

Oracle® Supplier Scheduling User's Guide

Release 11
March 1998



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Oracle® Supplier Scheduling User's Guide
Release 11

The part number for this book is A58274-01.

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Major Contributors: Louis Bryan, Deborah Clark, David Reitan

Contributors: Rachel Haas, Nancy Kane, Raghav Keshav, Vijay Pawar, Kim Powell.

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Contents

Preface **iii**

Chapter 1

- Setting Up** **1 - 1**
- Overview of Supplier Scheduling 1 - 2
- Defining Approved Supplier Statuses 1 - 5
- Bucket Patterns 1 - 7
- Defining Ship-to Organization Level Defaults and Controls .. 1 - 10
- Profile Options in Supplier Scheduling 1 - 13

Chapter 2

- Scheduler's Workbench** **2 - 1**
- Overview of Scheduler's Workbench 2 - 2
- Reviewing Item Schedules 2 - 4
- Viewing Authorizations 2 - 8
- Schedule Orders 2 - 10
- EDI Transactions 2 - 13
- MRP/MPS/DRP Plan Name Fields 2 - 15
- Schedule Types and Subtypes 2 - 18
- Building a New Schedule 2 - 23
- Locating/Reviewing Existing Schedules 2 - 31
- Confirming Schedules 2 - 35

Chapter 3	CUM Management	3 – 1
	CUM Management	3 – 2
Chapter 4	Supply Base Management	4 – 1
	Overview of the Approved Supplier List	4 – 2
	AutoScheduling	4 – 5
	Resource Authorizations	4 – 6
	Defining the Supplier and Item/Commodity Combination ...	4 – 8
	Defining the Supplier/Item Attributes	4 – 10
	View Approved Suppliers	4 – 13
Chapter 5	Reports and Processes	5 – 1
	CUM History Report	5 – 2
	AutoSchedule Processes	5 – 4
	Planning Schedule Report	5 – 7
	Shipping Schedule Report	5 – 9
Appendix A	Windows and Navigation Paths	A – 1

Glossary

Index



Preface

Welcome to the *Oracle[®] Supplier Scheduling User's Guide, Release 11*.

This user's guide includes the information you need to work with Oracle Supplier Scheduling effectively. It contains detailed information about the following:

- Overview and reference information
- Specific tasks you can accomplish using Supplier Scheduling
- Supplier Scheduling setup
- Supplier Scheduling functions and features
- Supplier Scheduling windows
- Supplier Scheduling reports and processes

This preface explains how this user's guide is organized and introduces other sources of information that can help you.

About This User's Guide

This guide contains overviews as well as task and reference information about Oracle Supplier Scheduling. This guide includes the following chapters:

- Chapter 1 describes setting up Supplier Scheduling, including defining approved supplier statuses, bucket patterns, and ship-to organization level controls.
Note: Implementation information and procedures are contained in this chapter.
- Chapter 2 explains the Scheduler's Workbench and how it is used to review item schedules, view authorizations, locate existing schedules, review schedule headers, review bucketed item schedules, rebuild schedules, and confirm schedules.
- Chapter 3 discusses CUM management in Supplier Scheduling.
- Chapter 4 describes supply based management, including the Approved Supplier List, autoscheduling, resource authorizations, defining supplier and commodity/item combinations, defining supplier item attributes, and viewing approved suppliers.
- Chapter 5 explains the reports provided with Supplier Scheduling.

Audience for This Guide

This guide assumes you have a working knowledge of your business area's processes and tools. It also assumes you are familiar with Supplier Scheduling. If you have never used Supplier Scheduling, we suggest you attend one or more of the Supplier Scheduling training classes available through World Wide Education. For more information about Supplier Scheduling and Oracle training, see: Other Information Sources.

Do Not Use Database Tools to Modify Oracle Applications Data

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

Consequently, we STRONGLY RECOMMEND that you never use SQL*Plus or any other tool to modify Oracle Applications data unless otherwise instructed.

Other Information Sources

Here are some other ways you can increase your knowledge and understanding of Supplier Scheduling.

Online Documentation

All Oracle Applications documentation is available online on CD-ROM, except for technical reference manuals. There are two online

formats, HyperText Markup Language (HTML) and Adobe Acrobat (PDF).

All user's guides are available in HTML, Acrobat, and paper. Technical reference manuals are available in paper only. Other documentation is available in Acrobat and paper.

The *content* of the documentation does not differ from format to format. There may be slight differences due to publication standards, but such differences do not affect content. For example, page numbers and screen shots are not included in HTML.

The HTML documentation is available from all Oracle Applications windows. Each window is programmed to start your web browser and open a specific, context-sensitive section. Once any section of the HTML documentation is open, you can navigate freely throughout all Oracle Applications documentation. The HTML documentation also ships with Oracle Information Navigator (if your national language supports this tool), which enables you to search for words and phrases throughout the documentation set.

Related User's Guides

Supplier Scheduling shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other user's guides when you set up and use Supplier Scheduling.

If you do not have the hardcopy versions of these manuals, you can read them online using the Applications Library icon or Help menu command.

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Supplier Scheduling (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Oracle Applications Demonstration User's Guide

This guide documents the functional storyline and product flows for Global Computers, a fictional manufacturer of personal computers products and services. As well as including product overviews, the

book contains detailed discussions and examples across each of the major product flows. Tables, illustrations, and charts summarize key flows and data elements.

Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide

This guide describes how to anticipate and manage both supply and demand for your items. Using a variety of tools and techniques, you can create forecasts, load these forecasts into master production schedules, and plan your end-items and their component requirements. You can also execute the plan, releasing and rescheduling planning suggestions for discrete jobs and repetitive schedules.

Oracle Purchasing User's Guide

This guide describes how to create and approve purchasing documents, including requisitions, different types of purchase orders, quotations, RFQs, and receipts. This guide also describes how to manage your supply base through agreements, sourcing rules and approved supplier lists. In addition, this guide explains how you can automatically create purchasing documents based on business rules through integration with Oracle Workflow technology, which automates many of the key procurement processes.

Reference Manuals

Oracle Automotive Implementation Manual

This manual describes the setup and implementation of the Oracle Applications used for the Oracle Automotive solution.

Oracle Manufacturing, Distribution, Sales and Service Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes open interfaces found in Oracle Manufacturing.

Oracle Applications Message Reference Manual

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11.

Oracle Project Manufacturing Implementation Manual

This manual describes the setup steps and implementation for Oracle Project Manufacturing.

Oracle Self-Service Web Applications Implementation Manual

This manual describes the setup steps for Oracle Self-Service Web Applications and the Web Applications dictionary.

Installation and System Administration

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Supplier Scheduling. This manual details additional steps and setup considerations for implementing Supplier Scheduling with this feature.

Multiple Organizations in Oracle Applications

If you use the Oracle Applications Multiple Organization Support feature to use multiple sets of books for one Supplier Scheduling installation, this guide describes all you need to know about setting up and using Supplier Scheduling with this feature.

Oracle Applications Implementation Wizard User's Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards*. It also provides information to help you build your custom Developer/2000 forms so that they integrate with Oracle Applications.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Supplier Scheduling implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle Applications Installation Manual for Windows Clients

This guide provides information you need to successfully install Oracle Financials, Oracle Public Sector Financials, Oracle Manufacturing, or Oracle Human Resources in your specific hardware and operating system software environment.

Oracle Applications Product Update Notes

If you are upgrading your Oracle Applications, refer to the product update notes appropriate to your update and product(s) to see summaries of new features as well as changes to database objects, profile options and seed data added for each new release.

Oracle Applications Upgrade Preparation Manual

This guide explains how to prepare your Oracle Applications products for an upgrade. It also contains information on completing the upgrade procedure for each product. Refer to this manual and the *Oracle Applications Installation Manual* when you plan to upgrade your products.

Oracle Applications System Administrator's Guide

This manual provides planning and reference information for the Supplier Scheduling System Administrator.

Other Sources

Training

We offer a complete set of formal training courses to help you and your staff master Supplier Scheduling and reach full productivity quickly. We organize these courses into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle Education Services at any one of our many Education Centers, or you can arrange for our trainers to teach at your facility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Supplier Scheduling working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8 server, and your hardware and software environment.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 45 software modules for financial management, supply chain management, manufacturing, project systems, human resources and sales and service management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 140 countries around the world.

Thank You

Thank you for using Supplier Scheduling and this user's guide.

We value your comments and feedback. At the end of this guide is a Reader's Comment Form you can use to explain what you like or dislike about Supplier Scheduling or this user's guide. Mail your comments to the following address or call us directly at (650) 506-7000.

Oracle Applications Documentation Manager
Oracle Corporation
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Or, send electronic mail to appsdoc@us.oracle.com.

Setting Up

This chapter tells you what you need to know about setting up Oracle Supplier Scheduling, including:

- Overview of Supplier Scheduling: page 1 – 2
- Function Security in Supplier Scheduling: page 1 – 4
- Defining Approved Supplier Statuses: page 1 – 5
- Bucket Patterns: page 1 – 7
- Defining Bucket Patterns: page 1 – 8
- Defining Ship-to Organization Level Defaults and Controls: page 1 – 10
- Profile Options in Supplier Scheduling: page 1 – 13

Overview of Supplier Scheduling

Oracle Supplier Scheduling lets you calculate, maintain, and communicate Planning and Shipping Schedules to your supplier partners.

You can use Planning Schedules to convey long-range requirement forecasts, and to optionally include order releases and material authorizations, which are commitments to fund investment in raw materials and processing for projected requirements.

You can use Shipping Schedules to communicate firm requirements such as order releases. You can also use Shipping Schedules in conjunction with Planning Schedules to provide a detailed view of expected delivery.

The schedules are comprised of unimplemented MRP/MPS/DRP Planned Orders, approved Requisitions, and approved Supply Agreement Releases for specific suppliers, supplier/site combinations, items, and ship-to organizations. You can include orders in the schedule if their due dates fall within the schedule horizon and their document types are relevant for the schedule type. For example, you cannot include Planned Orders in a Shipping Schedule with a subtype of Release Only.

You can build a schedule in a bucket pattern of days, weeks, months, and quarters that will best communicate your orders and you can distribute your schedules to your supplier by EDI or printed report.

Prerequisites

- Set up Oracle Purchasing.
- You must also set up one of the following:
 - Master Resource Planning
 - Supply Chain Planning
- Define schedule options
- Define bucket patterns
- Run your MRP/MPS/DRP plans, perform the implementation and/or reschedule actions that are required in the Planner Workbench, and optionally create approved releases from pending requisitions before building a schedule.

Major Features

With Supplier Scheduling you can:

- Automatically or manually build Planning Schedules to communicate long-range forecast information to suppliers.
- Automatically or manually build Shipping Schedules to communicate near-term release shipment information to suppliers.
- Build Revision schedules.
- Build Simulation schedules for personal use.
- Build schedules that include discrete requirements for multiple ship-to organizations.
- Use a wide variety of criteria for building and reviewing schedules.
- Number Planning and Shipping Schedules automatically using a combination of date stamp and unique sequence.
- Number/name saved Simulation schedules manually, which allows for easy retrieval.
- Communicate schedules to suppliers via EDI and/or printed report.
- Automatically maintain the cumulative quantity received (CUM) by supplier/item/ship-to organization for user-defined CUM periods.
- Optionally, adjust CUM quantities manually.
- Define and calculate quantities for up to four different Resource Authorization types by supplier site/item/ship-to organization.
- Review High Authorization and CUM details for all CUM periods.
- Define variable bucket patterns, which allow for flexible schedule presentation.
- Control access by responsibility for specific features using Function Security.
- Include Supplier Scheduling and the ASL in SupplierMerge.

See Also

EDI Transactions: page 2 – 13

Function Security in Oracle Supplier Scheduling

Function Security in Supplier Scheduling is controlled at the responsibility level by excluding functions from the responsibility. If one of the following functions is excluded from a responsibility, the button will be greyed out to indicate that the function is not available:

Build Schedule	Build radio button – Find Supplier Schedules window
Rebuild Item	Rebuild Item button – Supplier Schedules window
Confirm Schedule	Confirm Schedule button – Supplier Schedules window
Confirm Item	Confirm Item button – Supplier Schedules window
Open Releases	Open button – Orders Summary window

By excluding one or more functions from a responsibility, you can tailor responsibilities to users' needs. For example, you could:

- Provide view-only access to Supplier Scheduling by excluding all five functions above
- Allow users to build and confirm schedules at the line level but not allow them to confirm the schedules or open releases by excluding only the Confirm Schedule and Open Releases functions
- Prevent building of schedules and opening releases but allow schedule confirmation by excluding only the Build Schedule, Rebuild Item, and Open Releases functions

Defining Approved Supplier Statuses

You can create any number of Approved Supplier Statuses to describe the condition of the Approved Supplier. Each Approved Supplier Status can have Business Rules applied to manage the characteristics of the status.

► **To define Approved Supplier Statuses:**

1. Navigate to the Approved Supplier List Statuses window.

Status	Description	Inactive On	[]
			<input type="checkbox"/>

Description

Business Rules

Control	Rule	Rule Description

2. Enter a unique Status name.
3. Enter a status Description to convey the meaning of the status.
4. Optionally check Approved Supplier List Default to set this status as a default.

Note: You can only have one Approved Supplier Status as a default.

5. Optionally choose a date for Inactive On to set the time when the status will no longer be active.
6. If you choose to apply Business rules to the Approved Supplier Status, choose a Control. By choosing a Control, you either Allow or Prevent the Business Rule.

7. Choose a Business Rule from the List of Values.
8. Save your work.

See Also

Defining Planners *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*

Defining Supplier Lists: page 4 – 8

View Approved Suppliers: page 4 – 13

Bucket Patterns

You can define variable bucket patterns to use when building Planning and Shipping Schedules and generating the Supplier Scheduling Requirements report. Bucket patterns are comprised of up to 56 buckets of:

- days
- weeks
- months
- quarters

Monthly and quarterly buckets always begin on the first day of the month. Quarterly buckets begin on the first day of the next available month and last for three consecutive calendar months. For weekly buckets, you must specify the day, Monday – Sunday, that you want your weekly schedules to begin on.

Bucket start dates are dynamically defined at schedule build time based on the schedule horizon start date and bucket duration. Because the transition from days to weeks and weeks to months or quarters might not align perfectly, “buffer” buckets are automatically generated to bridge this gap.

Bucket patterns are assigned to the item in the Approved Supplier List. When you build a schedule using AutoSchedule, items matching the selection criteria are grouped by bucket pattern and included on the same schedule. If a supplier is associated with items that contain different bucket patterns for the selected schedule, multiple schedules are automatically built, one for each bucket pattern.

When you build a schedule using the Scheduler’s Workbench and include future releases, the schedule will have an additional bucket labeled Future. The Future bucket includes approved releases dated after the schedule horizon end. This bucket does not appear on the printed schedule or the electronic transaction; however, the contents of the bucket can be reviewed and rescheduled to fit within the horizon.

See Also

Defining Bucket Patterns: page 1 – 8

Defining Ship-to Organization Level Defaults and Controls: page 1 – 10

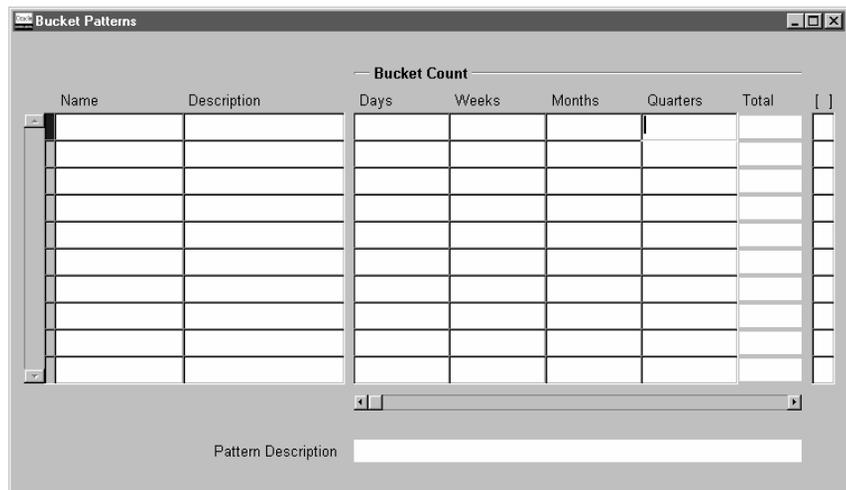
Defining Bucket Patterns

You can define variable bucket patterns in a combination of up to 56 of the following intervals:

- days
- weeks
- months
- quarters

► **To define a bucket pattern:**

1. Navigate to the Bucket Patterns window.



The screenshot shows a window titled "Bucket Patterns". Inside the window, there is a table with the following columns: Name, Description, Days, Weeks, Months, Quarters, Total, and a scroll bar. The table is currently empty. Below the table, there is a text field labeled "Pattern Description".

2. Enter a unique Name for the bucket pattern.
3. Enter an extended Description of the bucket pattern.
The description you enter will also be displayed in the Pattern Description text field.
4. In Bucket Count, do the following:
 - Enter the number of Days, Weeks, Months, and Quarters you want to include.
 - In Begin Weeks On, select the day of the week you want your weekly schedule to begin on.

If you entered a nonzero bucket count in Weeks, you must specify the day of the week on which all weekly intervals will begin.

- In Inactive On, enter a disable date to prevent future use of this bucket pattern for schedule generation and reporting.
5. Save your work.

See Also

Bucket Patterns: page 1 – 7

Defining Ship-to Organization Level Defaults and Controls

You can define ship-to organization defaults and controls. You can also enable CUM tracking.

- ▶ To define defaults and controls for each ship-to organization:
 1. Navigate to the Supplier Scheduling Options window.

The screenshot shows the 'Supplier Scheduling Options' window. At the top, there is a 'Ship-To Organization' field with a dropdown arrow. Below this, there are two checkboxes: 'Enable CUM Accounting' and 'RTV Updates CUM'. A 'Defaults' section is divided into two columns. The left column, titled 'Schedule Types', has 'Planning' and 'Shipping' fields. The right column, titled 'Bucket Patterns', has 'Planning' and 'Shipping' fields. At the bottom, there are 'MRP Plan' and 'DRP Plan' fields on the left, and an 'MPS Plan' field on the right.

2. Enter the Code of the Ship-To Organization.
3. Optionally, check the Enable CUM Management option if you want to enable CUM tracking for all Approved Supplier List items in the ship-to organization you specified.
4. Optionally, check the RTV Updates CUM option if you want Return to Supplier (RTV) transactions and their associated RTV corrections automatically included in the CUM calculation.
5. Select a default Shipping Schedule type:
 - Release Only*: includes approved Supply Agreement Releases
 - Release With Forecast*: includes Release and Forecast quantities
6. Select a default Planning Schedule Type.
7. Select a default Shipping Bucket Pattern.
8. Select a default Planning Bucket Pattern.

9. Select the default MRP, DRP, or MPS Plan that will be displayed in the Build Schedules window in the Scheduler's Workbench and be used for the AutoSchedule process.
10. Save your work.

See Also

Defining Bucket Patterns: page 1 – 8

CUM Management: page 3 – 2

Profile Options in Supplier Scheduling

MRP: Default Sourcing Assignment Set

This profile option indicates which sourcing rules assignment set will be used in Purchasing and Supplier Scheduling. Planning allows the user to use multiple Assignment Sets, but Purchasing looks at only a single Assignment Set. The value of this profile option should be the name of the Assignment Set used in Purchasing. This profile option must be set if the user is using sourcing rules in Purchasing.

MRP: Sourcing Rule Category Set

This profile needs to be set to display Category and Category-Organization assignments in the Sourcing Rule/Bill of Distribution Assignments window.

PO: Use Enhanced Sourcing Rules

Set this profile option to Yes if you are using the new sourcing rules and ASL. If you are continuing to use the Autosource Rules, this value should be set to No.

Scheduler's Workbench

This chapter tells you what you need to know about Oracle Supplier Scheduling Scheduler's Workbench including:

- Overview of Scheduler's Workbench: page 2 – 2
- Reviewing Item Schedules: page 2 – 4
- Viewing Authorizations: page 2 – 8
- Locating/Reviewing Existing Schedules: page 2 – 31
- Reviewing Schedule Headers and Items: page 2 – 32
- Reviewing Bucketed Item Schedules: page 2 – 32
- Rebuilding Schedules: page 2 – 33
- Confirming Schedules: page 2 – 35

Overview of Scheduler's Workbench

Use the Scheduler's Workbench to build, view, edit, print, and confirm Planning, Shipping, and Simulation Schedules using a wide variety of Find or Build criteria.

You can:

- build new schedules manually
- review and edit schedules
- build revised schedules
- rebuild scheduled items
- build simulation schedules
- confirm schedules
- number schedules automatically
- communicate schedules to supplier via EDI and/or printed report

Prerequisites

Set up Oracle Purchasing and Oracle Supplier Scheduling.

You must also install one of the following:

- Master Resource Planning
- Supply Chain Planning

Run your MRP/MPS/DRP plans, perform the implementation and/or reschedule actions that are required in the Planner Workbench, and optionally create approved releases from pending requisitions before building a schedule.

See Also

Tasks

Reviewing Item Schedules: page 2 – 4

Viewing Authorizations: page 2 – 8

Reviewing Schedule Headers and Items: page 2 – 32

Reviewing Bucketed Item Schedules: page 2 – 32

Rebuilding Schedules: page 2 – 33

Confirming Schedules: page 2 – 35

Reference

Scheduling Orders: page 2 – 10

EDI Transactions: page 2 – 13

MRP/MPS/DRP Plan Name Fields: page 2 – 15

Schedule Types and Subtypes: page 2 – 18

Resource Authorizations: page 4 – 6

Reviewing Item Schedules

Use this window to view the bucketed requirements and calculated authorization quantities for the current item within the schedule horizon start and end dates.

This window reflects the bucketing pattern applied at the time the schedule was built.

► **To review item schedules:**

1. Navigate to the Item Schedule window.

The screenshot shows a window titled "Item Schedule (19970306-1) - C41684". The window is divided into two main sections. The upper section contains various input fields for reference information, including PO UOM, Last Receipt Qty, Last Receipt Date, Last Receipt Num, Last Shipment Num, CUM Received, Primary UOM, Lead Time, Minimum Order Qty, Maximum Order Qty, and Fixed Lot Multiple. The lower section, titled "Schedule Quantities", contains a table with columns for Release, Forecast, Bucket Total, and CUM. The table has four columns and four rows. The Release column has a small black bar in the first row. Below the table is a scroll bar. At the bottom of the window are two buttons: "Authorizations" and "Orders".

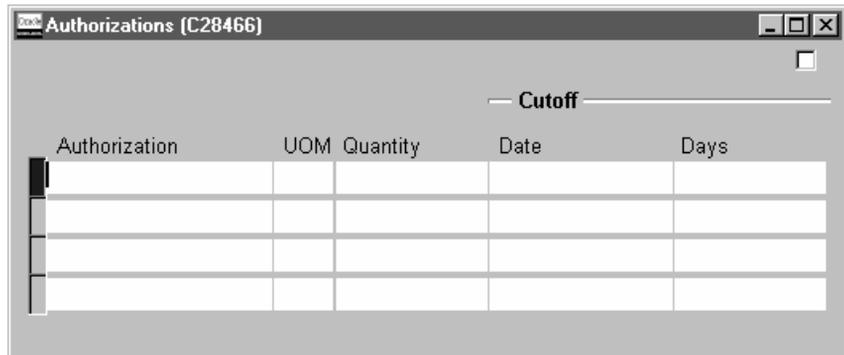
The current schedule number is displayed in the window heading. The upper portion of the screen displays the following reference information for the current item:

- Purchasing (PO) UOM
- Primary UOM
- Item
- Lead Time
- Supplier
- Site
- Additional Fields
- CUM Received

- View the complete list of individual source documents containing requirements for the current item's bucketed schedule.
- View only the current bucket's individual source documents containing requirements for the item when you drill-down from a specific bucket.
- Choose the Open button to open the Releases window in Oracle Purchasing, where you can make changes to the approved blanket release. After you have reapproved the release, you can return to the Supplier Schedules window and rebuild the schedule, which will then consider the changes. You cannot change requisitions, MRP/MPS planned orders, or unapproved releases. This option is subject to function security, schedule type, and schedule status.

► **To view Authorizations:**

1. Choose the Authorizations button.
2. The Authorizations window is displayed.



See the following:

Viewing Authorizations: page 2 – 8

Resource Authorizations: page 4 – 6

See Also

Tasks

Viewing Authorizations: page 2 – 8

Building a New Schedule: page 2 – 23

Building a Simulation Schedule: page 2 – 27
Building a Revision Schedule: page 2 – 26
Locating/Reviewing Existing Schedules: page 2 – 31
Reviewing Schedule Headers and Items: page 2 – 32
Reviewing Bucketed Item Schedules: page 2 – 32
Rebuilding Schedules: page 2 – 33
Confirming Schedules: page 2 – 35

Reference

Scheduling Orders: page 2 – 10
EDI Transactions: page 2 – 13
MRP/MPS/DRP Plan Name Fields: page 2 – 15
Schedule Types and Subtypes: page 2 – 18
Resource Authorizations: page 4 – 6

Viewing Authorizations

Use the Authorizations window to view the calculated authorization quantities for the current scheduled item if you are building a Planning Schedule and authorizations are enabled on the ASL (Approved Supplier List).

If CUM Management is enabled for the organization, the authorization quantity will be cumulative from the start of the CUM period.

If CUM Management is not enabled, the authorization quantity will be cumulative from the start of the schedule horizon.

Authorization

If authorizations are enabled for the item in the Approved Supplier List window, each authorization code and the applicable authorized quantities, time fence days, and cutoff dates based on the schedule horizon start date is displayed.

UOM

All quantities in the horizontal view, Authorizations window, and Schedule Orders window are reflected in this Purchasing UOM, which is taken from the ASL (Approved Supplier List).

Quantity

If CUM Management is enabled for the ship-to organization, these authorization quantities are compared to the highest corresponding authorizations for the CUM period when the supplier schedule header is confirmed. The authorization high-water mark is updated if necessary.

Days

Displays the corresponding authorization time fence from the ASL (Approved Supplier List).

Date

Displays the date that is calculated from the authorization time fence relative to the schedule horizon start date, subject to the following restrictions:

- Authorization cutoff date cannot exceed the schedule horizon end date
- Authorization cutoff date cannot exceed the current CUM period if the ship-to organization maintains CUMS.

See Also

Tasks

Reviewing Item Schedules: page 2 – 4

Building a New Schedule: page 2 – 23

Building a Simulation Schedule: page 2 – 27

Building a Revision Schedule: page 2 – 26

Locating/Reviewing Existing Schedules: page 2 – 31

Reviewing Schedule Headers and Items: page 2 – 32

Reviewing Bucketed Item Schedules: page 2 – 32

Rebuilding Schedules: page 2 – 33

Confirming Schedules: page 2 – 35

Reference

Scheduling Orders: page 2 – 10

EDI Transactions: page 2 – 13

MRP/MPS/DRP Plan Name Fields: page 2 – 15

Schedule Types and Subtypes: page 2 – 18

Resource Authorizations: page 4 – 6

Schedule Orders

Use the Schedule Orders window to:

- View the complete list of individual source documents that contain requirements for the current item's bucketed schedule.
- View only the current bucket's individual source documents that contain requirements for the item when you drill down from a specific bucket.
- Choose the Open button to open the Releases window in Oracle Purchasing, where you can make changes to the approved blanket release. After you have reapproved the release, you can return to the Supplier Schedules window and rebuild the schedule, which will then consider the changes. You cannot change requisitions, MRP/MPS planned orders, or unapproved releases. This option is subject to function security, schedule type, and schedule status.

PO UOM

Displays all quantities in the horizontal view, Authorizations window, and Schedule Orders window that are reflected in this UOM, which is taken from the ASL (Approved Supplier List) associated with the ship-to org identified with the item.

Order Quantity

Displays the source document supply quantity in the PO UOM purchasing unit of measure. If the document unit of measure differs from the purchasing unit of measure designated for the ship-to organization in the Approved Supplier List window, this quantity is converted before being added into the current bucket or shown here.

Due Date

Displays the source document due date.

Document Type

Displays one of the following source types of the supply quantity for each row:

Planned Order: unimplemented planned order resulting from the most recent MRP or MPS plan which has been assigned to this

schedule because this supplier site is the primary supplier to the ship-to organization on the current schedule.

Requisition: approved requisition sourced to this supplier site, including requisitions converted into currently unapproved releases.

Release: approved release of a supply agreement blanket order specified in the Approved Supplier List Documents sourced to this supplier site. Approved releases are applied to the Release Quantity

Document Number

Displays the document number if the source document type is Requisition or Release. Planned Orders do not have a source document number.

Document Revision

Displays the document revision if the source document type is Release. This field is not relevant for Requisitions or Planned Orders.

Document Status

Displays the document status if the source document type is Requisition or Release. This field is not relevant for Planned Orders.

Document Line

Displays the document line number if the source document type is Release or Requisition. This field is not relevant for Planned Orders.

- Recalculate/redisplay authorizations

See Also

Tasks

Reviewing Item Schedules: page 2 – 4

Viewing Authorizations: page 2 – 8

Building a New Schedule: page 2 – 23

Building a Simulation Schedule: page 2 – 27

Building a Revision Schedule: page 2 – 26

Locating/Reviewing Existing Schedules: page 2 – 31

Reviewing Schedule Headers and Items: page 2 – 32

Reviewing Bucketed Item Schedules: page 2 – 32

Rebuilding Schedules: page 2 – 33

Confirming Schedules: page 2 – 35

Reference

EDI Transactions: page 2 – 13

MRP/MPS/DRP Plan Name Fields: page 2 – 15

Schedule Types and Subtypes: page 2 – 18

Resource Authorizations: page 4 – 6

EDI Transactions

You can exchange business documents electronically between trading partners. EDI subscribes to standard formats for conducting these electronic transactions.

The following EDI transactions facilitate the Supplier Scheduling process:

- Planning Schedule (830)
- Shipping Schedule (862)

Planning Schedule (830)

The Planning Schedule allows for the electronic transmission of forecast and material release information between organizations. You can use a Planning Schedule as follows:

- forecast
- forecast with the buyer's authorization to commit resources such as labor or material
- forecast with order release capability

Forecast (830)

You can use a Planning Schedule (830) as a Forecast without order release capability, and optionally include material authorization. If you choose Forecast, you can use the Shipping Schedule (862) as an order release mechanism to show firm quantities. You may not need to archive if material authorizations are not included.

Material Release (830)

You can use a Planning Schedule (830) as a Material Release that conveys forecast and order release information to specific supplier sites for all production items sourced from that supplier site to a specific ship-to location. If you use the Planning Schedule (830) as an Material Release, you eliminate the need to print blanket releases, and may also eliminate the need for a Shipping Schedule.

Material Releases for all productive material suppliers are generated at specified daily or weekly intervals to reflect the planning data of a new MRP regeneration; exception releases can be generated between general releases.

You must archive Material Releases for the entire CUM Period so that they remain available for inquiry and reporting purposes.

Shipping Schedule (862)

The Shipping Schedule refines the information contained on the Planning Schedule and supports Just-In-Time Delivery (JIT). The Shipping Schedule includes near term shipment information that is collected from open purchase orders and blanket order releases for scheduled items associated with the supplier site.

Daily buckets convey requirements, as opposed to the weekly and monthly buckets typically used on the Planning Schedule.

You must archive Shipping Schedules for the entire CUM Period so that they remain available for inquiry and reporting purposes.

See Also

Tasks

Reviewing Item Schedules: page 2 – 4

Viewing Authorizations: page 2 – 8

Building a New Schedule: page 2 – 23

Building a Simulation Schedule: page 2 – 27

Building a Revision Schedule: page 2 – 26

Locating/Reviewing Existing Schedules: page 2 – 31

Reviewing Schedule Headers and Items: page 2 – 32

Reviewing Bucketed Item Schedules: page 2 – 32

Rebuilding Schedules: page 2 – 33

Confirming Schedules: page 2 – 35

Reference

Scheduling Orders: page 2 – 10

MRP/MPS/DRP Plan Name Fields: page 2 – 15

Schedule Types and Subtypes: page 2 – 18

Resource Authorizations: page 4 – 6

MRP/MPS/DRP Plan Name Fields

Scheduler's Workbench

- MRP Plan Name
- MPS Plan Name
- DRP Plan Name

MRP Plan Name

Select the MRP plan from which you want to extract unimplemented planned orders for MRP Planned items that will be included in the schedules you are building.

This field is relevant only if you are building a Planning Schedule or Shipping Schedule with a subtype of Release and Forecast. The planned orders recommended by this MRP Plan will be used when building the schedule for MRP Planned items only.

If you are building a Shipping Schedule with the subtype Release Only, this field is irrelevant because unimplemented MRP planned orders are not used.

If you are building a Shipping Schedule with the subtype Release and Forecast, the same MRP Plan must be used to generate both the Planning and the Shipping Schedule.



Attention: You can Master Schedule raw material with long lead times. You must complete Supplier Scheduling processing after you complete the MRP launch so that all master scheduled item requirements are included in the MRP recommendations.



Attention: The status of the selected MRP Plan is very important. You must complete all planning tasks of the selected MRP Plan before building a schedule. If several days pass after you launch the MRP plan, the forecast requirements are possibly inaccurate.

If you are planning for a single organization only in the Supplier Scheduling Options window and you do not select an MRP Plan in the Scheduler's Workbench, Supplier Scheduling defaults to the plan specified for your organization.

MPS Plan Name

Select the MPS Plan from which you want to extract unimplemented planned orders for MPS Planned items that will be included in the schedules you are building.

This field is relevant only if you are building any Planning or Shipping Schedule with a subtype of "Release and Forecast". The planned orders recommended by this MPS Plan will be used when you are building a schedule for MPS Planned Items only.

If you are building a Shipping Schedule with a subtype of "Release Only", this field is irrelevant because unimplemented MPS planned orders are not used.

If you are building a Shipping Schedule with the subtype "Release and Forecast", you must use the same MPS Plan to generate both the Planning and Shipping Schedules to ensure consistent reporting of requirements to the supplier.



Attention: The status of the selected MPS Plan is very important. You must complete all planning tasks of the selected MPS Plan before building a schedule. If several days have passed since you launched the MPS Plan, the forecast requirements are possibly inaccurate.

If you do not select an MPS Plan and you are planning for a single organization only, Supplier Scheduling uses the defaults specified for your organization.

DRP Plan Name

Select the DRP Plan from which you want to extract unimplemented planned orders for DRP Planned items that will be included in the schedules you are building.

This field is relevant only if you are building a Planning or Shipping Schedule with the subtype "Release and Forecast". The planned orders recommended by this DRP Plan will be used when you are building a schedule for DRP Planned items only.

If you are building a Shipping Schedule with a subtype "Release Only", this field is irrelevant because unimplemented DRP planned orders are not used.

If you select a Shipping Schedule with the a subtype "Release and Forecast", the same DRP Plan must be used to generate both the Planning and Shipping Schedules.

-  **Attention:** You can Master schedule raw material with long lead times. You must complete Supplier Scheduling processing after the DRP launch is completed so that all master scheduled item requirements are included in the DRP recommendations.
-  **Attention:** The status of the selected DRP Plan is very important. You must complete all planning tasks of the selected DRP Plan before you build a schedule. If several days have passed since the DRP Plan was launched, the forecast requirements are possibly inaccurate.

If you do not select a DRP Plan and you are planning for a single organization only, Supplier Scheduling uses the default plan specified for your organization. If the plan is no longer valid, Supplier Scheduling defaults to NULL.

See Also

Tasks

- Reviewing Item Schedules: page 2 – 4
- Viewing Authorizations: page 2 – 8
- Building a New Schedule: page 2 – 23
- Building a Simulation Schedule: page 2 – 27
- Building a Revision Schedule: page 2 – 26
- Locating/Reviewing Existing Schedules: page 2 – 31
- Reviewing Schedule Headers and Items: page 2 – 32
- Reviewing Bucketed Item Schedules: page 2 – 32
- Rebuilding Schedules: page 2 – 33
- Confirming Schedules: page 2 – 35

Reference

- Scheduling Orders: page 2 – 10
- EDI Transactions: page 2 – 13
- Schedule Types and Subtypes: page 2 – 18
- Resource Authorizations: page 4 – 6

Schedule Types and Subtypes

Planning Schedule

You can automatically or manually build Planning Schedules to communicate long-range forecast and material release information to suppliers. You can build Planning Schedules that include requirements for single or multiple ship-to organizations. You can also build Planning Schedules with buyer's authorizations to commit resources such as raw materials and labor.

Structure

The Planning Schedule is typically structured as follows:

Header: includes data such as the schedule number, forecast horizon start and end dates, supplier, supplier site code, ship-to information, schedule type, and bucket pattern.

Item Detail: includes data for each item number, such as purchase order or supply agreement number, unit of measure (UOM), current CUMs, last receipt date and quantity, and resource authorizations.

Item Detail Schedule: includes quantities for each item accumulated in predetermined date buckets that indicate the following forecast types:

- Past Due: past due shipment quantities from existing supply agreement release shipments.
- Release: Supply Agreement Release shipment information excluding past due shipment quantities.
- Forecast: estimates represented by unimplemented planned orders generated during MRP (Material Requirements Planning) and approved requisitions that have not yet been converted to Supply Agreement Releases.

You can control the bucketing of quantities with dates for each item on the Planning Schedule by defining the pattern of days offset from the forecast horizon start date.

You must define the number of available buckets and the duration of time associated with each bucket. Dates are then dynamically assigned in context of the forecast horizon start date when the Planning Schedule is generated.

You can define bucket patterns in a combination of up to 56:

- days
- weeks
- months
- quarters

Before you confirm a schedule, you can delete items, and edit and change item schedules if you have function security. After you confirm a schedule at the header level, you can print it and electronically transmit it as an 830 transaction if your supplier sites support EDI transactions. You cannot modify a schedule after you confirm it.

Shipping Schedule

You can automatically or manually build Shipping Schedules to communicate near-term release shipment information to suppliers. The Shipping Schedule provides a tool for refining the requirements conveyed on the Planning Schedule in support of Just-In-Time (JIT) delivery. Daily buckets are typically used instead of the weekly/monthly/quarterly buckets that are preferred for the Planning Schedule.

Before you confirm a schedule, you can delete items, and edit and change item schedules if you have function security. After you confirm a schedule at the header level, you can print it and electronically transmit it as an 862 transaction if your supplier sites support EDI transactions. You cannot modify a schedule after you confirm it.

Simulation Schedules

You can build Simulation schedules for personal use that can be saved or deleted when you exit the Scheduler's Workbench. Simulation schedules are unofficial schedules for personal use that contain the most current scheduled item information. You can optionally name or number saved Simulation schedules. Saved Simulation schedules can be deleted at any time. You can print Simulation schedules, but you cannot confirm or sent them via EDI.

Comparison: Schedule Types

Attribute	Planning Schedule	Shipping Schedule	Simulation Schedule
Purpose	Communicate long-range forecast requirements.	Communicate near term "firm" requirements; generally with a Forecast Planning Schedule.	View up-to-date item information. Play simulation games with alternate MRP/MPS/DRP plans. Manually build forecasts for negotiation activities.
Generation Frequency	Weekly	Daily	On Demand
Planning Horizon	4-24 months	3-4 weeks	Any
Bucket Pattern	Weeks, Months, Quarters	Days	Any
Include multiple Ship-to Organizations	Yes	No	Yes, if you are building a Planning Schedule.
Include Resource Authorizations	Yes	No	No
EDI Transaction Set	830	862	None
Specify ASL attribute	Generate Planning Schedules	Generate Shipping Schedules	None

Comparison: Schedule Subtypes

Schedule Type	Subtype (Type)	Description
Planning	Forecast All	Conveys all quantities as forecast information. Includes quantities taken from approved releases, approved requisitions, and unimplemented MRP/MPS/DRP planned orders. Can include Supply Agreement Releases. Shows past due requirements. Conveys firm requirements when used with the Shipping Schedule.

Planning	Forecast Only	<p>Conveys forecast information only.</p> <p>Includes quantities taken from approved requisitions and unimplemented MRP/MPS/DRP planned orders.</p> <p>Does not include Supply Agreement Releases.</p> <p>Does not show past due requirements.</p> <p>Conveys firm requirements when used with the Shipping Schedule; however, do not use Forecast Only for organizations that have CUM-based forecasts.</p>
Planning	Material Release	<p>Conveys firm requirements taken from approved releases of Blanket Purchase Agreements that are identified as Supply Agreements.</p> <p>Conveys forecast quantities.</p> <p>Includes Authorizations for each supplier item, if specified.</p> <p>Shows past due requirements.</p> <p>May not require a business requirement for the Shipping Schedule.</p>
Shipping	Release Only	<p>Conveys firm quantities only.</p> <p>Derives requirements from approved Supply Agreement Releases.</p> <p>Shows past due requirements.</p>
Shipping	Release and Forecast	<p>Conveys firm quantities.</p> <p>Conveys forecast quantities.</p> <p>Shows past due requirements.</p>

See Also

- Reviewing Item Schedules: page 2 – 4
- Viewing Authorizations: page 2 – 8
- Building a New Schedule: page 2 – 23
- Building a Simulation Schedule: page 2 – 27

Building a Revision Schedule: page 2 – 26
Locating/Reviewing Existing Schedules: page 2 – 31
Reviewing Schedule Headers and Items: page 2 – 32
Reviewing Bucketed Item Schedules: page 2 – 32
Rebuilding Schedules: page 2 – 33
Confirming Schedules: page 2 – 35
Scheduling Orders: page 2 – 10
EDI Transactions: page 2 – 13
MRP/MPS/DRP Plan Name Fields: page 2 – 15
Resource Authorizations: page 4 – 6

Building a New Schedule

► **To build a New schedule:**

1. Navigate to the Find Supplier Schedules window by choosing Scheduler's Workbench from the menu.
2. Select the Build option button to display the Build Supplier Schedules window.

The screenshot shows the 'Build Supplier Schedules' dialog box. It features a 'Find' vs 'Build' toggle at the top, with 'Build' selected. Below this are radio buttons for 'New', 'Revision', and 'Simulation', with 'New' selected. A checkbox for 'Include Future Releases' is present and unchecked. The dialog is populated with various text input fields for scheduling parameters: 'Bucket Pattern', 'MRP Plan', 'Supplier', 'Category Set', 'Item', 'Scheduler', 'Planner', 'Schedule' (a dropdown), 'Type', 'Number, Rev', 'Horizon Start', 'Ship-To Org', 'MPS Plan', 'DRP Plan', 'Site', 'Category', and 'Buyer'. 'Clear' and 'Build' buttons are located at the bottom right.

3. Select the New option button.
4. To enable multi-org schedules, check Multi-Org.
5. In Schedule, select one of the following types:
 - Planning* – Multi-Org is available only for Planning schedules.
 - Shipping*
6. In Type, select a schedule subtype.
7. Select a Bucket Pattern.
8. Optionally, check the Include Future Releases option if you want to include releases beyond the schedule horizon.

If you check the Include Future Releases option, a Future bucket will be included at the end of the horizontal bucket schedule. The Future bucket will include all approved releases that are associated

with a ship-to organization, supplier site, and item that have a due date which falls after the schedule horizon end date. These future releases will not be included in the printed or EDI schedules.

9. Select a Horizon Start Date.

The bucket pattern applicable for the supplier site will be used to calculate bucket dates and the schedule horizon date. Requirements that are dated earlier will be indicated as past due if they are from a Blanket Release, or ignored if they are from MRP Planned Orders or Purchase Requisitions.

10. If you are building a Planning Schedule, or a Shipping Schedule that includes forecast, select at least one of the following:

- MRP Plan
- MPS Plan
- DRP Plan

11. Select a Ship-To organization.

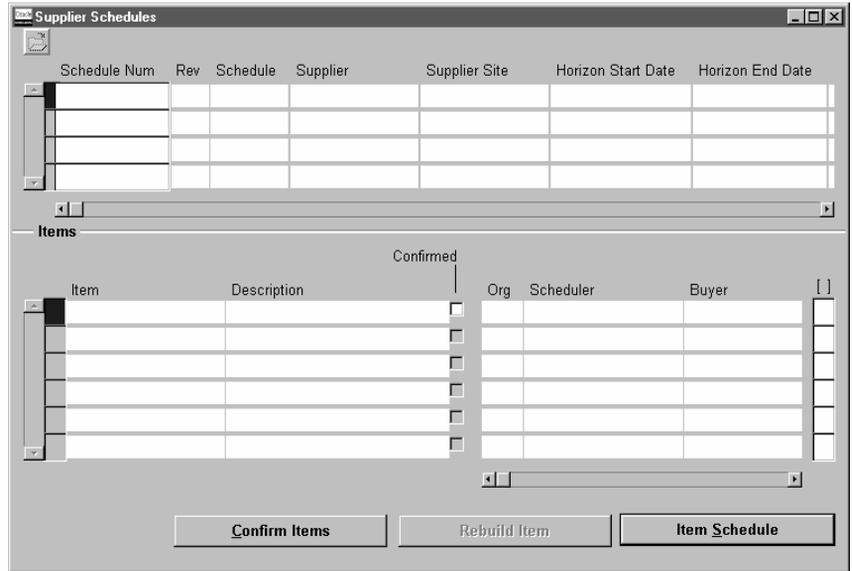
If you are building a planning schedule and checked the Multi-Org option, when you choose the build button, the Ship-To Organizations modal window opens, and you can check Include for any of the displayed organizations. These are organizations for which MRP/MPS/DRP plans have been defined.

12. Optionally, select the following:

- Supplier name
- Supplier Site code
- Category Set, which includes category sets from the PO item master organization.
- Category, which includes all categories for the selected category set and all items associated with the specified category.
- Item name
- Description of the item
- Scheduler name
- Buyer name
- Planner name

13. Choose Build.

The Supplier Schedules window is displayed, where you can view, edit, and confirm your schedule.



14. Choose Clear to clear all current build criteria.

See Also

Tasks

Reviewing Item Schedules: page 2 – 4

Viewing Authorizations: page 2 – 8

Building a Simulation Schedule: page 2 – 27

Building a Revision Schedule: page 2 – 26

Locating/Reviewing Existing Schedules: page 2 – 31

Reviewing Schedule Headers and Items: page 2 – 32

Reviewing Bucketed Item Schedules: page 2 – 32

Rebuilding Schedules: page 2 – 33

Confirming Schedules: page 2 – 35

Reference

Scheduling Orders: page 2 – 10

EDI Transactions: page 2 – 13

MRP/MPS/DRP Plan Name Fields: page 2 – 15

Schedule Types and Subtypes: page 2 – 18

Resource Authorizations: page 4 – 6

Building a Revision Schedule

You can build a revision schedule when you want to indicate to a supplier that a schedule should be replaced.

The revision schedule is the result of a new build schedule that uses the same supplier/site/organization(s)/items build criteria as the original schedule.

For example, if you send a weekly Planning Schedule to your supply base on Monday with the schedule number 19951016–seq–0 before discovering a significant MPS loading error on Tuesday, you will want to regenerate and transmit the Planning Schedule as 19951016–seq–1.

► **To build a Revision schedule:**

1. Navigate to the Find Supplier Schedules window.
2. Select the Build option button.
3. Select the Revision option button.

The screenshot shows the 'Build Supplier Schedules' dialog box. At the top, there are two tabs: 'Find' and 'Build', with 'Build' being the active tab. Below the tabs, there are three radio buttons: 'New', 'Revision' (which is selected), and 'Simulation'. To the right of these buttons is a 'Schedule' dropdown menu. Below the radio buttons, there are several input fields: 'Bucket Pattern', 'MRP Plan', 'Supplier', 'Category Set', 'Item', 'Scheduler', and 'Planner'. To the right of these fields, there are more input fields: 'Horizon Start', 'Ship-To Org', 'MPS Plan', 'DRP Plan', 'Site', 'Category', and 'Buyer'. At the bottom right, there are two buttons: 'Clear' and 'Build'.

4. Select a Schedule Number and Revision.
You MUST enter the Schedule Number of the schedule you want to revise.
5. Choose Build.
The Supplier Schedules window is displayed, where you can view, edit, and confirm your revised schedule.
6. Choose Clear to clear all current build criteria.

See Also

Tasks

Reviewing Item Schedules: page 2 – 4

Viewing Authorizations: page 2 – 8

Building a New Schedule: page 2 – 23

Building a Simulation Schedule: page 2 – 27

Locating/Reviewing Existing Schedules: page 2 – 31

Reviewing Schedule Headers and Items: page 2 – 32

Reviewing Bucketed Item Schedules: page 2 – 32

Rebuilding Schedules: page 2 – 33

Confirming Schedules: page 2 – 35

Reference

Scheduling Orders: page 2 – 10

EDI Transactions: page 2 – 13

MRP/MPS/DRP Plan Name Fields: page 2 – 15

Schedule Types and Subtypes: page 2 – 18

Resource Authorizations: page 4 – 6

Building a Simulation Schedule

You can use Simulation schedules to review selected scheduling data that reflects the most current receipt and past due quantities by supplier

site without actually building a Planning or Shipping Schedule. You have the option to assign a schedule number to the Simulation schedule.

► **To build a Simulation schedule:**

1. Navigate to the Find Supplier Schedule window from Scheduler's Workbench in the Navigator.
2. Select the Build option button.
3. Select the Simulation option button.
4. Check Multi-Org if you want the schedule to include multiple organizations.

The screenshot shows the 'Build Supplier Schedules' dialog box with the 'Build' tab selected. The 'Simulation' radio button is chosen. The dialog includes fields for 'Schedule', 'Type', 'Number, Rev', 'Bucket Pattern', 'Include Future Releases', 'MRP Plan', 'Supplier', 'Category Set', 'Item', 'Scheduler Planner', 'Horizon Start', 'Ship-To Org', 'MPS Plan', 'DRP Plan', 'Site', 'Category', and 'Buyer'. 'Clear' and 'Build' buttons are located at the bottom right.

5. In Schedule, select one of the following types:
 - Planning*
 - Shipping*
6. In Type, select a schedule subtype.
7. Select a Bucket Pattern.
8. Optionally, check the Include Future Releases option if you want to include releases beyond the schedule horizon.

If you check the Include Future Releases option, a Future bucket will be included at the end of the horizontal bucket schedule. The

Future bucket will include all approved releases that are associated with a ship-to organization, supplier site, and item that have a due date which falls after the schedule horizon end date. These future releases will not be included in the printed or EDI schedules.

9. Select a Horizon Start Date.

The bucket pattern applicable for the supplier site will be used to calculate bucket dates and the schedule horizon date. Requirements that are dated earlier will be indicated as past due if they are from a Blanket Release, or ignored if they are from MRP Planned Orders or Purchase Requisitions.

10. If you are building a Planning Schedule, or a Shipping Schedule that includes forecast, select at least one of the following:

- MRP Plan
- MPS Plan
- DRP Plan

11. Select a Ship-To organization.

If you check the Multi-Org option, when you choose the build button, the Ship-To Organizations modal window opens, and you can check Include for any of the displayed organizations. These are organizations for which MRP/MPS/DRP plans have been defined.

12. Optionally, select the following:

- Supplier name
- Supplier Site code
- Category Set, which includes category sets from the PO item master organization.
- Category, which includes all categories for the selected category set and all items associated with the specified category.
- Item name
- Description of the item
- Scheduler name
- Buyer name
- Planner name

13. Choose Build.

The Supplier Schedules window is displayed, where you can view, edit, and confirm your schedule.

14. Choose Clear to clear all current build criteria.

See Also

Tasks

Reviewing Item Schedules: page 2 – 4

Viewing Authorizations: page 2 – 8

Building a New Schedule: page 2 – 23

Building a Revision Schedule: page 2 – 26

Locating/Reviewing Existing Schedules: page 2 – 31

Reviewing Schedule Headers and Items: page 2 – 32

Reviewing Bucketed Item Schedules: page 2 – 32

Rebuilding Schedules: page 2 – 33

Confirming Schedules: page 2 – 35

Reference

Scheduling Orders: page 2 – 10

EDI Transactions: page 2 – 13

MRP/MPS/DRP Plan Name Fields: page 2 – 15

Schedule Types and Subtypes: page 2 – 18

Resource Authorizations: page 4 – 6

Locating/Reviewing Existing Schedules

► **To locate and review existing schedules:**

1. Navigate to the Find Supplier Schedules window.
2. Select the Find option button.
3. Optionally, select the following:
 - Schedule Number, Revision and Name
 - Select one of the following schedule status options:

In Process

Confirmed

- Select one of the following schedule types:

Planning

Shipping

- Schedule subtype
- Schedule owner name
- Ship-To Organization
- Supplier name
- Supplier Site code
- Category Set
- Category
- Item category for the category set you selected
- Item Description
- Scheduler name
- Buyer name
- Planner name
- Select from the following line item status options:

In Process

Confirmed

- Select a Creation from and Creation to Date

Schedules are retrieved from those created within the specified create date range.

- Select a Horizon Date
Schedules are retrieved from those that have a horizon start date which falls within the specified horizon start date range.
 - Select a MRP, MPS, or DRP Plan
4. Choose Find to query existing schedules.
If the query displays schedules that are not yet confirmed, they will be available for editing and confirmation only if you have functional security to perform these tasks.
 5. Choose Clear to clear all current search criteria.

Reviewing Schedule Headers and Items

► **To review schedule headers and items:**

1. Navigate to the Find Supplier Schedules window.
2. Enter your search criteria.
3. Select Find option button.

The Supplier Schedules window is displayed and your cursor is placed in the Schedule Headers block of the Supplier Schedules window.

4. Navigate to the Items block to view the items associated with the schedule. Items must match the search criteria for the Find.
5. Click the drilldown indicator in the Items block or choose the Schedule button to view the horizontal, bucketed item schedule.
6. You can delete unconfirmed schedule headers, and confirmed or unconfirmed schedule items if the associated header is not yet confirmed.

Reviewing Bucketed Item Schedules

► **To review bucketed item schedules:**

1. Navigate to the Item Schedule window from the Supplier Schedules window.

2. If Authorizations are enabled for the item, choose the Authorizations button to display the Authorizations window where you can view the authorizations, quantities, and cutoff dates.
3. Choose the Orders button to review the document orders for the schedule.

Rebuilding Schedules

► **To rebuild schedules:**

1. You can optionally rebuild schedules for either confirmed or unconfirmed schedule items as long as the associated schedule header has not been confirmed.

If you choose to rebuild a schedule, the existing schedule information for an item is deleted, and the schedule is rebuilt based on the current plan, order, and receiving status.

2. You can choose to rebuild one item or many items at the same time by using multi-select or the Select All menu option while your cursor is in the Items block

See Also

Tasks

Reviewing Item Schedules: page 2 – 4

Viewing Authorizations: page 2 – 8

Building a New Schedule: page 2 – 23

Building a Simulation Schedule: page 2 – 27

Building a Revision Schedule: page 2 – 26

Confirming Schedules: page 2 – 35

Reference

Scheduling Orders: page 2 – 10

EDI Transactions: page 2 – 13

MRP/MPS/DRP Plan Name Fields: page 2 – 15

Schedule Types and Subtypes: page 2 – 18

Confirming Schedules

You can review and confirm New and Revision schedules. You cannot confirm Simulation schedules.

You can confirm schedules at the header level to confirm the schedule in one step or you can confirm the schedule at the line item level before confirming the header. Use the line item procedure if different schedulers must approve their assigned items before the schedule itself is confirmed.

You can delete unconfirmed schedule headers, and you can delete confirmed or unconfirmed schedule items if the associated header is not confirmed.

You cannot edit or delete a confirmed schedule.

The Confirmed status is analogous to purchase order approval, and implies that the schedule is accurate and approved for distribution to the supplier.

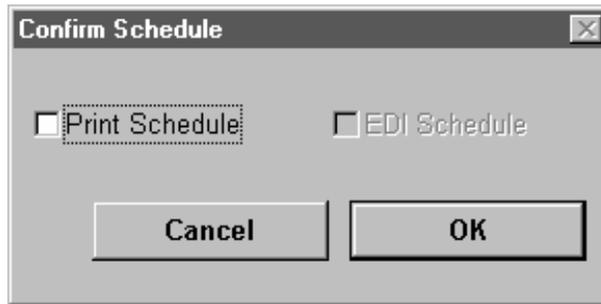
All new Planning and Shipping Schedules are created with a header and line item status of “In Process”. As you complete the confirmation process, the status is changed to “Confirmed.”

If the schedule header is still “In Process,” you can optionally edit or delete the schedule, or delete and edit any line items.

If Authorizations are enabled for any item and CUM Management is enabled for the ship-to organization, the high-water mark for each authorization within the current CUM period is evaluated when the schedule, not the item, is confirmed.

Confirming Schedule Headers

- ▶ **To confirm a single schedule at the header level:**
 1. Place your cursor in the Supplier Schedules header listing.
 2. Choose the Confirm Schedule button.



A dialog message will warn you if individual items on the schedule are unconfirmed, and will verify the confirmation action. You can optionally print and/or send the schedule at the same time.

Confirming Schedule Line Items

You can confirm schedule line items in the Items block of the Supplier Schedules window or in the Item Schedule window.

► To confirm a single schedule at the line item level:

1. Navigate to the Items block of the Supplier Schedules window or to the Item Schedule window.
2. If your cursor is in the Supplier Schedules Items block of the Supplier Schedules window, you can optionally use multiselect to Confirm multiple items at one time or choose Select All from the menu.

If your cursor is in the Item Schedule window, you can only confirm the current cursor item.

3. Choose the Confirm Items button in the Supplier Schedules window, and respond to the action verification.
4. You cannot print at the same time that you confirm individual items; you can print and confirm at the same time only when you are confirming the header.

See Also

Tasks

Reviewing Item Schedules: page 2 – 4

Viewing Authorizations: page 2 – 8

Building a New Schedule: page 2 – 23

Building a Simulation Schedule: page 2 – 27

Building a Revision Schedule: page 2 – 26

Locating/Reviewing Existing Schedules: page 2 – 31

Reviewing Schedule Headers and Items: page 2 – 32

Reviewing Bucketed Item Schedules: page 2 – 32

Rebuilding Schedules: page 2 – 33

Reference

Scheduling Orders: page 2 – 10

EDI Transactions: page 2 – 13

MRP/MPS/DRP Plan Name Fields: page 2 – 15

Schedule Types and Subtypes: page 2 – 18

Resource Authorizations: page 4 – 6

CHAPTER

3

CUM Management

This chapter tells you what you need to know about Oracle Supplier Scheduling CUM Management, including:

- CUM Management: page 3 – 2

CUM Management

CUM Management provides a mechanism for tracking the cumulative quantity received as of a given start date for each supplier site/item in a ship-to organization. The period during which the CUM is maintained is called the CUM period, and generally relates to a meaningful business time frame like the Model Year in the automotive industry.

At the start of a CUM period, all quantities are initialized to 0. As goods are received against a Supply Agreement Release for scheduled items, the CUM is updated. Receipts against other document types do not affect the CUM.

Oracle Supplier Scheduling automatically maintains the CUM quantity for the following transactions:

- increase for receipts and match transactions
- reduce for returns to supplier (RTV)
- reduce or increase for receipt quantity correction
- reduce or increase for RTV quantity correction

You can decide whether Return to Supplier (RTV) transactions and their associated corrections should be automatically included in the CUM calculation. You can also adjust the CUM quantity manually using the CUM Periods window.

A CUM period is started by selecting the Open CUM option in the Supplier Scheduling Options window. All CUM periods and their corresponding item quantities are saved and available for review in the CUM Periods window. An item's transaction history can be reviewed in the CUM Transaction History report.

Supply Base Management

This chapter tells you what you need to know about Oracle Supplier Scheduling Supply Base Management, including:

- Overview of the Approved Supplier List: page 4 – 2
- AutoScheduling: page 4 – 5
- Resource Authorizations: page 4 – 6
- Defining the Supplier and Commodity/Item Combination: page 4 – 8
- Defining the Supplier/Item Attributes: page 4 – 10
- View Approved Suppliers: page 4 – 13

Overview of the Approved Supplier List

Procurement organizations maintain lists, or repositories, that associate the items and services they buy with the companies that supply them.

Oracle Supplier Scheduling maintains a central data repository known as the Approved Supplier List (ASL) that contains relevant details about each ship-from/ship-to/item combination.

Only ASL items can be scheduled in Supplier Scheduling.

The scheduling organizations must be designated as inventory, receiving/ship-to organizations. You must define all items used in Supplier Scheduling in the ASL for each organization or the global ASL record.

For each supplier/item combination in the ASL, you can specify an effective Supply Agreement Blanket Purchase Order in the purchasing UOM. Only one Supply Agreement can be effective for the specified supplier site/item combination at a given time.

All supplier scheduling quantities, including schedules, authorizations, and CUM's, are tracked in the purchasing unit of measure as defined in the ASL.

For each ASL entry, you can specify Supplier Scheduling defaults and controls, the release generation method, purchasing unit of measure, and assigned scheduler. You can also specify source Blanket Agreements, Supply Agreements, and Catalog Quotations for automatic reference during document creation.

By maintaining the ASL you can:

- Support Supplier Certification programs by providing a single store of information regarding a supplier's current status.
- Help design engineers achieve higher quality designs at a lower total cost through the re-use of preferred suppliers in new designs, which avoids supply base proliferation or unnecessary design dependence on difficult suppliers.
- Eliminate redundant sourcing efforts within departments and across organizations.
- Facilitate a more global approach to contract negotiation.
- Provide immediate procurement visibility when a supplier is assigned an unfavorable status.
- Comply with external Quality System process requirements like ISO 9001/9002.

- Provide storage for general data attributes that are unique to the supplier/item combination.
- Maintain lists of supplier candidates by commodity or item for future consideration.

Major Features

With the Approved Supplier List (ASL) you can:

- Set approval (certification) status at the appropriate level for your business.
- Approve suppliers, distributors, and manufacturers.
- Define global or local ASL entries.
- Attach notes and external documents to each ASL entry.
- Link the primary supplier item number to your internal item number.
- Specify a Review By date, which indicates a proactive, planned review of your business with a longstanding supplier partner.
- Review ASL information in a flexible inquiry format.
- Define your own approval statuses and associate them with specific business rules.
- Manage procurement activity by preventing purchase order approval or supplier schedule confirmation for certain supplier/item combinations.
- Determine ASL access and modification.
- Determine whether Sourcing Rules must be comprised of approved suppliers.
- Define reference information for the supplier/item combination.

See Also

AutoScheduling: page 4 – 5

Resource Authorizations: page 4 – 6

Defining the Supplier and Item/Commodity Combination: page 4 – 8

Defining the Supplier/Item Attributes: page 4 – 10

Supply Chain Planning, *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*

Assigning Sourcing Rules and Bills of Distribution, *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*
Profile Options in Purchasing, *Oracle Purchasing User's Guide*

AutoScheduling

For supplier site/item combinations that do not require manual scheduling and confirmation in the Scheduler's Workbench, you can enable AutoScheduling in the Approved Supplier List (ASL).

You can use the Submit Requests window to set the AutoSchedule processes to run automatically at any frequency you desire. You can also use the Submit Requests window to run the process manually.

When the Planning and Shipping AutoSchedule concurrent processes run, either at predefined intervals or on demand, new schedules are generated for those supplier site/item combinations that have AutoScheduling enabled and that match the AutoSchedule build parameters.

You can also specify whether AutoSchedule will confirm and print when you define the concurrent request in the Submit Requests window. The schedule types and bucket pattern used for AutoSchedule are taken from the ASL.

See Also

Overview of the Approved Supplier List: page 4 – 2

Submitting a Request, *Oracle Applications System Administrator's Guide*

Viewing Requests, *Oracle Applications User's Guide*

AutoSchedule Processes: page 5 – 4.

Resource Authorizations

Resource Authorizations address the supplier's need to have long lead time components or to invest in material processing without incurring economic hardship if requirements are reduced.

Authorizations are defined using time fences, and are calculated based on scheduled quantities within the designated horizon.

If you are tracking CUMs, authorizations represent the current cumulative quantity released up to the time fence cutoff date.

If you are not tracking CUMs, authorizations represent the past due requirements as of the schedule start date plus the discrete order quantities from the start date to the authorization cutoff date.

The authorization cutoff date is calculated by adding the number of calendar days associated with each authorization definition to the schedule horizon start date.

Note: The schedule horizon date is counted as "Day 1," not "Day 0."

You can enable Authorizations in the Approved Supplier List by checking the Enable Authorizations option, and then associating up to four authorization lookup codes with individual time fences to the supplier site/item combination.

Example

The following example shows the defined Authorizations for Item A100/Supplier A Site B:

Authorization 1:	Finished Goods	21 days
Authorization 2:	Raw Materials	35 days

For a schedule with a 3/6/96 start date, the authorization cutoff dates are calculated as:

Authorization 1:	3/26/96
Authorization 2:	4/9/96

The following data applies to this supplier site/item:

Current CUM Received:	2500			
Blanket Releases:	Due Date	Quantity	Due Date	Quantity
BO 100 - rel 09	3/10/96	100	3/17/96	100
	3/20/96	100	3/23/96	100
	3/27/96	100	3/29/96	100
	4/03/96	100	4/08/96	200
BO 100 - rel 10	4/13/96	100	4/17/96	100

	4/20/96	100		
Requisition A	5/01/96	100	5/03/96	200
Requisition B	5/10/96	100	5/12/96	100
MRP Order	5/15/96	100		

If you are tracking CUMs, the result is:

Authorization 1: 2900
Authorization 2: 3400

If you are not tracking CUMs, the result is:

Authorization 1: 400
Authorization 2: 900

If the authorization time fence exceeds the schedule horizon, the authorization calculation will be truncated on the horizon end date.

If you are tracking CUMs and your schedule horizon bridges the transition from one CUM period to the next, authorizations for the current CUM period will be truncated on the CUM period end date. Authorization calculations for the next CUM period will start on the first planning schedule after the new CUM period is opened.

For a CUM period start date of 4/01/95 and a CUM period end date of 3/30/96, on a schedule with a 3/06/96 start date, the authorization cutoff dates are calculated as:

Authorization 1: 3/26/96
Authorization 2: 3/30/96

Finally, if you are tracking CUMs, Supplier Scheduling captures a reference to the High Authorization watermark by recording the associated schedule and quantity representing the single highest authorization level for each supplier site/item/authorization type by ship-to organization.

See Also

CUM Management: page 3 – 2

Defining the Supplier and Item/Commodity Combination

- ▶ To define the supplier and item/commodity combination:
 1. Navigate to the Approved Supplier List window from the menu.

The screenshot shows the 'Approved Supplier List (BAV)' window. It features two main data tables. The top table, 'Items', has columns for 'Type', 'Commodity', 'Item', and 'Description'. The bottom table, 'Suppliers', has columns for 'Business', 'Name', 'Site', 'Status', 'Supplier Item', and 'Manufacturer'. A 'Key Attributes' dropdown menu is located above the 'Suppliers' table. At the bottom of the window, there are three buttons: 'Copy From...', 'Assign To...', and 'Attributes'.

2. Select the ship-to organization for which you want to define ASL entries.
3. Select one of the following options that you want to assign supplier status to:
 - item
 - commodity
4. For an existing row in the Items block, select the item or commodity, then navigate to the Suppliers block to automatically query the list of suppliers associated with the item and/or commodity.
5. Select a Business from the following:

Direct (Supplier): Company sells their products directly to you

If you select Direct, select the supplier Name and optionally, the supplier site.

Distributor: Company sells products made by manufacturers

If you select Distributor, select the Name and optionally, the site.

You must also associate a Manufacturer with the Distributor.

Manufacturer: Company manufactures and sells through distributors

If you select Manufacturer, select the Manufacturer Name.

6. Select the supplier's approval status.
7. Optionally, select the supplier item number.
For Suppliers and Distributors, this supplier item number defaults to your purchase order and requisition lines, and is used to validate the source documents.
8. Optionally, select a Review By date.
You can use this date to determine when a proactive business review will be performed for the supplier.
9. Select Record Details from the region control poplist.
10. Select one of the following in Global:
 - Yes
 - No
11. Save your work.

See Also

Overview of the Approved Supplier List: page 4 – 2

AutoScheduling: page 4 – 5

Resource Authorizations: page 4 – 6

Defining the Supplier/Item Attributes: page 4 – 10

Supply Chain Planning, *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*

Defining Planners *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*

Defining Sourcing Rules, *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*

Defining Bills of Distributions, *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*

Defining the Supplier/Item Attributes

Use the Supplier-Item Attributes window to define the informational data attributes for each supplier/item combination.

► **To define the supplier and commodity/item attributes:**

1. Navigate to the Supplier-Item Attributes window.

Seq	Type	Number	Line	Status	From	To	[]

2. Choose the Purchasing UOM.
3. Choose the Release Generation Method from the following options:
 - Automatic Release/Review: automatically generate releases and approve in separate step.
 - Release Using AutoCreate: use the AutoCreate form to create releases.
4. Choose one of the following attribute groupings from the region control poplist:
 - Source Documents
 - Supplier Scheduling: you can select this option if you specified an item and a supplier site.

► **If you selected Source Documents:**

1. Enter a unique Seq (Sequence) Number.
2. Select a Document Type from the following:

- Blanket
 - Quotation
3. Choose a Document Number.
 4. Choose a Line number.
 5. The Status and effective dates are displayed.
 6. Save your work.

► **If you selected Supplier Scheduling:**

1. Check the Enable Planning Schedules and/or Enable Shipping Schedules option if you want to build Planning and/or Shipping Schedules.

If you check Enable Planning Schedules and/or Enable Shipping Schedules, you can select an assigned Scheduler.
2. Check Enable AutoSchedule if you want your schedule automatically built.
3. If you check Enable Planning Schedules and Enable AutoSchedule, you must select the following:
 - Plan Bucket Pattern
 - Plan Schedule Type
4. If you check Enable Shipping Schedules and Enable AutoSchedule, you must select the following:
 - Ship Bucket Pattern
 - Ship Schedule Type
5. If you check Enable Planning Schedules and Enable Authorizations, you can optionally select up to four Resource Authorizations with their associated time fences.
6. Save your work.

See Also

Overview of the Approved Supplier List: page 4 – 2

AutoScheduling: page 4 – 5

Resource Authorizations: page 4 – 6

Defining the Supplier and Item/Commodity Combination: page 4 – 8

Supply Chain Planning, Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide

Assigning Sourcing Rules and Bills of Distribution, Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide

Defining Planners Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide

Defining Sourcing Rules, Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide

Defining Bills of Distributions, Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide

View Approved Suppliers

► **To view the Approved Supplier List:**

1. Navigate to the Approved Supplier List Summary window from the menu. The Search Approved Supplier List window opens.
2. Optionally choose or enter data into the available fields to further define your search.

Note: Check Include Global Entries to specify that Global Entries are to be included.

3. Choose Find to begin the search.

Note: You can choose Clear to erase the data from the form to redefine your search, or choose New to navigate to the Approved Supplier List window to define new approved suppliers.

4. Choose a record to view then choose Open to view the Approved Supplier List window.

Reports and Processes

This chapter tells you what you need to know about Oracle Supplier Scheduling Reports and Processes, including:

- CUM History Report: page 5 – 2
- Planning AutoSchedule Process: page 5 – 4.
- Printed Change Orders Report (Landscape), *Oracle Purchasing User's Guide*.
- Printed Change Orders Report (Portrait), *Oracle Purchasing User's Guide*.
- Printed Planning Schedule Report: page 5 – 7
- Printed Purchase Order Report (Landscape), *Oracle Purchasing User's Guide*.
- Printed Purchase Order Report (Portrait), *Oracle Purchasing User's Guide*.
- Printed Shipping Schedule Report: page 5 – 9
- Shipping AutoSchedule Process: page 5 – 4.

CUM History Report

Use the CUM History Report to print details of receipts, returns and adjustment activity that has affected the CUM for a specified CUM period.

Report Submission

In the Transaction Reports (for Inventory) or Submit Requests window, select CUM History Report in the Name field.

Report Parameters

Organization

Select an organization to restrict the report to a specific organization.

CUM Period

Select a CUM Period to restrict the report to a specific period.

Supplier

Select a supplier to restrict the report to a specific supplier.

Supplier Site

Select a supplier site to restrict the report to a specific site.

Items From/To

To restrict the report to a range of items, enter a beginning and ending item.

Dynamic Precision Option

Enter the decimal precision for quantities on the report.

See Also

Submitting a Request, *Oracle Applications System Administrator's Guide*

AutoSchedule Processes

Use the Planning AutoSchedule process and the Shipping AutoSchedule process to automatically build supplier schedules. This process builds schedules for those supplier site/item combinations that have AutoScheduling enabled and that match the AutoSchedule build parameters. You can manually build schedules with the Scheduler's Workbench. See: Building a New Schedule, *Oracle Supplier Scheduling User's Guide*.

Exceptions encountered during the AutoSchedule process can be viewed by choosing the View Log button in the Requests window.

Report Submission

In the Submit Requests window, select Planning AutoSchedule or Shipping AutoSchedule in the Name field.

Process Parameters

Horizon Start Date

Enter the horizon start date.

Ship-To Organization

Select the ship-to organization.

MRP Name

Select the MRP plan name from which you want to extract unimplemented planned orders for MRP planned items to be autoscheduled.

MPS Name

Select the MPS plan name from which you want to extract unimplemented planned orders for MPS planned items to be autoscheduled.

DRP Name

Select the DRP plan name from which you want to extract unimplemented planned orders for DRP planned items.

Include Future Releases

Select Yes to indicate that you want to include releases beyond the schedule horizon.

If you check the Include Future Releases option, a Future bucket will be included at the end of the horizontal bucket schedule. The Future bucket will include all approved releases that are associated with a ship-to organization, supplier site, and item that have a due date which falls after the schedule horizon end date. These future releases will not be included in the printed or EDI schedules.

Autoconfirm

Select Yes to indicate autoconfirm the schedule. Otherwise, you must confirm the schedule manually in the Supplier Schedules window.

Communication Method

Select the method by which you want to communicate the schedule: BOTH, EDI, NONE, or PRINT.

Supplier

Select a supplier to restrict the schedule to a specific supplier.

Supplier Site

Select a supplier site to restrict the schedule to a specific site.

Category Set

Select a category set to restrict the schedule to a specific category set.

Category

Select a category from the category set to restrict the schedule to that category.

Item

Select an item to restrict the schedule to a specific item.

Scheduler

Select a scheduler to restrict the schedule to that scheduler.

Buyer

Select a buyer to restrict the schedule to that buyer.

Owner

Select the plan owner.

See Also

Submitting a Request, *Oracle Applications System Administrator's Guide*

Planning Schedule Report

Use the Planning Schedule Report to print any supplier schedule that was built using either the Scheduler's Workbench or AutoSchedule

Report Submission

In the Submit Requests window, select Printed Planning Schedule Report in the Name field.

Report Parameters

Schedule Number

Select a schedule number to restrict the report to a specific schedule.

Schedule Revision

Select a schedule revision to restrict the report to a specific revision.

Schedule Subtype

Select a schedule subtype to restrict the report to a specific subtype.

Horizon Start/End

To restrict the report to a date range, select the starting and ending horizon dates.

Supplier From/To

To restrict the report to a range of suppliers, select the beginning and ending suppliers.

Supplier Site

Select a supplier site to restrict the report to a specific site.

Test Print

Select Yes or No to indicate whether you want a test print of the report. This allows you to print a schedule that is not confirmed. "Test Print" appears in the report title.

Dynamic Precision Option

Enter the decimal precision for quantities on the report.

See Also

Submitting a Request, *Oracle Applications System Administrator's Guide*

Viewing Requests, *Oracle Applications User's Guide*

Shipping Schedule Report

Use the Shipping Schedule Report to print any supplier schedule that was built using either the Scheduler's Workbench or AutoSchedule

Report Submission

In the Submit Requests window, select Printed Shipping Schedule Report in the Name field.

Report Parameters

Schedule Number

Select a schedule number to restrict the report to a specific schedule.

Schedule Revision

Select a schedule revision to restrict the report to a specific revision.

Schedule Subtype

Select a schedule subtype to restrict the report to a specific subtype.

Horizon Start/End

To restrict the report to a date range, select the starting and ending horizon dates.

Supplier From/To

To restrict the report to a range of suppliers, select the beginning and ending suppliers.

Supplier Site

Select a supplier site to restrict the report to a specific site.

Test Print

Select Yes or No to indicate whether you want a test print of the report. This allows you to print a schedule that is not confirmed. "Test Print" appears in the report title.

Dynamic Precision Option

Enter the decimal precision for quantities on the report.

See Also

Submitting a Request, *Oracle Applications System Administrator's Guide*

APPENDIX

A

Windows and Navigation Paths

This appendix shows you the default menu path for each Supplier Scheduling window. Refer to this appendix when you do not already know the menu path for a window you want to use.

Windows and Navigator Paths

Brackets ([]) indicate a button or a radio group.

Approved Supplier List: page 4 – 13	Supply Base>Approved Supplier List
Approved Supplier List Statuses: page 1 – 5	Supply Base > Supplier Statuses
Approved Supplier List Summary: page 4 – 13	Supply Base>Summary Approved Supplier List>[Find]
Authorizations: page 2 – 8	Scheduler’s Workbench>Find Supplier Schedules>[Find]>Supplier Schedules>[ItemSchedule]>Item Schedule>[Authorizations]>Authorizations
Bucket Patterns: page 1 – 8	Setup>Bucket Pattern>Bucket Patterns
Confirm Schedule: page 2 – 35	Scheduler’s Workbench>Find Supplier Schedules>[Find]>[Find]>Supplier Schedules>[ConfirmSchedule]
CUM Periods: page 3 – 2	CUM Periods > [CUM Periods] > [Find]
CUM Period Items: page 3 – 2	CUM Periods > [CUM Period Items] > [Find]
Item Schedule: page 2 – 32	Scheduler’s Workbench>Find Supplier Schedules>[Find]>Supplier Schedules>[ItemSchedule]>Item Schedule>[Authorizations][Orders]
Supplier–Item Attributes: page 4 – 10	Supply Base>Approved Supplier List>[Attributes]>Supplier–Item Attributes
Supplier Schedules: page 2 – 32	Scheduler’s Workbench>Find Supplier Schedules>[Find]>SupplierSchedule
Supplier Schedules(New Build): page 2 – 23	Scheduler’s Workbench>Find Supplier Schedules>[Build]>[New]>[Build]>Supplier Schedules
Supplier Schedules(Revision): page 2 – 26	Scheduler’s Workbench>Find Supplier Schedules>[Build]>[Revision]>[Build]>Supplier Schedules
Supplier Schedules(Simulation): page 2 – 27	Scheduler’s Workbench>Find Supplier Schedules>[Build]>[Simulation]>[Build]>Supplier Schedules
Supplier Scheduling Options: page 1 – 10	Setup>Schedule Options

Supplier Schedules: page 2 – 31

Scheduler's Workbench>Find Supplier
Schedules>[Find]>[Find]>Supplier
Schedules

Supplier Schedules(Rebuild Item): page 2 – 33

Scheduler's Workbench>Find Supplier
Schedules>[Find]>Supplier
Schedules>[Rebuild Item]

Glossary

approve An action you take to indicate that you consider the contents of the purchasing document to be correct. If the document passes the submission tests and you have sufficient authority, Purchasing approves the document.

approved A purchase order or requisition status that indicates a user with appropriate authorization approved the purchase or requisition. Purchasing verifies that the purchase order or requisition is complete during the approval process.

ASC X12 Accredited Standards Committee X12 group. This group is accredited by ANSI and maintains and develops the EDI standards for the United States and Canada.

ASCII American Standard Code for Information Interchange. A standard file format used for transmission and storage. ASCII is a seven-bit code with an eighth bit used for parity.

ASL Approved Suppliers List. A list where you can set up your Approved Suppliers, Sites, and Items.

assignment hierarchy You can assign sourcing rules and bills of distribution to a single item in an inventory organization, all items in an inventory organization, categories of items in an inventory organization, a site, and an organization. These assignments have an order of precedence relative to one another.

assignment set A group of sourcing rules and/or bills of distribution and a description of the items and/or organizations whose replenishment they control.

automatic sourcing A Purchasing feature which allows you to specify for predefined

items a list of approved suppliers and to associate source documents for these suppliers. When you create a requisition or purchase order line for the item, Purchasing automatically provides appropriate pricing for the specified quantity based on the top-ranked open source document for the supplier with the highest percentage allocation.

autoschedule You can set up a supplier/site/item to have the schedules built by the concurrent program autoschedule. The schedules are not built by the Scheduler's Workbench.

base unit The unit of measure to which you convert all units of measure within one class. The base unit is the smallest or most commonly used unit of measure in the class. For example, millimeter is the base unit in the Length class. You define your base unit of measure when you create your unit class.

bill of distribution Specifies a multilevel replenishment network of warehouses, distribution centers, and manufacturing centers (plants).

blanket purchase agreement A type of purchase order you issue before you request actual delivery of goods or services. You normally create a blanket purchase agreement to document a long-term supplier agreement. A blanket purchase agreement may contain an effective date and an expiration date, a committed amount, or quantity. You use a blanket purchase agreement as a tool for specifying agreed prices and delivery dates for goods and services before ordering them.

blanket release An actual order of goods and services against a blanket purchase agreement. The blanket purchase agreement determines the characteristics and prices of the items. The blanket release specifies actual quantities and dates ordered for the items. You identify a blanket release by the combination of the blanket purchase agreement number and the release number.

bucket patterns Bucket patterns can be defined to include daily, weekly, monthly, or quarterly buckets. Bucket patterns are used to bucket quantity requirements on Planning or Shipping Schedules.

buyer Person responsible for placing item resupply orders with suppliers and negotiating supplier contracts.

cancel You can cancel a purchase order after approving it. When you cancel a purchase order, you prevent anyone from adding new lines to the purchase order or receiving additional goods. Purchasing still allows billing for goods you received before cancelling the purchase order. Purchasing releases any unfilled requisition lines for reassignment to another purchase order.

category Code used to group items with similar characteristics, such as plastics, metals, or glass items.

CUM Total received for a supplier site, item, and organization within a CUM Period.

CUM periods The Period you are going to use to track the quantity received to date for a particular organization. In the Automotive industry this may be a model year.

distribution resource planning (DRP)
Application of replenishment inventory calculations to assist in planning of key resources contained in a distribution system, such as sourcing and transport. DRP is an

extension of distribution requirements planning, which applies MRP logic to inventory replenishment at branch warehouses

drop shipment A method of fulfilling sales orders by selling products without handling, stocking, or delivering them. The selling company buys a product from a supplier and has the supplier ship the product directly to customers.

DRP See **distribution resource planning**

due date The date when scheduled receipts are currently expected to be received into inventory and become available for use.

EDI See **Electronic Data Interchange (EDI)**

EDIFACT Electronic Data Interchange for Administration, Commerce, and Trade is the current acronym for standards developed within Working Party 4. See also **WP4**

electronic commerce Conducting business via an electronic medium. This includes methods of exchanging business information electronically, such as Electronic Data Interchange (EDI), FAX, email, and eforms.

Electronic Data Interchange (EDI) Exchanging business documents electronically between trading partners. EDI subscribes to standard formats for conducting these electronic transactions as stated by various standards.

final close A purchase order control you can assign to prevent modifications to or actions against completed documents, lines, and shipments by final closing them. Final-closed documents are not accessible in the corresponding entry windows, and you cannot perform the following actions against final-closed entities: receive, transfer, inspect, deliver, correct receipt quantities,

invoice, return to supplier, or return to receiving.

fixed order quantity An item attribute the planning process uses to modify the size of planned order quantities or repetitive daily rates for the item. When net requirements fall short of the fixed order quantity, the planning process suggests the fixed order quantity. When net requirements for the item exceed the fixed order quantity, the planning process suggests multiple orders for the fixed order quantity. For discretely planned items, use this attribute to define a fixed production or purchasing quantity for the item. For repetitively planned items, use this attribute to define a fixed production rate for the item. For example, if your suppliers can only supply the item in full truckload quantities, enter the full truckload quantity as the fixed order quantity for the item.

forecast An estimate of future demand on inventory items. A forecast contains information on the original and current forecast quantities (before and after consumption), the confidence factor, and any specific customer information. You can assign any number of inventory items to the forecast and use the same item in multiple forecasts. For each inventory item you specify any number of forecast entries.

forecast all For a Planning Schedule. This indicates that schedule forecast requirements include Unimplemented Planned Orders, Approved Requisitions, and Approved Supply Agreement Releases.

forecast only For a Planning Schedule, indicates that the schedule forecast requirements include Unimplemented Planned Orders and Approved Requisitions.

interclass conversion The conversion formula you define between base units from the different unit classes.

internal requisition See **internal sales order, purchase requisition**.

internal sales order A request within your company for goods or services. An internal sales order originates from an employee or from another process as a requisition, such as inventory or manufacturing, and becomes an internal sales order when the information is transferred from Purchasing to Order Entry. Also known as **internal requisition** or **purchase requisition**.

inventory item Items you stock in inventory. You control inventory for inventory items by quantity and value. Typically, the inventory item remains an asset until you consume it. You recognize the cost of an inventory item as an expense when you consume it or sell it. You generally value the inventory for an item by multiplying the item standard cost by the quantity on hand.

item category See **category**.

just in time delivery (JIT) To have only the required inventory delivered exactly when needed.

Make or Buy An item attribute the Planner Workbench uses to default an appropriate value for implementation type when implementing planned orders for the item. A value **Make** means the item is usually manufactured. The Planner Workbench defaults the implementation type for planned orders for the item to **Discrete job**. The planning process passes demand down from manufactured items to lower level components. A value of **Buy** means the item is usually purchased. The Planner

Workbench defaults the implementation type for planned orders for the item to **Purchase requisition**. The planning process does not pass demand down from purchased items to lower level components.

master production schedule (MPS) The anticipated build schedule in terms of rates or discrete quantities, and dates.

master schedule The name referring to either a master production schedule or a master demand schedule. *See* **master demand schedule** and **master production schedule**

material release For a Planning Schedule, indicates that the schedule forecast requirements include Unimplemented Planned Orders and Approved Requisitions. The schedule released quantities include Approved Releases.

material requirements planning (MRP) A process that utilizes bill of material information, a master schedule, and current inventory information to calculate net requirements for materials.

Maximum Order Quantity An item attribute the planning process uses to modify the size of planned order quantities or repetitive daily rates for the item. For discretely planned items, when net requirements exceed the maximum order quantity, the planning process suggests the maximum order quantity. For repetitively planned items, when average daily demand for a repetitive planning period exceeds the maximum order quantity, the planning process suggests the maximum order quantity as the repetitive daily rate. Use this attribute, for example, to define an order quantity above which you do not have sufficient capacity to build the item.

Minimum Order Quantity An item attribute the planning process uses to modify the size of planned order quantities or repetitive

daily rates for the item. For discretely planned items, when net requirements fall short of the minimum order quantity, the planning process suggests the minimum order quantity. For repetitively planned items, when average daily demand for a repetitive planning period falls short of the minimum order quantity, the planning process suggests the minimum order quantity as the repetitive daily rate. Use this attribute, for example, to define an order quantity below which it is not profitable to build the item.

MPS *See* **master production schedule**.

MPS plan A set of planned orders and suggestions to release or reschedule existing schedule receipts for material to satisfy a given master schedule for MPS-planned items or MRP-planned items that have an MPS-planned component. Stated in discrete quantities and order dates.

MPS-planned item An item controlled by the master scheduler and placed on a master production schedule. The item is critical in terms of its impact on lower-level components and/or resources, such as skilled labor, key machines, or dollars. The master scheduler maintains control for these items.

MRP *See* **material requirements planning**.

MRP plan A set of planned orders and suggestions to release or reschedule existing schedule receipts for material to satisfy a given master schedule for dependent demand items. Stated in discrete quantities and order dates.

MRP Planning Method An item attribute used to decide when to plan the item. A value of **MPS planning** means the item is planned by the MPS planning process. It is an item that you master schedule and for which you require manual control. Choose

this option for items with independent demand, items that are critical to your business, or items that control critical resources. A value of **MRP planning** means the item is planned by the MRP planning process. Choose this option for non-critical items that do not require manual control. These are typically dependent demand items. A value of **DRP** planning means the item is planned by the DRP planning process. A value of **DRP & MRP** means the item is planned by either a DRP planning or MRP planning process. A value of **DRP & MPS** means the item is planned by either a DRP planning or MPS planning process. A value of **None** means the item is neither MPS-planned or MRP-planned. It does not require long-term plan planning of material requirements. Choose this option for high volume and/or low cost items that do not warrant the administrative overhead of material requirements planning. These are typically dependent demand items.

MRP-planned item An item planned by MRP during the MRP planning process.

order modifier An item attribute that controls the size of planned orders suggested by the planning process to mimic your inventory policies.

past due requirements Past due requirements include Release requirements that fall before the schedule horizon start date.

planned order A suggested quantity, release date, and due date that satisfies net item requirements. MRP owns planned orders, and may change or delete the orders during subsequent MRP processing if conditions change. MRP explodes planned orders at one level into gross requirements for components at the next lower level (dependent demand). Planned orders along with existing discrete jobs also serve as input to capacity requirements planning,

describing the total capacity requirements throughout the planning horizon.

planner The third of the three processes that comprise the planning process under the standard planning engine. The planner uses the low level codes calculated by the exploder, together with the supply and demand information gathered by the snapshot, and calculates net material requirements for every planned item associated with the master schedule used to drive the planning process. Under the standard planning engine, the planner runs after the exploder and the snapshot. Under the memory-based planning engine, the memory-based planner performs planner functions.

planning schedule Used to communicate long-range forecast and material release information to suppliers.

purchase order shipment A schedule for each purchase order line composed of the quantity you want to ship to each location. You can also provide delivery dates for each shipment line. You can create an unlimited number of shipments for each purchase order line. You receive goods and services against each shipment line.

purchase requisition An internal request for goods or services. A requisition can originate from an employee or from another process, such as inventory or manufacturing. Each requisition can include many lines, generally with a distinct item on each requisition line. Each requisition line includes at least a description of the item, the unit of measure, the quantity needed, the price per item, and the Accounting Flexfield you are charging for the item. *See also* **internal sales order**.

purchased item An item that you buy and receive. If an item is also an inventory item,

you may also be able to stock it. *See also inventory item.*

purge A technique for deleting data in Oracle Manufacturing that you no longer need to run your business.

purge category A Purchasing feature you use to purge a particular group of records from the database. Purchasing lets you choose from the following separate categories: **Simple Requisitions, Simple Purchase Orders, Suppliers, Simple Invoices** (only if you installed Payables), and **Matched Invoices and POs** (only if you installed Payables). The last category is the most comprehensive category you can choose. You should purge all appropriate documents before purging your supplier information, because Purchasing does not purge suppliers that you referenced on existing documents.

purge status A Purchasing method of reporting the progress of a purge you initiate. The Status field lets you take an action on your purge process (**Initiate, Confirm, Abort**), or reports on the current status of the purge (**Printed, Deleting, Completed–Aborted, Completed–Purged**).

receipt A shipment from one supplier that can include many items ordered on many purchase orders.

receipt line An individual receipt transaction that identifies receipt of an item against a purchase order shipment.

release An actual order of goods and services you issue against a blanket purchase agreement. The blanket purchase agreement determines the characteristics and the prices of the items. The release specifies the actual quantities and dates ordered for the items. You identify a release by the combination of blanket purchase agreement number and release number.

release only For a Shipping Schedule. Indicates that the schedule release requirements include Approved Releases.

release with forecast For a Shipping Schedule. Indicates that the schedule releases requirements include Approved Releases. The schedule forecast requirements include Unimplemented Planned Orders and Approved Requisitions.

requisition *See purchase requisition and internal sales order*

requisition approval The act of approving the purchases of the items on a requisition. A requisition must receive the required approvals before a buyer can create purchase orders from this requisition. The approvals can come from any employee, but a requisition is fully approved only when an employee who has enough authority approves it. If you require encumbrance or budgetary control for requisitions, a requisition is fully approved only when an employee with sufficient approval authority approves and reserves funds for the requisition.

requisition pool Requisition lines that are approved, not cancelled, and not yet on a purchase order.

resource authorizations Resource Authorizations address the supplier's need to have long lead time components or to invest in material processing without incurring economic hardship if requirements are reduced.

return to supplier A transaction that allows you to return to the supplier items from a fully or partially received purchase order and receive credit for them.

shipment release An actual order of goods and services against a planned purchase

order. The planned purchase order determines the characteristics of the items on the order. The planned purchase order also has the expected quantities, prices, and ship-to locations, and delivery dates for the items on the order. You identify a shipment release by the combination of the planned purchase order number and the release number. Each planned purchase order line can have multiple shipments and you can distribute the quantity of each shipment across multiple accounts.

shipping schedule Used to communicate near-term release shipment information to suppliers. The Shipping Schedule provides a tool for refining the requirements conveyed on the Planning Schedule in support of Just-In-Time (JIT) delivery.

simulation schedule Unofficial schedules for personal use that contain the most current scheduled item information. You can print Simulation schedules, but you cannot confirm or send them via EDI.

sourcing The action of identifying a purchasing source or supplier for goods or services. To identify the best sources for your purchases, you can create RFQs that you send to your suppliers, enter quotations from your supplier, and evaluate these quotations for each item you purchase.

sourcing rule Specifies how to replenish items in an organization, such as purchased items in plants. You can also use sourcing rules to override sourcing that is specified in the bill of distribution assigned to an item.

sourcing rule assignment hierarchy See **assignment hierarchy**

standard receipt A receipt routing in which shipments are received into a receiving location and then delivered in a separate

transaction. Standard receipts can be inspected or transferred before delivery.

standard unit conversion The conversion formula you define between different units from the same unit class. You define your own standard conversion.

submission check A set of tests on a purchasing document to ensure it is ready to be submitted for approval processing.

submit To send a document to another employee without attempting to approve or reserve funds for it yourself.

substitute receipt An option that lets you receive predefined acceptable substitutes for any item.

supply chain planning The development and maintenance of multi-organizational distribution and manufacturing plans across a global supply chain.

supplier Provider of goods or services.

supplier product number The number your supplier assigns to an item. You and your supplier can have different item naming conventions. You can identify the item with one number (Item) while your supplier identifies this item using another number (Supplier Product Number). Using and referencing supplier product numbers helps you speed up your purchasing cycle. By referencing a number your supplier knows, you can help your suppliers understand your purchase orders and RFQs better.

supplier purchasing hold A hold condition you place on a supplier to prevent new purchasing activity on the supplier. You cannot approve purchase orders for suppliers you placed on hold.

supply agreement blanket purchase order A type of purchase order you issue before you request actual delivery of goods or services. You normally create a blanket purchase agreement to document a long-term supplier agreement. A blanket purchase agreement may contain an effective date and an expiration date, a committed amount, or quantity. You use a blanket purchase agreement as a tool for specifying agreed prices and delivery dates for goods and services before actually ordering them. Blanket agreement in Oracle Purchasing with the Supply Agreement flag set on the Blanket Agreement header. Only Supply Agreement Releases are picked up by Supplier Scheduling.

supply release agreements Release shipments against a Blanket Supply Agreement.

trading partner Any company that sends and receives documents via EDI.

unit of measure The unit that the quantity of an item is expressed.

unit of measure class A group of units of measure and their corresponding base unit of

measure. The standard unit classes are Length, Weight, Volume, Area, Time, and Pack.

unit of measure conversions Numerical factors that enable you to perform transactions in units other than the primary unit of the item being transacted.

unordered receipt A site option that lets you receive an unordered item. You can later batch an unordered item to an existing purchase order, or add it to a new purchase order.

UOM *See* **unit of measure**.

vendor *See* **supplier**.

WP4 Working Party 4 on the facilitation of international trade procedures of the Economic Commission for Europe, a commission of the United Nations. Working Party 4 has experts on data elements and interchange, and on trade procedures.

X12 ANSI standard for inter-industry electronic interchange of business transactions.

Index

A

- Approved Supplier List
 - autoscheduling, 4 – 5
 - default, 1 – 5
 - find window, 4 – 13
 - Overview, 4 – 2
 - scheduling organizations, 4 – 2
 - window, 4 – 8
- Approved Supplier List Statuses window, 1 – 5
 - Defining Approved Supplier Statuses, 1 – 5
- Approved Supplier List Summary, window, 4 – 13
- Approved Supplier Status, default, 1 – 5
- Approved Supplier Statuses, defining, 1 – 5
- ASL, 2 – 8, 4 – 2
- Authorization, 2 – 8
- Authorization Cutoff Date, 2 – 9
- Authorization Time Fence, 4 – 7
- Authorizations, 2 – 6
 - recalculate/redisplay, 2 – 11
 - window, 2 – 8
- AutoSchedule, 1 – 7
- AutoScheduling, 4 – 5

B

- Begin Weeks On, 1 – 8

- Blanket Agreements, 4 – 2
- Bucket Count, 1 – 8
- Bucket Patterns, 1 – 2, 1 – 7
 - buffer, 1 – 7
 - combinations, 2 – 18
 - days, 1 – 7
 - defining, 1 – 8
 - months, 1 – 7
 - quarters, 1 – 7
 - start dates, 1 – 7
 - variable bucket patterns, 1 – 8
 - weeks, 1 – 7
 - window, 1 – 8
- Bucketed Item Schedules
 - authorizations, 2 – 33
 - reviewing, 2 – 32
- Build, option button, 2 – 28
- Building a New Schedule, 2 – 23
- Building a Revision Schedule, 2 – 26
- Building a Simulation Schedule, 2 – 27
- Business Rules, 1 – 5
- Buyer's authorizations, 2 – 18

C

- calculated authorization quantities, 2 – 4
- Catalog Quotations, 4 – 2
- Category Set, 2 – 24

Clear, 2 - 25
Confirmed, 2 - 31
Confirming Schedule Headers, 2 - 35
Confirming Schedules, 2 - 35
 authorizations, 2 - 35
 confirm button, 2 - 35
 confirmed, 2 - 35
 header level, 2 - 35
 high-water mark, 2 - 35
 in process, 2 - 35
 line items, 2 - 36
 unconfirmed schedule headers, 2 - 35
Control, 1 - 5
CUM
 initialized, 3 - 2
 management, 1 - 10, 2 - 8, 3 - 2
 open, 3 - 2
 period, 3 - 2
 tracking, 1 - 10
 Transaction History report, 3 - 2
CUM History Report, 5 - 2

D

Daily Buckets, 2 - 14
Dates, creation from and to, 2 - 31
Direct Supplier, 4 - 8
Discrete Order Quantities, 4 - 6
Distributor, 4 - 8
DRP
 plan, 2 - 16
 plan name, 2 - 16
 planned item, 2 - 16

E

EDI, 1 - 2, 2 - 13, 2 - 19
EDI Transactions, 2 - 13
Enable Authorizations, 4 - 11
Enable AutoSchedule, 4 - 11
Enable Planning Schedules, 4 - 11
Enable Shipping Schedules, 4 - 11

F

Find Supplier Schedules, window, 2 - 23
Forecast, 2 - 18
 830, 2 - 13
Function Security, 1 - 4
Future Bucket, 1 - 7, 2 - 23, 5 - 5
Future Release, 1 - 7, 2 - 5

H

Header, 2 - 18
Horizon Start Date, 2 - 24

I

In Process, 2 - 31
Inactive On, 1 - 5, 1 - 9
Include Future Releases, 2 - 23
Intervals, 1 - 8
ISO, 9001/9002, 4 - 2
Item Detail, 2 - 18
Item Detail Schedule, 2 - 18
Item Schedules, window, 2 - 4

J

JIT, 2 - 14, 2 - 19
Just-In-Time, 2 - 19

L

Line Item Status Options
 confirmed, 2 - 31
 in process, 2 - 31
Locating/Reviewing Existing Schedules, 2
 - 31

M

Manufacturer, 4 – 9
Master Resource Planning, 1 – 2, 2 – 2
Master Schedule, 2 – 15
Material Release, 2 – 13
 830, 2 – 13
 archive, 2 – 14
Menu paths, A – 2
MPS
 plan, 2 – 16
 plan name, 2 – 16
 planned item, 2 – 16
MRP
 plan, 2 – 15
 plan name, 2 – 15
 planned items, 2 – 15
 recommendations, 2 – 15
 status, 2 – 15
MRP/MPS/DRP, 2 – 15
Multi-Org Option, 2 – 24, 2 – 29

N

Navigator paths, A – 2
Near-Term Release, 2 – 19
New Build Schedule, 2 – 26
New Schedule
 Build, 2 – 23
 New, 2 – 23
 supplier site, 2 – 24, 5 – 5
Nonzero Bucket, 1 – 9

O

Orders, 2 – 5

P

Past Due, 2 – 18
Past Due Quantity, 2 – 5
Pattern Description, 1 – 8
Planned Order, 2 – 10

Planning, 2 – 31
Planning AutoSchedule, concurrent process,
 4 – 5
Planning AutoSchedule Process, 5 – 4
Planning Bucket Pattern, 1 – 10
Planning Schedule, 2 – 13, 2 – 18
 830, 2 – 13
 material release, 2 – 13
 release and forecast, 2 – 15
 type, 1 – 10
Planning Schedule Report, 5 – 7
Planning Schedules, 1 – 2
Processes
 Planning AutoSchedule Process, 5 – 4
 Shipping AutoSchedule Process, 5 – 4
Profile Options in Supplier Scheduling, 1 – 13

Q

Quantity, 2 – 8
Quantity Bucket, 2 – 5

R

Raw Material, 2 – 17
Rebuilding Schedules, 2 – 33
 select all, 2 – 33
Release, 2 – 11, 2 – 18
Release Generation Method, 4 – 10
 AutoCreate, 4 – 10
 automatic, 4 – 10
Release Only, 1 – 2, 1 – 10, 2 – 16
Release with Forecast, 1 – 10
Reports
 CUM History Report, 5 – 2
 Planning Schedule Report, 5 – 7
 Shipping Schedule Report, 5 – 9
Requisition, 2 – 11
Resource Authorizations, 4 – 6
 authorization cutoff date, 4 – 6
 enable authorizations option, 4 – 6
 example, 4 – 6
 time fences, 4 – 6

- tracking CUMs, 4 – 7
- Reviewing Item Schedules, 2 – 4
- Revision Schedule, 2 – 26
- RTV, 3 – 2
- RTV Updates, 1 – 10

S

- Schedule Headers, block, 2 – 32
- Schedule Headers and Items, reviewing, 2 – 32
- Schedule horizon end date, 2 – 5
- Schedule Number, 2 – 27
- Schedule Orders, 2 – 10
- Schedule Orders window, using, 2 – 10
- Schedule Owner Name, 2 – 31
- Schedule Type
 - planning schedule, 2 – 20
 - shipping schedule, 2 – 20
 - simulation schedule, 2 – 20
- Schedule Types, comparison, 2 – 20
- Schedule Types and Subtypes, 2 – 18
- Scheduler's Workbench, 2 – 2
 - Overview, 2 – 2
 - prerequisites, 2 – 2
- Scheduling Options, window, 2 – 15
- Scheduling Orders
 - Document Line, 2 – 11
 - Document Number, 2 – 11
 - Document Revision, 2 – 11
 - Document Status, 2 – 11
 - Document Type, 2 – 10
 - Due Date, 2 – 10
 - Order Quantity, 2 – 10
 - PO UOM, 2 – 10
- Ship-To Organization, 1 – 10
- Ship-to Organization Controls, defining, 1 – 10
- Shipping, 2 – 31
- Shipping AutoSchedule, concurrent process, 4 – 5
- Shipping AutoSchedule Process, 5 – 4
- Shipping Bucket Pattern, 1 – 10

- Shipping Schedule, 2 – 19
 - 862, 2 – 13, 2 – 14
 - archive, 2 – 14
 - release and forecast, 2 – 15
 - Requirements report, 1 – 7
- Shipping Schedule Report, 5 – 9
- Shipping Schedules, 1 – 2
- Simulation Schedule, include future releases, 2 – 28
- Simulation Schedule, 2 – 27
 - bucket pattern, 2 – 28
 - category set, 2 – 29
 - current receipt, 2 – 27
 - find window, 2 – 28
 - horizon start date, 2 – 29
 - include future releases, 2 – 28
 - option button, 2 – 28
- Simulation Schedules, 2 – 19
 - personal, 2 – 19
 - saved, 2 – 19
- Source Documents, 4 – 10
- Status Options, 2 – 31
- Structure, 2 – 18
- Supplier and Item Commodity Combination, defining, 4 – 8
- Supplier Item Attributes, defining, 4 – 10
- Supplier Name, 2 – 24
- Supplier Schedules
 - find window, 2 – 31
 - window, 2 – 36
- Supplier Scheduling
 - Overview, 1 – 2
 - prerequisites, 1 – 2
- Supplier Scheduling Options
 - single organization, 2 – 15
 - window, 1 – 10
- Supplier Site Code, 2 – 24, 2 – 31
- Supplier Status, define, 1 – 5
- Suppliers and Distributors, item number, 4 – 9
- Supply Agreement, 4 – 2
 - release, 1 – 2
- Supply Agreement Release, 3 – 2
- Supply Chain Planning, 1 – 2, 2 – 2
- Support Supplier Certification, 4 – 2

T

Transaction, 830, 2 - 19

U

UOM, 2 - 8

V

View Approved Suppliers, 4 - 13

Viewing Authorizations, 2 - 8

W

Windows, navigator paths, A - 2

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