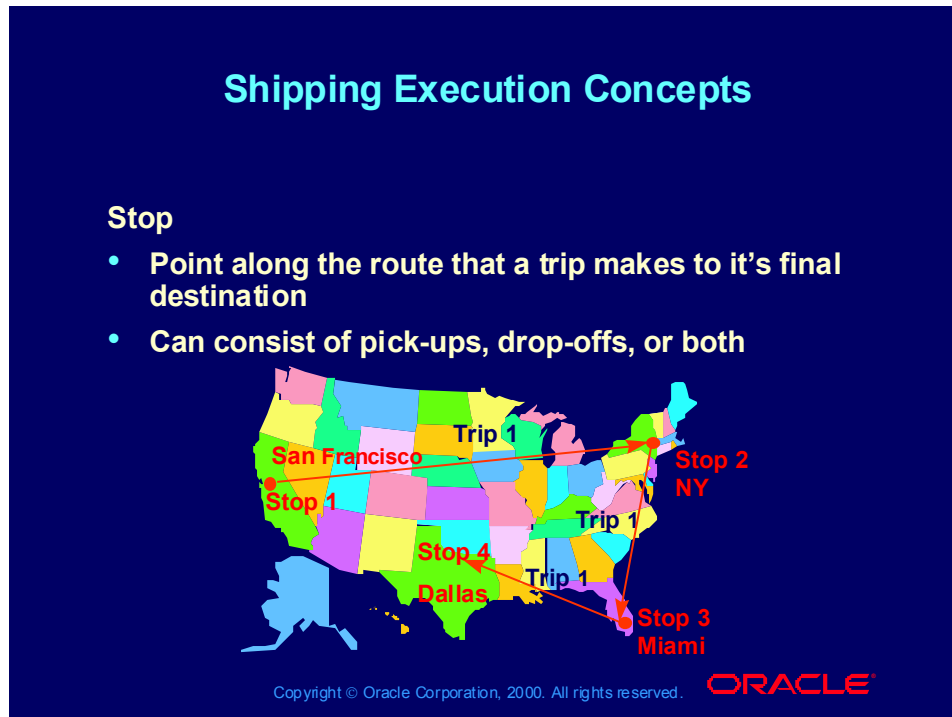
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Trips

Trip 1

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

Shipping Execution Concepts



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).

Shipping Execution Concepts

Delivery

- Consolidation of sales order lines by attributes
- Based on user defined criteria:
 - Mandatory grouping criteria consists of:
 - Customer
 - Ship from location
 - Ultimate ship to location
 - An optional grouping criteria include carrier, freight terms, freight on board (FOB), intermediate ship to location, freight terms, ship method, FOB code, and carrier.

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Shipping Execution Concepts



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.

Review Question

Review Question

A trip consists of which of the following?

- 1. Delivery status**
- 2. At least two stops and one carrier**
- 3. At least two carriers and one stop**
- 4. Pick release**
- 5. Concurrent manager**

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Answer to Review Question

A trip consists of which of the following?

1. Delivery status
2. At least two stops and one carrier
3. At least two carriers and one stop
4. Pick release
5. Concurrent manager

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Review Question

Review Question

A delivery leg consists of:

- 1. A single mode and is attributed to a specific time period**
- 2. Two stops where the delivery is picked up and dropped off respectively on the same trip.**
- 3. Set as default drop off points for one or several organizations**
- 4. A location along a route where a carrier picks up or drops off goods**

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Answer to Review Question

A delivery leg consists of:

- 1. A single mode and is attributed to a specific time period**
- 2. Two stops where the delivery is picked up and dropped off respectively on the same trip.**
- 3. Set as default drop off points for one or several organizations**
- 4. A location along a route where a carrier picks up or drops off goods**

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Agenda

Agenda

- Concepts of Oracle Shipping Execution
- **Creating containers and using 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

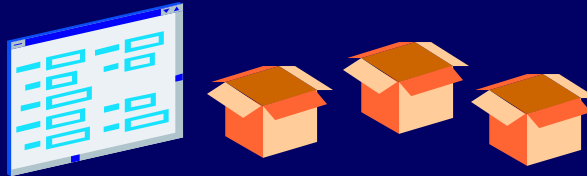
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Managing Containers

Managing Containers

- You can pack multiple containers with multiple lines in one transaction.
- Containers can be created without assigning them to deliveries or without having to pack them immediately. The containers can be created independently and can be queried later for assignment or packing.



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

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

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 hence 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 be 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

Enter the container's volume.

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

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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Item Master

- **Used to establish items as container or vehicles.**
- **Must be created to utilize the container packing capability.**
- **In addition to all other attributes, the Physical Attributes tab contains criteria specific to containers and vehicles.**

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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.

Container-Item Relationships

Container-Item Relationships

- Select the container item, load item, and specify the maximum number of load items that can be packed into a container item.
- Container-item relationships specify the maximum number of load items that can be packed into a container item.
- A container item can also be a load item: for example, a box that is loaded into a vehicle is also a load item for that vehicle (the container item).
- Allows you to create exception rules to react proactively problems that have occurred during the shipping process.

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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)

Agenda

Agenda

- Concepts of Oracle Shipping Execution
- Creating containers and using the item master
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 - Sequentially pack delivery lines into containers
- Assigning and unassigning a container to/from a delivery
- Autopacking delivery lines into containers

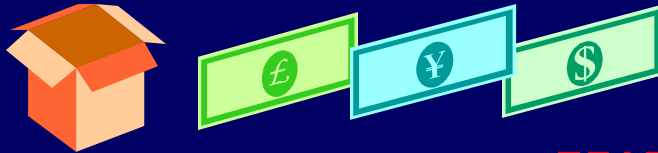
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Assigning Freight Costs to a Container

Assigning Freight Costs to a Container

- Costs associated with the freight charges for a specific container may be established.
- In addition to assigning new freight costs to a container you may:
 - Override the suggested amounts
 - Update existing freight costs
- Freight costs can also be assigned to a delivery, a stop, or a delivery detail.



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(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

Agenda

Agenda

- Concepts of Oracle Shipping Execution
- Creating containers and using 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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Packing Workbench

- The Packing Workbench is an extension from the Shipping Transactions window.
- It is used in the manual packing process and allows users to view how containers have been packed.
- Users can view fill percentages and space availability for planning purposes.

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Packing Workbench

Packing Workbench

- Provided a window to split the delivery lines between containers or to pack sequentially one container at a time to its capacity.
- Contains two tabs: one displays containers and it's contents and the other displays the delivery lines.
- Displays the total weight and volume of containers and delivery lines that can help the user determine the appropriate number of delivery lines and containers for packing.
- Uses two methods to assign/pack a number of lines into one or more containers: sequential and equal packing.

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(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

Equal Packing

Equal Packing

- A selected delivery line is split equally by the number of containers and every line is packed into all the containers in a one to many relationship, provided the container grouping attributes are satisfied by the line.
- Every container will have the same quantity of a particular delivery line item.
- This method of packing is useful if you have a number of lines (each with a different item) which may need to be grouped together at shipment time.
- If the containers are over-packed or under-packed, a warning appears.

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(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

Equal Packing

Equal Packing

- This packing method could result in delivery lines that remain unpacked at the end of the packing operation because of incompatibilities in grouping attributes of lines and containers (could result in underpacked containers).



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(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

Sequential Packing

Sequential Packing

- When packing multiple lines into multiple containers, the packing is performed one container at a time.
- The first delivery line is packed into the first container until the container is full or the line is completely packed.
- If the line is completely packed, then the next line is packed into the same container until the container is full.

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(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

Sequential Packing

Sequential Packing

- If the container is fully packed before the line is completed (only partial quantity fits), then the line is split so that the split line now fills up the first container and the remaining quantity of the original line is packed into the next container.
- If the containers are full before all the lines can be packed, the remaining lines are left unpacked.
- A warning will be issued to inform the user that some lines were left unpacked.

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(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

Review Question

Review Question

This window allows users to split the delivery lines between containers.

- 1. Pick slip workbench**
- 2. Splitting line workbench**
- 3. Container workbench**
- 4. Packing workbench**
- 5. Scheduling workbench**

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Answer to Review Question

This window allows users to split the delivery lines between containers.

1. Pick slip workbench
2. Splitting line workbench
3. Container workbench
4. Packing workbench
5. Scheduling workbench

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Polling Question

What are the two methods shipping execution uses to pack containers?

- 1. Equal and monitor**
- 2. Equal and automatic**
- 3. Sequential and balance**
- 4. Sequential and equal**
- 5. Sequential and multiple**

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Polling Question

What are the two methods shipping execution uses to pack containers?

1. Equal and monitor
2. Sequential and equal
3. Sequential and balance
4. Equal and automatic
5. Sequential and multiple

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Agenda

Agenda

- Concepts of Oracle Shipping Execution
- Creating containers and using 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

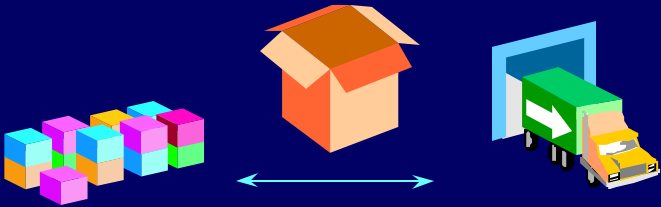
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Assigning and Unassigning a Container to/from a Delivery

Assigning and Unassigning a Container to/from a Delivery

- Assign a container by searching for the container and adding it to a delivery
- Unassign a container by searching for the container and unassigning it from a delivery



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(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

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

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

- The delivery must be set to open.
- A delivery must already be created.

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(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

Agenda

Agenda

- Concepts of Oracle Shipping Execution
- Creating containers and using 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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Auto-packing Delivery Lines into Containers

Auto-packing Delivery Lines into Containers

- Auto-packing creates the required number of containers and assigns/packs the delivery lines into the containers.
- Autopack the required number of containers for the delivery line based on either the container-load relationship or the preferred container item.
- If a container is specified on the delivery line, that container is used. If not specified, the container is determined by the default container-load relationship for that delivery line item.

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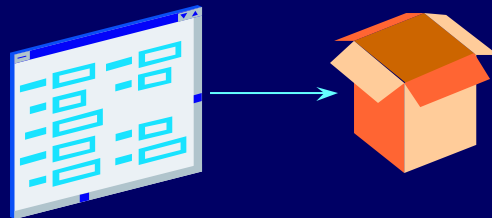
(N) Shipping > Transactions (I) Flashlight Icon Search to find the Delivery Lines Select one or more Lines (B) Actions (M) Auto-pack or Auto-pack master (B) Go

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

Auto-packing Delivery Lines into Containers

Auto-packing Delivery Lines into Containers

- If a container is specified for auto-packing, but no container-load relationship is defined between the item and the container, the number of containers is estimated based on the weight and volume restrictions of the container.



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(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

Auto-pack and Auto-pack Master Options

Auto-pack and Auto-pack Master Options

- **Auto-pack:** Only the detailed containers are created and packed.
- **Auto-pack Master (Actions button):** delivery line is packed into the detail container, and the detailed container is then packed into the parent/master container in one action.

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(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

Review Question

Review Question

If a container is not specified, the container is determined by the _____ for that delivery line item.

1. Default container load relationship
2. Default picked container load relationship
3. Default packed container load relationship
4. Default container picked relationship
5. Default pick slip and packing sequence

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Answer to Review Question

If a container is not specified, the container is determined by the _____ for that delivery line item.

1. Default container load relationship
2. Default picked container load relationship
3. Default packed container load relationship
4. Default container picked relationship
5. Default pick slip and packing sequence

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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

Setup, Implementation, and Upgrading for R11i Oracle Shipping Execution

Setup, Implementation, and Upgrading for R11i Oracle Shipping Execution

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Objectives

Objectives

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

- Setup organizations parameters
- Explain inventory allocation and shipping networks
- Setup shipping networks
- Setup shipping parameters
- Setup freight (carriers/cost) and ship methods
- Define document sequence rules and printing
- Define release sequence rules, pick slip grouping rules, and release rules
- Define shipping calendars
- Perform an arrival set
- Setup container item relationships, containers and vehicles, shipping exceptions, extrastat and intrastate, concurrent programs, and lookups

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Agenda

Agenda

- Organizations parameters
- Inventory allocation and shipping networks
- Shipping networks
- Shipping parameters
- Freight (carriers/cost) and ship methods
- Document sequence rules and printing
- Release sequence rules, pick slip grouping rules, and release rules
- Shipping calendars
- Arrival sets
- Setup container item relationships, containers and vehicles, shipping exceptions, extrastat and intrastate, concurrent programs, and lookups

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Documentation

- Shipping Execution User's Guide (A77030-01)
- Shipping Execution Technical Reference Manual (A83738-02)
- Oracle Manufacturing APIs & Open Interfaces Manual (A83746-01)
- Order Management User's Guide
 - (A77028-01)

http://www.oracle.com/support/elec_sup/index.html

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Agenda

Agenda

- **Organizations parameters**
- **Inventory allocation and shipping networks**
- **Shipping networks**
- **Shipping parameters**
- **Freight (carriers/cost) and ship methods**
- **Document sequence rules and printing**
- **Release sequence rules, pick slip grouping rules, and release rules**
- **Shipping calendars**
- **Arrival sets**
- **Setup container item relationships, containers and vehicles, shipping exceptions, extrastat and intrastate, concurrent programs, and lookups**

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Setup Processes: Define Organizations

Setup Processes: Define Organizations

Within the inventory responsibility:

- You define inventory organizations (warehouses), and their organization parameters.
- You must establish at least one item validation organization created as your item master.
- For Internal order fulfillment, you must establish one organization that acts as an inventory source.
- If you plan to utilize the drop ship some orders functionality, you must define at least one logical organization for receiving purposes.

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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. They 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.

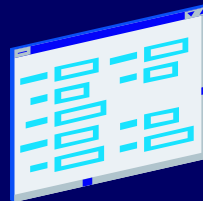
Every Organization is tied to an Item Master. The Item master is the organization that all items are created and maintained in.

Organization Parameters Window

Organization Parameters Window

Six tabs are used to completely define. They include:

- Inventory parameters
- Costing information
- Revision, lot, serial
- ATP, pick, item sourcing
- Inter-org information
- Other accounts



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(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.

Practice 1

Practice 1

This practice defines your organization inventory parameters, costing information, revision lot and serial, ATP, pick, Item-Sourcing, inter-org information, and accounts.

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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

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 XX as 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 timeout 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.

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.

Agenda

Agenda

- Organizations parameters
- **Inventory allocation and shipping networks**
- Shipping networks
- Shipping parameters
- Freight (carriers/cost) and ship methods
- Document sequence rules and printing
- Release sequence rules, pick slip grouping rules, and release rules
- Shipping calendars
- Arrival sets
- Setup container item relationships, containers and vehicles, shipping exceptions, extrastat and intrastate, concurrent programs, and lookups

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Subinventories

- **Subinventories are subdivisions of inventory organizations, and are created to hold the inventory items.**
- **They represent physical locations within an organization and act as a separator within an Organization. Examples include storerooms, parts cages, shipping area etc.**
- **Each subinventory has parameters which decide how items residing within it is viewed or allocated.**
- **You must create one subinventory to be utilized as a staging location for shipping.**

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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.

Subinventory Priorities

- Subinventory priorities are used in conjunction with the picking rules in Inventory allocation.
 - Subinventory priorities establish the hierarchical order in which the system looks for items to be allocated during the pick release process.
 - These must be set up at all inventory organizations that will be used for sales order fulfillment.
- Place whole numbers in the picking order field to establish your inventory organization's preferred hierarchy for allocation.

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(N) Inventory > Setup > Organization> Subinventory

Practice 2

Practice 2

This practice defines your subinventory attributes for your organization, finished goods, stores, and for your accounts.

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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.

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

Inventory Allocation

Picking Rules

- Picking rules are used to allocate Inventory during Pick release. The basic element of revision, lot, subinventory, and locator determines how to allocate inventory items. They work in conjunction with the pick slip grouping rules, release sequence rules, and release rules when the system performs detailing.
 - Criteria include: revision, lot, subinventory, and locator
- Picking rules can be placed at the Item level in the OM tab in the item master, or at the organization level in the organizational parameters in the ATP, Pick Item, Sourcing tab.

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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.

Practice 3

Practice 3

This practice defines your inventory picking rules attributes for revision, lot, sub-inventory, and locator.

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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

Agenda

Agenda

- Organizations parameters
- Inventory allocation and shipping networks
- **Shipping networks**
- Shipping parameters
- Freight (carriers/cost) and ship methods
- Document sequence rules and printing
- Release sequence rules, pick slip grouping rules, and release rules
- Shipping calendars
- Arrival sets
- Setup container item relationships, containers and vehicles, shipping exceptions, extrastat and intrastate, concurrent programs, and lookups

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Shipping Networks

- **Shipping networks are used in internal orders fulfillment. The established method of inventory transfer and account information pertaining to the transfer between the organizations.**
- **Choices for the transfer include direct and in transit.**
- **These must be set up for all combinations of organizational transfers that may occur.**
- **Enter transfer type selections direct or intransit.**

Note: Intransit selection requires an account to be set in the Intransit Inventory account field.

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(N) Inventory > Setup > Organization > Shipping Networks

Shipping Networks

- Enter selection for FOB
- Enter a selection for receipt routing: choices include standard, inspection required, and direct (dock to stock).
- Enter inter org transfer Charges if required
- Enter the appropriate accounting numbers for transfer credit, purchase price variance, receiving, payables, and intransit inventory (only if intransit is selected as a transfer type).

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Practice 4

Practice 4

This practice defines your inventory shipping network attributes for your organization.

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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.

Agenda

Agenda

- Organizations parameters
- Inventory allocation and shipping networks
- Shipping networks
- **Shipping parameters**
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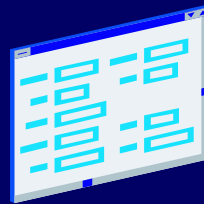
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Setup Processes: Define Shipping Parameters Window

Setup Processes: Define Shipping Parameters Window

In the Shipping Parameters window, you can define the following default values used in basic shipping transactions:

- General parameters
- Pick release parameters
- Shipping transaction parameters
- Delivery grouping parameters



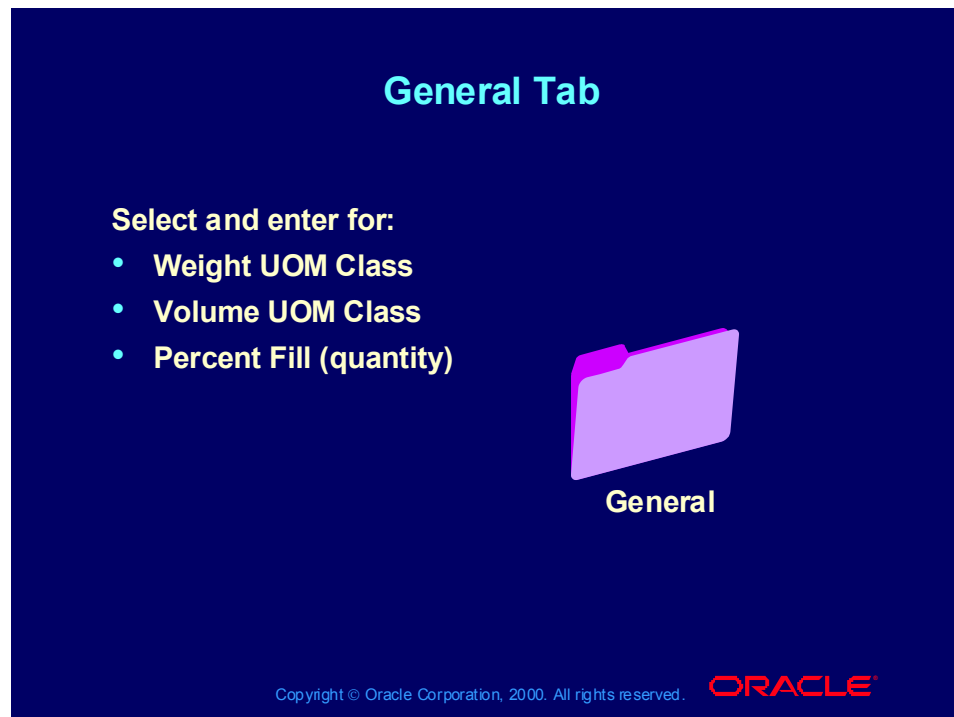
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ORACLE

(N) Shipping > Setup > Shipping Parameters

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

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.

Pick Release Tab

Pick Release Tab

Select and enter for:

- Release sequence rule
- Pick slip grouping rule
- Print pick slips
- Default pick release document set
- Autocreate delivery criteria
- Default stage subinventory
- Default stage locator
- Number of pick slip lines

Enable checkboxes for auto detail and autocreate deliveries



Pick Release

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(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.

- 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.

- 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.

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.

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.

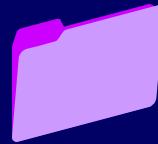
8) Commodity Code Category Set: This parameter has no functionality in the current release.

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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Review Question

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

1. Query Manager
2. Shipping Transaction window
3. Organization Parameters window
4. Find window
5. Shipping window

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Answer to Review Question

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

1. Query Manager
2. Shipping Transaction window
3. Organization Parameters window
4. Find window
5. Shipping window

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Review Question

These establish a method of inventory transfer and account information between organizations.

- 1. Shipping trading partners**
- 2. Shipping networks**
- 3. Shipping organizations**
- 4. Shipping methods**
- 5. Shipping inventory**

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Answer to Review Question

These establish a method of inventory transfer and account information between organizations.

1. Shipping trading partners
2. Shipping networks
3. Shipping organizations
4. Shipping methods
5. Shipping inventory

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Practice 5

Practice 5

This practice defines your shipping parameter attributes such as customer, freight terms, FOB code, intermediate ship to location, ship method carrier.

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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.

Agenda

Agenda

- Organizations parameters
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- Shipping networks
- Shipping parameters
- **Freight (carriers/cost) and ship methods**
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Setup Processes: Define Freight Carriers

Setup Processes: Define Freight Carriers

- A freight carrier is a commercial company that provides internal shipments between organizations and shipments to and from customers and suppliers.
- Enter a freight carrier name, description, and the related distribution account for the freight carrier:
- A carrier must be defined before you can tender a load or create a delivery for that carrier.
- Freight carriers must be assigned to each organization.

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(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

Practice 6

Practice 6

This practice defines your freight carrier attributes such as carrier, distribution accounts, and inactive dates.

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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.

Ship Method Setup

Ship Method Setup

- Define a ship method code
- Ship methods are organization and carrier specific
- Freight carriers can have multiple ship methods to reflect the different service levels
 - Carrier: UPS
 - Ship Methods:
 - UPS Next Day Air AM
 - UPS Next Day Air PM
 - UPS Ground



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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.

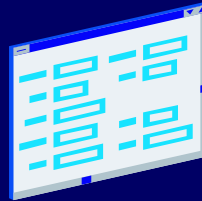
Establish mapping relationship between freight carriers, ship methods and vendors (carriers) for their organizations.

Navigation Path Define Ship Method Codes

Navigation Path Define Ship Method Codes

Use the Order Management Superuser responsibility to complete:

- Setup - Shipping - Shipping networks



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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

Practice 7

Practice 7

This practice defines your carrier ship methods for your organization.

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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

Freight Costs



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 created by Lookup = FREIGHT_COST_TYPE)
3. Select USD as the currency
4. Amount = Default value to be used
5. Map to Charge= establishes whether or not this cost will be mapped to freight charges that are defined as modifiers within Oracle Pricing

Practice 8

Practice 8

This practice defines your freight costs types for assigning costs to a delivery or a trip.

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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.

Freight And Special Charges

- You can set up freight and special charges as pricing modifiers.
- When you save an order line, the pricing engine applies the qualified freight and special charges to it.
- You can view the application of freight and special charges.
- OM captures costs at shipping and converts them to charges.
- Freight and special charges appear on invoices.

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Setting Up Charge Types

Setting Up Charge Types

- Charge types are based on the following lookup types:
 - FREIGHT_COST_TYPE in shipping execution: seeded values are insurance, export, duty, freight, administration and handling
 - FREIGHT_CHARGES_TYPE lookup type in Pricing: The seeded value is Miscellaneous.
- If you want to group charges, you can use multiple subtype codes for each charge_type_code. Create them in the Freight_Charges_Type lookup type.

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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.

Agenda

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Setup Processes: Define Document Sequences

Setup Processes: Define Document Sequences

- Names the document sequence criteria to generate unique document numbers for selected shipping documents.
- A document sequence uniquely numbers documents generated by Oracle Applications product, for example, invoices generated by Oracle Receivables.



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(N) Shipping > Setup > Documents > Document Sequences

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

Shipment Execution Document Sequence Overview

Shipment Execution Document Sequence Overview

- Two steps are required in order to print bill of lading and packing slip reports
 - Set up
 - Define document categories
 - Define document sequences
 - Make their assignments
 - Generate document number
 - Bill of lading number for a delivery leg
 - Packing Slip number for a delivery

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

Shipment Execution Document Sequence Set up

Shipment Execution Document Sequence Set up

- **Set up document categories**
 - Click on the New button
 - Enter the category name and description
 - Choose the document: bill of lading or packing slip

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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

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.

Shipment Execution Document Sequence Set up

Shipment Execution Document Sequence Set up

- **Set up document categories (continued)**
 - **Define the scope of the category**
 - **If bill of lading, one specific or all ship methods for the delivery leg's ship method (packing slip is always for Sales Order)**
 - **One specific or all locations for the delivery leg's pick-up location (if a bill of lading) or the delivery's pick-up location (if a packing slip)**
 - **Define the sequence prefix, suffix, and delimiter**

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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

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

Shipment Execution Document Sequence Set up

Shipment Execution Document Sequence Set up

- **Set up Document Sequences**
 - Enter the Sequence's name
 - Choose Oracle Shipping as Application
 - Enter the effective from and to dates
 - Always choose automatic as type.
 - Enter the initial value

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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

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.

Shipment Execution Document Sequence Set up

Shipment Execution Document Sequence Set up

- **Assign a document sequence to a document category**
 - Choose Oracle Shipping as application
 - Choose the document category
 - Enter the start and end dates
 - Choose the document sequence

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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.

Practice 9

Practice 9

This practice sets up document sequences for Oracle Shipping Execution based on rules you define.

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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 your work

Setup Processes: Define Document Categories

Setup Processes: Define Document Categories

- Create a unique document category for shipping documents such as a bill of lading that can be assigned to a location or all locations.
- Document categories can be created to identify documents associated with a particular carrier.
- For example, a unique document category can be created for a carrier that requires a unique bill of lading numbering system.

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(N) Shipping > Setup > Documents > Document Categories

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

Practice 10

Practice 10

This practice defines the document category attributes such as name, type, and location.

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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.

Setup Processes: Define Document Sets

Setup Processes: Define Document Sets

- **Select the document set to be printed at pick release and ship confirm. You can create additional document sets based on your business needs or select from the following existing seeded document sets.**
- **Pick Release documents**
- **All shipping documents**
- **Pack Slip only (at Ship Confirm)**

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(N) Shipping > Setup > Documents > Document Sets

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

Practice 11

Practice 11

This practice defines the document set attributes such as usage, methods, application, and reports.

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Define Document Sets

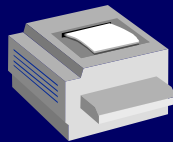
(N) Shipping > Setup > Document > Document Sets

1. Enter XX for 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 your work.

Setup Processes: Choosing Printers

Setup Processes: Choosing Printers

- Assign the shipping documents and selected reports to specific printers.
- Printers can be assigned on multiple levels from user (most specific) to site level (most general).
- Choose the Documents tab to display all documents assigned to a printer, and the printers tab to display all printers assigned to a document.



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(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.

Printing Bills of Lading and Packing Slips Generate Document Numbers

Printing Bills of Lading and Packing Slips Generate Document Numbers

- **Generate bill of lading numbers**
 - **Generate the bill of lading number for a delivery leg**
 - The trip carrying the delivery leg must have a ship method specified.
 - **The bill of lading number can be generated in two ways:**
 - Choose the **Generate Bill of Lading** button in the **Legs** tab page on delivery's **Detail** window.
 - **At ship confirm, check create bill of lading if the delivery is not assigned to any trip.**

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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.

Printing Bills of Lading and Packing Slips Generate Document Numbers

Printing Bills of Lading and Packing Slips Generate Document Numbers

- **Query delivery in the Shipping Transaction window**
- **Navigate to the “legs” tab**
- **Generate the bill of lading**

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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.

Printing Bills of Lading and Packing Slips Generate Document Numbers

Printing Bills of Lading and Packing Slips Generate Document Numbers

- **Generate packing slip numbers**
 - The packing slip Number is generated for a delivery.
 - Push the generate Pack Slip button in the Packing Slip tab page on the Delivery's Detail window.
 - The two fields can be input on the Packing Slip tab page for the packing slip.
 - Reason of transport
 - Description
 - These fields are automatically generated at ship confirm.

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Printing Bills of Lading and Packing Slips

- **After**
 - **Setting up**
 - **Document Sequences,**
 - **Document Categories,**
 - **and their Assignments**
 - **Generating the bill of lading and packing slip numbers**

You will be able to successfully print the bill of lading and packing slip reports.

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Review Question

Review Question

This must be defined _____ before you can tender a load or create a delivery.

- 1. Picking rules**
- 2. Trip sequences**
- 3. A query**
- 4. Stops**
- 5. Carrier**

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Answer to Review Question

This must be defined _____ before you can tender a load or create a delivery.

- 1. Picking rules**
- 2. Trip sequences**
- 3. A query**
- 4. Stops**
- 5. Carrier**

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Review Question

Review Question

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:

1. Assign a document sequence to a delivery
2. Assign a document sequence to a trip
3. Assign a document category to a document sequence
4. Assign a document sequence to a document category
5. Assign a document sequence to a printer

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Answer to Review Question

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:

1. Assign a document sequence to a delivery
2. Assign a document sequence to a trip
3. Assign a document category to a document sequence
4. Assign a document sequence to a document category
5. Assign a document sequence to a printer

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Agenda

Agenda

- Organizations parameters
- Inventory allocation and shipping networks
- Shipping networks
- Shipping parameters
- Freight (carriers/cost) and ship methods
- Document sequence rules and printing
- **Release sequence rules, pick slip grouping rules, and release rules**
- Shipping calendars
- Arrival sets
- Setup container item relationships, containers and vehicles, shipping exceptions, extrastat and intrastate, concurrent programs, and lookups

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Release Sequence Rules

Release Sequence Rules

This rule defines the order in which inventory will be allocated lines during the pick release process.

- Can be a defaulted rule in the Release Sales Order window
- Create rule for different business conditions
- Establish hierarchy based on priority

Attribute	Shipping Execution
Release By Order #	✓
Outstanding Invoice Value	✓
Scheduled Date	✓
Departure Date	✓
Shipment Priority	✓

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(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.

Practice 12

Practice 12

This practice defines the release sequence rules that are enabled in ascending for order according to numbering priority. They include outstanding, schedule date, departure date, and shipment priority.

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Define Release Sequence Rules

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

1. Enter XX for 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 your work

Pick Slip Grouping Rules

Pick Slip Grouping Rules

This rule defines how release lines will be grouped on to pick slips.

- Can be set as default rule in the release sales Order window.
- Create rule for different business conditions.
- Establish hierarchy based on priority

Attribute	Shipping Execution
Group by Order #	✓
Group by Sub Inventory	✓
Group by Customer	✓
Group by Carrier	✓
Group by Delivery /Trip Stop	✓
Group by Ship To	✓
Group by Shipment Priority	✓
Group By Item	✓ (Only when WMS Installed)
Group By Location	✓ (Only when WMS Installed)
Group By Lot/Revision	✓ (Only when WMS Installed)

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(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.

Practice 13

Practice 13

This practice defines the pick slip grouping rules that are enabled that are enabled by either customer or order number.

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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

Release Rules

Release Rules

This rule defines and saves picking criteria that can be used when running pick release.

- Required when running pick release as an SRS process
- Using current date defaults sys date in rule
- Create rule for order and shipping or inventory information

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(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.

Practice 14

Practice 14

This practice defines the release rules for order, shipping, and inventory.

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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

Agenda

Agenda

- Organizations parameters
- Inventory allocation and shipping networks
- Shipping networks
- Shipping parameters
- Freight (carriers/cost) and ship methods
- Document sequence rules and printing
- Release sequence rules, pick slip grouping rules, and release rules
- **Shipping calendars**
- Arrival sets
- Setup container item relationships, containers and vehicles, shipping exceptions, extrastat and intrastate, concurrent programs, and lookups

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Define Calendars

Define Calendars

- Calendars are used to establish workday patterns and start dates.
- Shifts can be created to establish starting times, sift numbers, and working patterns.
- You can assign a calendar that you created in the Bill of Materials (BOM) application to a supplier, customer, organization, or carrier.
- You can define both shipping and receiving calendars that designate shipping and/or receiving dates and times.

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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.

Practice 15

Practice 15

This practice defines a name calendar.

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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

Transportation Calendar

Transportation Calendar

- You can assign your calendars to all members of your supply chain to help manage your shipping and receiving tasks.
- Shipping calendar
 - Available shipping days for customer, supplier, and internal sites
- Receiving Calendar
 - Available receiving days for customer, supplier, and internal sites
- Carrier Calendar
 - Available pickup and delivery dates for a carrier

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(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.

Practice 16

Practice 16

This practice assigns a transportation calendar.

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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

Agenda

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- **Arrival sets**
- Setup container item relationships, containers and vehicles, shipping exceptions, extrastat and intrastate, concurrent programs, and lookups

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Arrival Sets

- **An arrival set is a set of order line shipments which must arrive at the customer site at the same time regardless of how it is shipped or from where it is shipped.**
- **The scheduling functions honor arrival sets and the ATP calculation will operate on a whole arrival set together as a group (taking delivery lead times into consideration to meet the scheduled arrival date). If actual shipments do not occur as planned arrival sets are not split.**

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Practice 17

Practice 17

This practice demonstrates how to perform an arrival set for an order with two line items.

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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.

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

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.

Agenda

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Setup Processes: Define Container-Item Relationships

Setup Processes: Define Container-Item Relationships

- Select the container item, load item, and specify the maximum number of load items that can be packed into a container item.
- Container-item relationships specify the maximum number of load items that can be packed into a container item.
- A container item can also be a load item: for example, a box that is loaded into a vehicle is also a load item for that vehicle (the container item).
- This allows you to create exception rules to react proactively problems that have occurred during the shipping process.

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(N) Shipping > Setup > Container Load Details


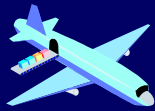
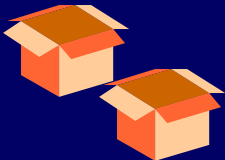
(Help) Oracle Manufacturing Applications > Oracle Shipping Execution > Setting Up > Defining Shipping Parameters > Defining Container-Item Relationships

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).

Containers & Vehicles

Containers & Vehicles

- **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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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 hence 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 be 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

Enter the container's volume.

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

Item Master

- **Used to establish items as container or vehicles.**
- **Must be created to utilize the container packing capability.**
- **In Addition to all other attributes, the Physical Characteristics tab contains criteria specific to containers and vehicles.**

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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

Practice 18

Practice 18

This practice defines container item attributes such as organization, type, and physical attributes.

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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

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

Practice 19

Practice 19

This practice defines container load relationship attributes for items and containers.

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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

Shipping Exceptions

Use the shipping exceptions feature to:

- **Define exceptions per business requirements**
- **Define handling processes for exceptions (through Workflow)**
- **Record shipping exceptions during shipment process**
- **Initiate exception handling**
- **View and track exceptions**

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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.

Shipping Exceptions

Shipping Exceptions

- These help you identify and correct shipping exceptions that violate the requirements of your operation or that of your carriers and customers.
- This gives you the ability to define exceptions and the processes for handling them.
- This enables you to record exceptions automatically from within Oracle Shipping Execution or log exceptions manually through the user interface input forms.
- They can be used to track carrier performance: POD date and ship date.
- They can be used to analyze changes to order after pick release.

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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.

Practice 20

Practice 20

This practice defines shipping exception driven by manual use or custom workflows.

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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

Practice 21

Practice 21

This practice defines manual shipping exception.

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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

INTRASTAT & EXTRASTAT

- **Intrastat & extrastat movement statistics for European Union (EU)**
 - **Automatically created based on Ship-from and Ship-to**
- **Review and validate using Movement statistics exception report**



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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.

Global Packing Slip

Global Packing Slip

- **Pack Slip**
 - **Print prior to ship confirmation.**
 - **Reprint packing slip**
 - **Sequence packing slip**
 - **Draft and final versions**
 - **Final designation freezes, but allows subsequent reprint**
 - **Sort by inventory item or by customer item**
 - **Allow alphanumeric prefix/suffix**



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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.

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.

Concurrent programs

Concurrent programs

There are four shipping SRS concurrent programs that must be run in order to complete the shipping process:

- **Import delivery lines**
- **Inventory interface - SRS**
- **OM interface - SRS**
- **Departure ship notice outbound**

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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

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.

Define Lookups

Define Lookups

- Establish LOV choices for user within windows.
- Can be set at three levels
 - User: can enter and modify as needed
 - Extensible: new codes can be added, however, you cannot modify seeded lookup codes.
 - System: these cannot be changed or deleted.

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(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

Profile Options

- **Profile options that existed in previous versions have been eliminated in release 11i. The only Shipping profile that needs to be set is WSH: Internet Proxy URL WSH_Internet_Proxy_URL.**

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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

Summary

Summary

In this course, you should have learned about:

- Organizations parameters
- Inventory allocation and shipping networks
- Shipping networks
- Shipping parameters
- Freight (carriers/cost) and ship methods
- Document sequence rules and printing
- Release sequence rules, pick slip grouping rules, and release rules
- Shipping calendars
- Arrival sets
- Setup container item relationships, containers and vehicles, shipping exceptions, extrastat and intrastate, concurrent programs, and lookups

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