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Glossary

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Send Us Your Comments

Oracle Warehouse Management Implementation Guide, Release 11*i*

Part No. A90844-03

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

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Preface

This manual describes how to implement Oracle Warehouse Management.

Intended Audience

This manual is intended for anyone who is interested in implementing Oracle Warehouse Management.

Accessibility Statement Instructions

See the preface unpopulated template file for instructions on how to include the Accessibility statements.

Documentation Accessibility

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Structure

Chapter 1

This chapter outlines the setup required to model a basic warehouse.

Chapter 2

This chapter discusses setting up Oracle Warehouse Management.

Chapter 3

This chapter discusses the advanced lot control features available within Oracle Warehouse management.

Chapter 4

This chapter discusses lot and serial attributes.

Chapter 5

This chapter discusses how to use cartonization within Oracle Warehouse Management

Chapter 6

This chapter discusses how to use Cost Groups within Oracle Warehouse Management.

Chapter 7

This chapter discusses cycle counting within Oracle Warehouse Management

Chapter 8

This chapter discusses Oracle Warehouse Management Dock Management.

Chapter 9

This chapter illustrates how to setup your warehouse to receive material to suit your business process.

Chapter 10

This chapter discusses 3rd party software integration for label printing.

Chapter 11

This chapter discusses how to use material status controls.

Chapter 12

This chapter discusses how to use physical inventory.

Chapter 13

This chapter discusses the Oracle Warehouse Management Rules Engine.

Chapter 14

This chapter discusses shipping transactions.

Chapter 15

This chapter discusses Oracle Warehouse Management Transactions.

Chapter 16

This chapter discusses Oracle Warehouse Management integration with Oracle Work in Process.

Chapter 17

This chapter discusses transaction reasons.

Chapter 18

This chapter discusses how to use bar code identifiers within Oracle Mobile Applications.

Chapter 19

This chapter discusses Oracle EDI Inbound ASN transactions.

Chapter 20

This chapter discusses picking for manufacturing.

Chapter 21

This chapter discusses material handling devices.

Chapter 22

This chapter discusses Oracle Warehouse Management system performance.

Chapter 23

This chapter discusses global trade item numbers.

Chapter 24

This chapter discusses the integration between Oracle Warehouse Management, and Oracle Project Manufacturing.

Chapter 25

This chapter discusses task management.

Appendix A

This appendix contains information on label printing fields.

Appendix B

This appendix contains the seeded information for the rules engine.

Appendix C

This Appendix contains information on task implementation.

Appendix D

This appendix contains information on LPN contexts.

Appendix E

This appendix contains migration information.

Appendix F

This appendix contains an implementation case study.

Related Documents

If you list related documents using variables for the book names, remember that you should not build the named character format into the variable. Always apply the character format after you insert the variable. Although including character formats in the variables works well for FrameMaker hardcopy output, this does not work when filtering to HTML.

For more information, see the following manuals in the Release 7.0 Oracle Other Product One documentation set or in the Release 6.1 Oracle Other Product Two documentation set:

- *Oracle Other Product One7 Release Notes*
- *Oracle Other Product One7 Installation and Configuration Guide*
- *Oracle Other Product One7 Oracle RMU Reference Manual*
- *Oracle Other Product Two Release Notes*
- *Oracle Other Product Two Installation Guide*
- *Oracle Other Product Two Database Administration Reference Manual*

Conventions

In this manual, Windows refers to the Windows95, Windows98, and the Windows NT operating systems.

Other Product One refers to Oracle Other Product One for Windows and Oracle Other Product One for UNIX software.

Version 7.0 of Oracle Other Product One software may be referred to as Other Product Two7.

The SQL interface to Oracle Other Product One is referred to as SQL. This interface is the Oracle Other Product One implementation of the SQL standard ANSI X3.135-1992, ISO 9075:1992, commonly referred to as the ANSI/ISO SQL standard or SQL92.

In examples, an implied carriage return occurs at the end of each line, unless otherwise noted. You must press the Return key at the end of a line of input.

The following conventions are also used in this manual:

Convention	Meaning
. . .	Vertical ellipsis points in an example mean that information not directly related to the example has been omitted.
...	Horizontal ellipsis points in statements or commands mean that parts of the statement or command not directly related to the example have been omitted
boldface text	Boldface type in text indicates a term defined in the text, the glossary, or in both locations.
< >	Angle brackets enclose user-supplied names.
[]	Brackets enclose optional clauses from which you can choose one or none.

Sample Warehouse Setup

This chapter outlines the setup required to model a basic warehouse. It contains the following topics:

- [Overview](#) on page 1-2
- [Scenario](#) on page 1-2
- [Initial Setup](#) on page 1-11
- [Operation](#) on page 1-23
- [Additional Features](#) on page 1-23

Overview

This chapter outlines the setup required to model a basic warehouse that performs receiving transactions with directed putaway, replenishment tasks, and outbound flows. With the aid of the users guide, this chapter will enable the quick setup of a basic functioning warehouse.

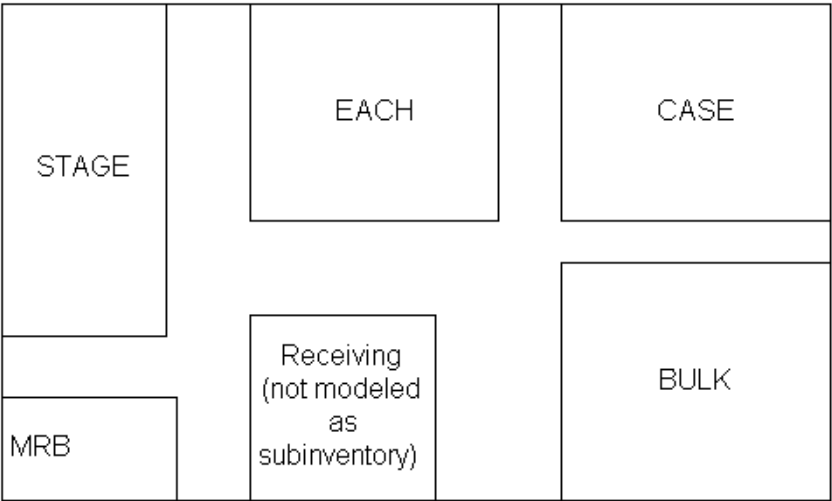
This chapter does not include setup for cycle counting, lot or serial attributes, cartonization, pick methodologies, cost groups, or manufacturing integration, or other features that may be critical to your business. A brief discussion of the additional power provided by these and other features is included at the end of this chapter.

This setup chapter is complementary to the users guide and to the Vision database that comes with an installation of Oracle WMS. The users guides provide field by field navigation and descriptions of all options on the desktop and mobile forms, while the implementation guide provides topical essays on large functional areas, detailed explanations on the available options, pitfalls to avoid, and trouble shooting notes.

Scenario

The following setup could be used for a simple warehouse with bulk, case, and each subinventories named BULK, CASE, and EACH. In addition, there is a staging subinventory STAGE, and an overflow / exception handling subinventory called MRB. A warehouse manager must deal with any material placed in subinventory MRB.

Figure 1–1 Sample Warehouse Layout



Receiving

This organization uses standard and inspection routing receipts. When the purchase order is created, the buyer indicates the receipt routing to use, based on past performance of the supplier.

Standard routings split the receiving process into two distinct steps: the initial receipt from the purchase order, and the putaway to inventory. Until the putaway step is performed, the material is not visible and is not considered on-hand. If the organization wanted to recognize material as on-hand immediately after the receipt step, then the organization would use the direct receipt routing. Inspection routings add an inspection step between the receipt and the putaway. Material that fails inspection can be putaway to different locations.

Shipments are generally received of full pallets, though occasionally cases and eaches will be received as well. The receiver packs and performs the receipt transactions against a purchase order document, indicating the quantity and unit-of-measure for each receipt.

A separate LPN is used for each unit-of-measure that is received, and it is assumed that the receiver builds the LPNs with the correct standard pack quantity defined in the warehouse. Stated another way, the receiver builds one LPN for each pallet, and

one LPN for each case, receiving in the PL or CS unit-of-measure respectively. One LPN for all individual eaches combined can be received.

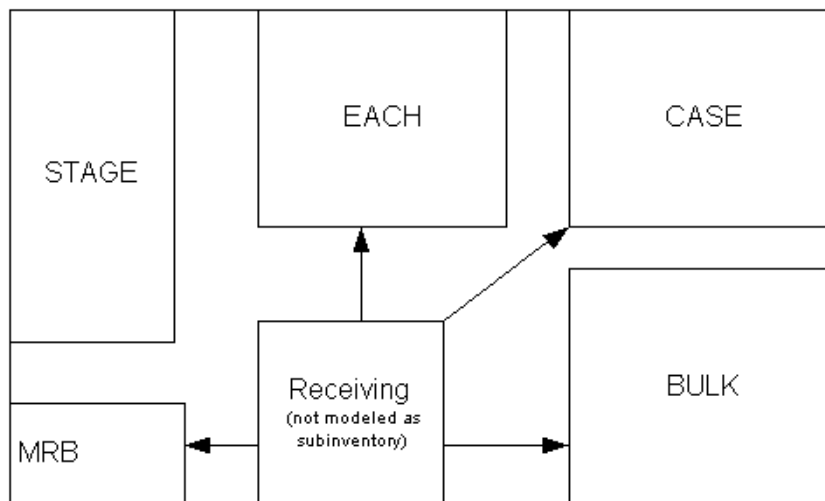
Alternatively, the receipt could be performed from an ASN. With the ASN, the LPNs could be prepacked into the correct LPNs of the standard pack quantity.

While the purchase order receipt scenario assumes that the receiver knows the standard pack quantity for each item, the system can also be used to build the standard packs using features provided with cartonization. Specifically, material can be putaway to a receiving subinventory, packed using the Bulk Pack feature into standard pack LPNs, and then putaway from this intermediate subinventory.

Put Away From Receipt

Upon putaway from receipt, material is directed to EACH, CASE, BULK, and MRB as described below. The following diagram illustrates how material flows from the receiving dock to inventory:

Figure 1–2 Material Flow from Dock to Inventory



Material that was received in eaches (unit-of-measure EA) is directed to its dedicated locator in EACH. Any overflow from that locator is directed to its dedicated locator in CASE. Any overflow that cannot be putaway to EACH or CASE will be putaway to MRB for the warehouse manager to handle. Note that as the warehouse may want to attempt keeping only full cases in the CASE

subinventory, eaches may be directed to MRB instead of to CASE with a simple modification of the setup presented below.

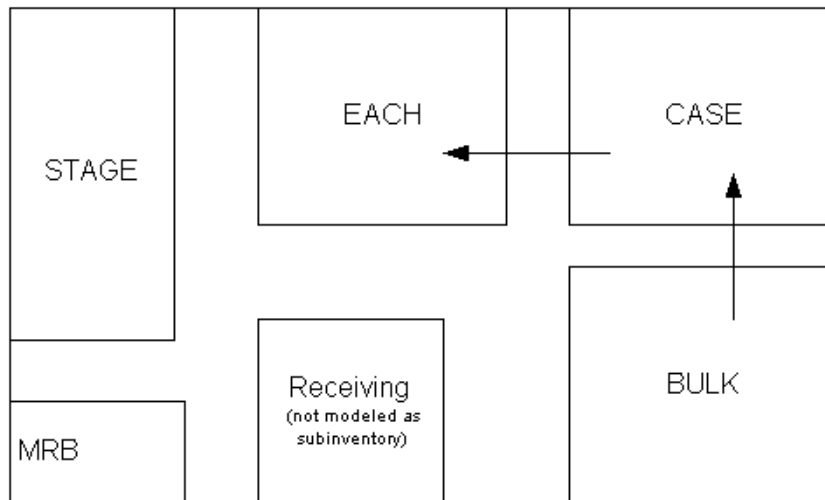
Material that was received in cases (unit-of-measure CS) is directed to its dedicated locator in CASE. Any overflow that cannot be putaway to CASE will be putaway to a locator in BULK that already has that item, or if necessary, an empty locator in BULK.

Material that was received in pallets (unit-of-measure PL) is directed to an empty locator in BULK.

Item commingling is not permitted in BULK; each item will get a different locator (or perhaps, several locators) in BULK. Empty locators are used in ascending sequence of row-rack-bin. If no empty locators are available in BULK, material will be putaway to subinventory MRB. In addition, any material that fails inspection will be placed in MRB.

Replenishment

Replenishment is performed in an automated fashion by scheduling the concurrent manager to continually run the Min-Max Planning report and the Move Order Pick Slip report. These reports should be scheduled at the warehouse manager's discretion, depending on the profiles of the SKU's (size, velocity, peak demand) in the warehouse of the forward pick locations (if forward pick locations hold 2 days demand replenishment is more frequent than if they hold 5 days demand), but typically replenishment can be completed throughout the day to ensure stock will be available when required. The concurrent manager is set up to run replenishment reports every 60 minutes in this facility.

Figure 1–3 Warehouse Replenishment Example

EACH is replenished from CASE, and CASE is replenished from BULK. BULK is replenished from a supplier.

Replenishment of a given item in EACH is always movement of material between the same two locators because an item has a dedicated locator in both CASE and EACH. This replenishment requires an operator with a specific skill-set, but no equipment. The task type will be called RPEA.

Replenishment of a given item in CASE is always movement of material to the same destination locator, but the item may occur in multiple locators in BULK. Material from BULK should be allocated in FIFO fashion. FIFO will empty locators in the sequence they were filled (ignoring overflow from CASE), so only one locator at a time will be used for replenishment, and thus empty locators will be reclaimed quickly. This replenishment requires a forklift operator and a forklift. The task type will be called RPCS.

Wave Planning

This warehouse does primarily parcel shipping. 90 percent of the orders are shipped with either UPS or FedEx and the remaining 10 percent are primarily shipped via two LTL carriers which are established annually. Any parcel orders received by noon are shipped the same day if request.

Every day at 4:30p.m., UPS picks up the two trailers that they have dropped, and leaves two empty trailers. In addition, FedEx picks up its one trailer daily at 10:30 a.m. Finally, there are periodic LTL outbound shipments from a fourth outbound dock door. It is assumed that the preferred shipping method is entered on the sales order when the order is taken.

To meet these regular shipments, pick release is performed daily for FedEx orders at 6:00 a.m., and again at 4:00 p.m. Therefore, today's FedEx truck will have shipments pick released this morning, as well as yesterday afternoon. This means that all orders not received by 6:00 a.m. will not make the 10:30 a.m. FedEx departure. Of course, high priority orders can be manually released and added to the shipment. All items to be picked for FedEx are dropped to a single dedicated staging lane.

In addition, pick release for UPS is performed three times daily, at 6:30 a.m., 10:00 a.m., and 1:00 p.m. Because the first FedEx wave is released before the first UPS wave, FedEx sales orders will be staged first. UPS has one dedicated staging lane for the two dock doors. The cutoff to make the 4:30 p.m. UPS departure is 1:00 p.m., but as with FedEx, high priority orders can be manually released in addition.

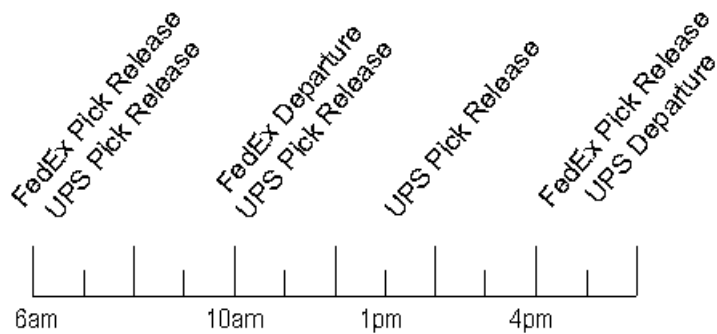
The four daily pick release processes are performed automatically by a scheduled concurrent request. This request has the staging lane embedded in it. Alternatively, the Rules Engine could choose the staging lane by comparing the shipment method on the sales order with the final staging lane.

Additional order criteria are included in the pick release rule, so that, for instance, only sales orders scheduled for shipment today are included. The pick release process also automatically creates deliveries for the warehouse, grouping all sales order lines for which material was allocated into a single delivery. Note that if partial orders are not acceptable to the customer, the system would halt the process during allocation, or afterwards, prior to ship confirm, as defined for the warehouse.

Of course, the schedule can be adjusted so that the concurrent request is run more (or less) frequently for one or both carriers.

The pick regular pick release processes and truck departures can best be understood with the following timeline:

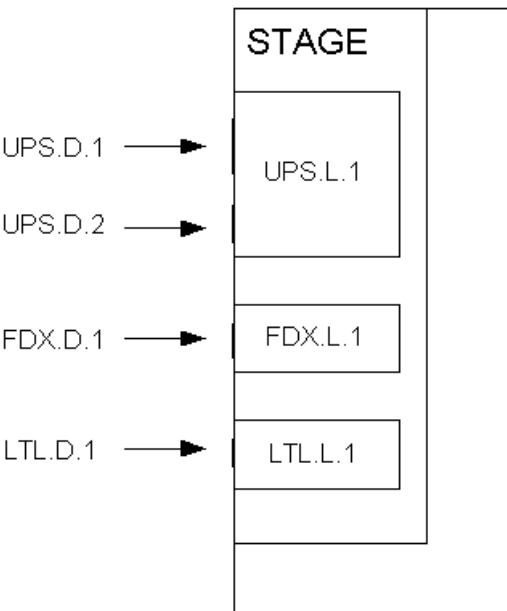
Figure 1–4 Warehouse Wave Planning Example



Occasionally, the warehouse receives large sales orders, in the order of several pallets. These are shipped out on LTL carriers at a fourth dock door dedicated to this purpose. A pick release rule has been defined for this use, but it is not scheduled to run regularly, because the warehouse manager prefers to control exactly when it is released to ensure that it will not interfere with fulfilling tasks for parcel carriers.

The staging subinventory has four dock doors and three staging lanes defined in it as follows:

Figure 1–5 Staging Subinventory Example



Picking for Sales Orders

Sales orders are regularly released to the warehouse based on pick release / wave planning defined above. Material should be allocated in a FIFO basis, but the warehouse is more concerned with optimizing picks by using pick unit-of-measure than honoring FIFO. The pick units-of-measure PL, CS, and EA have been assigned to BULK, CASE, and EACH respectively. No cartonization is performed during the picking process.

Material is moved to the staging lane in subinventory STAGE. Different skill-sets are required based on if the material has been allocated from BULK, CASE, or EACH, and will be modeled with task types BKPK, CSPK, and EAPK respectively.

Operators consolidate multiple LPNs required for a single delivery when the LPN is dropped, as indicated by the system.

Material in the MRB subinventory is not available for allocation, reservation, or ATP. This is modeled via a material status on the subinventory that disallows sales

order staging transfers, as well as disabling the subinventory attributes for reservations and ATP.

Labeling

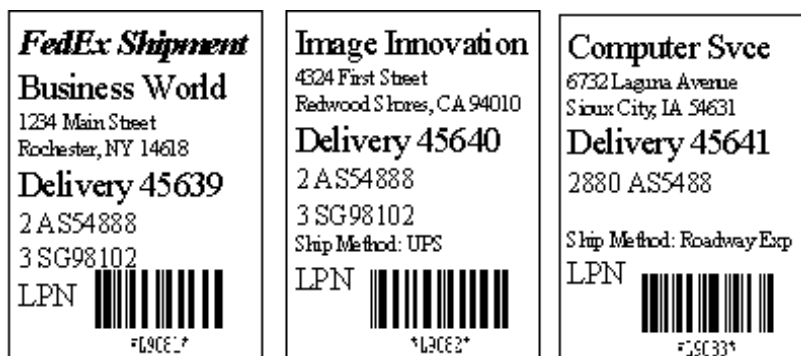
Assuming that the subinventories and locators are already labeled, and that the dedicated locators in CASE and EACH are already labeled with the items they contain, only two types of labels are required for the warehouse.

As part of the receiving process, labels must be placed on the pallets before they are putaway to the warehouse. These labels must include the contents of the LPN. For pallets, they will be placed on a section that will remain visible after the pallet is putaway, while cases will be labeled on the box. Both pallet and case labels should include the quantity converted to eaches. Labels placed on totes used to deliver material to the EACH subinventory must also include the item, quantity, and LPN.

Figure 1–6 Label Example 1



The only other label required by the warehouse is a shipping label. This label, printed when each LPN is dropped in the appropriate staging lane, includes customer and order information, as well as the contents of each LPN. Different label formats are used depending on the shipping method used, and sample labels appear as follows:

Figure 1–7 Label Example 2

Note the different formatting used for the FedEx label.

Shipping Execution

With all LPNs in the staging lanes labeled with the ship method and an LPN, the shipping clerk can load LPNs into the open trailers by scanning the LPN labels. Shortly before the truck is scheduled to depart, the operator checks for missing material – LPNs that belong to deliveries that were staged, but not loaded to the truck, or tasks that are not yet completed that belong to deliveries on the truck.

The operator can then find the missing LPNs to load. The operator can also check the status of tasks that have not been completed, and either unassign them from the delivery that is about to depart, or increase the priority of the tasks to ensure that they get done sooner. When the truck is about to depart, the operator indicates to the system that the truck is closed, and all the material is issued and the sales orders updated.

Initial Setup

An inventory organization must have the WMS enabled flag setup on the organization.

In addition, the unit-of-measure conversions between PL and EA and between CS and EA must be defined prior to continuing with subinventory setup. The units of measure, and a brief description of their usage, is as follows:

Table 1–1 Unit of Measure and Usage

UOM Code	UOM Name	Usage
EA	Each	Pick UOM of EACH
CA	Case	Pick UOM of CASE
PL	Pallet	Pick UOM of BULK

Finally, a material status, named HOLD, must be defined. A material status is used to disallow certain transactions from occurring to material to which it is applied. This material status will be used for the MRB subinventory, to indicate that material in that subinventory should not be used for sales orders.

Subinventory Setup

Subinventories

This scenario has five subinventories defined: EACH, CASE, BULK, STAGE, and MRB. The following table shows how the subinventories should be set up. Only those flags that are particularly relevant to WMS are included. Note that all subinventories have locator control set to Prespecified.

Table 1–2 Subinventory Structure

Sub	Status	LPN Controlled	Enable Cartonization	Allow Reservations	Include In ATP	Pick Order	Pick UOM
EACH	Active	No	No	Yes	Yes	1	EA
CASE	Active	Yes	No	Yes	Yes	2	CS
BULK	Active	Yes	No	Yes	Yes	3	PL
STAGE	Active	Yes	No	Yes	Yes	none	none
MRB	Hold	Yes	No	No	No	none	none

EACH is not LPN-controlled, which means that any LPNs that are moved to the EACH subinventory will be automatically unpacked. The warehouse does not perform cartonization as part of the picking process, so cartonization is disabled for all subinventories (or alternatively, disabled at the organization level).

Material in MRB, used for temporary overflow while the warehouse manager searches for additional space, and also used for rejected material, is not included in

ATP calculations, nor can reservations be made against it. Finally, an operator qualified to do tasks in multiple subinventories will be dispatched tasks in the sequence EACH, then CASE, and then BULK.

Locators

Several sample locators for the subinventories above will be shown. Of course, as many locators as necessary can be defined for each subinventory.

Table 1–3 Locator Setup

Subinventory	Locator	Type	Status	Picking Order
EACH	E1.1.1	Storage	Active	1
EACH	E1.1.2	Storage	Active	2
CASE	C1.1.1	Storage	Active	1
CASE	C1.1.2	Storage	Active	2
BULK	B1.1.1	Storage	Active	1
BULK	B1.1.2	Storage	Active	2
STAGE	UPS.1.1	Staging Lane	Active	none
STAGE	UPS.1.1	Dock Door	Active	none
MRB	M1.1.1	Storage	Active	none

All locators are Storage locators except those used for staging of sales orders and those used to model dock doors. Transaction types disallowed at any level that apply to the transaction are disallowed, so even though the MRB locators have an Active status, they material in that locator will still take on the behavior of the subinventory status.

Locator picking order, similar to subinventory picking order, is used to sequence tasks within the subinventory; an operator qualified to perform multiple tasks in a subinventory will receive the task with the lowest picking sequence that is larger than the last locator at which that operator performed a task.

Unit, weight, volume, or a combination of those should define locator capacity; refer to the Rules setup section below. Locator pick unit-of-measure need only be defined if a locator has a different pick unit-of-measure than the subinventory in which it is defined.

Now that locators have been set up, min-max parameters can be defined in the Item Subinventories form. The scenario requires that minimum values and maximum

values be entered for EACH, CASE, and BULK, and that a dedicated locator be assigned to each item for the warehouse in subinventory EACH and CASE. Furthermore, the supply for subinventory EACH should be set to CASE, the supply for CASE should be set to BULK, and finally the supply for BULK should be set to Supplier.

Rules Setup

The following setup details the rules engine setup that will be required to model the scenario listed above.

Overall Setup

Picking Rules

- Seq (10) Assigned to organization WH3
- (20) Rotate stock in FIFO pick UOM enabled strategy
- (30) Rotate stock in FIFO pick UOM enabled rule

Put Away Rules

- Seq 10 Assigned to transaction type Sales Order Pick
- (20) Default put away strategy
- (30) Default put away rule

Internal Order Pick

- (10) Default put away strategy
- (10) Default put away rule

Subinventory Transfer

- (10) Dedicated locator strategy
- (10) EACH dedicated locator
- (20) CASE dedicated locator

EA

- (10) Each put away strategy
- (10) Failed inspection to MRB

(20) EACH dedicated locator

(30) CASE dedicated locator

(40) MRB put away

CS

(10) Case put away strategy

(10) Failed inspection to MRB

(20) CASE dedicated locator

(30) BULK minimize fragmentation

(40) MRB put away

PL

(10) Pallet put away strategy

(10) Failed inspection to MRB

(20) BULK empty locator

(30) MRB Put away

Pick Strategy Assignments

The pick strategy assignments are all made to a single object, the organization. All move orders will use the strategy assigned to this organization, including both picks for sales orders, and material allocations for replenishment. Pick Strategy

The pick strategy is straightforward, with a single rule used for all material allocations. This strategy will always be used. The strategy should have the partial success flag enabled, unless the warehouse does not want to allocate any move order that cannot be fully allocated. The date type of Always will be used because no time dependent strategies are necessary.

Pick Rule Definition

Rotate stock in FIFO pick UOM enabled rule

Enable pick unit-of-measure for rule

Putaway Strategy Search Assignments

The putaway strategy assignments uses only two objects, Transaction Type and Transaction UOM.

All move orders, including pick wave move orders, use the Rules Engine to allocate both the source material, and the destination locator. However, prior to getting to the Rules Engine, the destination of pick wave move orders is likely already selected by the default staging lane in the release rule, the default staging lane in the Shipping Parameters form, or the logic behind trip appointments. Therefore, the Rules Engine must simply validate the pre-selected staging lane. By using rules with no restrictions for the staging transfer transaction types, the staging lanes will always be accepted by the Rules Engine.

The min-max report creates unallocated move orders with destination subinventory supplied, but the destination locator left for the Rules Engine to provide. Dedicated locators have been setup for the EACH and CASE subinventories. Therefore, replenishment move orders, which have the transaction type called Subinventory Transfer, should be putaway to the dedicated locators.

The only other type of putaway used in this organization is for putaway from purchase order receipt. The logic is slightly different depending on the unit-of-measure in which the material has been received, so transaction unit-of-measure is used as the second object.

Putaway Strategies

The put away strategies follow the logic presented in the text. All strategies have the partial success flag enabled (though it may also be possible that the warehouse may not want to split putaways across two or more rules). The date type of Always will be used because no time dependent strategies are necessary.

Putaway Rule Definition

Default put away rule This rule has no restrictions and no sort criteria, and is used only to validate the staging lane selected during the pick release process. Because the staging lane should not have any capacity defined, any quantity function other than the customer defined quantity function can be used.

EACH dedicated locator This rule ensures that material goes into the locator in the EACH subinventory that has been assigned to that item.

Because the locators in the EACH subinventory are dedicated to each item, locator capacity based on units can be set up specifically for each locator. If this is not feasible, locator capacity can be defined simply by weight and volume, so long as weight and volume is also defined on the items. The quantity function used in the rule must correspond to how the locator capacity has been defined.

Item Locator > Locator Identifier = Destination Locator > Locator Identifier AND Destination Subinventory > Subinventory Name = Constant Character > EACH

CASE dedicated locator This rule ensures that material goes into the locator in the CASE subinventory that has been assigned to that item.

Because the locators in the CASE subinventory are dedicated to each item, locator capacity based on units can be set up specifically for each locator. If this is not feasible, locator capacity can be defined simply by weight and volume, so long as weight and volume is also defined on the items. The quantity function used in the rule must correspond to how the locator capacity has been defined.

Item Locator > Locator Identifier = Destination Locator > Locator Identifier AND Destination Subinventory > Subinventory Name = Constant Character > CASE

Failed inspection to MRB This rule puts material that fails inspection to subinventory MRB. Note that inspection is only performed as part of an inspection routing receipt.

In this scenario, MRB is assumed to have infinite capacity, and it is the warehouse manager's job to ensure that the MRB area does not overflow by regularly reporting on (and taking care of) material that appears here. Therefore, this rule can use the capacity-by-units quantity function, with the assumption that the locator capacity has not been set up and so will be treated by the Rules Engine as if it were infinite.

Actual Transaction > Inspection Status = Constant Number > 3 AND Destination Subinventory > Subinventory Name = Constant Character > MRB

BULK minimize fragmentation This rule is used when material received in a unit-of-measure of EA or CS cannot be putaway to EACH or CASE because there is not enough space. It should, instead, be directed to BULK, and preferably to locators where there is already some of that item located already. Only if there are no locators with this item (or if all the locators that contain this item are full) will this rule use a new (empty) locator. Empty locators should be used in row-rack-bin order.

For the minimize fragmentation rule to work well, locator capacity must be defined; otherwise, this rule will continue to suggest placing material in a locator that is already full. Capacity by units will not work well unless all items in the warehouse are of roughly the same size, because unlike the EACH and CASE subinventories, the BULK subinventory does not have a dedicated locators for each item. Instead, capacity by weight and/or volume should be defined, and the corresponding quantity function selected.

Destination Subinventory > Subinventory Name = Constant Character >
BULK, sort by Subinventory/Locator > Item on-hand quantity >
Descending, Destination Locator > Row > Ascending, Destination Locator
> Rack > Ascending, Destination Locator > Bin > Ascending

MRB put away This rule is used whenever there is overflow that cannot be put away into other locators.

As above, the quantity function should be capacity-by-units, with the assumption that the locator capacity has not been set up and so will be treated by the Rules Engine as if it were infinite.

Destination Subinventory > Subinventory Name = Constant Character > MRB

BULK empty locator This rule is used whenever a pallet is received and putaway. The assumption is that even if the pallet could be squeezed into multiple partially full locators of that same item, it should be put into one empty locator for operational efficiency.

If all locators in the BULK subinventory can fit a pallet equally well, capacity-by-units can be used as the quantity function because this rule will always place a pallet in an empty locator. If, however, locators have different sizes and a best-fit is desired so that smaller pallets are placed into smaller locators as available, additional sort criteria can be added to the rule and a more appropriate quantity function can be used.

Destination Locator > Num. Other Items = Constant Number AND
Subinventory/Locator > Actual Item On-hand = Constant Number Destination
Locator > Row Ascending Destination Locator > Rack Ascending Destination
Locator > Bin Ascending

Alternate Setup

The rules can be setup differently to achieve the same output with the Rules Engine, but with different performance implications.

- The two rules under the strategy “Dedicated locator strategy” can be combined into a single rule with a single restriction. Although this would require an additional rule to be defined (instead of reusing rules in strategies), the Rules Engine would be able to execute this single rule more quickly than a strategy with two rules.

- Instead of setting up a strategy search order for picking...” with “Instead of setting up a strategy assignment in the Rules Workbench for picking, because a single rule is used for the entire organization and no exceptions to the rule are required, the picking rule could be defined as the default picking rule on the organization definition. Then no strategy assignments or pick strategies need be defined.

Task Type Setup

There are five task types required for this warehouse as follows:

- RPEA: replenishment of EACH from CASE; no equipment required
- RPCS: replenishment of CASE from BULK; forklift required
- PKEA: picking from EACH; no equipment required
- PKCS: picking from CASE; cart required
- PKBK: picking from BULK; forklift required

It is assumed that the same operators capable of performing replenishment with no equipment (RPEA) can also perform a pick with no equipment (PKEA). Similarly, an operator that can use a forklift is qualified to use it for both a pick and replenishment.

Resource Definition

The following manual resources should be created, and all employees capable of performing these operators should be assigned to the resource:

- Manual operator: used for RPEA and PKEA
- Cart operator: used for PKCS
- Forklift driver: used for RPCS and PKBK

Users with mobile device responsibilities must be set up, and the employees used in the resource definition must be the employees assigned to these resources.

In addition, the following machine resources should be created, and equipment items that have roughly the same operating characteristics (weight capacity, and so on), should be assigned to them:

- Cart: used for PKCS
- Forklift: used for RPCS and PKBK

Department Setup

One department, WHSE DEPT, will be defined that encompasses both replenishment and picking tasks. All the resources, both manual and machine, defined above should be assigned to this department.

Standard Task Types

Next, the five task types need to be defined as follows:

Table 1–4 Task Types

Code	Department	Task Type	Resource
RPEA	WHSE DEPT	Replenishment	Seq: 10 Resource: Manual operator
RPCS	WHSE DEPT	Replenishment	Seq: 10 Resource: Forklift driver
			Seq: 20 Resource: Forklift
PKEA	WHSE DEPT	Pick	Seq: 10 Resource: Manual operator
PKCS	WHSE DEPT	Pick	Seq: 10 Resource: Cart operator
			Seq: 20 Resource: Cart
PKBK	WHSE DEPT	Pick	Seq: 10 Resource: Forklift driver
			Seq: 20 Resource: Forklift

Task Type Rules

Finally, five task type rules must be defined as follows. Note that the task type rules for replenishment and picking appear identical. However, when attempting to

assign a user task type to a task, the Rules Engine only considers rules that have the same user task type as the task being considered. Therefore, even though the restriction is identical, the Rules Engine will not return RPEA for a picking task.

Each Replenishment Return value RPEA / weight 100

Source Subinventory > Subinventory Name = Constant Number > CASE

Case Replenishment Return value RPCS / weight 200

Source Subinventory > Subinventory Name = Constant Number > BULK

Each Pick Return value PKEA / weight 300

Source Subinventory > Subinventory Name = Constant Number > EACH

Case Pick Return value PKCS / weight 400

Source Subinventory > Subinventory Name = Constant Number > CASE

Bulk Pick Return value PKBK / weight 500

Source Subinventory > Subinventory Name = Constant Number > BULK

Label Setup

Only two label types are used in this scenario: LPN Summary, and Shipping Content. The Oracle labeling solution is an integration kit with third-party label printing software. The integration is handled through XML messages that are either dropped in a specific folder, or passed directly to the third party software via a PL/SQL API. This section addresses the setup from the perspective of Oracle WMS.

LPN Summary Label

The LPN Summary label should be printed during the business process of receipt. This is done by assigning the LPN Summary label type to the Receipt business flow. Only one format is required for this label type, and it should be set as the default format. This format, which will be named LPN Summary Format 1, requires only the following four fields:

- License Plate Number
- Item
- UOM

- Quantity

No label format rules need be defined for this label type, because there is only one label format and the system will automatically retrieve the default format if no label format is found by any rules.

Shipping Content Label

The Shipping Content label should be printed during the business process of pick drop. This is done by assigning the Shipping Content label type to the Pick Drop business flow. This format requires two formats, and the format selection will depend on the shipment method used. The two formats differ only in the layout of hard-coded text that is embedded in the label format; they both include exactly the same data. Therefore, two formats, UPS LTL Shipping Summary (set as the default format), and FedEx Shipping Summary, should be setup. Both formats include the following fields:

- Delivery Number
- Customer
- Ship to Address
- Ship to State
- Ship to Postal Code
- License Plate Number
- Item
- Delivery Quantity

The last setup step in Oracle WMS is to setup rules that differentiate when each of the two Shipping Content labels should be printed. Only one rule need be defined. This rule will return the FedEx Shipping Summary label if the ship method is set to FedEx. If the ship method is set to anything else, then this rule will not return any values, and the default format will be selected.

FedEx Shipping Summary Return value FedEx Shipping Summary / weight 100

Sales Order Header > Ship Method Code = Constant Number > FedEx

Output

The data, along with the format name, will be provided via an XML file to the third-party label printing software. The third-party label printing software will then

format the data as defined in the label format identified in the format name, adding barcodes, and interfacing with the printer indicated in the XML file.

Operation

The warehouse is now ready for operation.

- Putaway from purchase order receipt will be directed to the appropriate locators depending on the transaction unit-of-measure, locator capacity, and inspection results. Labels that display the LPN contents will be printed prior to putaway.
- The Min-Max Planning report, followed by the Move Order Pick Slip report, will create tasks to replenish the locators in CASE and EACH that are below their minimum values. Only qualified operators can complete the tasks.
- Sales order pick release will create tasks to move material from BULK, CASE, or EACH, depending on sales order quantity, to the staging lane. Only qualified operators can complete the tasks.

Additional Features

This setup documented here is for a very basic warehouse. While it is sufficient to demonstrate some of the basic setup required for Oracle WMS, many other features were bypassed. The following features are also available with Oracle WMS, and are documented in detail in the users guide and throughout this implementation manual. This is not meant as a complete list of the features available with Oracle WMS.

Pick Methodology

Tasks can be grouped by various criteria so that one operator is responsible for completing all tasks of a group. For instance, by using the order picking pick methodology, one operator will get dispatched all tasks for a single sales order to aid in the consolidation process.

Cartonization

The system can suggest the preferred type of container into which a group of sales order lines should be picked or packed. Combined with order picking, operators can pack an entire sales order into the optimal shipping carton during the picking execution process. Cartonization can also be used to build pallets of standard pack quantities as part of the inbound process flow.

Crossdocking

Purchase order receipts can be directed to the appropriate staging lane for a backordered sales order, completely bypassing the non-value-added step of putaway to inventory.

Lot & Serial Attributes

Particular attributes, such as grade, color, fab site, or country of origin, may vary from lot to lot, or serial to serial. These attributes can be tracked and queried. Putaway locations can be selected based on these attributes, and particular attributes can be allocated for certain customers or for other reasons using these attributes.

Lot Transactions & Genealogy

Particular lots can be split if their defining characteristics have changed. Lots may need to be merged if they can no longer be differentiated. The complete genealogy of a lot must be maintained for quality reasons and regulatory compliance, including any split / merge transactions, as well as the composition lots that were used in manufacturing to build the assembly lot.

Dispatched Cycle Counts

Cycle counts, like replenishment and picking tasks, should be sent directly to qualified operators on their handheld devices. Discrepancies between when the cycle count is performed and when it is recorded in the system are eliminated, and cycle counts can be interleaved with the rest of the tasks, or performed only at the end of the day.

Consolidation Support

Consolidation of orders that are picked by multiple operators and/or picked into multiple LPNs is aided by the system by directing the operator to LPNs of the same delivery. Reports further assist consolidation of all LPNs for a single order, delivery, or trip. The system warns if trips and deliveries are about to be shipped if material that has been staged is missing.

Dock Management

Staging lanes can be chosen automatically based by the system based on trip appointments that have been setup in advance of pick release. Workload can be balanced across multiple staging lanes associated to a single dock door.

Cost Groups

Accounting groups for material is tracked at the material level, rather than at the subinventory level, enabling subinventories to more accurately reflect the physical zones of material in the warehouse.

Material Status

Particular lots or serials of an item, due to quality or other reasons, may not be available for all transactions. Furthermore, quarantine locators or subinventories may be defined which do not allow specific transactions on material that resides there. Material status enables the user to define which transactions are allowed and disallowed for each lot, serial, locator, and subinventory.

Material Handling Device Integration

The material handling device integration toolkit enables the system to export data through several different methods to material handling equipment, such as pick-to-light, carousels, and conveyor systems. The material handling equipment is then able to use the exported data to operate in the appropriate way.

Directed Picking for Manufacturing

Picking tasks for manufacturing requirements can be sent directly to qualified warehouse operators in the same way that sales order picking tasks are sent to operators, leveraging crossdocking, Rules Engine, label printing, and change management features that are available with sales order tasks.

Directed Completion for Manufacturing

Assemblies can be completed directly into LPNs from manufacturing. The LPNs then use the Rules Engine to direct putaway to the best locator, and also leverage crossdocking and label printing.

This chapter discusses setting up the Oracle Warehouse Management system, including the following:

- [Overview of Warehouse Management Setup](#) on page 2-2
- [Related Product Setup](#) on page 2-3
- [Oracle Warehouse Management Setup Overview](#) on page 2-4
- [Warehouse Setup](#) on page 2-9
- [Material Setup](#) on page 2-24
- [Task Management Setup](#) on page 2-38
- [Compliance Labeling Setup](#) on page 2-52
- [Cost Group Setup](#) on page 2-62
- [Inbound Setup](#) on page 2-67
- [Outbound Setup](#) on page 2-71

Overview of Warehouse Management Setup

Setting up covers the standard setup for Oracle Warehouse Management. The chapter is organized into the following major sections:

- [Overview of Oracle Warehouse Management Setup](#)
- [Related Product Setup steps](#)
- [Setting Up the Oracle Warehouse Management system](#)

Note: This chapter assumes that you have knowledge of Oracle Inventory, Oracle Bills of Material, Oracle Receiving, Oracle Order Management, and Oracle Shipping.

This section provides an overview of the setup requirements for Oracle Warehouse Management system. For instructions, see the detailed setup instructions that are associated with each step.

Warehouse management setup includes the setup of related Oracle applications, such as Oracle Inventory and Oracle Bills of Material. If you already have an installation of Oracle Inventory and Oracle Bills of Material, you may only need to make warehouse management modifications specific to existing data, like existing items.

Oracle Applications Technology and the Implementation Wizard

The setup steps in this chapter explain how to implement the parts of Oracle Applications specific to Oracle Warehouse Management.

The Oracle Implementation Wizard guides you through the entire Oracle Applications setup. However, if you do not use the Wizard, you need to complete several other setup steps, including the following:

- Performing system-wide setup tasks, such as configuring concurrent managers and printers.
- Managing data security, which includes: setting up responsibilities to allow access to a specific set of business data and transactions, and assigning individual users to responsibilities.

If you are implementing more than one product, use the Oracle Applications Implementation Wizard to coordinate your setup activities. The Implementation Wizard guides you through the setup steps for the applications you installed. The

Wizard suggests logical sequences that satisfy cross-product implementation dependencies and reduces redundant setup steps. The Wizard also identifies steps that can be completed independently by several teams working in parallel to help you manage your implementation process most efficiently.

You can also use the Implementation Wizard as a resource center to graphically view the setup steps, read outline help for a setup activity, and open the appropriate setup window. By using the Wizard to record comments for each step, you can also document your implementation for further reference and review.

See Also

Implementation Wizard, *Oracle Applications Implementation User's Guide*

Oracle System Administration, *Oracle Applications System Administrator's Guide*

Setting Up Oracle Workflow, *Oracle Workflow User's Guide*

Related Product Setup

To use Warehouse Management you must also install and setup Oracle Inventory, Oracle Purchasing (Receiving), and Oracle Order Management (Shipping).

Oracle Inventory

Set up Oracle Inventory as described in Overview of Setting Up, *Oracle Inventory User's Guide*.

Oracle Bills of Material

Set up Oracle Bills of Material as described in Overview of Setting Up, *Oracle Bills of Material User's Guide*.

Oracle Purchasing

Set up Oracle Purchasing as described in Overview of Setting Up, *Oracle Purchasing User's Guide*.

Oracle Cost Management

Set up Oracle Cost Management as described in Overview of Setting Up, *Oracle Cost Management User's Guide*.

Oracle Order Management

Set up Oracle Order Management as described in Overview of Setting Up, *Oracle Order Management User's Guide*.

Oracle Work In Process

Set up Oracle Work in Process as described in Overview of Setting Up, *Oracle Work In Process User's Guide*.

Oracle Warehouse Management Setup Overview

Setup for Warehouse Management is divided into the following sections:

- [Warehouse setup](#)
 - Setting up warehouse organizations
 - Setting up warehouse-related subinventory parameters
 - Setting up warehouse-related locator parameters
 - Setting up dock door-to-staging lane relationships
- [Material setup](#)
 - Setting up item attributes
 - Setting up material statuses
 - Setting up lot and serial attributes
- [Task management setup](#)
 - Setting up resources
 - Setting up or verifying equipment items
 - Setting up equipment resources
 - Setting up warehouse task types
 - Setting up departments
 - Setting up task type assignment rules
- [Labeling setup](#)
 - Defining label formats
 - Associating label types to business flows

- Setting up label format assignment rules
- [Cost group setup](#)
 - Defining inventory cost groups
 - Specifying the default cost group in the Organization Parameters window
 - Setting up cost group rules
- [Inbound logistics setup](#)
 - Setting up receiving parameters
 - Setting up put away rules
- [Outbound logistics setup](#)
 - Setting up cartonization
 - Defining pick methodologies
 - Setting up pick wave rules
 - Defining shipping parameters
 - Setting up picking rules

Setting Up the Oracle Warehouse Management System

This section includes a setup checklist, and the detailed setup steps for Warehouse Management. Warehouse management contains the following setup areas:

- [Setup check list](#)
- [Warehouse setup](#)
- [Material setup](#)
- [Task Management setup](#)
- [Compliance Labeling setup](#)
- [Cost Group setup](#)
- [Inbound setup](#)
- [Outbound setup](#)

Setup Check List

The following table displays the required setup steps necessary for Oracle Warehouse Management. The table also displays the location of the detailed documentation for each step. You may be required to refer to another Oracle application user’s guide, in addition to this guide, for information.

Table 2–1 Oracle WMS Setup Steps

Setup Step	Reference	Notes
Define profile options	Chapter 2, <i>Oracle System Administration User’s Guide</i>	
Define mobile user ID	Chapter 2, <i>Oracle System Administration User’s Guide</i>	
Define warehouse parameters	Chapter 2, Oracle WMS Implementation Guide	
Define subinventory attributes	Chapter 2, Oracle WMS Implementation Guide	
Define locator attributes	Chapter 2, Oracle WMS Implementation Guide	
Define dock door to staging lane relationships	Chapter 2, Oracle WMS Implementation Guide	
Define shipping networks	Chapter 2, <i>Oracle Shipping Execution User’s Guide</i>	
Define calendars	Chapter 1, <i>Oracle Inventory User’s Guide</i> Chapter 1, <i>Oracle Bills of Material User’s Guide</i>	
Define calendar exception templates	Chapter 1, <i>Oracle Inventory User’s Guide</i> Chapter 1, <i>Oracle Bills of Material User’s Guide</i>	
Define unit of measure	Chapter 1, <i>Oracle Inventory User’s Guide</i> Chapter 3, <i>Oracle Inventory User’s Guide</i>	
Define item attributes for WMS	Chapter 2, Oracle WMS Implementation Guide	

Table 2–1 Oracle WMS Setup Steps

Setup Step	Reference	Notes
Define material statuses	Chapter 2, Oracle WMS Implementation Guide Chapter 4, Oracle WMS User's Guide	
Define lot and serial attributes	Chapter 2, Oracle WMS Implementation Guide Chapter 4, Oracle WMS Implementation Guide	
Assign descriptive flexfield context mapping	Chapter 2, Oracle WMS Implementation Guide	
Define warehouse resources	Chapter 2, Oracle WMS Implementation Guide	
Define equipment items	Chapter 2, Oracle WMS Implementation Guide	
Define equipment serial numbers	Chapter 2, Oracle WMS Implementation Guide	
Define departments	Chapter 2, Oracle WMS Implementation Guide	
Define transaction reasons	Chapter 20, Oracle WMS Implementation Guide	
Define label formats	Chapter 2, Oracle WMS Implementation Guide	
Define associated label formats to business flows	Chapter 2, Oracle WMS Implementation Guide	
Assign labels to printers	Chapter 10, Oracle WMS Implementation Guide	
Define cost groups	Chapter 2, Oracle WMS Implementation Guide	
Define account alias	Chapter 1, Oracle Inventory User's Guide	
Define receiving options	Chapter 9, Oracle WMS Implementation Guide Chapter 5, Oracle WMS User's Guide	

Table 2–1 Oracle WMS Setup Steps

Setup Step	Reference	Notes
Define pick slip grouping rules	Chapter 1, <i>Oracle Shipping Execution User's Guide</i> or Chapter 26, <i>Oracle Order Management Suite Implementation Guide</i>	
Define release sequence rules	Chapter 3, <i>Oracle WMS User's Guide</i> Chapter 14, Oracle WMS Implementation Guide	
Define release rules	Chapter 3, <i>Oracle WMS User's Guide</i> Chapter 14, Oracle WMS Implementation Guide	
Define container types	Chapter 1, <i>Oracle Shipping Execution User's guide</i> or Chapter 26, <i>Oracle Order management Suite Implementation Guide</i>	
Define cartonization groups	Chapter 2, Oracle WMS Implementation Guide	
Define cartonization category sets	Chapter 2, Oracle WMS Implementation Guide Chapter 1, <i>Oracle Inventory User's Guide</i>	
Define shipping parameters	Chapter 2, Oracle WMS Implementation Guide	
Define task types	Chapter 2, Oracle WMS Implementation Guide	
Define task type assignment rules	Chapter 2, Oracle WMS Implementation Guide Chapter 3, <i>Oracle WMS User's Guide</i>	

Table 2–1 Oracle WMS Setup Steps

Setup Step	Reference	Notes
Define warehouse strategy	Chapter 3, <i>Oracle WMS User's Guide</i> Chapter 2, <i>Oracle WMS Implementation Guide</i>	
Define strategy assignments	Chapter 1, <i>Oracle WMS User's Guide</i> Chapter 3, <i>Oracle WMS User's Guide</i>	
Define warehouse strategy search order	Chapter 2, Oracle WMS Implementation Guide Chapter 3, <i>Oracle WMS User's Guide</i>	

Warehouse Setup

Warehouse configuration requires you first set up your warehouse as an inventory organization, and then select parameters that identify the organization as a warehouse. Warehouse configuration also includes defining the appropriate subinventories to represent the zones within your warehouse, as well as defining appropriate locators, and assigning dock doors to their related staging lanes.

Warehouse setup includes the following tasks:

- [Setting up warehouse organizations](#)
- [Setting up warehouse-related subinventory parameters](#)
- [Setting up warehouse-related locator parameters](#)
- [Setting up dock door to staging lane relationships](#)

Note: When you set up your organization parameters, you should specify a default cost group. Therefore, you should set up the default cost group before setting up the organization.

The following list provides the new or enhanced attributes in Oracle Inventory that you set up for warehouse related organizations:

- Organization parameters

- New warehouse tab in the Inventory Organizations Parameters form
- Default cost group
- License Plate Number (LPN) information
- Default picking rule
- WMS enabled check box
- Capacity weight and volume unit of measures
- Default put away rule
- Defaults pick task type
- Default replenishment task type
- Cartonization option
- Time zone
- Default cycle count header
- Subinventory attributes
 - Subinventory status
 - Default cost group
 - Cartonization option
 - LPN controlled option
 - Locator controlled option
 - Default locator status
 - Picking unit of measure (UOM)
 - Picking order (functionality change)
- Locator attributes
 - Locator type
 - Locator status
 - Locator capacity
 - Pick UOM associated with the locator
 - Locator dimensions (length, width, and height)
 - Locator coordinates (X, Y, and Z)

- Define dock door to staging lane relationships

To set up a warehouse, set up an inventory organization and make modifications as described in the following instructions. For specific instructions on setting up organizations, see: Organization Parameters, *Oracle Inventory User's Guide*.

How to Set Up Warehouse Organizations

1. Navigate to the Organization setup window.

Figure 2–1 Organization Window

The screenshot shows the 'Organization' window with the following details:

- Name:** WMS-WH3
- Type:** (empty)
- Dates:**
 - From:** 17-OCT-2001
 - To:** (empty)
- Location:** WH3LOC
- Internal or External:** Internal
- Location Address:** REDWOOD SHORES...Redwood Shores.CA.94065.San Mateo.United States..
- Internal Address:** (empty)
- Organization Classifications:**
 - Name:** Inventory Organization
 - Enabled:** ☒
 - Others:** (button)

2. Set up your warehouse organization in the same way in which you set up a standard inventory organization. In the Organizations window, make sure to specify an organization classification of Inventory Organization.
3. After you set up standard organization information, save your work, and then navigate to the Organization Parameters window.
4. In addition to specifying the standard organization parameters, set up the following parameters for the Warehouse organization:
 - On the Inventory Parameters tab, select the WMS Enabled check box.

Note: Specifying that the organization is a WMS enabled organization, enables you to use LPNs, task management, cost groups, rules, and other WMS functionality in this organization. If the organization is not WMS enabled, but WMS is still licensed and installed as a product, you will still be able to use the WMS-related material status, lot and serial attributes, and lot split and merge features.

- On the Costing Information tab, select a default cost group.
If the system does not find a cost group when executing rules, or at the subinventory level, it will assign the default cost group.
- On the Revision, Lot, Serial, LPN tab, specify how you want the system to generate License Plate Numbers (LPNs).

Note: LPNs must be unique across organizations. Setting the parameters on this tab enables the system to generate license plate numbers on demand, or through a concurrent request. As long as the number is unique, Oracle WMS also enables users to generate their own license plate numbers.

- Note the following information before you set up the Warehouse and Warehouse Task Management tabs:

Subinventories in a WMS enabled organization must be locator controlled (even if there is only one locator in each subinventory). You must make all subinventories in your organization locator controlled before setting the WMS enabled flag in the Organization Parameters window for a preexisting, non-WMS organization.

Because every item in a subinventory for non-WMS organizations must have the same cost group, WMS organizations with on-balances cannot be switched back to a standard inventory organization without significant effort. It is therefore advised that you do not select the WMS enabled parameter, until you have clearly decided to implement WMS methodologies in the organization.

Figure 2–2 Organization Parameters Window-Warehouse Tab

The screenshot shows the 'Organization Parameters (W1)' window with the 'Warehouse' tab selected. The window contains several sections with various settings:

- Crossdocking:**
 - ☒ Enabled
 - ☐ Prioritize Manufacturing
 - Delivery Subinventory for Mfg: [Text Field]
 - Delivery Locator for Mfg: [Text Field]
- Time Zone:** [Text Field] EST
- Default Cycle Count Header:** [Text Field]
- Default Rules:**
 - Picking: [Text Field] Default Pick Rule (no restrictions)
 - Put Away: [Text Field] Default Put away
- Cartonization:**
 - Enable Cartonization: [Dropdown Menu] Controlled at Subinventory
 - ☐ Cartonize Sales Orders
 - ☐ Cartonize Manufacturing
- ☐ Direct Shipping Allowed

- On the Warehouse tab, select the Enabled check box in the Crossdocking region to indicate if you want the system to direct the user to cross dock material that was backordered.
- Select the Prioritize Manufacturing option if you wish backordered component requirements for jobs and schedules to be prioritized above sales orders when crossdocking opportunities are available for both. This is only applicable if an organization has items that are both entered on sales orders for customers and used as a component for manufacturing.
- Enter a Delivery Subinventory for Mfg and Delivery Locator for Mfg if crossdocking is enabled for the organization. A crossdocked material requirement for a push material requirement is transferred directly from receiving to WIP; from the operator's perspective, it never goes through

inventory. However, a purchase order receipt and WIP issue transaction must be recorded for costing and other technical reasons. These transactions must be posted to a particular subinventory and locator. These two options are used to determine where that transaction should be posted.

- In the Time Zone field, use the list of values to optionally select the time zone in which your warehouse resides.
- If required by the discrepancy management workflows, in the Default Cycle Count Header field, enter the default cycle count header that will be used to request cycle counts.
- In the Picking and Put Away fields, optionally select the appropriate default picking and put away rules. If no matching strategy can be found using the matrix assignments in the Rules Workbench, this rule will be used to allocate space or materials.
- In the Enable Cartonization field, specify at which level you want the cartonization process to be controlled at the time of pick release. The cartonization process suggests the type of container to be used during the picking operation.

The cartonization process includes three levels of control: Enable cartonization at the organization level, disable cartonization at the organization level, and enable cartonization at the subinventory level.

- Yes: Pick released lines will be cartonized regardless of the subinventory from which they were allocated
- No: No pick released lines will be cartonized
- Controlled at Subinventory: The system will first check the cartonization flag on the subinventory definition before cartonization

The cartonization flag on the subinventory only has two options: enabled or disabled. This flag is used only if the organization parameter is set to Controlled at Subinventory.

In addition, there are two flags to independently control whether cartonization should be performed during sales order pick release or manufacturing component pick release. Different pick methodologies can be used for these different business flows.

Figure 2–3 Organization Parameters Window-Warehouse Tasks Management Tab

The screenshot shows the 'Organization Parameters (W1)' window with the 'Warehouse Task Management' tab selected. The window contains several sections for configuring warehouse tasks:

- Default Task Types:** This section contains four text input fields: 'Pick Task Type' (with a dropdown arrow), 'Replenish Task Type', 'Move Order Transfer Task Type', and 'Move Order Issue Task Type'.
- Put Away Tasks:** This section includes a checkbox labeled 'Pregenerate after Receipt' (which is currently unchecked) and a text input field for 'Regeneration Interval Minutes' with the value '15'.
- Cluster Picking:** This section contains a text input field for 'Skip Task Wait Minutes' and another for 'Maximum Clusters'.
- Consolidation:** This section contains a dropdown menu for 'Outbound Consolidation Plan'.

- On the Warehouse Task Management tab, in the Pick Task Type and Replenish Task Type, specify default picking and replenishment task types that are required for your warehouse. If no task type rule with the right system task type and all restrictions being met can be found, then this task type will be used for the task.
- In the Move Order Transfer Task Type and Move Order Issue Task Type fields, specify the default move order transfer and move order issue task types. If no task type rule with the right system task type and all restrictions being met can be found, then this task type will be used for the task.
- In the Put Away Tasks region, select the Pregenerate after Receipt check box to specify whether the system should allocate space for the material when items are initially received.

If you do not select the Pregenerate after Receipt check box, the system will allocate space only after the user initiates the put away process.

- With a value in the Regeneration Interval Minutes field, if you elected to pre generate put away tasks, these tasks/suggestions will get regenerated if the elapsed time between initial pre generation and actual put away exceeds the value given in the Regeneration Interval Minutes field. This is done so the suggested storage locations can be updated based on the latest space availability estimates.
- Enter a value for Skip Task Wait Minutes. This is the number of minutes that a task skipped by a user will be held by the system before it is returned to the pool of pending tasks to be dispatched again.
- In the Cluster Picking region, enter the maximum clusters for cluster picking. This is an optional field. Mobile users will see this as the default value in the Max Clusters field in the Cluster Picking mobile screen.
- In the Consolidation region, enter the outbound consolidation plan. The Outbound Consolidation Plan has three options:
 - LPN If LPN based consolidation is selected, all picked material that has to be consolidated together are directed to be dropped into the same License Plate Number.

LPN based consolidation is the default option and ensures current system behavior is retained for existing customers who want to continue operating their facility as-is.
 - Locator If Locator based consolidation is selected, picked material is consolidated into locators.
 - Locator and LPN If Locator and LPN based consolidation is selected, picked material is consolidated into locators. In addition, consolidation LPN suggestions within the consolidation locator are provided.

5. Save your work.

Set Up Subinventory Parameters

With Oracle WMS, the subinventory represents the physical zones of a warehouse or facility. You need to define at least one subinventory for each warehouse organization. The following figure illustrates subinventories that you might define for a warehouse. See: *Defining Subinventories, Oracle Inventory User's Guide*.

Figure 2–4 Warehouse Zones

Bulk	Hazardous material	
Case	Refrigerated	
Each	High value	
Receiving	Inspection	Shipping

Note: Unlike Oracle Inventory, for warehouse subinventories, you do not need to set up or associate any accounts with the subinventory.

The Oracle WMS has extended the subinventory definition with the following additional parameters:

- [Material status](#)
- [Default cost group](#)
- [LPN controlled option](#)
- Cartonization flag
- Pick UOM
- Default locator status

How to Set Up Warehouse-Related Subinventory Attributes

1. Navigate to the Subinventories Window.

Figure 2–5 Subinventories Window

The screenshot shows the 'Subinventories (WH3)' window. At the top, there are fields for 'Name' (CASE PICK), 'Status' (Active), 'Description' (CASE PICK), and 'Default Cost Group' ([CG-4047]). Below these are tabs for 'Main' and 'Accounts'. The 'Main' tab is selected, showing a 'Parameters' section with checkboxes for 'Quantity Tracked', 'Asset Subinventory', 'Depreciable', 'Include in ATP', 'Allow Reservation', 'Nettable', 'LPN Controlled', and 'Enable Cartonization'. To the right of these are fields for 'Locator Control' (Prespecified), 'Default Locator Status' (Active), 'Picking Order' (2), 'Inactive On', 'Notify', 'Location', and 'Picking UOM' (DZ). Below the parameters are 'Lead Times' (Pre-Processing, Processing, Post-Processing) and 'Sourcing' (Type, Organization, Subinventory) sections.

- 2. Query on or define the subinventory for which you want to define warehouse-related attributes.
- 3. In the Status field, use the list of values to select the material status associated with this subinventory.
- 4. In the Default Cost Group field, enter the default cost group for material that will be received into the subinventory.

Note: If the rules engine fails to select an appropriate cost group for the newly received material, then the material will be assigned to the default cost group of the subinventory into which it is being received.

- 5. Selecting the LPN controlled check box enables you to specify if you want to be able to transact material using LPNs in the subinventory.
- Packing is not allowed in non-LPN controlled subinventories. If you do not select the LPN Controlled check box, LPNs transacted into the subinventory will be automatically unpacked and their contents will be delivered loose to the locator.

6. Whenever a pick comes from this subinventory, if you want the system to suggest packing configurations, and then generate labels for the suggested packed LPNs, select the Enable Cartonization check box.

This flag is only valid when the organization-level cartonization parameter is set to Controlled at Subinventory.

7. In the Default Locator Status field, select the default material status that will be associated with each locator in the subinventory.

You can override the default locator status for each locator.

Note: For WMS-controlled organizations, locator control of a subinventory is restricted to Prespecified or Dynamic.

8. In the Picking Order field, enter a sequence number so that the system can determine the sequencing of the pick path through the warehouse.

The system directs pickers to pick material in the subinventories, in the order that you specify in the subinventory's Picking Order field. Thus, these values determine the picking path through the warehouse.

9. In the Picking UOM field, select the picking unit of measure transacted from this subinventory. For example, if a your BULK subinventory holds pallets, you might select a picking UOM of Pallet.
10. When you finish defining or modifying the subinventory, save your work.

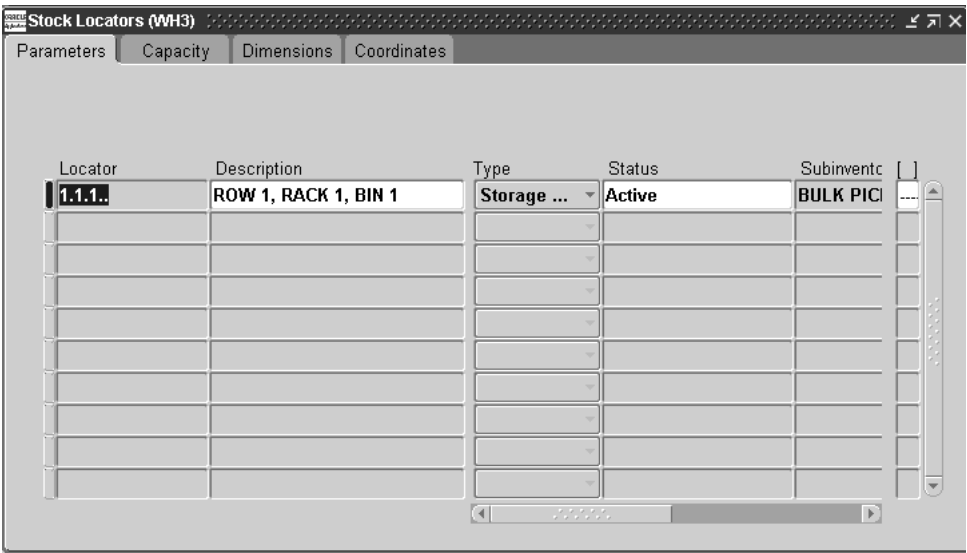
Set Up Locator Parameters

Locators identify physical areas within subinventories where you store items, such as rack/bin or aisle/row/bin locations. You also set up [dock doors and staging lanes](#) as locators. See: *Defining Stock Locators, Oracle Inventory User's Guide*.

How to Set Up Warehouse-Related Locator Attributes

1. Navigate to the Stock Locators window.

Figure 2–6 Stock Locators Window



- 2. In the Picking Order field (scroll to the right to view this field), enter the picking order for the locator.

The locator pick sequence determines the sequence in which the system dispatches tasks to the user within a subinventory. Thus, the locator picking order defines the picking path in the warehouse.
- 3. In the Type field, select Storage Locator from the list of values. (Storage is selected only if items will be stored in the locator.)
- 4. In the Status field, select the material status associated with this locator. For example, you might select a material status that has been designed to disallows transactions and prevent any transactions against the item from the locator.

Note: Material status is explained in more detail in the chapter, Explaining Supply Chain and Inventory Management, [Material Status Overview](#) topic.

- 5. If you want to specify capacity constraints for this locator, select the Capacity tab and enter the volume, weight, number of units, and capacity information that can be stored in this locator.

The system uses three capacity constraint values to calculate the available capacity in the storage locator so that the WMS Rules Engine can suggest put away locations for material that have the appropriate remaining capacity. For best results, the units of measure that you enter here should be convertible into the units of measure for those items that might be stored in the locator.

6. If you want to enter a locator-specific picking unit of measure, for the locator, select the Dimensions tab, Pick UOM field, and then use the list of values to select the appropriate unit of measure.

The picking unit of measure defaults from the unit of measure at the subinventory level, but can be changed at the locator level.

7. In the Dimensions region, specify the dimensions of the locator.

The locator dimensions are used to calculate the available capacity in the locator so that the system can suggest storage locations for material where there is sufficient available space.

8. If you want to specify coordinates for this locator, select the Coordinates tab and enter the appropriate X, Y, and Z coordinates.

The X, Y, and Z coordinates are used to sequence tasks for dispatching to the warehouse users, if picking orders are not specified. However, X, Y, and Z coordinates do not take into account any walls or other barriers that might exist between stock locators and a subinventory.

9. When you are finished defining or modifying the locator, save your work.

Setting Up Dock Door to Staging Lane Relationships

In Oracle WMS, dock doors and staging lanes are both defined as stock locators.

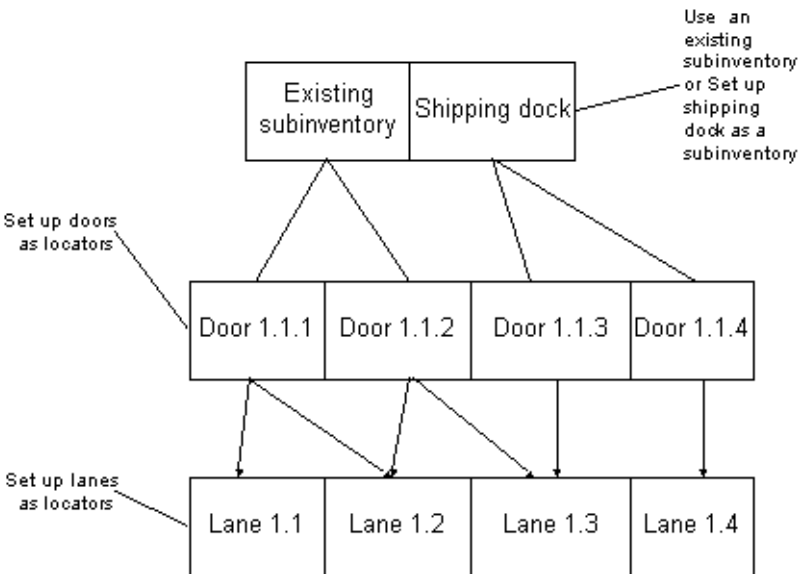
If you use Oracle Shipping Execution to plan trips for departures from your warehouse or facility, Oracle WMS enables you to schedule appointments for dock doors from which to load the LPNs for a specific trip.

The system can automatically select staging lanes near the scheduled dock door in which to stage the material prior to shipment. However, for the system to automatically select staging lanes, you must set up dock doors and staging lanes. After you set them up, you must define relationships between the dock doors and the staging lanes that service them.

Note: With Oracle WMS, whether or not you are using trips and dock door appointments, you must create at least one staging lane.

The following figure provides an example of staging lane, dock door, and shipping dock relationships.

Figure 2–7 Staging Lane and Dock Door Relationships



Note: You do not need to create a new subinventory just to define dock door and staging lane locators. You can define dock door and staging lane locators as part of another existing storage subinventory. However, defining a separate subinventory excludes the dock door-defined subinventory from cycle counts. This prevents a staged item, in the process of being loaded onto a vehicle, from being included in the cycle count. Also note that staging lanes should be assigned to a subinventory.

How to Set Up Staging Lanes and Dock Doors

You set up staging lanes and dock doors the same as you do other subinventory locators. However, when you set them up, you specify a staging lanes and dock doors with locator types of Staging Lane and Dock Door, respectively.

Note: It is recommended that you do not set capacity constraints for staging lanes and dock doors, because material allocation processes might fail due to limited space in a staging lane.

How to Set Up Dock Door to Staging Lane Relationships

1. Navigate to the Associate Staging Lanes to Dock Door window.

Figure 2–8 Associate Staging Lanes to Dock Door Window

Number	Subinventory	Lane	Description	Enabled
				☒
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐

2. In the Dock Door field, use the list of values to select the dock door that you want to assign a staging lane.
The system automatically populates the Subinventory and Description fields.
3. In the Staging Lanes region, Number field, enter a sequence number that represents the proximity of the staging lane to the dock door.
When selecting a staging lane, Oracle WMS will select an available staging lane in the order of the sequence indicated here.
4. In the Staging Lanes region, Subinventory field, enter the subinventory and locator of the staging lane that serves the dock door.
5. Save your work.

Material Setup

Material setup includes the following tasks:

- [Setting up item attributes and mobile UI attachments](#)
- [Setting up material statuses](#)

- [Setting up lot and serial attributes](#)

Set Up Item Attributes

In addition to setting up WMS-related item attributes, you use the same item setup steps that you do for setting up items in Oracle Inventory. For instructions on how to set up standard inventory items, see: *Defining Items, Oracle Inventory User's Guide*.

How to Set Up WMS-related Item Attributes

1. Navigate to the Master Items window.

Figure 2–9 Master Item Window - Inventory Tab

The screenshot shows the 'Master Item (V1)' window with the 'Inventory' tab selected. The top section contains fields for Organization (V1), Item (AS18947), and Description (Sentinel Deluxe Desktop). Below this is a 'Display Attributes' section with radio buttons for Master, Org, and All. The main area is divided into several sections: 'Main' (with tabs for Main, Inventory, Bills of Material, Asset Management, Costing, Purchasing, Receiving, and Physical Attributes), 'Cycle Count' (with checkboxes for Transactable, Check Material Shortage, and Cycle Count Enabled, and input fields for Negative and Positive Measurement Error), 'Serial' (with a dropdown for Generation set to 'At Sales Order Issue', and input fields for Starting Prefix 'SM' and Starting Number '100000'), 'Material Status Control' (with checkboxes for Lot Status Enabled, Serial Status Enabled, Lot Split Enabled, Lot Merge Enabled, Lot Translate Enabled, Lot Substitution Enabled, and Bulk Picked, and input fields for Default Lot Status 'Active' and Default Serial Status 'Active'), and 'Restrict Subinventories' and 'Restrict Locators' (both checked).

2. If this item will be lot controlled, select the Inventory tab and specify the following lot attributes. If this item is not lot controlled go to step 3.

- If you want the system to automatically generate lot numbers, in the Lot Region, select Full Control, and enter a starting prefix and starting lot number.
- In the Material Status Control region (scroll to the right to access this region), select the Lot Status Enabled check box to indicate that each lot enabled transaction can be controlled with material status.
- In the Default Lot Status field, use the list of values to select a default material status that you want to be assigned to a newly received or created lot.

The status that you enter in the Default Lot Status field, will be the material status that appears as default whenever new material is received. If necessary, you can override the default status.

- If this lot can be split into multiple child lots, select the Lot Split Enabled check box.
 - If multiple lots can be merged into a single parent lot, select the Lot Merge Enabled check box.
3. If this item will be serial controlled, specify the following serial attributes. If this item is not serial controlled, then proceed to step 4.

Note: Serial numbers can be pre-defined, generated at the time of receipt, or generated at the time of issue.

- If the item is serial controlled and you want the system to generate serial numbers for the item, in the Serial Region, Generation field, select the point where you want the serial number to be generated.
- In the Starting Prefix and Starting Number fields, enter the starting prefix and the starting number from which you want serials to be generated.
- In the Material Status Control region, select the Serial Status Enabled check box to indicate that serial enabled transactions can be controlled with material status.
- In the Default Serial Status field, use the list of values to select a default material status to be assigned to a newly received or created serial numbers.

The status that you enter as the default serial status, will be the material status that appears as default whenever new material is received. If necessary, you can override this status.

Note: Status control is not applicable to—and therefore not advised for— items that are serialized at sales order issue.

4. If you want to pick this item in bulk, select the Bulk Picked check box.

Note: Bulk picking requires that deliveries not be created prior to pick release unless the batch only contains one delivery.

5. Save your work.

WMS enables you to enter an item's dimensions. The system uses these dimensions to determine the appropriate container size when making cartonization suggestions.

Note: To make put away and cartonization suggestions, you must make sure that the units of measure used to indicate weight, volume, and dimensions of the item can be converted into the unit of measure that is used to indicate the locator capacity and container item capacity.

The following instructions explain how to enter physical dimensions for an item.

1. Navigate to the Master Items window, and select the Physical Attributes tab.

Figure 2–10 Master Item Window - Physical Attributes Tab

Master Item (V1)

Organization: **V1** **Vision Operations**

Item: **WAL-03 PC**

Description: **Personal Desktop Computer** [...]

Display Attributes
☒ Master ☐ Org ☐ All

Main **Inventory** **Bills of Material** **Costing** **Purchasing** **Receiving** **Physical Attributes** **General Planning**

Weight
 Unit of Measure: **Pounds**
 Unit Weight: **30**

Volume
 Unit of Measure: **Cubic foot**
 Unit Volume: **2**

Dimensions
 Unit of Measure:
 Length:
 Width:
 Height:

Container
☐ Container ☐ Vehicle (B)
 Container Type:
 Internal Volume:
 Maximum Load Weight:
 Minimum Fill Percent:

Type
☐ Collateral Item ☐ Electronic Format (J)
☐ Event (D) ☐ Downloadable (P)
☐ Equipment ☐ OM Indivisible (X)

2. In the Weight region, Unit of Measure field, select the unit of measure and enter a weight for the item.
3. In the Volume region, select the unit of measure associated with the volume and a unit volume.
4. In the Dimensions region, select the unit of measure in which the length, width, and height will be measured, and enter the item's length, width, and height.
5. Save your work.

Set Up Material Statuses

Material status codes enable you to control the movement and usage of material for portions of on-hand inventory (in the warehouse) that might have distinct differences because of grade, quality, or maturity level differences.

Using material status control enables you to control whether material can be picked or shipped on an internal order, picked or shipped to a customer, or can be issued

for a work order. You can also specify if some material needs to be quarantined until some activity, such as inspection is performed on it.

How to Set Up Material Statuses

Note: Before you set up material status control codes, you should identify which transaction types that you want to be restricted by material status. To do this, set the Material Status Control flag in the Transaction Types window.

1. Navigate to the Material Status Definition window.

Figure 2–11 *Material Status Definition Window*

2. Enter a name and description for the material status.

3. In the Usage region, select or clear each check box that indicates where this material status can be used.

For example, if you select the Subinventory check box, the system will enable you to assign the material status at the subinventory level.

4. In the Allowed Transactions column, select the transaction that you do not want to allow for the material status code, and then click the Move to Disallow List button.

To move a transaction back to the Allowed Transactions column, select the transaction and then click the Move to Allow List button.

5. Repeat step 4 for additional transactions that you either want to allow or disallow for the material status.
6. After you finish selecting the transactions, if you do not yet want to enable this material status, clear the Enabled check box.

Enabling a material status means that the status can be used by the system when setting up subinventories, and other system requirements. The Enabled check box defaults to selected.

Note: A material status that is currently in use cannot be disabled. Enabled material statuses cannot be modified, so make sure that your material status is correctly defined before enabling it, and using it in transactions.

7. When you are finished, save your work.

Set Up Lot and Serial Attributes

Setting up lot and serial attributes includes the following tasks:

- [Setting up lot and serial control](#)
- [Configuring lot and serial attribute Descriptive flexfields](#)

Setting Up Lot and Serial Control

With the WMS, you can better control a lot item by specifying the following material status lot and serial control attributes:

- Enabling lot control

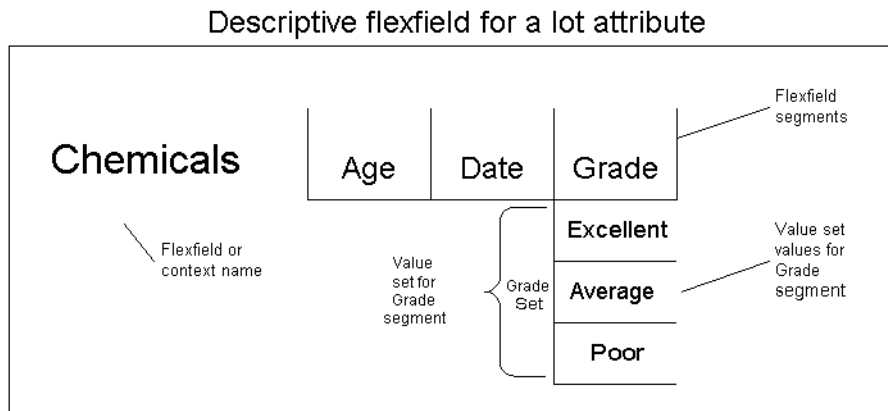
- Specifying a default lot status
- Enabling serial control
- Specifying a default serial control

When you enable lot and serial control for the material status of an item, you can restrict or expand the item's use based on the level of material status control. You enable lot and serial control by selecting Lot and Serial Enabled check boxes on the Inventory tab of the Master Items window.

With WMS items, you can also decide whether lots can be split or merged, and whether you want an item to be bulk picked.

Lot and serial attributes track the characteristics of items, based on lot and (or) serial numbers. Descriptive flexfields enable you to configure lot and serial attribute flexfields so that you capture only those lot and serial attributes that you need to maintain. The following figure provides an example of a flexfield defined for a lot attribute called, Chemicals.

Figure 2–12 Descriptive Flexfield Example



Configuring Lot and Serial Attribute Descriptive Flexfields

Configuring lot and serial attribute descriptive flexfields includes the following tasks:

- [Defining each attribute's value set](#)

- [Setting up descriptive flexfield contexts](#)
- [Setting up the segments in each context](#)
- [Compiling the flexfield](#)
- [Assigning context mapping by item category or item](#)

How to Define Attribute Value Sets for Lot and Serial Attributes

Value sets hold the actual values for a particular segment of a descriptive flexfield. Defining attribute value sets involves setting up the value set that is associated with a particular flexfield segment. For example, the following figure illustrates a value set for the Grade segment. In this case, the value set, Grade Set, includes three grades: Excellent, Average, and Poor.

Note: Before you define the value set for an attribute, you should determine its context requirements, including the types of values required for each of the context segment.

1. Navigate to the Value Sets window.

Figure 2–13 Value Sets Window

The screenshot shows the 'Value Sets' window with the following fields and options:

- Value Set Name:** WMS_GRADE
- Description:** (empty text field)
- Security Available:** ☐
- List Type:** List of Values (dropdown menu)
- Format Validation:**
 - Format Type:** Char (dropdown menu)
 - Maximum Size:** 20 (text field)
 - Precision:** (empty text field)
 - ☐ Numbers Only (0-9)
 - ☒ Uppercase Only (A-Z)
 - ☐ Right-justify and Zero-fill Numbers (0001)
 - Min Value:** (empty text field)
 - Max Value:** (empty text field)
- Value Validation:**
 - Validation Type:** Independent (dropdown menu)
 - Edit Information:** (button)

2. Define the value sets for your lot or serial attribute segments. For instructions about how to define value sets, see the *Oracle Flexfields User's Guide*.

Figure 2-14 Segment Values Window

Segment Values

☒ Value Set
 ☐ Key Flexfield
 ☐ Descriptive Flexfield
 ☐ Concurrent Program

Title: **Lot Attributes**
 Context: **Chemicals**

Independent Segment: **Grade**
 Dependent Segment:

Independent Value:
 Value Description:

Values (Grade)

Values, Effective
 Values, Hierarchy, Qualifiers

Value	Translated Value	Description	Enabled	
			From	To
AVERAGE	AVERAGE		☒	
EXCELLENT	EXCELLENT		☒	
GOOD	GOOD		☒	
			☐	
			☐	
			☐	
			☐	

3. After you finish setting up the value set, navigate to the Values window and enter the actual values for the value set.

How to Set Up Lot and Serial Descriptive Flexfield Contexts

Setting up lot and serial descriptive flexfield contexts involves defining a context for each type of item that will track different groups of attributes. You should define different contexts to do the following:

- Track different attributes for different types of items
- Provide different default values for different types of items

To set up lot and serial descriptive flexfield contexts:

1. Navigate to the Descriptive Flexfields Segments window.

Figure 2–15 Descriptive Flexfield Segments Window

Descriptive Flexfield Segments

Application: **Oracle Inventory** Title: **Lot Attributes**

☒ Freeze Flexfield Definition Segment Separator: **Period (.)**

Context Field

Prompt: **Context Value** ☐ Value Required

Default Value: ☐ Override Allowed (Display Context)

Reference Field: **LOT_CONTEXT_REF**

Context Field Values

Code	Name	Description	Enabled
Global Data Elements	Global Data Elements	Global Data Element Context	☒
Biotechnology	Biotechnology	Biotechnology	☒
Books	Books	Books	☒
Chemicals	Chemicals	Chemicals	☒
Food and Beverage	Food and Beverage	Food and Beverage Industry	☒
Fragrances	Fragrances	Fragrance Industry	☒

2. In the Title field, query on Lot Attributes to display the context codes that currently exist for lot attributes.
3. Set up lot and serial descriptive flexfield contexts according to the instructions in the *Oracle Flexfields User's Guide*.

How to Set Up Lot and Serial Descriptive Flexfield Segments

When you configure each attribute for each context, you specify the following:

- The database column in which to store the attribute. WMS supports data types of varchar, number, and date.
- Whether the attribute is required or optional
- The default value for the attribute
- The value set for the attribute. The value set determines the following:
 - The length of the attribute
 - The type of validation of the data. Attribute validation types include: no validation, independent validation, and table validation. Independent validation means that the attribute will be validated against a manually define list of values.

To set up lot and serial descriptive flexfield segments:

- 1. Navigate to the descriptive flexfields Segments window.

Figure 2–16 Segments Window

The screenshot shows the 'Segments (Lot Attributes) - Chemicals' window. It contains several sections: 'Name' with 'Grade', 'Column' with 'GRADE_CODE', 'Description' (empty), and 'Number' with '120'. There are checkboxes for 'Enabled' and 'Displayed'. The 'Validation' section includes 'Value Set' (WMS_GRADE), 'Default Type' (empty), and checkboxes for 'Required' and 'Security Enabled'. The 'Sizes' section has 'Display Size' (20), 'Description Size' (50), and 'Concatenated Description Size' (25). The 'Prompts' section has 'List of Values' (Grade) and 'Window' (Grade). A 'Value Set' button is at the bottom right.

- 2. Enter segment information according to the instructions in the *Oracle Flexfields User's Guide*.

How to Compile Descriptive Flexfields

After you define your descriptive flexfield, including all of its components, such as segments and values, you must freeze the flexfield definition by selecting the Freeze Flexfield Definition check box. Freezing the flexfield automatically compiles it. However you can compile your flexfield manually, by choosing Compile.

Note: To modify a flexfield, you must clear the Freeze Flexfield Definition check box.

For detailed instructions on compiling descriptive flexfields, see the *Oracle Flexfields User's Guide*.

Assigning Context Mapping by Item Category or Item

After you compile your flexfield, you need to navigate to the Descriptive Flexfield [Context Mapping](#) window and assign the attribute context to its associated item category or item. Only categories within one category set can be used in an organization to assign attributes at the category level.

Figure 2-17 Descriptive Flexfield Context Mapping Window

Descriptive Flex Context Mapping (WH3)

Flexfield Name: **Lot Attributes**

Context Column: **Category**

Category Set: **Inv.Items** Find

☐ Common to All Orgs

Context Assignment

Category	Context Value
VCT_CAT.MISC	Pulp and Paper

When you assign a context to an item or an item category the following occurs:

- The system prompts the user to enter the correct group of attributes for each type of item.
- Users can assign default contexts by item category or item number.
- Users can assign by categories that exist in any category set. However, by assigning an item to a context that is different than its owning category, then the item takes the attributes assigned at the item level.

Note: If an attribute is assigned to an item category, then the item inherits the attribute.

Task Management Setup

Task management setup includes the following tasks:

- [Setting up resources](#)
- [Setting up or verifying equipment items](#)
- [Setting up equipment resources](#)
- [Setting up warehouse task types](#)
- [Setting up departments](#)
- [Setting up task type assignment rules](#)

Set Up Warehouse Employee Resources

For the system to capture the skill set of each user, and then use this information to dispatch tasks to qualified users, each user defined in the system must be associated with an employee defined in Oracle Human Resources. For more information about setting up users and employees, refer to Oracle Applications System Administrator and Oracle Human Resources System user's guides.

Note: Only one person can be logged onto the mobile user interface, with one user name at a time. Therefore, users that will be using the system concurrently cannot share a username.

Oracle WMS enables you to define the types of employees who work in the warehouse. The BOM resources entity is used to capture the skill sets of employees required to perform a specific task. For each task that requires a unique set of skills, define a new resource. However, if the same set of skills can be used to perform a variety of tasks, you do not need to define individual resource types. In this case, a single resource type will suffice.

How to Set Up Warehouse Employee Resources

1. Navigate to the Resources window.

Figure 2–18 Resources Window - Employees

The screenshot shows the 'Resources (WH3)' window with the following fields and values:

- Resource: CDPK EMP
- Inactive On: (empty)
- Description: Cold Pick Unit
- Type: Person
- UOM: HR
- Charge Type: WIP Move
- Basis: Item
- Expenditure Type: (empty)

Below these fields are two main sections:

- Outside Processing:** Includes an 'Enabled' checkbox (unchecked) and an 'Item' field (empty).
- Costed:** Includes a checked 'Costed' checkbox, an 'Activity' field with '{Picking }', a 'Standard Rate' checkbox (unchecked), an 'Absorption Account' field with '01.520.5370.000000.000', and a 'Variance Account' field (empty).

At the bottom of the window are three buttons: 'Employees' (highlighted), 'Equipment', and 'Setups'. There are also 'Overheads' and 'Rates' buttons within the 'Costed' section.

2. In the Resource field, enter the resource (or skill set) name.
3. Enter a description.
4. In the Type field, select Person.

Note: If you select Person in the Type field the Employees button becomes enabled. If you select Machine in the Type field, the Equipment button becomes enabled. The Employees and Equipment buttons represent new functionality added to the Resources window for WMS.

5. Because they are not used by the WMS and will not affect warehouse-related processing, select any values for the following required fields:
 - UOM (typically HR)
 - Charge Type

- 6. Because Oracle WMS does not use the remaining fields in this window, leave them as is or blank.
- 7. Click the Employees to enter the warehouse employees with this resource’s skill set.

Figure 2–19 Employee [Resources] Window



- 8. In the Employee field, use the list of values to select the employee number of the employee that you want to associate with this resource.

Note: The employees that you enter here are the employees to whom the system will dispatch tasks that require this resource’s skill set. Also note that the employees that you select from the list of values are the employees that you set up in the Human Resources system.

- 9. Repeat step 8 to associate additional employees to this resource.
- 10. Save your work.

Set up or Verify Equipment Items

Equipment, such as forklifts, pallet jacks, and so on are used to perform tasks in a warehouse. In WMS, you set up equipment as a serialized item and a BOM resource. Users sign on to the serial number of the equipment and are then dispatched tasks appropriate to that equipment.

To set up equipment for use with WMS, you must do the following:

- Define the equipment as an item
- Define the item as an equipment type
- Specify the equipment as serial controlled (predefined)
- Enter the equipment's capacity (optional)
- Generate serial numbers for the individual pieces of equipment

You can apply the Equipment Item Template to your equipment items to ensure that standard equipment-item attributes are properly set. For more information about applying item templates, see: *Copying Item Templates, Oracle Inventory User's Guide*.

How to Set Up Warehouse Equipment

1. Navigate to the Master Items window.

Figure 2–20 Master Item Window - Equipment Attributes

Master Item (V1)

Organization: **V1** **Vision Operations**

Item: **ABC_FkLft**

Description: **Fork Lift Equipment for UG** [...]

Display Attributes: ☒ Master ☐ Org ☐ All

Tabs: Main | Inventory | Bills of Material | Costing | Purchasing | Receiving | **Physical Attributes** | General Planning

Weight

Unit of Measure: []

Unit Weight: []

Volume

Unit of Measure: []

Unit Volume: []

Dimensions

Unit of Measure: []

Length: []

Width: []

Height: []

Container

☐ Container ☒ Vehicle (B)

Container Type: []

Internal Volume: [**100**]

Maximum Load Weight: [**500**]

Minimum Fill Percent: []

Type

☐ Collateral Item ☐ Electronic Format (J)

☐ Event (D) ☐ Downloadable (P)

☒ Equipment ☐ OM Indivisible (X)

2. Enter a Name and Description for the equipment.
3. To set the equipment's standard attributes, apply the Equipment Item template to the item.
4. Save your work.
5. On the Inventory tab, verify that the Transactable check box is selected.

Making the equipment transactable ensures that it can be received into the warehouse.

6. In the Serial region, select how you want the item's serial number defined, either At Receipt or Predefined).

If you select Predefined, then you must enter a starting prefix and starting serial number. If you select At Receipt, you can optionally enter a starting prefix and starting serial number.

7. Enter a starting serial prefix and starting serial number in their respective fields.

8. Select the Physical Attributes tab.
9. In the Container Region, select the Vehicle check box.
10. Entering the equipment capacity enables the system to split the tasks in such a way that a single task can be handled by the smallest equipment available to perform the task.

Note: If you do not specify an equipment capacity, the system assumes that the equipment has infinite capacity.

11. In the Type region, Item Type field, select the equipment check box.
12. After you set it up, assign the equipment to your organization.
13. Save your work.

Set Up Equipment Resources

After you set up equipment items, you must set up the equipment types as resources. Equipment resources represent types of equipment. For example, you might have several items that all perform the same function and can be used interchangeably. In this case, you could create one resource and then associate each similar piece of equipment under that resource.

After you set up the equipment resource type, you would associate each piece of equipment with the resource type.

How to Set Up Equipment Resources

1. Navigate to the Resources window.

Figure 2–21 Resources Window - Equipment

Resources (WH3)

Resource: Inactive On:

Description:

Type: UOM:

Charge Type: Basis:

Expenditure Type:

Outside Processing

☐ Enabled

Item:

☒ Costed

Activity: ☐ Standard Rate

Absorption Account:

Variance Account:

2. In the Resources field, enter the name of the equipment resource.
3. Enter a description for this resource.
4. In the Type field, select Machine.
The Equipment button becomes enabled.
5. Because they are not used by the WMS and will not affect warehouse-related processing, select any values for the following required fields:
 - UOM (typically Each)
 - Charge Type
6. Because Oracle WMS does not use the remaining fields in this window, leave them as is or blank.
7. Click Equipment to associate the equipment resources that are associated with this equipment type.

Figure 2–22 Equipment [Resource] Window

The screenshot shows a window titled "Equipment Types (WH3)". It has two input fields at the top: "Resource" with the value "CDPK_EQP" and "Description" with the value "Cold Pick Equipment". Below these fields is a section titled "Equipment" containing a table with two columns: "Equipment" and "Description".

Equipment	Description
JDREF197	{John Deere Refrigerated Unit
JDREF100	{John Deere Refrigerated Container Model #100

8. In the Equipment field, use the list of values to select the pieces of equipment that you want to associate to this equipment resource type.
9. Repeat step 8 to add additional pieces of equipment.
10. Save your work.

Set Up Warehouse Task Types

Each task generated by the system for dispatch to a user must have a task type. Task types are user-definable through the BOM Standard Operations window. For each task that requires a unique combination of human and equipment type resources, a new task type should be created.

Note: WMS requires that, at a minimum, you set up at least one pick and one replenishment task type. In addition, one cycle count task type can be defined if cycle counts should be dispatched as tasks. Do not define more than one cycle count task type for the organization.

Set Up Departments

A department represents a grouping of similar resources within a warehouse. For example, all of the employees and equipment that perform picking tasks might be grouped together in the Picking department.

To use the task management system, you must set up at least one department. To use a human and equipment resource to perform the same task, each must be defined to the same department. Therefore, you should not implement separate departments for equipment and human resources.

The following instructions explain how to set up the department attributes necessary for Oracle WMS.

How to Set Up Departments

1. Navigate to the Departments window.

Figure 2-23 *Departments Window*

The screenshot shows the 'Departments (WH3)' window. The 'Department' field is populated with 'CSPK DEP'. The 'Description' field is populated with 'Case Pick Department'. The 'Class' and 'Location' fields are empty. The 'Project Expenditure Org' field is empty. The 'Inactive On' field is empty. There are two buttons at the bottom right: 'Rates' and 'Resurces' (misspelled).

2. Enter a short name for the department.
3. Enter a description of the department.
4. Because Oracle WMS does not use the remaining fields in this window, you can leave them blank.
5. Click Resources to enter the resources that are used in this department.

To use a resource defined in the employee or equipment definition steps, they must be assigned to a department. If you are only setting up one department, then you must assign to it all of the resources that you want the WMS task management system to consider when assigning tasks.

Figure 2–24 [Department] Resources Window

Resources (WH3) - CSPK_DEP

Owned

Main Planning

Resource	Description	Available 24 Hours	Share	UOM	Units	Check CTP	Group	Schedule by Instance
CSPK_EMP	Case Pick Employees	☒	☐	HR	2	☐		☒
CSPK_EQP	Case Pick Equipments	☒	☐	Ea	5	☐		☒
		☐	☐			☐		☐
		☐	☐			☐		☐
		☐	☐			☐		☐

Instances Tolerance Fences Shifts

Borrowed

Resource	Description	Owning Department	UOM	Units	Check CTP	Group
					☐	
					☐	
					☐	
					☐	

6. In the Resource field, use the list of values to select the resource that you want to assign to this department.
7. In the Units field, enter any value as the WMS does not use this field for processing.
8. Leave the remaining fields blank, as they are not used by the WMS.
9. Repeat steps 6 through 8 for any additional resources to be added to this department.
10. Save your work.

How to Set Up Warehouse Task Types

1. Navigate to the Standard Operations window.

Figure 2–25 Standard Operations Window - Task Type Setup

The screenshot shows the 'Standard Operations (WH3)' window. It contains a table with the following columns: Code, Description, Department, Min Transfer Qty, Task Type, Option Dependent, and Count Point. The table lists several task types, including CASE, CDPK, CSPK, EACH, EAPK, EXPK, EXRP, and FDPK. Each row has checkboxes in the 'Option Dependent' and 'Count Point' columns. A scroll bar is visible on the right side of the table. Below the table is a button labeled 'Operation Resources'.

Code	Description	Department	Min Transfer Qty	Task Type	Option Dependent	Count Point
CASE	Case Pick Task	REXDEPT	1	Pick	☒	☒
CDPK	Cold Storage Pick Task	CDPK_DEP	1	Pick	☒	☒
CSPK	Case Pick Task Type	CSPK_DEP	1	Pick	☒	☒
EACH	Each Pick Task	REXDEPT	1	Pick	☒	☒
EAPK	Each Pick	CSPK_DEP	1	Pick	☒	☒
EXPK	Exclusive Pick	Exclu_dep	1	Pick	☒	☒
EXRP	EX REP Task	Exclu_dep	1	Replenish	☒	☒
FDPK	Forward Pick	FWD_PICK	1	Pick	☒	☒

2. Enter a code name for the task type.
3. Enter a description for the task type.
4. In the Department field, use the list of values to select the department responsible for the task type.
5. In the Min Transfer Qty field, enter any value, as Oracle WMS does not use this field for processing.
6. In the Task Type field, use the list of values to select the system task type for this task.

Note: WMS dispatches the following kinds of tasks: Pick, Cycle Count, Replenishment, Move Order Issue, and Move Order Transfer. Only these values should be used as Task Type

7. Leave the remaining fields in this window blank, as Oracle WMS does not use these fields for processing.
8. Click Operation Resources to assign the resources (both human skill sets and equipment types) required to perform tasks of this type.

Enter one human resource per task type and at most, one equipment resource. Every task requires exactly one human resource, but the equipment resource is optional.

Figure 2–26 Resources [Assignment] Window

The screenshot shows the 'Resources (WH3) - CDPK' window with the 'Main' tab selected. The window contains a table with the following columns: Seq, Resource, UOM, Basis, Usage, and Inverse. The table has two rows of data:

Seq	Resource	UOM	Basis	Usage	Inverse
1	CDPK_EMP	HR	Item	100	.01
2	CDPK_EQP	Ea	Item	90	.011111

On the right side of the table, there are several buttons: '..', '..', and a vertical stack of buttons including '+', '-', and others. The window title bar includes standard OS controls (minimize, maximize, close) and the text 'Resources (WH3) - CDPK'.

9. Enter a sequence number associated with the resource.
10. In the Resource field, use the list of values to select the human resource required to perform this task.
11. Leave the remaining fields blank or enter any value, as Oracle WMS does not use these fields for processing.
12. In the next record, use the list of values to select an equipment resource, if any, required to perform this task.
13. Save your work.

Set Up Task Type Assignment Rules

Note: Task type assignment rules need to be set for all tasks types except cycle count tasks. Cycle count tasks do not require task type rules because only one cycle count task type may be used in an organization.

Recall that the rules engine can assign tasks based on the criteria specified in a task type assignment rule. For example, the system can assign tasks based on the following:

- Predefined objects and criteria
- Unit of measure of the picking line, for example case, pallet, or drum
- Characteristics of the material, for example hazardous, or refrigerated
- Lot characteristics

You set up task type assignment rules in the WMS Rules window.

Note: Before you set up task type assignment rules, make sure that you have already set up the task types that you want the rule to return when the rule's restrictions are met.

How to Set Up Task Type Assignment Rules

1. Navigate to the WMS Rules window.

Figure 2–27 WMS Rules Window - Task Type Assignment Rule

The screenshot shows the 'WMS Rules (CLS)' window. The 'Type' is 'Task Type Assignment'. The 'Name' is 'CLS TTT B'. The 'Description' is 'Task assignment rule for one resource CLSA'. The 'Return Value' is 'CLSA' with a tooltip 'Picking task type for CLS'. Below these are checkboxes for 'User Defined' (checked), 'Enabled' (checked), and 'Common to All Orgs' (unchecked). There are three tabs: 'Restrictions', 'Sort Criteria', and 'Consistency'. The 'Restrictions' tab is active, showing a table with columns: Seq, And/Or, Object, Parameter, Operator, Object, Parameter / Value / LOV, Value, and empty parentheses for grouping. The first row has Seq '10', And/Or 'And', Object 'Item', Parameter 'Item Number', Operator '=', Object 'Constant char', Parameter / Value / LOV 'CLS_RADIO', and Value is empty. At the bottom, the 'Weight' is set to '10'.

Seq	And/Or	Object	Parameter	Operator	Object	Parameter / Value / LOV	Value	(	)
10	And	Item	Item Number	=	Constant char	CLS_RADIO			

Weight: 10

2. Use the list of values to select Task Type Assignment.
3. Enter a name and description for this task type assignment rule.
4. Use the list of values to select the task type that you want the system to return if the rule's restrictions are met.

For example, assume that you are setting up a task type assignment rule that requires resources that can handle hazardous materials. In this case, you would specify a task type return value that includes the resources qualified to handle hazardous materials.

5. In the Weight field, enter a weight for the rule. The weight indicates its priority.
For example, if you enter a weight of 20 for rule A and a weight of 10 for rule B, the system will execute Rule A before it executes rule B.
6. On the Restrictions tab, enter (or accept the default value of 10) a sequence number for this restriction.

7. In the first Object field, use the list of values to select the object that represents the entity that you want the rule to consider.
8. In the Parameter field, select the attribute of the object to which you want to apply the rule against.
9. In the Operator field, use the list of values to select the appropriate operator, such as equal to or greater than or less than.
10. In the second Object field, select the object or entity that makes up the second part of this rule restriction.
11. If the object that you specified in step 10 is Constant Character or Constant Number, in the Parameter/Value/LOV field, enter the specific value of the object. Otherwise, go to step 12.
12. If the object that you specified in step 10 is an object other than Constant Character or Constant Number, use the list of values to select the appropriate attribute of the object.
13. To enter more restrictions, repeat steps 6 through 12.
14. When you finish entering restrictions, save your work.

Compliance Labeling Setup

The WMS compliance labeling features help inventory to move more efficiently throughout the warehouse. Compliance labeling from suppliers speeds the receiving process by allowing bar code scanning of inbound purchase orders, resulting in less receipt processing time, immediate recognition of available materials, and higher receiving accuracy.

By producing customer specific labels on demand for each shipment, compliance labeling also enables your organization to easily comply with your customer's requirements for bar code labeling and advance shipment notifications (ASNs).

The Oracle WMS compliance labeling features enable you to do the following:

- Meet supplier-specific needs for bar code labels for both products and containers
- Meet customer-specific needs for bar code labels for both products and containers
- Produce partner-compliant shipping labels specific to the carrier, customer, and so on

Note: To design and print compliance labels, you should consult an Oracle Applications business partner, which provides label printing and design services.

Setting up compliance labeling includes the following tasks:

- [Describing customer labeling requirements](#)
- [Setting up labels](#)

Describing Customer Labeling Requirements

Customer labels are typically centered around the following major requirements:

- Label format
- Label data
- Bar code specifications
- Symbol content

The Oracle WMS compliance labeling features enable all of these requirements to work together to meet your customers's guidelines. The WMS supports the following label types:

- Materials label
- Serial label
- LPN label
- LPN Contents label
- LPN Summary label
- Location label
- Shipping label
- Shipping Contents label
- Flow Contents label
- WIP Contents label

Setting Up Labels

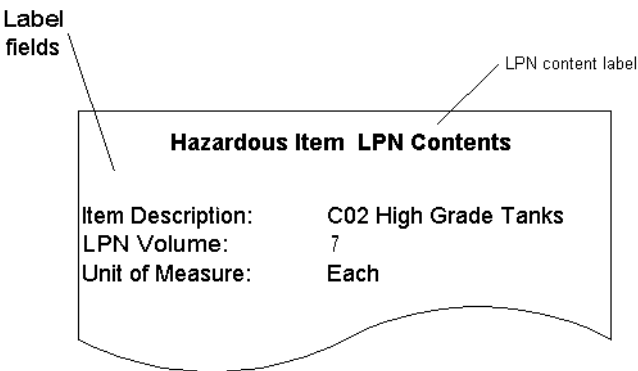
Setting up labels involves the following tasks:

- Defining label formats
- Associating label types to business flows
- Setting up label format assignment rules

Defining Label Formats

When you define label formats, you are setting up the data fields to include on a particular label. The following figure provides an example of the data that might appear on a small hazardous items LPN content label. To define this label in the system, set up the label fields: item description, LPN volume, and unit of measure, shown in the example.

Figure 2–28 Label Example



Associating Label Types to Business Flows

After you set up label formats, you must associate them to the specific warehouse business flow where you want to use them. This association enables the label type to be printed automatically as part of that business flow.

The following table provides a list of the various business flows and the types of labels that you can associate to each flow. The horizontal header row of the table lists the various label types available. The far left vertical column lists the warehouse-related business flow. Yes indicates that the system can generate the label type for that business flow. No means that the system does not generate that label type for the business flow.

Setting Up Label Formats

When you set up label formats, you must set up the following:

- [Label formats](#)
- [Label field variables](#)
- [Label types to business flow assignments](#)

How to Set Up Label Formats

Before you can specify label generation points and construct label format rules, you must define label formats. You define labels in the Define Label Field Variables window.

1. Navigate to the Define Label Formats window.

Figure 2–29 Define Label Formats Window

Define Label Formats

Label Type Find

Label Formats

Name	Description	Disable Date	Default Format
			☐ []
			☐ []
			☐ []
			☐ []
			☐ []
			☐ []
			☐ []
			☐ []
			☐ []
			☐ []

Label Fields and Variables

2. In the Label Type field, use the list of values to select the label type for which you want to define label formats.
3. In the Label Formats region, Name field, enter a name for the label.

This name should be the name that is recognized by the third party printing software.

- 4. Enter an optional description to describe the label format.
- 5. In the Disable Date field, enter an optional date on which this label format can no longer be used.
- 6. Select the Default Label check box to identify that this label type will be used as the default label type if the system cannot find a rule that determines the label format.

Note: You can specify only one label format as the default label.

- 7. Save your work, and click Label Fields to open the Define Label Field Variables window.

How to Define Label Field Variables

These instructions assume that you have already defined a label format and you have clicked Label Fields to open the Define Label Field Variables window.

Figure 2–30 Define Label Field Variables

Define Label Field Variables

Label TypeLPN Content

Label FormatLPN_HAZ_SMALL

Label Fields

Field Name	Field Description	Field Variable Name	Description
Item Description	Item Description	ITEM	
LPN Volume	LPN Volume	LPN	
UOM	UOM	QTY	

1. In the Label Fields region, Field Name field, use the list of values to select the data element that represents the field on the label.

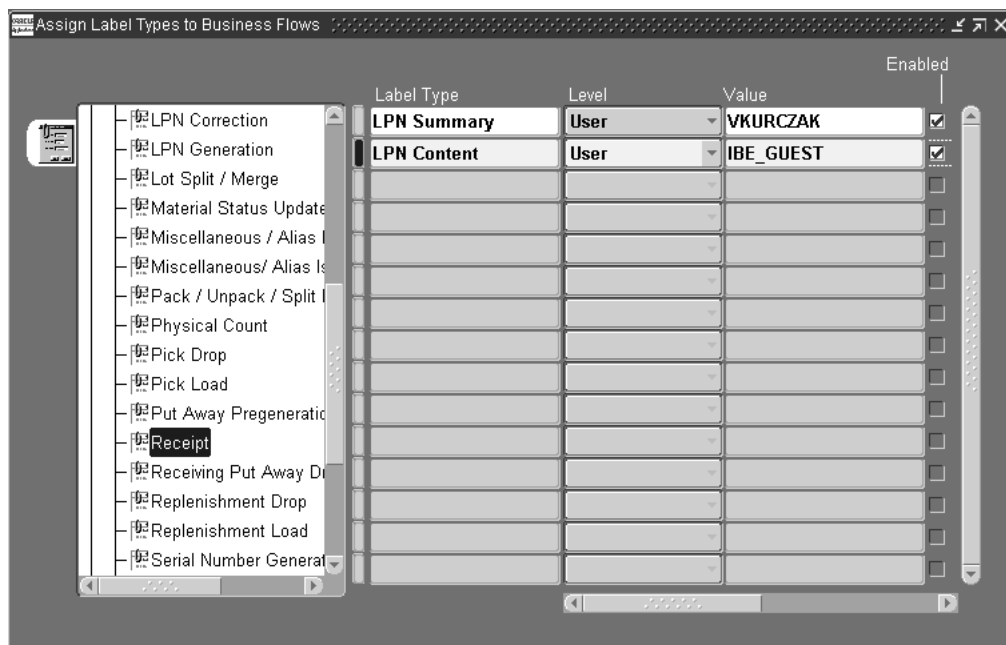
The list of values in this field is determined by the label type that you selected, for example LPN Contents, in the Define Label Formats window.
2. In the Field Variable Name field, enter a unique text string that will be used as a variable to represent the data field on the label format.
3. Enter an optional description for the field variable name.
4. Repeat steps 8 through 10 to enter additional label fields.
5. Save your work.

How to Associate Label Types to Business Flows

Before you can associate label types to business flows, you must have already defined the appropriate label format that is compatible with the business flow. For a list of compatible label formats for business flows, see the Assign Label Types to Business Flows window. Note that you also use this window to associate label types to business flows.

1. Navigate to the Assign Label Types to Business Flows window.

Figure 2–31 Assign Label Types to Business Flow Window



2. In the left panel of the window, Expand the Business Flows icon to display a list of business flows.
3. Select the business flow where you want to associate a label type.
4. In the Label Type field, use the list of values to select the label type that you want to associate to the business flow.

Note: The list of values displays only those label types valid for the business flow.

5. In the Level field, select the level at which you want to control printing for this label type.
Valid values are Site, Application, Responsibility, and User.
6. In the Value field, select the value for the level that you selected in step 5.

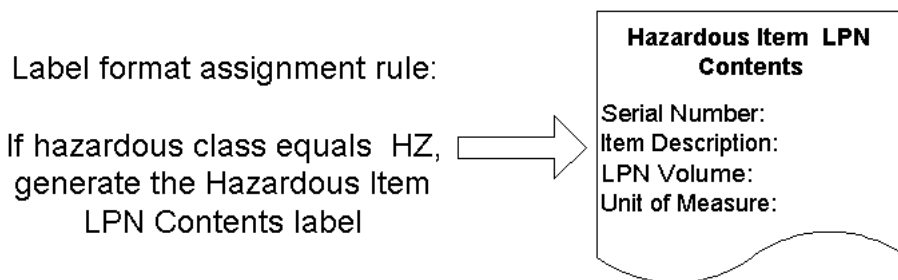
The Value field is disabled if you selected Site as the level in step 5. If you selected Application, the list of values displays a list of valid applications, if you selected User, the list of values displays a list of valid users, if you selected Responsibility, the list values displays a list of valid responsibilities.

7. The Enabled check box is automatically selected to indicate that this label type can be used for generating the label associated with the business flow. Clearing this check box disables this association, and the label type will not be generated for the business flow.
8. In the Comments field, enter any comments about the association that you just created.
9. Save your work.

Setting Up Label Format Assignment Rules

After you define label formats and associate them with the appropriate business flows, you can define label format assignment rules. Label format assignment rules associate a particular label to a business object based on the parameters and restrictions that you specify. For example, assume that you have defined a LPN Content label for small hazardous items. The following figure provides an example of a rule that you might create to generate a LPN Content label. Recall that Label Format Assignment rules have return values. When WMS executes this rule, it returns the value LPN_HAZ—if all of the rule's restrictions are met—that represents the label format for the LPN Content label.

Figure 2–32 Label Format Assignment Rule



How to Define Label Format Rules

After you associate label types to business flows, you can create label format assignment rules. You use the WMS Rules window to create these rules. For more information about label format assignment rules, see Label Format Assignment Rules in the *Oracle Warehouse Management User's Guide*.

Note: Before you set up label format rules, you should manually plan and design your rule.

1. Navigate to the WMS Rules window.

Figure 2–33 WMS Rules Window - Label Format Assignment Rule

The screenshot shows the 'WMS Rules (WH3)' window. At the top, there are input fields for 'Type' (set to 'Label Format'), 'Name' (set to 'Label_ABC'), 'Description' (set to 'LPN content assignment rule'), and 'Return Value' (set to 'LPNContent'). Below these are three checkboxes: 'User Defined' (checked), 'Enabled', and 'Common to All Orgs'. A tabbed interface at the bottom has three tabs: 'Restrictions', 'Sort Criteria', and 'Consistency'. The 'Restrictions' tab is active, displaying a table with columns: 'Seq', 'And/Or', 'Object', 'Parameter', 'Operator', 'Object', 'Parameter / Value / LOV', 'Value', and 'Value'. The first row contains the following data: '10', a dropdown arrow, 'Item', 'Internal Ordered I', '=', 'Constant chara', 'Clock Radio', and two empty 'Value' fields. At the bottom of the window, there is a 'Weight' field set to '10'.

Seq	And/Or	Object	Parameter	Operator	Object	Parameter / Value / LOV	Value	Value
10		Item	Internal Ordered I	=	Constant chara	Clock Radio		

2. In the Type field, select Label Format.
3. Enter a name for the label format assignment rule.

Note that the Sort Criteria and Consistency tabs are disabled for this type of rule.

4. Enter a description for the label format assignment rule.
5. In the Return Value field, use the list of values to select the label format that you want to the system to generate whenever the rule is executed.

Note: The User Defined check boxes User Defined, Enable, and Common to All Orgs are explained following the instructions on the rule definition.

6. In the Weight field (located at the bottom of the window), enter a weight that specifies the rule's execution priority in relation to other label rule execution priorities.
Higher weighted rules receive a higher priority and will be executed first.
7. On the Restrictions tab, in the Seq field, enter a sequence number for the first restriction.
8. In the Object field, use the list of values to select the first business object for the rule.
9. In the Parameter field, enter the value associated with the business object.
10. In the Operator field, select the operator that represents the rule conditions.
11. In the second Object field, use the list of the values to select the appropriate business object.
12. In the second Parameter field, either use the list of values or enter the parameter value associated with the second business object.
13. Repeat steps 7 through 12 to add more restrictions to your rule, however, in the Seq field, enter a subsequent sequence number and in the And/Or field, join the new restriction with the previously defined restriction.
14. If more than one restriction is specified, select the options to restrict.
This determines how the restrictions should be considered during execution of the rules.
15. Select the Enabled check box if you want to enable the rule.

Note: when you enable a rule, the system compiles the rule and checks for possible syntax errors.

16. Save your work.

Cost Group Setup

This section includes the following topics:

- Cost group overview
- Setting up cost groups, which you set up in Oracle Cost Management. For more information about cost groups, see, *Project Cost Groups, Oracle Cost Management User's Guide*.
- Setting up cost group assignment rules

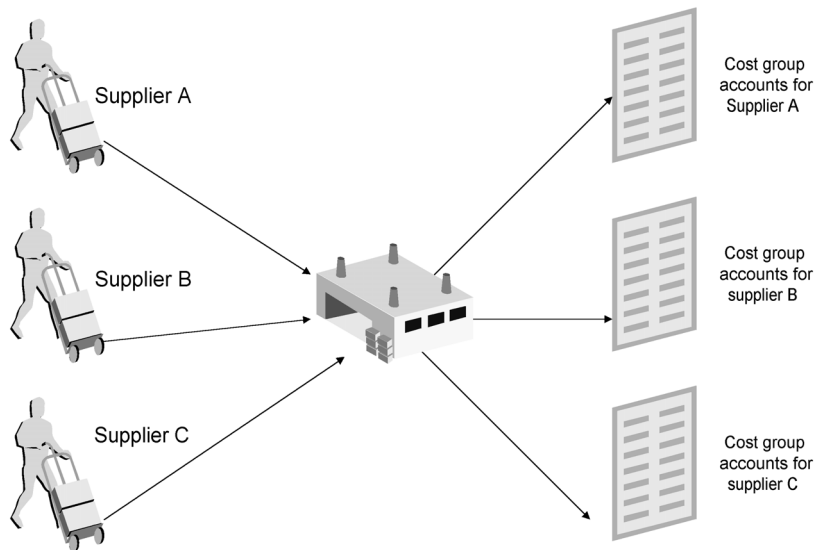
Cost Groups Overview

Cost groups associate account information with its related inventory item. Cost groups provide a way to track both physical and accounting attributes for a subinventory, and enable you to manage inventory that is owned by multiple owners within the same subinventory and locator. Thus, with cost groups, inventory account information no longer needs to be tracked in a separate inventory or physical location.

Note: After you set up cost groups, you should update your warehouse organization to include the default cost group.

The use of cost groups improves warehouse space management and enhances the visibility of storage information.

The following figure provides an example of how cost groups might be assigned to individual suppliers. In this example the cost groups are derived based on the supplier.

Figure 2–34 Cost Groups Example

You can also set up cost groups for the following:

- Descriptive flexfields
- Customer
- Item
- Location
- Item category
- Item status

With cost groups, account information is associated and carried with the inventory.

Setting Up Cost Groups

Cost group rules define the conditions under which a specific cost group should be assigned to a specific set of inventory. After you define cost group rules, you assign strategies that define the sequence in which a set of rules should be executed to determine the cost group.

For example, you might define a strategy that evaluates several rules to determine whether inventory is consigned from a specific supplier, and subsequently evaluate other rules to determine whether the item is of a category that should be associated with a specific account.

When you set up cost groups, you modify or add attributes to existing organizations and subinventories.

Cost group setup involves the following general steps:

1. [Defining an inventory cost group for a particular organization.](#)
2. [Specifying the default cost group in the Organization Parameters window.](#)
3. [Setting up cost group rules.](#)

Steps 1 and 2 represent the incorporation of cost groups into the standard inventory organizations and subinventories setup. See *Defining Cost Groups*, *Oracle Cost Management User's Guide*.

The WMS Rules Engine enables you to set up rules that assign items to cost groups, based on business criteria, such as the item's material status, or the item's ownership.

First, for all costing methods, accounts are determined by the cost group, not by the subinventory or the organization parameters. The cost groups allow items in the same subinventory to be held in different accounts.

For actual costing, such as Average, FIFO, and LIFO, item costs are held by the cost groups. When cost groups are assigned by item status, the cost groups hold different item costs for items of different status. In FIFO and LIFO organizations, the layer cost is maintained with the cost group.

A new transaction, called Cost Group Update, now enables the costs associated with one item to be transferred to another cost group, without physically moving the item. In organizations with both Project Manufacturing and WMS enabled, the Project cost group overrides the WMS Cost Group.

Setting Up Cost Group Assignment Rules

Cost group rules define the conditions under which a specific cost group should be assigned to a specific item or set of inventory. Setting up cost group assignment rules involve the following general steps:

- [Define cost group rules](#)
- [Set up strategies and assign the rules to the strategies](#)

- [Assign the strategies to business objects](#)

Defining Cost Group Rules

1. Navigate to the WMS Rules window to define associated cost group rules for your cost groups.

Figure 2–35 WMS Rules Window - Cost Group Setup

The screenshot shows the 'WMS Rules (WH3)' window. The 'Type' is set to 'Cost Group Assignment'. The 'Name' is 'AGS Item Category Rule 2'. The 'Description' is 'If Item Category = ASSEMBLY then Cost Group = CSM_102'. The 'Return Value' is '{CSM_102 }'. Below these fields are checkboxes for 'User Defined' (checked), 'Enabled' (checked), and 'Common to All Orgs' (unchecked). At the bottom, there are three tabs: 'Restrictions', 'Sort Criteria', and 'Consistency'. The 'Restrictions' tab is active, showing a table with two rows of restrictions.

Seq	And/Or	(	Object	Parameter	Operator	Object	Parameter / Value / LOV	Value	)	[
10			Category Set	Category Set Name	LIKE	Constant character	%Inv.Items%			
20	And		Category	Segment1	LIKE	Constant character	%ASSEMBLY%			

2. In the Type field, select Cost Group Assignment.
3. Enter a name for the cost group assignment rule.
Note that the Sort Criteria and Consistency tabs are disabled for this type of rule.
4. Enter a description for the cost group assignment rule.
5. In the Return Value field, use the list of values to select the cost group that you want to assign to the various objects on which the rule acts.

6. On the Restrictions tab, in the Seq field, enter a sequence number for the first restriction.
7. In the Object field, use the list of values to select the first business object for the rule.
8. In the parameter field, enter the value associated with the business object.
9. In the Operator field, select the operator that represents the rule conditions.
10. In the second Object field, use the list of the values to select the appropriate business object.
11. In the second Parameter field, either use the list of values or enter the parameter value associated with the second business object.
12. Repeat steps 6 through 11 to add more restrictions to your rule.
13. Select the Enabled check box if you want to enable the rule.
14. Select the Common to All Orgs check box if you want the rule to be available for all organizations.
15. Save your work.

How to Set Up Cost Group Strategies

Cost group strategies define the sequence in which a set of rules should be executed to determine the cost group.

1. Navigate to the WMS Strategies window to define strategies sequences for the cost group rules.
2. In the Type field, select Cost Group Assignment from the list of values.
3. Enter a name for the cost group assignment strategy.
4. Enter a description for the cost group strategy.
5. In the Seq enter a sequence number (the default value is 10) for the first cost group assignment rule that you want to include in the strategy.
6. In the Rule field, use the list of values to select the cost group assignment rule for this sequence number.
7. In the Date Type field, use the list of values to select the effective date type for this rule.
8. In the Effective From and To fields, enter optional dates on which this cost group assignment rule is effective.

9. Repeat steps 5 through 8 to add more cost group rules to this strategy.
10. When you are finished adding rules to your strategy, select the Strategy Enabled check box to enable the strategy.
11. Save your work.

How to Assign Cost Group Strategies to Business Objects

1. Navigate to the Strategy Assignment window to assign strategies to business objects.
2. In the Object Type field, use the list of values to select either the system- or user-defined object type.
3. In the Object Name field, select the business object to which you want to assign the strategy.
4. In the Object Identifier field, select the specific instance of the business object, to which you want to assign the strategy.
5. In the Strategies region, Seq field, enter a sequence number for the first strategy that you are assigning to this business object.
6. In the Type field, use the list of values to select the type of strategy.
7. In the Name field, use the list of values to select the strategy that you are assigning to this business object.
8. In the Date Type field, use the list of values to select the effective date type for this strategy assignment.
9. In the Effective From and To fields, enter optional dates on which this strategy assignments effective.
10. Save your work.

When you assign the cost group strategy to a specific business object, such as a subinventory, then the assigned strategy will be executed whenever inventory is created in association with that object. For example, assume that you have a subinventory called, EACH. Whenever you receive material into the EACH subinventory, the system executes the cost group rules for the EACH subinventory.

Inbound Setup

Inbound setup involves setting up and defining the receiving options that you need to receive material or items into your warehouse. Inbound setup also requires that you set up the appropriate put away rules.

WMS requires that the entire receipt and putaway process be performed either via the mobile user interface with a hand-held device or desktop telnet session, or via the desktop user interface. WMS-specific features, such as LPNs and directed putaway will not be available when the desktop user interface is used. This guide will continue assuming that you are using the mobile user interface.

Inbound setup involves the following major steps:

- [Setting up receiving parameters](#)
- [Setting up put away rules](#)

Setting Up Receiving Parameters

Receiving parameters represent the options that you want to govern how your organization handles receipts in your system. You set up receiving options in the Receiving Options window.

Figure 2–36 Receiving Options Window

Receiving Options (WH3)

Receipt Date

Days Early5

Days Late2

ActionNone

Over Receipt Control

Tolerance10%

ActionWarning

Receipt Number Options

ActionAutomatic

TypeNumeric

Next Receipt Number412

Miscellaneous

☐ Allow Substitute Receipts

☐ Allow Unordered Receipts

☐ Allow Express Transactions

☐ Allow Cascade Transactions

☐ Allow Blind Receiving

Receipt Routing{Standard Receipt}

Enforce Ship-ToWarning

ASN Control ActionWarning

Receiving Inventory Account01.000.1412.0000.000

Account DescriptionOperations.Balance Sheet.Inventory Assembly/FG Ma.No Sub

Note: Receiving options are set up at the Organization-level. However, most of the options that you set in the Receiving Options window can be overridden for specific suppliers, items, and purchase orders

For instructions on how to set up receiving parameters, see: *Setting Up Receiving Options, Oracle Purchasing User's Guide*.

When setting up receiving options, you should note that Oracle WMS does not support the following on the mobile telnet device:

- For receipt number options, WMS only supports Automatic, not Manual
- For miscellaneous receiving, WMS does not support unordered receipts
- The Express Transaction under Miscellaneous Receipts refer to Oracle Purchasing Express Transactions, not Oracle WMS Express Receipts
- For miscellaneous receipts, Oracle WMS always cascades transactions
- Oracle WMS does not support the concept of Blind Receiving

Setting Up Put Away Rules

You define put away rules in the same way that you define other WMS rules. Build a put away strategy and include your rule in that strategy. After you set up the strategy, you must associate the strategy to a business object.

How to Set Up Put Away Rules

1. Navigate to the WMS Rules window.

Figure 2–37 WMS Rules Window

WMS Rules (CLS)

Type: Put away

Name: Item Locator Put Away Rule

Description: Item Locator Put Away Rule

Quantity Function: Subinventory/Locator Available Capacity by Units

☒ User Defined ☒ Enabled ☒ Common to All Orgs

Restrictions Sort Criteria Consistency

Seq	And/Or	Object	Parameter	Operator	Object	Parameter / Value / LOV	Value	)	[]
10		Item Locator	Locator Identifier	=	Destination Lo	Locator Identifier			
20	And	Destination Su	Subinventory Nan	=	Constant char	EACH			

- 2. In the Type field, use the list of values to select Put Away.
- 3. Enter a name for the put away rule.
- 4. Enter a description for the put away rule.
- 5. In the Quantity Function field, use the list of values to select the equation that you want the system to use to determine the capacity of the potential locators for this put away rule.
- 6. On the Restrictions tab, in the Seq field, enter a sequence number for the first line of the restriction.
- 7. In the Object field, use the list of values to select the first business object for the rule.
- 8. In the parameter field, enter the value associated with the business object.
- 9. In the Operator field, select the mathematical operator that supports the rule conditions, for example equals or greater than.

10. In the second Object field, use the list of the values to select the appropriate business object.
11. In the second Parameter field, either use the list of values or enter the parameter value associated with the second business object.
12. To add more restrictions to your rule, repeat steps 6 through 11 on each subsequent line.
13. If you want the system to sort the locators that will be returned by the rule, enter the sort criteria on the Sort Criteria tab, by selecting the object, parameter, and ascending/descending specification.
14. After you finish defining all of your rule restrictions and have specified the appropriate sort criteria, return to the Restrictions tab and select the Enabled check box if you want to enable the rule
15. Select the Common to All Orgs check box if you want the rule to be available for all organizations.
16. Save your work.

Outbound Setup

Outbound set up includes the following tasks:

- [Setting up cartonization](#)
- [Defining pick methodologies](#)
- [Setting up pick wave rules](#)
- [Defining shipping parameters](#)
- [Defining picking rules](#)

Setting Up Cartonization

Setting up cartonization includes the following steps:

Table 2–2 *Steps for Setting Up Cartonization*

Step	Description
1	Enable cartonization
2	Define cartonization groups
3	Assign cartonization groups to cartonization category sets

Table 2–2 Steps for Setting Up Cartonization

Step	Description
4	Define container items
5	Assign containers to cartonization groups
6	Define contained item physical characteristics
7	Assign contained items to cartonization groups
8	Define container-load relationships

Enable Cartonization for Sales Order Line Picking

To enable cartonization, you must select the organization parameter Enable Cartonization to be either Yes, or Controlled at Subinventory. This parameter is located on the Warehouse tab. In addition, you must check the flag to indicate that sales orders should be cartonized

A Controlled at Subinventory value of Yes means that cartonization is enabled for all subinventories, regardless of the cartonization flag setting at the subinventory level. Controlled at Subinventory Level means that the cartonization option will be determined at the subinventory level.

Figure 2–38 Organization Parameters Window - Enable Cartonization

The screenshot shows the 'Organization Parameters (W1)' window with the 'Warehouse' tab selected. The window contains several sections for configuration:

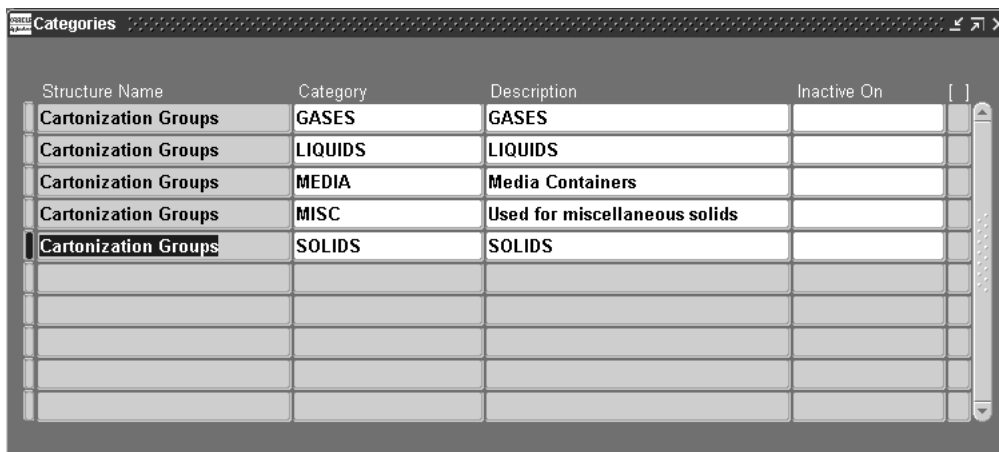
- Crossdocking:**
 - ☒ Enabled
 - ☐ Prioritize Manufacturing
 - Delivery Subinventory for Mfg: [Text Field]
 - Delivery Locator for Mfg: [Text Field]
- Time Zone:** [Text Field] EST
- Default Cycle Count Header:** [Text Field]
- Default Rules:**
 - Picking: [Text Field] Default Pick Rule (no restrictions)
 - Put Away: [Text Field] Default Put away
- Cartonization:**
 - Enable Cartonization: [Dropdown Menu] Controlled at Subinventory
 - ☐ Cartonize Sales Orders
 - ☐ Cartonize Manufacturing
- Direct Shipping Allowed:** ☐ Direct Shipping Allowed

Define Cartonization Groups

A flexfield structure, called Cartonization Groups, is seeded with the system. Therefore, to define cartonization groups, you need only to select the Cartonization Groups flexfield structure and then set up a category code and description for each group.

How to Set Up Cartonization Groups

1. Navigate to the Categories window

Figure 2–39 Categories Window - Cartonization Groups


Structure Name	Category	Description	Inactive On
Cartonization Groups	GASES	GASES	
Cartonization Groups	LIQUIDS	LIQUIDS	
Cartonization Groups	MEDIA	Media Containers	
Cartonization Groups	MISC	Used for miscellaneous solids	
Cartonization Groups	SOLIDS	SOLIDS	

2. In the Find Categories window click New.
3. In the Structure Name field, use the list of values to select Cartonization Groups.
4. In the Category field, enter a name for the cartonization group that you are defining.
5. Enter a description for the cartonization group.
6. Save your work.

Assign Cartonization Groups to Cartonization Category Sets

After you set up the appropriate cartonization groups (also known as category codes), you assign the groups to category sets. You must assign cartonization groups to the following two category sets:

- Contained item, which represents items that are packed
- Container item, which represents the actual container, such as a box, or pallet into which items are packed.

Both the Contained Item and Container Item have been seeded with the WMS. You should assign each category code that you define to both the Contained Item and Container Item category sets.

Specifying Cartonization Control Levels

When you add a cartonization group to a category set, you must specify at which level—either the Master or Organization—that the cartonization group should be controlled. If the containers you use are common among different organizations, yet the way in which the groups are organized differ between organizations, then you should specify that this category set is controlled at the organization level. If, however, the cartonization groups that you define are to be used for all organizations, you should specify that this category set is controlled at the master level.

Controlling cartonization groups at the organization level enable different cartonization groups to be assigned to the same item for different organizations. However, it is easier to set up and maintain cartonization groups that are controlled at the Master level, because the category assignment need not be made for each organization.

How to Assign Cartonization Groups to the Contained Item Category Set

1. Navigate to the Category Sets window.

Figure 2–40 Category Sets Window - Contained Item

The screenshot shows a window titled "Category Sets" with a toolbar at the top. The main area contains several fields and checkboxes:

- Name:** Contained Item
- Description:** Category Set for Contained Items
- Flex Structure:** Cartonization Groups
- Controlled At:** Org Level (dropdown menu)
- Default Category:** (empty text field)
- ☐ Allow Multiple Item Category Assignments
- ☐ Enforce List of Valid Categories

Below the "Enforce List of Valid Categories" checkbox is a list box containing the following items:

- GASES
- LIQUIDS
- MEDIA
- RAM-LIQUID
- RAM-SOLID
- SOLIDS

At the bottom right of the window is an "Assign" button.

2. Query the Contained Item category set.
3. Select the empty field below the last category code.
4. Use the list of values to select the item category code to assign to the category set.
5. Save your work.

If you want a default category to be associated with the Contained Item category set, you can optionally define a default category in the Default Category field. However, an item must still be assigned to the category set for the default category code to be used. You must leave the Allow Multiple Item Category Assignments check box blank, so that items can only be assigned to a single category code in a given cartonization category set.

If you select the Enforce List of Valid Categories check box, you can prevent users from selecting the inappropriate category set when they assign an item to a category set.

How to Assign Cartonization Groups to the *Container Item* Category Set

1. Navigate to the Category Sets window.

Figure 2–41 *Category Sets Window - Container Item*

The screenshot shows the 'Category Sets' window with the following fields and options:

- Name:** Container Item
- Description:** Category Set for Container Items
- Flex Structure:** Cartonization Groups
- Controlled At:** Org Level (dropdown menu)
- Default Category:** (empty text field)
- ☐ Allow Multiple Item Category Assignments
- ☐ Enforce List of Valid Categories
 - GASES
 - LIQUIDS
 - SOLIDS
 - (Three additional empty rows)
- Assign** button

2. Query the Container Item category set.
3. Select the empty field below the last category code.
4. Use the list of values to select the category code (which represent the various container types) to which you want to assign the category set.
5. Click Assign to complete the assignment.

If you want a default category to be associated with the Container Item category set, you can optionally define a default category in the Default Category field. However, an item must still be assigned to the category set for the default category code to be used. If you leave the Allow Multiple Item Category Assignments check box blank, you can restrict items to only one cartonization group.

If you select the Enforce List of Valid Categories check box, you can prevent users from selecting the inappropriate category set when they assign an item to a category set.

Note: Both category sets should have the same list of categories assigned to them.

Define Containers as Items

After you set up the appropriate category codes and category sets, you must define the containers and cartons into which you will later pack items. Because containers represent another type of item, you use the Master Items form to set them up.

Note: You must define container items and contained item with the same unit of measure class. For example, if you have an item defined in inches, and a container defined in centimeters, the system will make the conversion from inches to centimeters (or centimeters to inches), because both units of measure are of the UOM class, Length.

The following instructions explain how to set up those attributes that specify the item as a container. For detailed instructions on setting up inventory items, See: *Defining Items, Oracle Inventory User's Guide*.

How to Define Container Item Attributes

1. Navigate to the Master Item window
2. Query on or create a new item that you want to define as a container.

Figure 2–42 Physical Attributes for a Container Item

Master Item (V1)

Organization: **V1** Vision Operations

Item: **LGBox**

Description: **Large Box Container** []

Display Attributes: ☒ Master ☐ Org ☐ All

Main | Inventory | Bills of Material | Costing | Purchasing | Receiving | **Physical Attributes** | General Planning

Weight

Unit of Measure: **Pounds**

Unit Weight: []

Volume

Unit of Measure: **Cubic foot**

Unit Volume: **48**

Dimensions

Unit of Measure: **Foot**

Length: **2**

Width: **8**

Height: **3**

Container

☒ Container ☐ Vehicle

Container Type: **Box**

Internal Volume: **48**

Maximum Load Weight: **150**

Minimum Fill Percent: []

Type

☐ Collateral Item ☐ Electronic Format

☐ Event ☐ Downloadable

☐ Equipment ☐ OM Indivisible

- On the Physical Attributes tab, optionally enter the following information:

Note: Physical attributes are optional, and by leaving a particular attribute blank, cartonization will assume that the item has 0 weight, volume, and dimension for the case of contents, or infinite capacity in the case of containers.

- In the Weight region, use the list of values to select the unit of measure associated with the container's weight, for example, pounds.
- In the Volume region, use the list of values to select the unit of measure that defines the volume for this container, for example, inches.
- In the Volume region, also enter the container's unit volume.

Note: The internal volume is not necessarily equal to the product of the container's length, width, and height measurements. For example, a pallet might have dimensions of 4 feet by 3 feet by 6 inches, while the internal volume (or volume capacity) of the pallet might be 50 cubic feet.

- In the Dimensions region, select the unit of measure associated with the dimensions of the container.
- In the Dimensions region, enter the length, width, and height of the container.
- In the Container region, select the Container check box to indicate that this item is a container.
- In the Container region, enter the container's internal volume and maximum load weight, in their respective fields.
- In the Container region, enter the Minimum Fill Percent to indicate the minimum capacity of this container that must be consumed by the system in order for this type of container to be suggested. The minimum capacity is calculated based on either the weight or volume, depending on the setting of Percent Fill Basis on the Shipping Parameters window.

Assign Containers to Cartonization Groups

After you set up container items, you must assign them to the appropriate cartonization groups. You designate this assignment at the Master item level or at the Organization item level, depending on the definition of the category set. For example, if the category set to which you want to assign a container item is controlled at the Master level, then when you assign the container item to the category set, you should specify that it be controlled at the Master level.

How to Assign Container Items to Cartonization Groups (or Categories)

1. Navigate to the Master Item window.
2. Query on the container item to assign it to a cartonization group.
3. Select Categories from the Tools menu, to open the Category Assignment window.

Figure 2–43 Category Assignments Window - Container Item

Category Assignment (V1) - LGBBox

Item: LGBBox Large Box Container

Category Assignment ☒

Category Set	Control Level	Category
Inv.Items	Org	MISC.MISC
Container Item	Org	SOLIDS

4. In the Category Set field, use the list of values to select the Container Item category set.
5. In the Category field, use the list of values to select the cartonization group (or category) to which you want to assign the container.
6. Save your work.

Define Contained Item Physical Characteristics

After you set up appropriate category codes and category sets, you must modify or update the attributes of the items for which you want the system to suggest containers. For cartonization to work properly, you must update the following item attributes:

- Item's category set from the Contained Item category set
- Physical dimensions of the item: weight, volume, and dimension

Note: Optionally, you may specify a weight, volume, and dimension, and corresponding UOMs for items in which you want the system to suggest cartonization, otherwise, cartonization will assume that the item has 0 weight, volume, and dimension for the case of contents, or infinite capacity in the case of containers.

How to Define Contained Item Physical Characteristics

1. Navigate to the Master Items window.
2. Query on the item for which you want to define weight, volume, and dimensions.
3. On the Physical Attributes tab, in the Weight region, use the list of values to select the unit of measure for the item, and then enter its weight.
4. In the Volume region, use the list of values to select the unit of measure associated with the volume, and then enter the unit volume.
5. In the Dimensions region, use the list of values to select unit of measure for the item's dimensions, then enter the item's length, width, and height.
6. Save your work.

Assign Contained Items to Cartonization Groups

1. Navigate to the Master Items window.
2. Query on the item that you want to assign to a cartonization group.
3. Select Categories from the Tools menu, to open the Category Assignment window.

Figure 2–44 Category Assignments Window - Container Items

Category Assignment (V1) - A555890

Item: A555890 Stereo Item - WMS UG

Category Assignment ☒

Category Set	Control Level	Category
Purchasing	Master	MISC.MISC
Inv.Items	Org	MISC.MISC
Contained Item	Org	SOLIDS

4. In the Category Set field, use the list of values to select the Contained Item category set.
5. In the Category field, use the list of values to select the cartonization group (or category) to which you want to assign the container.
6. Save your work.

Define Container-Load Relationships

Recall that container-item relationships direct the system to suggest packing an item into a specific container, and override cartonization.

How to Define Container-Load Relationships

1. Navigate to the Container-Item Relationships window.

Figure 2–45 Container-Item Relationships Window

Container		Load			
Item	Type	Item	UOM	Maximum Quantity	Preferred Flag
LBox	Box	A55891	EAH	1	☒
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐

Item Description
Container: {Large Container
Load: Stereo System 2 - WMS UG

- 2. In the Container region, Item field, use the list of values to select the container that you want to associate with a specific item.
- 3. In the Load region, Item field, use the list of values to select the item that you want to be packed in the container item that you selected in the previous step.
- 4. Save your work.

Defining Pick Methodologies

Pick methodologies refer to the different ways that you might select to fulfill a group of orders. For example, up might select to pick an order by itself, or to pick multiple orders at the same time. The type of picking methodology that a warehouse uses depends on the kinds of operations that they run. A high volume warehouse that is concerned with picking speed might not use a Bulk Picking option.

Oracle WMS supports the following pick methodologies:

- Order picking: The system assigns picks for one order or job/schedule at a time to you. Thus, when you accept a task for the first line of a job/schedule or sales order, all other picking tasks associated with that job/schedule or order are

automatically assigned to you as well, regardless of the task type or subinventory.

- Wave picking: The system dispatches tasks line by line, regardless of the subinventories in which those tasks are picked from or to whom the line on the order has been dispatched to.
- Zone picking: The system assigns you picks for a given order or job/schedule in a given subinventory. Thus, if you accept a task for the first line of a job/schedule or sales order, all other lines on that job/schedule or order that are sourced from that subinventory are assigned to you.
- Bulk picking: The system groups tasks to pick the same items that are sourced from the same subinventory and locator, so that the user only sees one task that might represent picks for several orders.
- Paper-based picking: Users pick according to a paper pick slip that is printed at pick release. This enables a user to dispatch tasks to themselves when working in a paper-assisted environment.
- Pick and Pass picking: LPNs are generated by the system during cartonization and the labels are printed prior to picking. Thus, in order to pick, the user scans the LPN, and is dispatched the picking task that is associated with that LPN. The user can then “pass” the LPN to the next user or continue picking all material for the LPN and will not be prompted to drop the LPN in the staging lane until all of the lines have been picked.
- Cluster picking: A specified number of clusters is dispatched to a single user at once. A cluster is defined as all the tasks related to a sales order delivery, or a manufacturing job or schedule. Clusters are comprised of a group of tasks associated to a delivery or cartonization group for a sales order, manufacturing job, or schedule.

In the WMS, you set up pick slip grouping rules to specify different ways where a warehouse might choose to fulfill a groups of orders. For example, warehouse operators might choose to pick an order across multiple subinventories, or they might decide to pick by bulk. Pick slip grouping rules enable warehouse managers to specify the type of picking methodology used to pick orders.

To set up pick slip grouping rules in WMS, you use the standard c Pick Slip Grouping Rules window. However, instead of specifying a user-defined grouping rule, you can use several system-defined options. Oracle WMS includes the following picking methodologies: order picking, bulk picking, wave picking, and zone picking.

Setting Up Pick Wave Rules

Setting up pick wave rules includes the following tasks:

- [Setting up pick slip grouping rules](#)
- [Setting up release sequences](#)
- [Setting up release rules](#)

How to Set Up Pick Slip Grouping Rules

You use the Pick Slip Grouping Rules window to set up WMS pick methodologies.

For instructions on setting up pick slip grouping rules see: Defining Pick Slip Grouping Rules, *Oracle Inventory User's Guide*

How to Set Up Release Sequences

You use the Release Sequence Rules window to set up rules that specify the priority in which you want the system to consider pick releases. You can prioritize picking lines by the following criteria:

- Order number
- Outstanding invoice value
- Departure date
- Schedule date
- Shipment priority

For instructions on setting up release sequence rules, see: Defining Release Sequence Rules, *Oracle Shipping Execution, User's Guide*.

How to Set Up Release Rules

You set up release rules to specify the release criteria that you want the system to consider during pick release. Release rules specify the following release criteria:

- Order, either for all, backordered, or unreleased orders
- Shipping, including specifying the carrier and ship from location
- Inventory, including specifying the warehouse and pick slip grouping rule

Use the following instructions to set up release rules.

1. Navigate to the Release Rules window.

2. Enter the name of the release rule.
3. In the Release Criteria region, Order tab, select the type of order (either All, backordered, or unreleased) to which this rule applies.
4. Specify any optional order information, such as order type, in the remaining fields on this tab.
5. Select the Shipping tab.
6. On the Shipping tab, enter optional shipping information, such as the carrier and ship-from location.
7. Select the Inventory tab.
8. On the Inventory tab, enter optional inventory information, such as the Ship-from warehouse, and pick slip grouping rule.

Note: Although optional, if you want the system to consider your warehouse and pick slip grouping rule, you should at least complete these fields, on the Inventory tab.

9. Save your work.

Defining Shipping Parameters

You use the Shipping Parameters window, which is part of the Oracle Order Entry module, to enter the shipping parameters for your warehouse.

Setting Up Picking Rules

A picking rule defines the restrictions and preferences the organization has when allocating material. For instance, material should be allocated in FIFO or FEFO fashion, or material from only certain subinventories should be selected for allocation. While this functionality is covered in greater depth in the [Warehouse Management Rules Engine](#) chapter of this guide, you can define a single default rule as shown below and then assign that rule to the organization in the Organization Parameters.

See Also

Defining Pick Slip Grouping Rules, *Oracle Inventory User's Guide*

Advanced Lot Control

Topics covered in this chapter include:

- [Lot Split and Merge and Lot Genealogy](#) on page 3-2
- [Functional/Business Flow Description](#) on page 3-3
- [Lot Merging Features](#) on page 3-4
- [Setup](#) on page 3-5
- [Examples](#) on page 3-6
- [Common Problems](#) on page 3-7
- [Frequently Asked Questions](#) on page 3-7

Lot Split and Merge and Lot Genealogy

Overview

Oracle Warehouse Management system (WMS) provides subplot control functionality that enables the user to split and merge lots. Lot splitting enables splitting to an infinite number of levels to differentiate between quantities of material that are no longer similar enough to be considered as a single lot. A new lot (child lot) is created from a old lot (parent lot). The ability to split lots into child lots allows for more exact inventory tracking by lot attributes. Similarly, multiple lots can be merged into a single resulting lot. Supporting lot merging will enable you to track when lots are stored together and the identity of each lot can no longer be maintained. In the process of splitting or merging lots the lot attributes can be transferred or changed for a new or resulting lot.

Lots may be split or merged for a variety of reasons as material moves through a facility starting with receiving material from suppliers up to shipping.

1. **PO Receiving:** Lots received from suppliers may be split to create a subplot for each quantity of that material. For example, a supplier sends five rolls of paper from the same lot number. The supplier lot number may be split into sublots: one subplot for each roll of paper.
2. **Putaway:** Lots may be merged at put away when lots are stored together and the identity of each lot can no longer be maintained, for example storing material in a vat or silo together.
3. **Issue Components / Raw Materials to Manufacturing:** When material is issued to a work order or batch, the component/ingredient lot numbers are associated to the work order/batch.
4. **Complete Assembly / Final product into Inventory (Manufacturing completion):** When production is complete, subsets of the assembly/product batch with similar characters may be split into sublots, for example one subplot per shift of a production batch.

The lot genealogy will track the composition and 'where used' history of a lot through the split and merge transactions. With the lot genealogy functionality the user is able to track the various transactions that have been performed on any given lot.

Lot genealogy is useful in product recall situations. Production problems or tampering are examples of when a product recall is required. In a recall situation, a company needs to be able to recall all assembly/final product lots that have had a

particular component/raw material lot used in the manufacturing process. At least one level of the parent/child hierarchy inquiry is required; at other times the full lot genealogy inquiry is required.

Functional/Business Flow Description

Lot Split / Merge

Lot: Quantity produced together and sharing the same production specifications.

Sublot functionality fundamentally consists of splitting and merging lots to track a lot's genealogy. Sublots are created by splitting a single starting lot into multiple resulting lots. Sublots are created by splitting a lot, therefore a sublot is a lot that has a child relationship to another lot. Sublots have the same functional support as lots and an unlimited number of sublot levels are supported.

Functional Area

Lot Splitting Features

Lot Splitting: Dividing a lot into two or more sublots and simultaneously processing each sublot on identical facilities as separate lots.

Lot splitting enables you to split a quantity of material that is produced in a single lot to a different lot residing in inventory. Splitting may also be performed when a portion of a lot has different characteristics. Lot splitting supports full and partial quantity splits, loose or packed material splits, and autosplit. Lot genealogy is populated when performing a lot split. Lot quantities that have been reserved against the starting lot cannot be split

Full and Partial Split Support

Lot splitting supports full and partial lot splits. A full lot split enables you to split the entire quantity of a lot into new child lots ensuring there is no remaining quantity of the starting lot. A partial lot split is to split a partial quantity of a lot into new child lots, leaving a remainder quantity in the parent lot.

Support Splitting Loose and Packed in LPN Material

Loose material can be split to loose inventory or packed in a LPN. Similarly, lots within an LPN can be split to loose inventory, split within that LPN, or packed in a

new LPN when they are split. The new LPN that they split to can be an existing LPN or a new LPN generated dynamically.

Support Autosplit and Manual Split

Autosplit is to automatically create numerous resulting lots with the same lot attributes. Users can perform an autosplit when a lot is split into a large number of resulting lots. To perform an autosplit, the user should specify the number of resulting lots or the quantity that should be put in each new lot. When performing an autosplit, the user has to split the lot to at least two result lots.

When a lot is split into a small number of resulting lots, users can manually split the lot by specifying the resulting lot numbers and lot quantities for each of the result lots. They can also specify different lot attributes of the resulting lots.

Lot Attributes

Lot splitting defaults lot attributes of resulting lots from the lot attributes of the starting lot. Users can update the defaulted resulting lot attributes after the resulting lot is specified.

Lot Merging Features

Lot merging enables you to merge multiple existing lots into a new lot and to merge multiple existing lots into an existing lot. Merging may be performed when you store lots together from multiple inventory locations or the identity of each lot can no longer be maintained. Lot merging supports full and partial quantity merges and loose or packed material merges. Lot genealogy is populated when performing a lot merge.

Support Full and Partial Merge

Lot merging supports full and partial lot merges. A full lot merge is to merge the entire quantity of one or more lots into a new lot or an existing lot. A partial lot merge is to merge a partial quantity of one or more lots into a new lot or an existing lot, leaving a remainder quantity in the parent lots.

Support Merging Loose and Packed Material in LPN

Loose material can be merged to loose inventory or packed in an LPN. Similarly, lots within an LPN can be merged to loose inventory or merged within an LPN. When lots in different LPNs are merged, the LPN will be consolidated when the lot is merged by selecting an existing LPN or generate a new LPN.

Lot Attributes

Lot merging defaults lot attributes to the resulting lot from the starting lot with the largest quantity. If lots of equal quantity are merged, the lot attributes will be defaulted from the first start merge lot.

Lot Genealogy

A lot genealogy transaction will be created whenever lots are split or merged. In addition, a reference to the transaction information will be stored. Tracking the parent/child relationship between the parent lot and the new child lot enables and infinite level of lots to be tracked. Lot genealogy also helps in keeping a track of the attributes associated with a given lot.

Lot genealogy includes and on-line inquiry forms that display parent/child relationships between lot and sublots created during lot split and lot merges, lot attributes, transaction history of a lot, and the current on-hand quantities of a lot. In the Lot Genealogy window, for the Lot Source tab, lot genealogy is displayed in a tree structure that shows all of the ingredients or component lots that have been used in creating a particular lot. For the Where Used tab, all subsequent lots that have used a lot as an ingredient or component are shown in a tree structure.

Setup

Lot Split/Merge

There are two ways to restrict or enable lot split/merge:

- Item Level Control
- Lot Level Control

Item Level Control

Lot Split Enabled is an item attribute that has been added to control whether lot splitting should be allowed for that item. Select Lot Split Enabled item attribute when defining an item to allow lot splits.

Lot Merge Enabled is an item attribute that has been added to control whether lot merging should be allowed for that item. Select Lot Merge Enabled item attribute when defining an item to allow lot merges.

Lot Level control

Lot split and lot merge are transaction types. Hence, they may be transactions that have been disallowed for certain material statuses. If the lot, the locator, or subinventory where the lot is located, has a material status that disallows lot split, then a lot split may not be performed for the lot. Similarly, if the lot, the locator, or subinventory where the lot is located, has a material status that disallows lot merge, then a lot merge may not be performed for the lot.

Note: WMS does not support lot split or merge for a item that is under lot and serial control, unless the serial number control is at sales order issue.

Lot Genealogy

To view the lot genealogy properly, two profile options: INV: Genealogy Prefix or Suffix and INV: Genealogy Delimiter should be set on the site, application, responsibility, or user level. The profile option INV: Genealogy Prefix or Suffix determines how the item and lot number should be displayed in the genealogy tree structure. The two possible settings are Prefix (the lot number is displayed before the item number), and Suffix (the lot number is displayed after the item number). The profile option INV: Genealogy Delimiter determines what should be the delimiter between the item number and the lot number. If the profiles are not set, when the user views the lot genealogy, it will show NULL on the tree node instead of the lot number.

Example: In the System Profile Values form, set INV: Genealogy Prefix or Suffix to Prefix and INV: Genealogy Delimiter to "." on the site level. In the Lot Genealogy Form, the node of the tree will show as L2-003.MR_LC2 where L2-003 is the lot number and MR_LC2 is the item number.

Examples

Lot Split

Manual Lot Split

During a manual split neither the number of lots nor the quantity per lot is mentioned; only the split quantity. The user can split the lot loose or into an LPN. In

this example the starting lot was split into two lots of 5 each. On each of the lots, one was split loose and the other was split in an LPN.

Auto Lot Split

While performing an auto split the user either mentions the number of resulting lots or the quantity per lot. For example if the number of lots are two, then a quantity of 7 was split into two lots of 3.5 per lot. The user can split the lot loose or into an LPN.

Lot Merge

This is a example of lot merging. Two different lots of different quantities are merged into a single resulting lot. The resulting lot is in packed into an LPN. The total quantity is the sum of both the starting lots.

Common Problems

1. The lot is not shown in the Lot LOV of the Lot Split/Lot Merge window.

The reasons for this could be the item attribute Lot split enabled or Lot merge enabled is not checked in the item form of that item, or the item has a material status that disallows lot split or lot merge.

2. Lot Merge shows the error Lot Belongs to a Different Cost Group. Cannot Merge.

This could happen because you are merging lots with different cost groups and it causes the co-mingling problem. When doing lot merge, the cost group of all starting lots must be the same.

Frequently Asked Questions

1. How is Lot Split/Merge and Lot/Serial genealogy supported in inventory organizations?

Lot Split/Merge and Lot genealogy are supported in Inventory and WMS organizations, and they are available only when WMS is installed. Serial genealogy is supported in 11i and it is supported in both Inventory and WMS organizations.

2. How do you perform a manual split and autosplit?

You can perform a manual split and autosplit in the same form. To perform an autosplit, in the start page, enter the Num Lot field or Ea Lot Qty field, then the

button <Auto Split> will appear. Select <Auto Split>. You will go to the resulting page, generate the resulting lots and calculate the resulting quantity automatically. When performing an autosplit, users cannot change the resulting quantity for each resulting lot and the starting lot must split into at least two resulting lots.

To perform a manual split, from the Start page, you skip the Num Lots and Ea Lot Qty fields and select <Save/Result> instead of <Auto Split>, select <Save/Result> and the Result page will open. In the Result page, you generate the lot and enter result quantity manually. You can split the lot into another lot with manual splitting.

3. Will the result lot default the LPN from start lot when performing lot split/merge within an LPN?

When you split lots within an LPN, the resulting lot will not default the LPN from the starting lot. You must specify the LPN if the lot is to be packed in an LPN. The same is true for merging lots.

For an autosplit, if the users split the lot into three resulting lots and only specify the LPN in the first resulting lot, then select <Done> in the first result page, only the first resulting lot will be packed in the LPN and the other resulting lots will be in loose inventory.

4. When should full lot splits be used and when should partial lot splits be used?

The ability to split lots into new lots allows for more exact inventory tracking by lot attributes. If some key lot attributes for a quantity within a lot no longer match the attributes of the rest of the lot, then that portion of the lot should be split into a new lot. In this example, should you have a partial quantity lot split or a full quantity lot split?

Proposed solution: In this situation the user should perform a partial quantity lot split. They will split the quantity that has different lot attributes into a new lot. The quantity that still has the same lot attributes is allowed to remain in the same lot number.

When new lots are created at WIP Completion, the quantity at the parent lot will usually be fully split into the child lot.

5. What cost group is associated with the new lot formed during lot split?

During lot split, the cost group of the parent lot will be assigned to the new lot.

6. What lot attributes are carried over to the resulting lot when two lots are merged?

When two lots are merged the resulting lot will have the attributes from the lot that is higher in quantity. When two lots of the same quantity are merged, the lot attributes of the first parent lot will be carried over to the resulting lot.

7. Can two lots of different items be merged?

No. This is not currently supported.

8. How can a lot packed in a nested LPN be merged with lots packed in nested LPNs?

Merging a lot packed in a nested LPN with lots packed in nested LPNs is not supported.

9. Can Split and Merge transactions be performed on a desktop?

No. Split and Merge transactions must be performed on the Mobile user interface.

Lot and Serial Attributes

Topics covered in this chapter include:

- [Lot/Serial Attributes](#) on page 4-2
- [Implementation](#) on page 4-12
- [Common Problems](#) on page 4-13
- [Frequently Asked Questions](#) on page 4-14

Lot/Serial Attributes

High Level Overview

What are lot attributes?

Lot attributes are fields in addition to the lot number that provide additional information about a lot. Expiration date, which is already supported within Oracle Inventory, is a lot attribute. However, a significant number of additional important qualities about a lot can be tracked with the new Lot attribute functionality. The most notable lot attributes include Country of Origin, Grade, and Best By date.

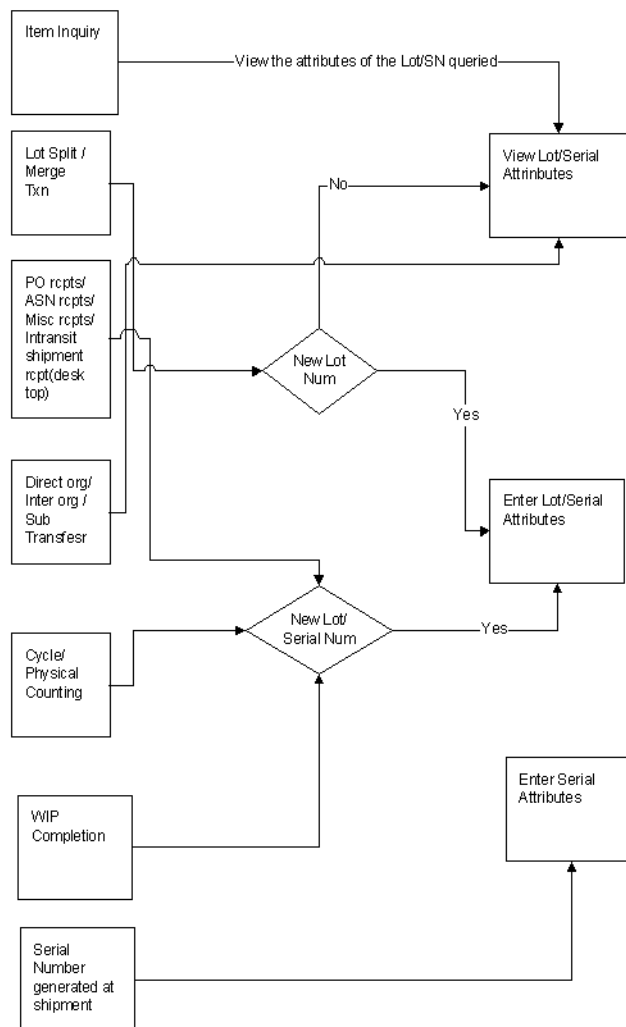
What are serial attributes?

Serial attributes are fields in addition to the serial number that provide additional information about a serial. The most notable serial attribute to track is Condition. The condition would indicate whether a particular piece is New or Refurbished, for example.

Functional/Business Flow Description

Lot and serial attributes that are used widely across several industries have been added as named columns (e.g. Best By Date). In addition, forty unnamed lot and forty unnamed serial attributes have been added (e.g. c_attribute1) so you can track important information for your industries. Different attributes may be tracked for each item, customized for specific defaulting and validation requirements. The attributes information can be populated any time new lots or serials are created, such as at Purchase Order receipt, Miscellaneous Receipt, Cycle/Physical Counting, Lot Split/Merge transaction, or WIP Completion.

Figure 4–1 Lot/Serial Business Flow Example



Types of Attributes

The Oracle Warehouse Management system (WMS) will natively store attributes in the date, number, and character fields to simplify extensions you may wish to build on these attributes. There are three types of attributes:

- Date
- Number
- Character

Date Attributes

The following date attributes have been added as named lot attributes:

- Best by date
- Change date
- Maturity date
- Origination date (manufacturing date)
- Retest date

Maturity date is the date the lot matures and is ready for use (e.g. shipping to customers), while best by date is the date when the quality of the lot may degrade. The opportunity exists for you to write extensions to update the material status of the lot once the maturity date or best by date is reached. The Origination date may be defaulted to the current date upon receipt and overridden to the date of manufacture at the supplier, if applicable. When completing a finished product, this date is the date of manufacturing completion. The re-test date is the date the material needs to be re-tested to re-verify its quality. You may define an item descriptive flexfield to track how frequently an item should be re-tested. This item attribute can be used to default the re-test date.

Note that expiration date, the date after which lot should not be used in production or shipped to customers, is controlled by the item attribute. Therefore, an expiration date does not behave exactly as other lot attributes.

Origination date (manufacturing date) has been added as a named serial attribute.

You may define up to ten distinct date attributes for any given lot or serial number that reflects information which your organization captures for an item. This information is stored in the D_ATTRIBUTE1 through D_ATTRIBUTE10 columns on the MTL_LOT_NUMBERS and MTL_SERIAL_NUMBERS tables respectively.

Character Attributes

One category of additional lot and serial information to track are characteristics of the lot. Some of these characteristics may include lot grade, color, country of origin, place of origin, and recycled content.

The following character attributes have been added as named lot attributes:

- Color
- Territory_code (Country of origin)
- Date code
- Grade
- Place of origin
- Supplier
- Supplier lot number

Territory_code has been added as a named serial attribute.

You may define up to twenty distinct character attributes for any given lot or serial number that reflects information which your organization captures for an item. This information is stored in the C_ATTRIBUTE1 through C_ATTRIBUTE20 columns on the MTL_LOT_NUMBERS and MTL_SERIAL_NUMBERS tables respectively.

Note that the material status may be controlled at the subinventory, locator, lot, or serial level. Therefore, the material status on the lot or serial number does not behave exactly as other lot or serial attributes. If the material status of the subinventory or locator is more restrictive than the material status of the lot or serial number, then the material status of the subinventory or locator will override the material status of the lot or serial number.

Numeric Attributes

Some industries track numerous dimensions and weights of each lot. Up to ten distinct numeric attributes can be used for any given lot.

The following numeric attributes have been added as named lot attributes:

- Age (in days)
- Length
- Recycled content

- Thickness
- Volume
- Width

There is a concurrent program that calculates the age of an existing lot by computing the time from the time it was created to the current date and stores this value. The advantage of this being, if the allocation rule requires some calculation based on age, the value can be straight away used from this calculated field rather than computing the age at the time of performing the allocation or such task. Storing these values ahead of time, to be used in calculations, improves the performance during allocation or wherever the case maybe. The downside to this would be the age may not be quite exact, but again it depends on the frequency of this concurrent program.

It is recommended that the unit of measure (UOM) attributes (length UOM, thickness UOM, volume UOM, and width UOM) for each of the dimension attributes (length, thickness, volume, and width) be implemented together.

The following numeric attributes have been added as named serial attributes:

- Cycles since new
- Cycles since repair
- Cycles since overhaul
- Cycles since visit
- Cycles since mark
- Number of repairs
- Time since new
- Time since repair
- Time since overhaul
- Time since visit
- Time since mark

You may define up to ten distinct number attributes for any given lot or serial number which reflects information that your organization captures for an item. This information is stored in the N_ATTRIBUTE1 through N_ATTRIBUTE10 columns on the MTL_LOT_NUMBERS and MTL_SERIAL_NUMBERS tables respectively.

Attribute Functionality

Lot and serial attributes are supported when you license the Oracle Warehouse Management product. However, the lot and serial attribute functionality may be implemented for both WMS enabled inventory organizations and inventory organizations that are not WMS enabled.

Oracle WMS supports forms and APIs to populate, maintain, and use the lot and serial attributes.

Populate Attributes

Default by item number or category which attributes to collect at receipt.

The lot context or serial context of an item specifies which lot or serial attributes need to be maintained for each item. For example, lot controlled food product may include attributes such as best by date, grade, and age, while lot controlled textiles may include attributes such as length, thickness, and style. By specifying a context for the lot and serial attributes, only those attributes which are appropriate for each item can be collected.

Contexts can be assigned to item categories, therefore all lot controlled items in a particular category have the same context. All the categories where you want to assign context assignment should be in the same category set. However, there may be exceptions to the item category, so individual items may be assigned to a context that overrides any item category assignment. Default values for attributes can be specified when configuring the contexts. The currently supported default methods for attributes are constant, current date, previous field, profile option, and SQL statement.

Desktop functionality

Lot and serial attributes need to be populated when new lots and serials are created. If desired, the attributes may be defaulted and/or overridden by the receiver. When you receive against an existing lot, you may view but not update the attributes of the existing lot. The attributes of the material received will be inherited from the attributes of the pre-existing lot.

Populating lot and serial attributes is supported for the following transactions for non-WMS inventory organizations:

- Purchase order delivery
- Miscellaneous receipt
- WIP completion

- Work-orderless completion
- Flow schedule completion

Note: Populating lot attributes is only supported in the Lot Entry window of the Miscellaneous Transactions form. You may find it easier if you remove the lot field from the Miscellaneous Transaction Lines window using the folder form functionality.

Mobile functionality

Lot and serial attributes must be populated when new lots and serials are created. If desired, the attributes may be defaulted and overridden. When you receive against an existing lot, the attributes of the material received will be inherited from the attributes of the pre-existing lot.

Populating lot and serial attributes are supporting for the following transactions for non-WMS inventory organizations:

- Receiving Delivery transactions
- Cycle and Physical counting
- Lot Split/Merge transactions
- Miscellaneous Receipt

Populating lot and serial attributes are supported for the following transactions for WMS enabled inventory organizations:

- Inbound receipt (including ASN receipt)
- Cycle and physical counting
- Lot Merge/Split transactions
- Miscellaneous receipt

If the Serial Number is generated at the time of shipment you can enter Serial attributes at that time.

Note: There are distinct differences between the receiving process for WMS-enabled inventory organizations and regular inventory organizations. For inventory organizations, lots and serials may not be specified until the delivery transaction. Therefore, the lot and serial attributes may not be populated until after this time. For WMS-enabled organizations, this limitation has been lifted. However, the introduction of the LPN functionality changes the business flow substantially. Incoming material is packed into an LPN at receipt. To specify the material being packed into the LPN, the lot and serial numbers are specified at this time. Consequently the lot and serial attributes are specified at this time.

Desktop functionality

The Maintain Lots and Maintain Serial Numbers windows enable authorized personnel to update lot and serial attributes. The View Lot Numbers and View Serial Numbers windows will give non-authorized personnel view-only access to lot and serial attributes. Limiting access is achieved by calling the Lots and Serials forms in query only mode (using the QUERY_ONLY form function parameter). An audit log of changes to lot and serial attributes is NOT stored. However, viewing the attributes populated at receipt of the lot in the Materials Transactions desktop form may indicate whether the attributes have been updated since the original receipt of the lot or serial.

Mobile functionality

You may view lot and serial attributes through the mobile Item Inquiry form. If you wish to update a lot or serial attribute, this maintenance should be performed through the desktop form.

Use Attributes

Picking and Put-away rules may be based on lot and/or serial characteristics such as the country of origin or the age of the material.

Fulfilling sales orders based on lot and serial attributes

If material is manually reserved at sales order entry, you may search for appropriate lots by their characteristics in the Material Workbench. Once the lot with the appropriate characteristics has been located, that specific lot may be reserved.

Reservations is *not* supported for serial numbers. Therefore, fulfilling sales orders based on the serial attributes will need to take place at pick release.

If material is not reserved at sales order entry, the material will be allocated when the sales order pick released. Complex picking rules may be configured to control the characteristics of the lots and serials you use to fulfill each order. For example, you may specify which grade of material each class of customer should receive. Other material allocation requirements could include picking lots with the best by date at least fourteen days from the current date.

Transfer attributes with lot or serial number

Lot and serial attributes are transferred to other inventory organizations within the supply chain, so that the attributes only need to be populated once. However, it is required that the SAME context assignments be defined in all the source and destination organization. Otherwise, there is no automatic way to identify that the first segment of one context is the same information as the first segment in a different context. To aid the requirement of transferring attributes when performing organization transfers, the context mapping can be made common to all organizations, which will result in the attributes always being transferred with the material.

Defaulting lot attributes when lots are split and merged

When a lot is split into multiple new lots, the lot attributes of the new lots are defaulted from the starting lot. You may override the defaulted attributes. When lots are merged into a new lot, the lot attributes of the new lot are defaulted from the lot attributes of the largest lot merged into the new lot. If two lots of the same quantity are merged, the lot attributes of the new lot are defaulted from the first starting lot.

Populating lot and serial attributes during cycle count and physical count

When you perform a cycle count or physical count and have to create a new lot or serial, you will be prompted to enter attributes based on context assignment for that item.

Setup

There are two steps to setting up lot and serial attributes. First, the lot and serial contexts must be defined. Contexts are supported by descriptive flexfields, so the setup is identical to the setup for descriptive flexfields. Second, the default context must be assigned to item categories and, if appropriate, items. The reason for this

step is that standard descriptive flexfield functionality requires the reference field for the context be on the Transaction form. The Item Category field is not on the Transactions forms. Therefore, this additional piece of functionality was built to drive the context off of the item category.

Define Context

A context (set of attributes to be tracked for a lot or a serial), should be defined using the Segments form for descriptive flexfields, where the descriptive flexfield title is Lot Attribute or Serial Attribute. Different contexts should be defined for each type of item that tracks different groups of attributes. In addition, since default values are defined at the context level, different defaulting behavior will require different contexts.

Each context can have up to forty attributes (ten numeric attributes, twenty character attributes, and ten date attributes). Each attribute must specify which database column the attribute will be stored in. Database types of varchar, number, and date are supported. Each attribute may be required or optional, and can have a default value set based on any of the defaulting types. If any attribute is a required attribute it must have a default value. Finally, a value set must be specified for each attribute. The value set determines the length of the attribute, and the type of validation of the date (no validation, independent validation against a manually defined list of values, or table validation).

Assign Context

You will be prompted to enter the correct group of attributes for each type of item based on the assigned context. You may assign contexts by item category or item number, at the organization level, or globally (common to all organizations). You may assign by categories in any category set. Therefore, the attributes may be driven off of the Inventory category set or a new category set may be created to drive the attributes, but contexts can be assigned to only one category set.

The hierarchy for determining which context will be used is illustrated below:

Context Level	Assignment Type
Global	Item Category
Global	Item
Organization	Item Category
Organization	Item

For example, the organization level assignment by item will override the organization level assignment by item category and the organization level assignment by item category will override the global level assignment by item, and so on.

Note that in 11*i*, category sets may be enabled to enable items to be assigned to multiple categories within a category set. You will only be able to select category sets that do not have this feature selected. This is required so a unique context when receiving an item may be derived.

Implementation

1. Should I default the context at the global or organization level?

Contexts may be assigned at the organization level when different organizations in the supply chain wish to track different information regarding a lot and/or serial. For example, a manufacturing plant may need to track more information about a lot and or serial than a sales office. On the other hand, inter-organization transfers of items with lot or serial attributes require that the same context assignments be defined in all the source and destination organization. To aid in this setup, the context mapping can be made common to all organizations. For example, material that is sent back from the sales office might lose the information originally gathered regarding the lot and this information would need to be re-entered. In summary, the priority of these two requirements needs to be weighed to determine the optimal setup for your organization's supply chain.

2. How changeable is the Lot/Serial Attribute setup?

It is recommended that a detailed analysis be completed regarding which attributes will be tracked for each item or category before receiving the material. In general, disabling lot/serial attributes and adding non-required lot/serial attributes should not pose problems (other than the issue that all existing lots will not have information populated for the new attributes). Problems mainly result from the addition of a required lot/serial attribute once lots/serials exist for that item. Once lots and serial numbers for an item have been defined with a given context, changing that context may result in an error when querying up the lot/serial due to a null value in for a required attribute.

It is recommended that all the required attributes have default values defined.

3. What needs to be set up before I set up Lot/Serial attributes?

ICX: Numeric characters profile needs to be set up. For setting up this profile, you should logon as System Administrator, and then go to System Administrator > profile > System to set this values. An example of values for this profile are ICX Numeric Characters ".", which specifies the decimal separator for number fields displayed in the flexfield pop-up window. Similarly, there are other profiles like, ICX: Date language -> "American English", ICX: Date format -> "DD-MON-RRRR", which specifies the formats for date fields in the flexfield pop-up window.

Common Problems

1. I am getting an error while compiling Lot/Serial Attributes Descriptive I flexfield.

If any of the segments, in any context associated with this descriptive flexfield (DFF) have a segment name that is an oracle reserved word like varchar, number, date, or char, then concurrent request which will create a view for this descriptive flexfield (DFF) will fail. Please check to see non of the segments have oracle reserved words as segment names.

2. The Lot or Serial attributes Mobile page gives an unexpected error.

Please check to see your Lot or Serial attributes descriptive flexfield definition is frozen.

3. Not prompted for Lot or Serial attributes during transactions or prompted for wrong attributes?

Here are the steps that should be taken to debug this issue:

- a. Check to see if there is any context assigned to the item that you are transacting in that particular organization. You can do this by opening the Assign Descriptive Flex context mapping form.
- b. Check the context assignment hierarchy.
- c. Check to see if the descriptive flexfield has been compiled properly.
- d. Check to see if the item is lot or serial enabled. Lot and serial attributes will not appear for non lot and serial controlled items.

Frequently Asked Questions

1. Can I assign Lot or Serial attributes to an item that has already been transacted in an organization?

You can assign lot or Serial attributes to an item that is already transacted in an organization, but it is very important to do the following steps. If there are any required segments for attributes and the following steps are not performed, then any inventory transaction for existing lots or serials will fail.

- For Lot attributes go to Maintain Lot Numbers form and query up all the existing lots for that item and give values for the required segments.
- For Serial attributes go to Maintain Serial Numbers form and query up all the existing Serial Numbers for that item and give values for the required segments.

2. Can I change the Lot or Serial attribute context of an item that has already been transacted in an organization?

Yes, you may change contexts.

Warning: Lots or Serials which are already transacted will still have the old context and attributes corresponding to the old context.

3. Can I add new segments to a context that is assigned to an item or item category which has been transacted?

Adding segments to a context does not pose any problems so long as the segments are optional segments. If you need to add required segments to an existing context, you must update the attributes of the on-hand lots or serials that are already assigned to that context to populate the newly required segments

4. Is it possible to have different Lot or Serial attributes contexts for an item which are enabled in different organizations? How will the attributes be transferred for such an item in organization transfer transactions?

Yes, you can have different Lot or Serial attributes contexts for an item which is enabled in different organizations.

Mobile: When you transfer a lot or a serial from one organization to a different organization and if the contexts are different, then lot or serial numbers that are transacted will have the default values defined for the context in the destination

organization. Then you can go to desk top Maintain Lot/Serial Numbers form and update attribute values if they are different from default values.

Desktop: Direct organization transfer if the context is different the default attributes will be populated in the destination organization. For inter organization transfer at the time of in-transit shipment receipt on desktop you will be able update or enter new set of attributes.

5. Who can alter Lot or Serial attributes of an existing lot or serial?

Anyone with access to the Maintain Lot Numbers form and the Maintain Serial Numbers form can alter lot and serial attributes

6. How can I configure default values for Lot or Serial attributes?

Lot and serial attributes functionality is an extension of descriptive flexfield functionality. Please refer to flexfield set up manual for the set up of Lot/Serial attributes descriptive flexfields.

7. Will Lot or Serial attributes behave differently in inventory organizations & WMS organizations?

Lot and serial attributes functionality will be enabled only if you purchase Warehouse Management Applications. Lot and serial attributes behave same way in inventory organizations & WMS organizations if WMS is purchased.

8. Are there any seeded Lot or Serial attributes?

No.

9. Can lot and serial attributes be integrated with third party software?

Oracle WMS subplot functionality includes all of the APIs to integrate with 3rd party systems.

10. Which segments would appear in the pop-up window?

For a descriptive flexfield with context-sensitive segments, a single structure consists of both the global segments plus the context-sensitive segments for a particular context field value, so for this case all the segments for the global and the segments for the context for flexfield Lot Attributes or Serial Attributes that have been setup for the item or the item category will show up as a pop-up window.

11. Is there a limitation on the number of characters in the prompts for descriptive flexfield segments window?

The standard length for mobile forms is nine characters. Therefore when configuring the Lot and Serial Attributes descriptive flexfields, it is recommended the length of window prompt not to exceed nine characters.

- 12.** Can you add more than one context value for the same flexfield Name (e.g. Lot attributes) and context column (e.g. item) in the Descriptive Flex Context Mapping window for an item?

No. You can have only one context value for an item.

Cartonization

Topics covered in this chapter include:

- [Warehouse Management Cartonization](#) on page 5-2
- [Setup](#) on page 5-9
- [Implementation](#) on page 5-14
- [Customization](#) on page 5-15
- [Common Problems](#) on page 5-15
- [Debugging Notes](#) on page 5-17
- [Frequently Asked Questions](#) on page 5-20

Warehouse Management Cartonization

Oracle Warehouse Management uses cartonization to suggest the best packaging configuration for a group of items. The system can present the packaging suggestion to you in one of many ways, including automatically generating license plates, printing container and shipping labels, and presenting the suggestion to you as part of a task.

Cartonization can segregate items by categories you identify based on different packaging requirements. For instance, refrigerated goods may require a particular type of insulated cooler, while miscellaneous goods can be packed into any standard corrugated cardboard box. In addition, the warehouse may use several sizes of each type of container. Items within a category can be commingled in the same license plate, or perhaps a particular item must be packed separately. You can also set minimum fill percentages for containers, below which the system suggests a smaller container.

You can create multiple levels of packaging, along with the requisite labels, so you can generate in a single operation, labels for inner cartons, packed inside outer cartons, and placed on a pallet. You can halt packing with a hierarchy of containers midway, and then continue again at a later point, so you can pack material in a storage container when it is first received or completed, and then pack it again during sales order picking into a final shipping container.

All these considerations, in addition to the item dimensions, weight, and volume in comparison to the physical attributes of the container, are made when the system selects the container type and quantity to use.

Cartonization Uses

Oracle Warehouse Management uses cartonization in three places:

- Sales order and manufacturing picking
- Prepack for manufacturing completion
- Inventory bulk pack

Cartonization at Pick Release

Cartonization is automatically performed when sales order or manufacturing jobs / schedules are released for picking, if you enable the option on for the organization and subinventory. After the lines are allocated using the Rules Engine, sales order lines are grouped by delivery, or by the delivery grouping rule if no deliveries are created prior to or at pick release. Manufacturing allocations are grouped by job or

schedule. Cartonization is then performed on each grouping. You may use this to suggest the carton to pick into, or the box to place on the conveyor belt if you perform conveyor-based picking.

Prepack for Manufacturing Completion

You can use the Container Prepack concurrent request, Container Prepack, to pre-print labels in preparation for a manufacturing completion. You can then perform the completion in an LPN triggered mode, minimizing further data entry during the completion.

Inventory Bulk Pack

You can use bulk packing of loose material to suggest the containers to pack material that already resides in inventory. You can use bulk pack for both loose and packed material. If you pack loose material, you can pack multiple items in a single operation. You can pack material into additional levels of packaging if you set up multi-level packaging, automatically creating the LPNs and labels for scenarios where inner cartons should be packed into outer cartons.

Cartonization Process

The cartonization algorithm warehouse management uses minimizes the number of containers used at each level in the packaging hierarchy, subject to volume, weight, and minimum percent fill settings of the containers. The algorithm also verifies the dimensions of the packed material can fit inside the dimensions of the container.

If you defined multi-level hierarchy after all the material is packed at the first level, the algorithm repeats itself with the new containers. The process continues until the top of the packaging hierarchy has been reached, the packaging process has completed the indicated number of levels, or no additional containers are available due to minimum percent fill, dimensions, or other physical attributes.

The following two examples illustrate how cartonization works on a single and a multiple level cartonization hierarchy. Although labels are generated at all levels in the cartonization process, LPNs are only created for the outermost level for each request.

Single Level Cartonization

Single level packaging hierarchies are most commonly used during sales order pick release for Pick by Label functionality, or to select the right packing container. You

may also use it for packing material in inventory and generating labels prior to manufacturing completion if the labeling requirements are simple.

Suppose an item with the dimensions W:1' L:5' H:3', weighing 60 pounds, must be packed. There are five containers in the container group. Container groups are linked to the items that they can pack by using common categories. See: [Categories](#) on page 5-9. For this example, the following categories are defined and assigned to the item and the containers as follows:

Item	Contained Item	Container Item
A	-	Misc
B	-	Misc
C	-	Misc
D	-	Misc
E	-	Misc

The common category code assignment MISC to the item and to the indicates you can pack the item into any of the five container items. The dimensions of each of the five container items are as follows:

Container	Width	Length	Height	Capacity
A	1	1	1	40
B	2	4	4	60
C	6	2	2	75
D	2	4	6	80
E	4	4	6	100

You pack a single unit of the item. Warehouse management rejects container A because it does not have sufficient weight capacity. Container B can hold the weight of the item, so warehouse management checks the dimensions. The largest dimension of the item, its length, cannot fit in any dimension of container B, so it is disqualified. The largest dimension of the item can fit into the largest dimension of container C, but the next largest dimension of the item, its height, does not fit into either the length or height of container C. Container D, however, is large enough for the item. Container E is also large enough for the item, but container D is selected because it has the smaller weight capacity of the two containers.

Multi Level Cartonization

Use multi level packaging hierarchies when you require labeling for more complex packaging configurations, such as when you need to pack inner boxes into outer boxes, that are placed on a pallet. The multiple levels can be packed all at once, or when using the mobile Bulk Pack page, can be broken up into several intermediate steps. Labels can be generated for each of the many levels of the hierarchy.

Suppose you have to pack an item with the dimensions W:6" L:6" H:6", weighing 2 pounds, when it completes from the manufacturing line. You wrap four of these items together into a 4-Pack, and place a label on the plastic shrink wrap. You then pack the 4-Pack into a large outer box of 10 4-Pack (40 individual units) per outer box. Finally, 12 outer boxes are stacked on a pallet. Labels are required for each of the three levels: 4-pack, outer box, and pallet.

Because of the way the material is packed, you should use the 4-packs and outer boxes only if they can be completely filled. You should not use a 4-pack if there are only 2 items to pack. However, you should use a pallet any time there are 4 or more outer boxes available. You can use the minimum fill percent attribute on the container item model these restrictions.

You can use the following category assignments to model the hierarchy:

Item	Contained Item	Container Item
Item	Inner	-
4-Pk	Outer	Inner
Outer	Pallet	Outer
Pallet	-	Pallet

You can translate quantity packed into the weight capacities of the containers. Because the weight of the item is 2 pounds, the weight capacity of the 4-Pack container item is 8 pounds, the outer container is 80 pounds, and the pallet 960 pounds. You do not need to define the dimensions of the items or container items because the system does not need to use them to determine how the items are packed.

Container	Capacity	Minimum Fill Percentage
4-Pk	8	100%
Outer	80	100%

Container	Capacity	Minimum Fill Percentage
Pallet	960	34%

In this scenario, where the item-container relationship is specific to the item and is based on a specific predetermined quantity, rather than dimensions in comparison to the containers, Container Load Relationships are easier to set up and maintain. See: [Container Load Relationships](#) on page 5-7.

In anticipation of a job completion, you pack 2000 units. Using the same cartonization algorithm defined above, you pack the 2000 units into 500 4-packs. However, because there is only one container item tied to the item via the category setup, and you defined weight and weight capacity, the process by which cartonization selects the 4-pack container item is more direct.

Cartonization now attempts to pack each of the 4-packs, treating each of these as the item to pack. You pack the 4-packs into 50 outer boxes, based on the weight capacity of the inner box. Because each outer box is filled completely, the minimum fill percent is met.

The 50 outer boxes are then packed. Based on the weight capacity of the pallet, 12 outer boxes can fit on each pallet container item. The 50 outer boxes thus require 5 pallets: four completely filled with 12 boxes each, and the fifth packed with the remaining two outer boxes. However, the two outer boxes weigh only 160# in total, less than 34% of the pallet weight capacity of 960#, and thus that last partial pallet is not packed.

At the end of the cartonization process, therefore, 500 4-packs, 50 outer boxes, and 4 pallets have been packed, and if set up, labels for each of these container items are created.

Percent Fill Basis

The cartonization process considers both weight and volume when recommending specific container items to use. It uses, if defined, both of these criteria, in addition to an optional minimum percent fill, to restrict certain containers. The Percent Fill Basis parameter controls precedence of the volume or the weight when sequencing the containers for evaluation and in calculating the percent filled. See: *Defining Shipping Parameters, Oracle Order Management Suite Implementation Manual*.

You can set the parameter to either weight or volume. When you set the parameter to weight, the containers are evaluated in ascending sequence of the weight capacity, and the minimum percent fill calculates with respect to the weight capacity of the container. Similarly, if you set the parameter to volume, the

containers are evaluated in ascending sequence of their volume capacity, and the minimum percent fill calculates with respect to volume capacity.

When evaluating containers to pack, the cartonization algorithm attempts to find the smallest container that can fit the complete request. The system determines the smallest container by the percent fill basis as described above. If that container is the correct size for the material, but cannot meet the minimum percent fill, then the cartonization process attempts to use the next smaller container, but still considers the physical attributes. This may require the request to be broken up into two or more containers. If after checking all the container items, cartonization cannot fit the material, it does not pack the material further.

Container Load Relationships

You can fix the relationship between items and containers based on a specific quantity. This type of relationship is also referred to as a standard pack quantity. For instance, the multi-level cartonization example described above has fixed the relationship between the item and the packing container. The physical attributes of the item are not directly relevant to the packaging process.

In these cases, container load relationships are easier to define and maintain. Container load relationships state an explicit quantity relationship between a container and the item (or other container item) that it includes. While you can define multiple relationships for each contained item, the cartonization process always uses the preferred relationship. Furthermore, using container load relationships allows the same container items to be used in multiple relationships while preventing item commingling within a specific level in the cartonization process.

Prior to evaluating the categories assigned to each item, the cartonization algorithm checks for any container load relationships. If defined, the system uses the preferred relationship, bypassing any cartonization groups.

Note: Only the preferred relationship is used, the cartonization process ignores any container load relationships you defined that do not have the preferred flag enabled.

You can use a combination of container load relationships and cartonization groups to define a multi-level packaging hierarchy. If you define a container load relationship, an item is never commingled with another item in that level. Only cartonization groups honor the minimum percent fill attribute of the container item; minimum percent fill for container load relationships is not honored.

Packaging vs. LPN

Only the outermost level created at each level of cartonization is defined as a license plate. License plates are not generated for intermediate levels. You can only calculate material availability at the innermost license plate level, and the rules engine cannot allocate nested LPNs and you cannot pick them in a single transaction. The way you create license plates and packaging entities impacts how labels print and on-hand balance maintenance.

In the multi-level example described above, 2000 items were packed into 500 4-packs. These 500 4-packs were packed into 50 outer boxes. 48 of these outer boxes were then packed into 4 pallets. There are 6 outermost levels, 4 pallets each with 480 units, and 2 outer boxes each with 40 units. The system generates a total of 6 license plates for the outermost containers.

You can use the inventory Bulk Pack window, to specify an arbitrary level to stop the packaging hierarchy. You can separate the packaging process into two or more separate steps, so you can perform the initial packaging and label generation when you first receive the material, and the second level packaging prior to shipment.

Because you generate license plates at the outermost level for each packaging request, when you perform Bulk Pack multiple times, license plates are nested. For instance, instead of performing the pack request prior to completion from manufacturing, you could perform Bulk Pack on the loose material after completion from manufacturing. If you perform Bulk Pack on 2000 loose units, specifying a packing level of 1, cartonization stops after packing the items into 500 4-packs, and the system generates 500 license plates.

You then pack the 500 4-packs to the end of the hierarchy by entering each of the license plates in the Bulk Pack user interface, which creates the 50 outer boxes and 4 pallets. Of the 50 outer boxes created, 48 are packed into pallets, and the system generates 4 new outermost license plates for the 4 pallets of 12 outer boxes each, and two new outermost license plates for the two remaining out boxes for a total of 6 outermost license plates. However, an inquiry on the contents of the outer boxes or pallets shows the license plates created at the 4-pack level. Because you packed in a single request for the pallets, the system did not generate license plates for the outer boxes contained in the pallets. If, you require license plates at all levels, you could break the packaging process into three distinct packaging steps.

Note: This does not impact single level packaging hierarchies. License plates always generate for these requests.

Content and Summary Labels

Labels generate for each level in the packaging hierarchy regardless of whether you create a license plate or record the level as packaging.

LPN Summary labels are printed at every level during the cartonization process. These multi-record labels include all the items contained at or below the current cartonization.

LPN Content labels print at every level that contains loose material. For levels that license plates are not generated, the innermost packaging level contains loose material and a LPN Content label may be printed. Because material availability calculations do not have visibility to packaging levels that do not have license plates, the system also prints an LPN Content label for the innermost license plate even if there are other levels of packaging inside the license plate.

You can identify all levels created by cartonization with a unique number. If a license plate exists, the number is the license plate number. If a license plate does not exist, the number is a packaging identifier that can be included on the label. You can print the identifier (packaging or LPN), as well as the immediate parent of the level on every content and summary label. Thus an LPN Summary label may be identified by a package ID and a parent license plate number, or by a license plate number and a parent package identifier. These relationships help you pack the material as determined by the defined packaging hierarchies.

See Also

Physical Attribute Group, *Oracle Inventory User's Guide*.

Setup

You must perform several setup steps before you can use cartonization. For items that always require a specific container, use the container load relationship. For other items packed into containers in a container group, you must create categories to group the container types and the items. You must then assign the corresponding items to the categories, and assign the physical characteristics such as volume and weight. Finally, you must define the containers the, designate physical characteristics, and assign them to the corresponding categories. You must enable sales order cartonization at the subinventory and organization levels if necessary.

Categories

Setup for cartonization uses Category and Category Set functionality. There are 2 pre-seeded category sets:

- Contained Item
- Container Item

Within these category sets, you create categories that model the different types of packaging used for outbound loads. For example, miscellaneous loose material requires a simple corrugated cardboard box. These boxes, and the items that use these boxes, are given the category MISC within the category sets Container Item and Contained Item.

Refrigerated items, however, must be packed within coolers. These perishable items and the coolers are given the category COOLER within the two category sets.

First, you create categories. In the example above, this corresponds to defining BOX and COOLER. You define categories in the Categories window. You must associate the category with a flexfield structure, and enter a name and description. The structure name for the category must be Cartonization. You can define a name and description for the category.

Before assigning the categories to a category set, the “Controlled At” field at the proper level of control. Controlling the cartonization groups at the master level makes setup easier, particularly if the items already exist. However, it does limit the ability of different organizations to use different packing configurations.

At installation, the category sets Contained Item and Container Item are seeded with the flag Allow Multiple Item Category Assignments unchecked. This prevents assigning multiple categories in a single category set to a single item. The Cartonization algorithm does not support multiple category codes in a single category set assigned to a single item. Instead, you might want to define a new category representing both categories combined.

You can now assign categories to category sets. You must add each category to both the Contained Item and Container Item category sets. The check box Enforce List of Valid Categories should be checked to ensure that container items and contained items are assigned to categories to defined categories.

Note: The single and multi-level packaging hierarchies use the same process of linking items (either loose material, or container items) to container items.

See Also

Defining Category Sets, *Oracle Inventory User's Guide*

Defining Categories, *Oracle Inventory User's Guide*

Overview of Item Categories, *Oracle Inventory User's Guide*

Contained Items

The next step is to assign the categories to the contained items and to complete the physical attributes of the item. Contained items, or items that are to be packed into containers, are given the appropriate category in the Contained Item category set. The weight, volume, and dimensions of the item can be entered in the Physical Attributes tab of the Master Items window. The unit-of-measure for these measurements should be within the same class for the contained items and the container items. For example, the cartonization algorithm can convert inches to centimeters because they are in the same class, Length. If an item specific conversion is setup to convert, say, 1 liter of an item to 2 pounds, the conversion will still be performed, but the system may be more difficult to maintain because units-of-measure will have to be checked as well as the items physical characteristics.

Setting up all the physical attributes for the containers or the contents is optional. You can skip the set up of physical attributes or use a subset. For instance, if all the items for a sales order generally fit within all the containers with respect to volume but could potentially exceed the weight capacity of a container, then only the weight of the items and the weight capacity of the container need be entered.

If left null, the physical attributes on container items is assumed to be infinite, while the physical attributes on the contents is assumed to be 0. An item container item, if used in a multi-level packaging hierarchy, will at different times be considered as both contents and as a container.

See Also

Overview of Units of Measure *Oracle Inventory User's Guide*

Defining Unit of Measure Classes *Oracle Inventory User's Guide*

Defining Units of Measure *Oracle Inventory User's Guide*

Defining Units of Measure Conversions *Oracle Inventory User's Guide*

Defining Items *Oracle Inventory User's Guide*

Physical Attribute Group, *Oracle Inventory User's Guide*

Container Items

You define container items the same way as contained items. Container items must have the appropriate category assignment within the Container Item category set. You can also define the three sets of physical attributes defined for contained items, weight capacity, volume capacity, and dimensions, for container items. These attributes pertain to the container itself. You must set the container flag as well as the internal volume and maximum load weight.

The units-of-measure for these measurements are the same units-of-measure used for the volume and weight of the container. You must also set the transactable flag for container items. The container weight and volume are different from its maximum load weight and internal volume. For a container, weight and volume are optional fields that give the weight of an empty container and the volume of an empty container. The maximum load weight and the internal volume are used to determine the capacity of the container. The container weight and volume are used to calculate the total gross weight and loaded volume of the LPN.

The total volume of an LPN may be calculated in one of two ways, depending on how the container is used. In the case of a pallet, where material is stacked on top of the container, the total LPN volume is the sum of the content and container volume. In the case of a drum, where material is packed inside the container, the total LPN volume is always the container volume, regardless of the quantity of material packed. Therefore, the LPN volume is calculated as the maximum of the LPN volume and the content volume.

For example, an item weighs 15 pounds and requires 1 cubic foot. It can be packed into a drum or a pallet. Assume that both containers can hold at least 10 of the item, by dimensions, weight, and volume.

Container	Weight	Volume
Drum	10 pounds	20 cubic feet
Pallet	20 pounds	5 cubic feet

If you pack 10 of the item on a single pallet, the total LPN weight is $10 \times 15 + 20 = 170$ pounds, while the total LPN volume is $\max(5, 10 \times 1) = 10$ cu. ft. If you pack 10 of the item in a single drum, the total LPN weight is $10 \times 15 + 10 = 160$ pounds, while the total LPN volume is $\max(20, 10 \times 1) = 20$ cu. ft.

Container Load Relationships

Some items require specific containers. These items have container load relationships, which are direct relationships between a container item and a contained item. The relationship specifies how many of the contained item can fit into one container. You set up container load relationships in the Container Item Relationship window.

Although you can establish multiple relationships for a single contained item, the cartonization process uses only the preferred relationship. There can be only one preferred relationship for each content item.

Prior to setting up these relationships, the container items must be properly setup. Any container item setup using the steps above will be a valid container item for a direct relationship. Alternatively, to setup items just for direct container load relationships, the only required step is to check the container flag in the container object group. No other physical attributes of the contained item or container item need to be entered.

See Also

Define Container-Load Relationship, *Oracle Warehouse Management System User's Guide*

Overview of Units of Measure *Oracle Inventory User's Guide*

Defining Unit of Measure Classes *Oracle Inventory User's Guide*

Defining Units of Measure *Oracle Inventory User's Guide*

Defining Units of Measure Conversions *Oracle Inventory User's Guide*

Defining Items *Oracle Inventory User's Guide*

Physical Attribute Group, *Oracle Inventory User's Guide*

Subinventory and Organization Setup

You must setup cartonization for subinventories and organizations when you use cartonization during pick release if cartonization for sales orders or manufacturing is appropriate for your business process. Some subinventories may store items in LPNs that are already packed, such as a case or a pallet area.

Parameters on the Warehouse tab of the Organization Parameters window control the cartonization level, and the cartonization processes to use. The "Enable Cartonization" flag has three options:

- You can turn on cartonization, in which case pick released lines are cartonized regardless of the allocation subinventory.
- You can turn off cartonization in which case no pick released lines are cartonized.
- You can configure cartonization at the subinventory level. The system first checks the cartonization flag on the subinventory definition before cartonization.

In addition, there are two flags that independently control whether cartonization is performed during sales order pick release or manufacturing component pick release.

The cartonization flag on the subinventory has only two options: enabled or disabled. This flag is used if you set the “Enable Cartonization” to “Controlled at Subinventory” on the Organization Parameters window.

See Also

Warehouse Setup, *Oracle Warehouse Management System User’s Guide*

Implementation

LPN Controlled and Cartonization Enabled

Cartonizing sales order lines that are allocated from subinventories where items are already packed in LPNs can cause confusion during picking tasks. If you pick an entire LPN you can either discard the suggestion the cartonization process makes, or place the entire picked LPN into the cartonization suggestion. If you use cartonization at pick release the following setup is recommended:

- Organization setting of cartonization controlled at subinventory level
- Subinventories that enable cartonization disable LPN control

Therefore, whenever a task is cartonized by the system, you are guaranteed that loose material is available.

In some scenarios, you should enable cartonization in LPN-controlled subinventories. For instance, an item may require different shipping packaging that differs from the storage packaging even if it is already stored in a license plate. Task management also supports these scenarios.

LPN Allocation

The Rules Engine allocates a particular license plate for a task based on the rule allocation mode or on prior reservations. This is possible if you enable both LPN allocation and cartonization for a subinventory.

However, the system bypasses cartonization when an entire LPN is allocated by a single task, so you can perform the picking execution process in a single scan. If an LPN is partially allocated for a line, the system cartonizes it if cartonization is enabled for the subinventory.

Customization

Bulk Pack API

You can trigger the bulk pack process via the transaction interface table, MTL_TRANSACTION_INTERFACE, as well as from the mobile window. Bulk pack transactions are added to the interface table in exactly the same way as pack transactions. The only difference is the license plate column TRANSFER_LPN_ID is left null. In addition, the column CONTAINERS can be optionally populated with the level at which bulk pack should halt.

Common Problems

The following problems relate to the operation of cartonization rather than the setup on the individual items or categories.

1. Different quantity for task than expected

There are several possible reasons why you are dispatched a task for a different quantity than you expect. The line was split at allocation because the Rules Engine did not allocate the entire quantity from a single locator. The line was split at cartonization based on the weight and volume capacities of the suggested container. Finally the line was split when the task was created due to limited capacity of the required equipment. You can check for all tasks created for a particular sales order via the Warehouse Control Board.

2. Non-integer tasks not cartonized

Cartonization is not performed on tasks with non-integer primary quantities unless container load relationships have been defined. Non-integer primary quantities are generally only found when the sales order lines were created with

non-integer primary quantities. This is because the system does not know into which fractional units the item can be split.

However, as container load relationships are item specific, and because container load relationships can be setup for non-integer quantities, the system assumes the item can be broken up into the quantity indicated on the container load relationships, regardless of the degree of precision.

3. Tasks not cartonized together when they should be

If tasks are not being cartonized together as expected, or conversely, if different tasks have been cartonized together when they should not be, check the delivery grouping rules. The cartonization system does not cartonize across deliveries, but verifies the deliveries are created as expected.

If you use container load relationships, different content items are not packed into the same LPN, even though both content items have relationships to the same container item. The cartonization algorithm considers merging different items into the same LPN when container groups, defined via categories and category sets, are used.

4. Task was not cartonized

There are several reasons a task created by the pick release process may not be cartonized. Verify that cartonization is either enabled at the organization level, or the subinventory level, and the subinventory from which the task was allocated has cartonization enabled. Also verify cartonization is enabled for the sales order or manufacturing pick release processes on the Organization Parameters window.

Verify you defined either the cartonization groups or container load relationships for the item and that the container item is transactable. If you use cartonization groups, verify at least one of the container items has the capacity for the item you are trying to pack, and that the container item is not invalidated based on item dimensions or container minimum fill percent. If you use container load relationships verify only one relationship for that particular content item is specified as the preferred or default relationship.

5. Container load relationships not honored

The cartonization process honors only the preferred container load relationship and you can enable only one relationship for any given content item as the preferred relationship. Verify the expected container item is marked as the preferred relationship.

Debugging Notes

Several common mistakes are made when defining the container groups and the physical attributes of the container and contents. Several validation scripts are included below to verify the individual setup steps, and to aid in troubleshooting.

Category Assignments

This script checks the category assignments of an item at the organization level. Given an item name and three-letter organization code (both inside single quotes), the script returns any category assignment of the item in the Contained Item or Container Item category set. If the system does not return a category assignment or displays an incorrect category assignment, cartonization does not work properly.

```
select concatenated_segments, category_set_name,
       mtl_categories.segment1 as category
from mtl_category_sets mcs, mtl_item_categories mic,
     mtl_system_items_kfv msik, mtl_categories_b mc,
     mtl_parameters mp
where concatenated_segments = &Name
and mp.organization_code = &Org_code
and mc.category_id = mic.category_id
and msik.organization_id = mp.organization_id
and mic.organization_id = mp.organization_id
and mcs.category_set_id = mic.category_set_id
and msik.inventory_item_id = mic.inventory_item_id
and category_set_name in ('Container Item','Contained Item')
```

This script lists the items the system recognizes as valid containers for a given contained item. Verify the `inventory_item_flag` and the `transactions_enabled_flag` for the container items are set to Yes. They must both be set to Y for the cartonization system to generate LPNs for the container item.

```
select kfva.concatenated_segments as contained,
       kfvb.concatenated_segments as container, kfvb.inventory_item_flag,
       kfvb.mtl_transactions_enabled_flag
from mtl_category_sets setsa, mtl_item_categories itema,
     mtl_system_items_kfv kfva, mtl_categories_b cata,
     mtl_category_sets setsb, mtl_item_categories itemb,
     mtl_system_items_kfv kfvb, mtl_categories_b catb, mtl_parameters
where mtl_parameters.organization_code=&org_id
and kfva.concatenated_segments = &Name
and cata.category_id = itema.category_id
and kfva.organization_id=mtl_parameters.organization_id
```

```
and itema.organization_id=mtl_parameters.organization_id
and setsa.category_set_id = itema.category_set_id
and kfva.inventory_item_id = itema.inventory_item_id
and setsa.category_set_name = 'Contained Item'
and catb.category_id = itemb.category_id
and kfvb.organization_id=mtl_parameters.organization_id
and itemb.organization_id=mtl_parameters.organization_id
and setsb.category_set_id = itemb.category_set_id
and kfvb.inventory_item_id = itemb.inventory_item_id
and setsb.category_set_name = 'Container Item'
and cata.category_id = catb.category_id
```

If both of scripts give the expected results and bulk packing still fails, then physical attributes may be missing or incorrectly defined.

Physical Attributes

Physical attributes are optional. You only need a subset of them for a given container or item. The only physical attributes setup that prevent a particular item or container from cartonization relate to the unit of measure. If physical attributes are defined, ensure they have a corresponding unit of measure and unit of measure conversions. The units of measure must all be in the same class; inter class conversions are only used when converting the transaction unit of measure to the primary unit of measure of the item.

This script displays all the physical attributes for all items (both contained items and container items) of a particular category.

```
select concatenated_segments as item, volume_uom_code,
       unit_volume, unit_weight, weight_uom_code,
       dimension_uom_code, unit_height, unit_length, unit_width,
       internal_volume, maximum_load_weight, container_item_flag
from mtl_system_items_kfv msik, mtl_item_categories mic,
     mtl_categories_b mc, mtl_parameters mp, mtl_category_sets mcs
where mp.organization_code=&org_code
and mc.segment1 = &Category
and mp.organization_id = msik.organization_id
and mp.organization_id = mic.organization_id
and mc.category_id = mic.category_id
and mic.category_set_id = mcs.category_set_id
and mic.inventory_item_id = msik.inventory_item_id
and mcs.category_set_name in ('Container Item','Contained Item')
order by container_item_flag
```

Bulk Pack Verification

In general, the printed labels are bulk pack and prepack. However, you can use these scripts to retrieve cartonized LPNs when label printing is not set up, such as for early stages in an implementation or in a testing environment.

This script gives all the LPNs that contain a particular item. It also displays lot and revision information, if applicable to the contained item. This script is valid for items that are not serial controlled.

```
select b.concatenated_segments as container, license_plate_number,
quantity, a.concatenated_segments as contained,
contained.lot_number, contained.revision, lpn_context
from wms_lpn_contents contained, wms_license_plate_numbers container,
mtl_system_items_kfv a, mtl_system_items_kfv b, mtl_parameters
where mtl_parameters.organization_code = &org_id
and b.inventory_item_id = container.inventory_item_id
and contained.organization_id = mtl_parameters.organization_id
and a.concatenated_segments=&ContainedItem
and a.organization_id =contained.organization_id
and container.lpn_id = contained.parent_lpn_id
and container.organization_id = contained.organization_id
and a.inventory_item_id=contained.inventory_item_id
and b.organization_id = a.organization_id
order by lpn_content_id
```

This script give all the LPNs that contain serial controlled items.

```
select b.concatenated_segments as container,
license_plate_number,quantity,
a.concatenated_segments as contained, sn.revision,
sn.serial_number, sn.lot_number, lpn_context
from wms_lpn_contents contained, wms_license_plate_numbers container,
mtl_system_items_kfv a, mtl_system_items_kfv b,
mtl_parameters, mtl_serial_numbers sn
where mtl_parameters.organization_code = &org_code
and b.inventory_item_id = container.inventory_item_id
and contained.organization_id = mtl_parameters.organization_id
and a.concatenated_segments=&ContainedItem
and a.organization_id =contained.organization_id
and container.lpn_id = contained.parent_lpn_id
and container.organization_id = contained.organization_id
and a.inventory_item_id=contained.inventory_item_id
and b.organization_id = a.organization_id
and sn.lpn_id = container.lpn_id
and contained.inventory_item_id = sn.inventory_item_id
order by lpn_content_id
```

Both scripts work for LPNs that are packed with either the Bulk Pack form or the Concurrent Prepack request. LPNs packed via bulk pack have an LPN context of 1, that indicates that it is currently in inventory, while LPNs packed via the concurrent request have an LPN context of 3, that indicates the LPN contents are not yet available for inventory.

Frequently Asked Questions

1. How are lots prepacked?

The lot number must be known when an LPN is prepacked. You can enter an existing lot number, if the assemblies are to be completed into an existing lot. However, if it is a new lot, you can leave the lot number blank on the prepack request and the system automatically generates a new lot number using the item lot generation prefix and starting number. The lot number can then be printed on the label. Only a single lot can be prepacked in each request.

This means it is possible to have a prepacked lot in an LPN, with the lot number indicated on WMS_LPN_CONTENTS, but no corresponding lot number created in MTL_LOT_NUMBERS.

2. How are serials prepacked?

Individual serial numbers are not prepacked. This is because the system has no way to indicate which serials are expected in each LPN short of printing a serial label for each serial number, which may not be set up. Therefore, a request is made to pack a particular quantity (and potentially lot and revision) of a serial controlled item, but the serials are only entered (and potentially created) at the completion.

This means it is possible to have prepacked serials in an LPN, with the serial quantity indicated on WMS_LPN_CONTENTS, but no corresponding serial numbers created in MTL_SERIAL_NUMBERS.

3. Can the prepacked item, quantity, or lot be overridden?

No, the prepacked item, quantity, or lot cannot be overridden at time of completion, nor can the revision or container item (type of container) be changed. For instance, an LPN with 25 of an item prepacked in it cannot be used for a completion of a job with only 24 remaining to complete, and LPNs prepacked with one item cannot be used for a completion transaction of another item.

However, as there is no tie between the prepacked LPNs and the job prior to the completion transaction, there is no need to use the prepacked LPNs or to cancel the prepacked LPNs; new LPNs can be generated on the fly.

4. Can non-preferred container load relationships used?

When container load relationships are setup, multiple relationships can be established for a single contained item. Exactly one of these must be specified as the preferred container. The preferred container is always used for cartonization of sales orders and inventory bulk pack, and is also the default container selected for prepack requests. However the operator can choose a different container item than the preferred container for container prepack. If there is a container load relationship setup for this different container, the system determines the correct quantity of that container. If there is no container load relationship setup for the container item you entered the system assumes the entire quantity can be packed into a single instance of that container item.

5. What happens when an LPN is picked for a cartonized task?

Despite the implementation suggestion that sales order cartonization only be enabled for subinventories that are not LPN controlled, in some situations, it may make sense to cartonize tasks allocated from subinventories where cases, pallets, and other larger LPNs are stored. In these cases, a combination of loose and/or packed material can be picked for a cartonized task. If the LPN quantity is less than or equal to the remaining task quantity and there are no other contents of that LPN, then the entire LPN is loaded onto the pickers equipment, and then you can pick additional LPNs or loose material. If any contents do not match, the contents that do match can be picked from that LPN which are automatically unpacked from the original LPN and then repacked in the cartonized LPN.

6. How do cartonization and LPN allocation interact?

Depending on the allocation mode indicated on the rules selected by the Rules Engine, the allocation may be made to the LPN detail level, or only to the locator level. Furthermore, the Rules Engine may allocate an LPN in its entirety, or only part of an LPN may be allocated.

Whenever the Rules Engine allocates an entire LPN, cartonization is bypassed for that LPN. However, partially allocated LPNs may still be cartonized.

7. What if a subset of the physical attributes are defined?

The simplest setup for cartonization uses no physical attributes. The containers are assumed to have infinite capacity in relation to the items in the same category code. This setup is useful if cartonization is necessary for pick and

pass picking and the sales order lines that would be cartonized together rarely would require more than one tote. However, a subset of the physical attributes can be used. If only weight is relevant in selecting the number and type of cartons, for instance, then only the weight (and corresponding unit of measure) need be setup for the container item and the contents. Similarly, only the volume, or only the linear dimensions may be applicable. Cartonization uses previously set up attributes.

There are some combinations, however, that cannot be used or which may not make sense. If there is a weight (or volume), but no corresponding UOM for either the container or the contents, that container item is not used. On the other hand, if there is a weight UOM (or volume UOM), but no corresponding measurement for either the container or the contest, the UOM is ignored. If either the container or the contents has a weight and weight UOM (or volume and volume UOM), but the contents do not, that dimension will be ignored. If only a subset of the linear dimensions have been defined, the system assumes the null dimensions are infinite for containers or zero for contents. Finally, if there are multiple cartons in a container group and one can fit infinite quantity, the infinite capacity carton will be chose; if there are many such cartons, one will be chosen arbitrarily.

8. Why are only some LPNs available for bulk pack?

Only license plates that reside in inventory or have been picked are available for bulk packing. Furthermore, these LPNs must be associated with a container item, so the system knows the dimensions, weight, and volume of the container item, as well as which of potentially many packaging hierarchies should be used. The container item association may be made either manually via the LPN Update available on the mobile, or systematically from a previous bulk pack request that was halted at an indicated level.

9. How are items sequenced for packing?

After sales order pick release, the items are packed in sequence based on the subinventory and locator picking order that has been defined. If the next item in the sequence cannot fit into a box that is currently being packed by the cartonization process, cartonization closes the suggestions on the current container and start processing a new container, rather than attempting to fit some other item in the same cartonization group and delivery in the container. This is based on the assumption that a single operator, traveling in the user-defined picking order, may be picking to the containers suggested by the system. By sequencing in this way, then you have only one active container at a time.

10. How can I determine what level to enter for bulk packing?

During a bulk pack transaction you initiate, you can indicate the level in the cartonization hierarchy the system should bulk pack. This level indicates the number of times the system should iterate through the cartonization process with successive container items. It should be thought of as the number of additional levels above the current level cartonization should proceed, not as the number of levels from the bottom.

If you enter a number greater than the remaining levels in the hierarchy, cartonization stops at the top of the hierarchy. Similarly, cartonization may stop prior to reaching the top of the hierarchy for other reasons, such as inability to meet minimum percent fill for all of the container items. The level entered by the user is applicable regardless of whether cartonization groups or container load relationships, or some combination, are being used.

11. What labels are available during a manual label reprint?

During a multi-level cartonization process, labels may be generated at all levels in the packaging hierarchy. Recall that LPNs are generated only at the outermost levels. The system does not track the on-hand balances in the individual packaging entities; transactions could have been performed on the license plate after cartonization and the system does not know for which package inventory should be incremented or decremented. The system knows the overall quantity, revisions, and lots in the license plates.

Therefore, manual label reprints for the license plate support printing labels for the levels at which LPNs were created. In order to re-create all the labels for the intermediate non-LPN levels produced during cartonization, the cartonization process must be repeated.

12. Does auto pick confirm honor cartonization suggestions?

The system automatically transacts move orders created by the pick release process, if auto pick confirm is enabled on pick release. Auto pick confirm confirms the allocated revisions, lots, and if enabled, serials, from the allocated subinventory and locator from loose material. It moves the material to the staging lanes without packing the material into any LPNs; the cartonization suggestion is discarded. If auto pick confirm is enabled, ship confirmation can only be performed on the desktop, or via the mobile Quick Ship window.

Cost Groups

Topics covered in this chapter include:

- [Cost Groups](#) on page 6-2
- [Common Problems](#) on page 6-6
- [Debugging Notes](#) on page 6-7
- [Frequently Asked Questions](#) on page 6-7

Cost Groups

High Level Overview

A Cost Group is the set of accounts that hold on hand inventory. Before the advent of Cost Groups, subinventories in an Oracle Inventory organization defined both the physical and accounting attributes of the material. Different subinventories represented functional/processing requirements, packaging/material handling characteristics or storage/control characteristics. In each warehouse zone, different accounts were maintained by creating separate subinventories, and pre-assigning locators to each subinventory. Thus a single physical area of the warehouse was subdivided to represent the different accounts which are present in this area.

Several business needs arose due to the limitations of this architecture, including:

- Improve space utilization by eliminating pre-assignment of each subinventory (and all associated locators) to a unique account
- Maintain inventory valuation as a characteristic of inventory, rather than as a characteristic of the subinventory and locator
- Change valuation separately from physical movement
- Allow multiple inventory asset accounts within the same subinventory

Cost Groups were introduced in WMS to separate tracking of physical and accounting attributes. The subinventory now represents the physical characteristics of the warehouse and the Cost Group tracks the accounts of the inventory that is held in the warehouse.

With the introduction of Cost Groups, it is now possible to have a 1:1 mapping of the zones in the warehouse to the subinventories in the system resulting in more accurate representation of capacity. Cost Groups are assigned by the rules engine based on the Cost Group rules setup. Cost Groups provide the following functional enhancements:

- Provide a two-dimensional matrix for tracking physical and account characteristics
- Derive Cost Groups dynamically based on a variety of information including supplier, customer, item, locator, item-status, item-category, and so on.
- Allows inventory of the same item with different Cost Groups in the same locator or LPN

- Support multiple item costs per organization (in Average, LIFO, or FIFO costed organizations)

With the introduction of cost groups, subinventory transfers do not trigger accounting changes. They are now purely physical moves. A new transaction called the Cost Group Change can perform accounting moves.

Process Overview

A Cost Group is assigned whenever inventory is introduced into the warehouse. inventory enters the warehouse by:

- Receiving (from external source), including:
 - Standard receiving
 - Direct receiving
 - Receiving with inspection
 - Miscellaneous receipt
 - Intransit receipt
 - Direct org transfer
- WIP transactions (from internal Manufacturing), including:
 - WIP Assembly completion
 - WIP Component Return

The Cost Group engine can be driven off of numerous pieces of information of these transactions including:

- Supplier
- Descriptive flexfield information
- Customer
- Item
- Location
- Item category
- Item status
- Item disposition (used, new, and refurbished)

WMS will not permit the Cost Group to be the only distinguishing characteristic between two quantities of loose inventory within a single locator or LPN. After the Cost Group is derived by the Cost Group rules engine, the Transaction Manager checks to see if there is any conflict between the assigned Cost Group and Cost Groups of existing material in the location. If there is a commingle error then the Transaction Manager reports an error condition. Once a Cost Group is assigned to material, it can be changed only by a Cost Group Update transaction.

Business Cases

Receiving from Multiple Suppliers to Same Subinventory

Without Cost Groups, multiple logical subinventories are created to receive material from multiple suppliers. Multiple logical subinventories are required to separate the accounting information of items coming from different suppliers. With Cost Groups, it is possible to receive all the inventory to the same subinventory and have it associated with different Cost Groups. During the receiving transaction, the Cost Group rules engine allocates a different Cost Group to the item based on the value of supplier business object.

Once these items have been received into inventory, the onhand would reflect a case like this:

Table 6–1 On-Hand Example

Subinventory	Locator	Item	Qty	LPN	Cost Group
BULK	BLK1.1.1	Item1	10	1	CG-Suppl1
BULK	BLK1.1.1	Item1	20	2	CG-Suppl2

Receiving Item of Different Grade to Same Zone

In this case, Cost Group Rules engine could be set up to look into some attribute of the item. Supposing the Cost Group Rules were setup to assign different Cost Groups to a Lot-controlled item based on the attribute of the Lot.

In this scenario, after the item has been received, the onhand could reflect a case like this:

Table 6–2 On-Hand Example 2

Subinventory	Locator	Item	Qty	Lot Number	Cost Group
BULK	BLK1.1.1	Item1	10	GoodLot	CG-Good

Table 6–2 On-Hand Example 2

Subinventory	Locator	Item	Qty	Lot Number	Cost Group
BULK	BLK1.1.1	Item1	20	BadLot	CG-Reject

Implementation

Cost Group setup consists of these four setup operations:

1. Define organization and specify default Cost Group
2. Define inventory Cost Groups for a particular organization
3. Define subinventories and assign default Cost Groups
4. Define Cost Group rules

Steps 1 - 3 reflect the incorporation of Cost Group associations into the basic setup of inventory organizations and subinventories.

Step 4 reflects the additional setup required to specify new rules to assign accounts to inventory with specific characteristics.

These steps are described in detail in the following documents:

- *Oracle Warehouse Management User's Guide*
- *Oracle Inventory User's Guide*
- [Warehouse Management Rules Engine](#)

A summary of the steps involved, in defining Cost Group rules, include:

- Configure the strategy search order
- Define cost group rules
- Configure the strategy search order
- Define cost group strategies
- Assign cost group strategies to business objects

Define Cost Groups Rules

Cost Group rules define the conditions under which a specific Cost Group should be assigned to a specific set of Inventory.

Define Strategies and Assign Rules to Strategies

Cost Group Assignment Strategies define the sequence in which a set of rules should be exercised to determine Cost Group. For example, a specific strategy might evaluate several rules to determine whether inventory is consigned from a special supplier, and subsequently evaluate other rules to determine whether the item is of a category that should be associated with a specific account.

Assign Strategies to Business Objects

Assigning the strategy to a specific business object indicates that the specific strategy should be invoked when the inventory is created in association with that specific object. For example, a specific strategy could be assigned to the business object 'Transaction Type = Account Alias Receipt,' a second strategy could be assigned to 'Item = M9571A,' a third strategy could be assigned to 'Item Category = ASSEMBLY.FINAL,' and so on. If an Account Alias Receipt is performed, the first strategy is invoked. If some other transaction is performed for Item M9571A, the second strategy is invoked. If a different transaction is performed for a different item of Item Category ASSEMBLY.FINAL, the third strategy is invoked. If none of these conditions are met, the default cost group for the subinventory is invoked.

Common Problems

1. Receiving causes a Cost Group commingle error.

A Storable Unit is a quantity of inventory, uniquely identifiable by a combination of Item Number, Revision, Lot, Serial Number, LPN, and Locator. If any one of these six identifying characteristics varies between two quantities of inventory, then each quantity represents a distinct Storable Unit, capable of carrying a distinct Cost Group. If all of the characteristics are identical, then the two quantities are really a single Storable Unit of the combined quantity, which must carry a single Cost Group.

Any on-hand inventory that exists for a specific Item carries some Cost Group. For example, LPN 123 contains 100 Each of Item M9571A in Organization WM1, Subinventory Bulk, and Locator BLK1.1.1. The Item is not Revision, Lot, or Serial controlled. This Storable Unit carries Cost Group Alpha. A receipt for Item M9571A is performed against a purchase order. As the Cost Group rules have been established, this new inventory will be assigned Cost Group Beta. If the newly received quantity is destined for LPN 123 in Locator BLK1.1.1, this transaction is attempting to co-mingle inventory of two different Cost Groups

into a single Storable Unit. The Transaction Manager will report a co-mingle error, and the transaction will fail.

For the transaction to succeed, the new inventory must be a distinct Storable Unit. This can be accomplished by receiving or performing the put away into a different locator or into a different LPN (this includes the option to store the inventory loose in Locator BLK1.1.1). For other items that are Revision, Lot, and/or Serial controlled, co-mingling errors may be prevented by using distinct Revisions, Lots, or Serial Numbers. There is no circumstance under which a co-mingling error may arise for serial tracked inventory, since every unit of inventory is its own Storable Unit, uniquely identified by the serial number.

2. Failure to assign a Cost Groups when performing a transaction.

Changing the definition of a rule in one user session could cause a failure in other user sessions if the rule being changed is used by the other sessions. The Inventory Transaction Manager would fail in this case with an error message of 'Failed to assign Cost Group to Item.' The solution to this problem is log out of the affected session and log back in and retry the transaction.

Debugging Notes

The Inventory Transaction Manager log file provides details on the various steps involved in deriving the Cost Group when processing a transaction. This trace is enabled by the Transaction Manager trace profiles. Please refer to *Oracle Warehouse Management Mobile Inventory Transaction Technical Manual* for details on enabling trace.

List of common error conditions in deriving cost groups

FOB (Free on Board) point is not defined for the organization

The onhand quantity is zero for the selection criteria entered

Error Updating Entity

Frequently Asked Questions

1. What is a Cost Group?

A Cost Group is a set of related financial accounts, representing ownership of inventory. Think of this as the accounts that used to be on the accounting tab of the subinventory form.

2. Does the Cost Group change when inventory is moved?

Cost Group is not changed by a Subinventory Transfer. Inventory retains the originally assigned Cost Group throughout any movements within the same organization. When an InterOrg Transfer is performed, a new Cost Group is assigned based on the Cost Group Rules for the destination organization.

3. How can I change the Cost Group assigned to inventory?

The Cost Group Update transaction is specifically designed to do this. The physical location of the inventory is managed by a Subinventory Transfer, and ownership is separately managed by a Cost Group Update.

4. What is the difference of a WMS Cost Group and a Project Manufacturing Cost Group?

They are the same thing. If the organization is a Project Manufacturing organization, the PJM cost group will always be assigned to project inventory regardless of the rules you set up. A user cannot transfer material that belongs to a project out of the project's cost group.

5. What if I want to derive the Cost Group from the subinventory?

The final, underlying default for the Rules Engine is to assign the default Cost Group of the subinventory to new inventory arriving there. If no other, more specific rules are created, the Default Cost Group of the subinventory will always be used (similar to functionality before Cost Groups). However, the Cost Group will not be changed by a subsequent Subinventory Transfer. That functionality will remain the province of the Cost Group Update.

6. Do multiple Cost Groups enable multiple costs?

In an Average, LIFO or FIFO costed organizations, a distinct cost is maintained for each Item/Cost Group combination. In a Standard costed organization, a single Standard Cost is maintained for each item. All inventory of that item, regardless of Cost Group, carries the same Standard Cost.

7. What is commingling?

Commingling is an attempt to assign two distinct Cost Groups to a single Storable Unit of inventory. WMS will prevent co-mingling by failing any transaction that would result in co-mingled inventory. The user can avoid co-mingling errors by ensuring that at least one of the characteristics Item Number, Revision, Lot, Serial Number, LPN, or Locator differ between any two quantities of inventory that should belong to different Cost Groups.

8. How does Cost Group assignments differ between Oracle Inventory and Oracle WMS?

Cost Groups in Oracle WMS are assigned by the Cost Group Rules Engine. In Oracle Inventory, Cost Groups are derived based on the Primary Cost Method of the organization and the location where the material is being moved. If the costing method is Standard-Costing, then the Cost Group associated with subinventory is assigned to the material. For the other costing methods, the Cost Group associated with the organization is used. In Oracle WMS, once a Cost Group is associated with a material, it does no change when the material is moved within the organization. In Oracle Inventory, the Cost Group associated with the material changes with the location where it is residing.

Cycle Count

Topics covered in this chapter include:

- [Overview](#) on page 7-2
- [Common Problems](#) on page 7-14
- [Debugging Notes](#) on page 7-15
- [Frequently Asked Questions](#) on page 7-16

Overview

Cycle Count functionality has always been an integral part of Oracle Inventory. Cycle counting is the process of periodically counting individual items to ensure accuracy of inventory quantities and value. With Oracle Warehouse Management system (WMS) this functionality has become more user friendly, less time consuming, and more accurate. The most significant improvement is in the way the actual count is entered and the flexibility in entering the count. In a WMS enabled environment the Mobile Radio Frequency (RF) devices essentially provide a new interface for the same cycle count transactions that were formerly performed on the desktop. Counts are recorded immediately in the database. The latency between when the count is recorded on paper and entered in the system has been eliminated. Counts are automatically matched to the cycle count request; if no match is found, an unscheduled count (if allowed) is created. This direct entry eliminates the need for a data entry clerk to type in the cycle count values, simplifying the process and making it less error-prone. Also, when License Plate Numbers (LPNs) are entered, either the entire contents of the LPN can be verified or the LPN can be recorded as on-hand and all the contents are assumed present.

With Oracle WMS, cycle counts are dispatched as tasks. This chapter will give you a very high level overview of how to utilize the Cycle Count Task Dispatching functionality to perform cycle counts. The entire process of counting with WMS remains the same as in Oracle Inventory except that the scheduled counts are dispatched as tasks. Users who are eligible to perform these tasks will be the only users that will see these tasks. There are some additional WMS set up steps that are required so that the task infrastructure can be utilized for this purpose.

Functional/Business Flow Description

The business flow of a Cycle Count is outlined below:

1. Set up and schedule a Cycle Count through the desktop forms
2. Dispatch Cycle Count Task (optional)
3. Perform the cycle count and enter the count results through the mobile interface either from the regular Cycle Count menu or in the form of Cycle Count Tasks. (Optionally, counts can be recorded on paper and entered from the desktop)
4. Approve the counts and adjustments through the desktop forms
5. Run reports through the desktop forms

Set up, defining, scheduling, and generating Cycle Counts is done from the desktop forms. While all these desktop forms are available from the Warehouse Manager

responsibility, the actual scheduling process has not changed with WMS. There are some new fields and options in the Cycle Count Header form. Details can be found in the Functional Area section of this guide.

Once a Cycle Count is scheduled and generated to be counted, the operator can log onto the mobile device and is now ready to perform the count. At this point the user has performed all the task set up required to utilize Cycle Count Task Dispatching. The user navigates to the Task menu to perform the count. If the Task set up is not done the user will have to go the regular Cycle Count menu to perform the count. All other fields, such as item, subinventory, and locator, are scanned using the mobile RF device. If the count does not allow unscheduled entries, all fields will be limited to what has been scheduled. If Cycle Count allows unscheduled entries, for example if no match is found, the system automatically creates an unscheduled entry. Such entries can only be made from regular Cycle Count menu or the Desktop forms.

After the count has been performed, a manager can approve, reject, or send for recount those count entries that fell outside of the tolerances defined on the Cycle Count. These adjustments are immediately posted to the accounts indicated on the Cycle Count once they are approved. For details on the approval process, please refer to the Cycle Counting section in the *Oracle Inventory User's Guide*.

Cycle Count Functionality

This section details the Cycle Count functionality.

You can define and maintain an unlimited number of Cycle Counts in Oracle Inventory. For example, you can define separate Cycle Counts representing different sets of subinventories in your warehouse.

There are five steps to performing a Cycle Count, though the only steps that have changed in the process are seen when defining the Cycle Count (additional options have been added for counting LPNs, entering the counts performed on the mobile device instead of the desktop, and setup required to utilize task dispatching of the counts). All other steps remain unchanged from Oracle Inventory prior to WMS.

Entering the count: After the count is scheduled and generated successfully, the user can log on to the mobile RF device and navigate to the Cycle Count menu to enter the counts. There are two ways of entering the count regardless whether the user is performing the count from the regular Cycle Count menu or from the Task Dispatching menu:

- **Summary count:** This option gives the counter the ability to count all the items inside the LPN by scanning the LPN number. If the LPN is sealed the counter is

not required to open the LPN and count each item individually. This type of counting helps in counting nested LPNs, which are sealed. The system assumes that the contents of the LPN are as expected. Once the counter enters the LPN they are prompted for the next item or LPN in that subinventory and locator. The counter can optionally change the subinventory and locator.

- **Detail count:** When Details is selected the person entering the count only confirms all the contents of that LPN, including specific lots, serials, and revision numbers. Once you complete the entry of that LPN you are prompted for the next item or LPN in that subinventory and locator. You can optionally change the subinventory and locator.

Figure 7–1 Sample Detail Cycle Count

```
{Cycle Counting '***  
{Name '***>Demo Cyc1  
{Sub '***>CJSBULK  
{Loc '***>CJSB.1.1  
{ParentLPN>C101495W  
<{Detail '*** '***  
<{Summary '*** '***  
  
Cycle Counting (WD1)  
Name >Demo Cycle  
Sub >CJSBULK  
Loc >CJSB.1.1  
ParentLPN>C101495W  
Item >SJ 102  
Desc :SJ Serial  
UOM >Ea  
Qty :3  
<SN Detail>
```

The graphic above shows the counter is entering count for Cycle Count: Demo Cycle Count. The counter is currently in subinventory CJSBULK and locator CJSB.1.1. This entry is for LPN: C101495W. Once an LPN is entered the counter is given the flexibility of entering a Detail or a Summary count. In this case the user is entering a Detail count. The counter is then prompted to enter the item SJ102 (item description field is defaulted depending on the item selected in the previous field). Counter then enters the UOM and a quantity of 3. Because this is a serial control item, the user is then prompted to enter the Serial Number details.

Figure 7–2 Sample Summary Cycle Count

```

{Cycle Counting '***
{Name '***>Demo Cyl
{Sub '***>CJSBULK
{Loc '***>CJSB.1.1
{ParentLPN>C101495W
<{Detail '*** '***>
<{Summary '*** '***>

Cycle Counting (WD1)
Name >Demo Cycle
Sub >CJSBULK
Loc >CJSB.1.1
ParentLPN>C101495W
<Save/Next Item>
<Done>
<Cancel>

```

The graphic above shows the counter is entering count for Cycle Count Demo Cycle Count. The counter is currently in subinventory CJSBULK and locator CJSB.1.1. This entry is for LPN C101495W. Once an LPN is entered the counter is given the flexibility of entering a Detail or a Summary count. In this case the user is entering a Summary count. The user is not prompted to enter the value of items, UOM, and so on after the Summary option is selected. The system assumes that everything that is supposed to be in that LPN is actually there. Thus the counter can proceed to enter the next count.

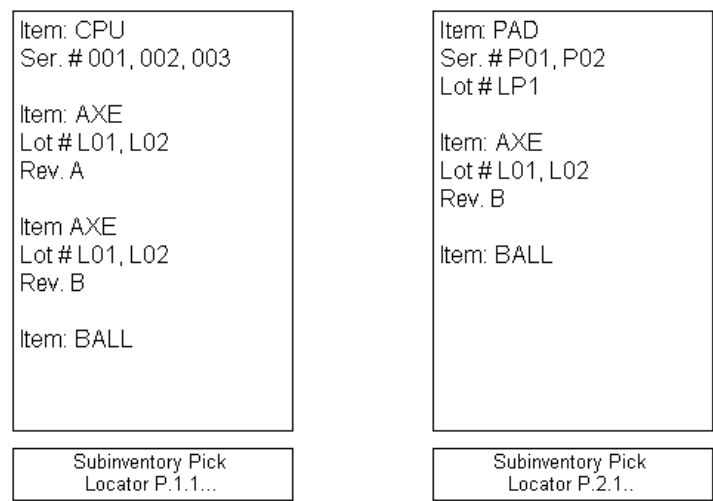
Entering Cycle Counts as Tasks

The counter will be prompted to perform a Cycle Count at a location based on their current location and the equipment that they are signed on to. Moreover, tasks will be filtered based on the users skill set, only qualified employees will able to perform Cycle Count tasks. Cycle Count tasks can be assigned to a specific user or manually moved up the task queue, or can be re-prioritized, from the WMS Control Board by a warehouse manager or user with the correct responsibility. Cycle Counting tasks will be interleaved with picking and replenishment tasks to optimize the movement of the warehouse operator within the warehouse. WMS does not support multiple Cycle Count Task Types.

The system sequences cycle count tasks based on priority, subinventory, and locator picking order.

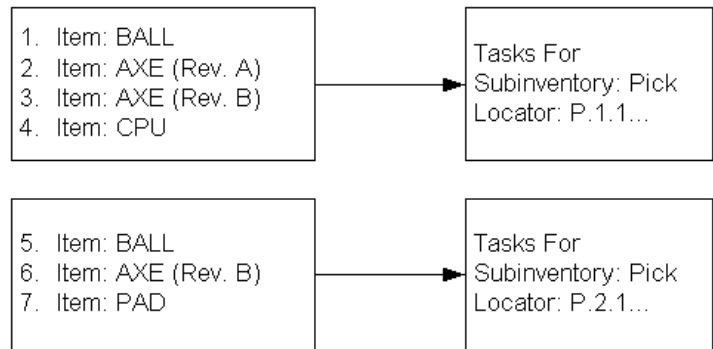
Consider the following scenario:

Figure 7-3 Cycle Count Scenario 1



The above scenario generates the following tasks:

Figure 7-4 Cycle Count Scenario 1 Tasks

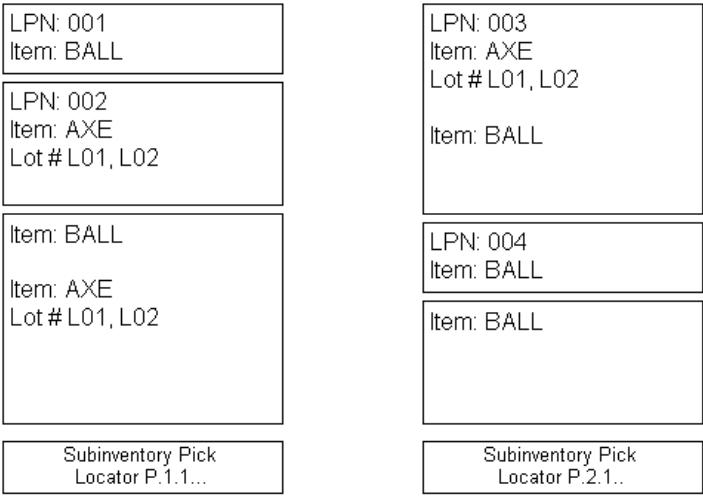


In this case 7 different tasks will be dispatched to the user. If the items are packed inside LPNs, a separate task will be created for counting that LPN. Consider a case in where there are some loose and some packed in an LPN of an item in same subinventory and locator. In this case two tasks will be created for counting the item. One task will be for counting loose quantity of that item and another task will

be to count quantity of that item packed in LPN. Like regular cycle counting, the mobile Cycle Count interface user will be able to enter LPN counts in the form of either SUMMARY or DETAIL.

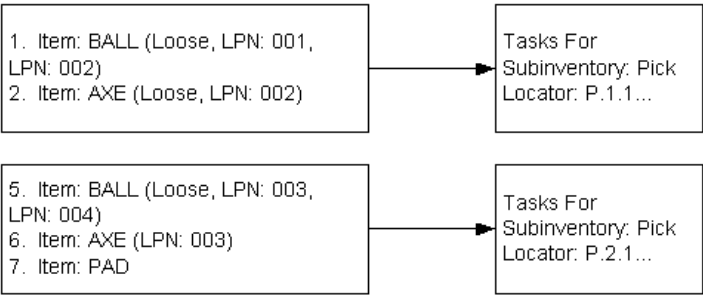
Consider the following Cycle Count scenario involving items contained in LPNs and loose items:

Figure 7–5 Cycle Count Scenario 2



The above scenario will generate the following tasks:

Figure 7–6 Cycle Count Scenario 2 Tasks



There are different cases that might happen while completing these tasks. Lets assume that User A accepts the task of counting BALLS & User B accepts the task of counting AXES at the same time. User A will be able to count only item BALL, and user will B will be able to count item AXE only. When user A is counting LPN:002 / LPN:003, he will be able to count only item BALL in that LPN, no matter whether user A performs detail or summary count for these LPNs. The same will apply for User B while counting LPNs LPN:002 and LPN:003. User B will be able to count only item AXE while performing the count on these LPNs.

In the second locator (P.1.2...) if user A accepts the task of counting BALLS then they will be able to count only item BALL from LPN:003 & LPN:004. And if user B accepts the task of counting AXES then User B will be able to count only item AXE from LPN:003.

If an LPN is partially counted then it cannot be approved on the desktop. This is the existing functionality, which remains unchanged.

The user would be able to skip a task after entering partial information while performing the count or in the beginning of the count. This can be done using <ESC-K>, which is one of the preseeded hot keys. This task will be sent to the user after some specific time, which will be defined as one of the organization parameters. At the end of the count the user will receive a message that all the scheduled counts are over. The user will be able to count ONLY SCHEDULED entries from the Cycle Count Task menu. Once the counting is complete, the user will be able to view the completed counts on the desktop. There the user will be able to approve, reject, or recount the count. This part of the Cycle Count functionality remains unchanged.

Table 7–1 Visibility of Scheduled and Generated Counts

Sr.	Task Status	Task Menu	Mobile Menu	Desktop
1.	Not accepted by any user	Blank	Visible. The user will be able to perform the count entry from this screen.	Visible. The user will be able to perform a count entry from this menu.
2.	Accepted by user	Visible. The user must perform all counts that have been dispatched as tasks from this menu.	Visible, but will give a warning message when trying to perform a count that has been dispatched as task. If unscheduled entries are allowed for the Cycle Count then the user will be able to perform unscheduled entries from here.	Not visible. If unscheduled entries are allowed for the Cycle Count then the user will be able to perform unscheduled entries from here.
3.	Skipped	Not visible. Will become visible if the count is not complete after the scheduled skipping time is over.	Visible, but will give a warning message when trying to perform a count that has been AGAIN dispatched as a task after the scheduled skipping time is over. If unscheduled entries are allowed for the Cycle Count then user will be able to perform unscheduled entries from here.	Visible only until the time the count task is in the skipped mode. The user will be able to perform a count entry from the desktop menu as long as the count has not been AGAIN dispatched as a task after the scheduled skipping time is over. If unscheduled entries are allowed for the Cycle Count then the user will be able to perform unscheduled entries from here.

The user cannot perform unscheduled multiple serial counts from the mobile interface. This ability is available on the desktop interface. Also, the desktop interface does not have the ability to dynamically generate lot and serial numbers (and their attributes if WMS is installed). LPNs cannot be generated from the desktop, so if there is an unscheduled Cycle Count entry, which involves LPNs, then that entry should be made from the mobile interface. 0 (zero) count can be made from the desktop as well as the mobile interfaces. For example if user wants to enter an item and if all of the items are missing then user can enter 0 to report missing quantity.

Counting Multiple Serials on a Mobile Device

There have been a number questions about how multiple serials are counted on the mobile interface. On the Cycle Count mobile form the user first specifies the item name. Then user enters the total quantity of the serials that user is going to count. On the Serial Number field the user will be taken to an interface on which the first field will give a list of all the serials that are scheduled to be counted. Selecting <CTRL-L> will give the list of values. If all the serials are present, the user can directly select All Present or if the serials are missing then user can select ALL Missing tabs. If there is a serial that is missing then user has to create a running list of serials that are present and that are missing. The user scans each serial and if that serial is present then select Add / next item. This way all the serials are counted. When the counting is complete select Done. This will take user back to the Cycle Count main screen. The total quantity of serials on the first page and the total numbers of serials MUST match. For example if Available Quantity was shown as 10 and the user entered Quantity of 7, then on the next page user will just have to scan the 7 serials that are present. If while scanning the user scans a serial that is not meant to be counted the user can re-scan that serial and select Remove / Next Item and remove that serial.

If there are serials that belong to multiple lots then the user will have to enter the total quantity first, then the lot number, and then scan the serial that belongs to that lot number. After the user has finished scanning serials for that lot number they enter the other lot number, enter the quantity for that lot number, and then enter the serials that belong to this second lot number.

Serials can be entered in a range or as individuals depending on the SERIAL_TYPE form function parameters.

After the counts are entered, the approver approves, rejects, or schedules a recount for the items and then posts the adjustments. There are no changes in this part of the functionality, but there is a new tab in the Cycle Count Approvals form that gives the details of the container. This tab contains fields such as:

- Parent LPN
- Outermost LPN
- Cost group
- Container Item

A similar tab has been included in the Cycle Count Entries form on the desktop. This form also has fields such as Parent LPN, Outermost LPN, Cost group, Container Item, and so on.

Implementation

Setup

Once the cycle count has been defined on the desktop, and entries have been scheduled and generated to be counted, there is no further setup required for using the regular mobile Cycle Count menu. As stated previously, the mobile portion of Cycle Counting enables you to perform user directed counting of the entries that were generated. You can still enter counts through the desktop just as before. However with the mobile, you do not have to perform the matching process between counting an item and inputting the values into the appropriate count entry. You print out a Cycle Count report to see what to count, and then proceed to the specified locations and count the items that are on the list.

If Task Dispatching is going to be utilized, there is additional setup required:

- Set up an employee
- Assign that employee to the user that will perform the Cycle Count tasks
- Define a department for Cycle Counting (optional)
- Create a new resource type of Person. Assign the employee that is associated with the user who will perform the Cycle Count tasks
- Define a standard task type for Cycle Counting. Assign the Cycle Counting department to this task type
- Assign task type of Cycle Count
- Assign the resource that was created for Cycle Count in Operational Resource

The user is ready to accept dispatched Cycle Counts once this setup is complete. The process of creating, scheduling, and generating Cycle Counts remains unchanged.

This setup is organizational specific. Each organization must set up Cycle Count tasks if applicable.

One of the major differences between entering cycle counts on the desktop and on the mobile is that with the mobile, the counter directs the counting. In other words, the counter counts items and doesn't have to match that count with the specific count entry that was generated for it. On the desktop, in the cycle count entries window, each record corresponds to an active cycle count entry generated. There is no need to match entry information since this is done explicitly. On the mobile, the information that the user inputs is matched with an entry in the MTL_CYCLE_

COUNT_ENTRIES table. It will search for a record for that particular Cycle Count header ID, subinventory, locator ID, inventory item ID, revision, lot number, and serial number for cycle count entries that haven't yet been counted and are still active. This matching is done in the PLSQL backend in the process_entry method. The inputs that the user enters are matched with an existing active cycle count entry and then that record is processed in a manner similar to how it is done on the desktop.

Note: If you enter data that is not found in the cycle count entries table and if unscheduled entries are allowed, a new record is created in this table for the new count.

LPN Related Counts

If your count contains an LPN, you can perform either a summary count or a detail count. A detail count requires the counter to open up the LPN and count the items stored within it. A summary count requires the counter to enter LPNs only. The LPN contents do not need to be verified. The system will assume that the LPN is intact. This is useful if the LPN is sealed and the user believes that it is highly likely that the LPN quantity matches what the system thinks it should have. Therefore if you perform a summary count, all of the items packed within it will be counted automatically. Only those count entries which were scheduled will be updated. Unscheduled counts will be performed only if it is allowed and if the item packed within the LPN is defined within the scope of the cycle count.

LPN Discrepancies

LPN discrepancy means that an LPN was found in a location other than expected. On the desktop this works by modifying the subinventory, locator, and LPN of the existing entry rather than creating a new entry. On the mobile this works by automatically determining if there is a discrepancy; the existing entry is similarly modified as in the desktop. If you are performing an LPN count and you allow container discrepancies, the system will automatically issue a subinventory transfer for the entire LPN and all of its contents if it is ever found in a different location. Thus if the user finds a sealed LPN and does not want to open it up and the LPN is found in a new location, the user can still perform the count. Even though the LPN is found in a discrepant location, count entries for items packed within the LPN can still be entered as if the LPN was found in the original location on the system. So, when the system has to decide whether or not to perform an adjustment for an item packed in an LPN, it doesn't matter where the LPN is found. The packed

information for the LPN should still be correct. If it is not, then an adjustment will be made for the item. In any case, a subinventory transfer will be issued for the LPN to ensure system accuracy for the location of the LPN.

Note: ILPN settings override the serial settings of the contents of that LPN. For example, if the LPN allows discrepancies, upon finding the LPN in a different locator, all the contents including any serialized contents are moved as well, even though the cycle count may not allow serial discrepancies.

Serial Counts

There are two options for performing serial counts:

- single serials
- multiple serials

When you perform a single serial count, a count entry is generated for each serial number. For multiple serials, a single cycle count entry is created for the given item, revision, and lot. In the single serial case, the counter will scan in the item, revision, lot, and quantity information, then enter the serial number. Depending on the form function parameter, either single or ranged serials will be displayed. For single serial, if the user claims that they have found 10 serials, they will need to scan in each individual serial for a total of 10 scans. However if ranged serials is allowed, they will scan the first and the last serial number. For ranged serials, there will be a From and a To serial field, which will require a total of 2 scans by the counter. However, it is implied that all of the serials in the range exist, no gaps exist, and the total amount equals the quantity that the user had entered in earlier. Once all of the serials have been entered, either one by one or in a range, you can process all of the entries at once.

In the case of multiple serials, once you have entered the item, revision, lot, and quantity information, a Serial Detail button will be displayed. You will then navigate to a multiple serial detail page where you will input in the serials that were found during the count. On this page, there are two fields, the first is the scheduled serial field. This field is a non-editable List of Values (LOV) field that enables you to query up to see which serials were scheduled to be counted for that multiple serial entry. The second field is the serial entry field. Here the counter will scan in the serial that were found. When you first enter the page, there are two buttons available which are All Present and All Missing. If you select All Present, then all of the serials which were scheduled to be counted for the entry will be

marked as present. Likewise if you select All Missing, all of the serials will be marked as missing. You can scan or input in a serial number and either choose Save/Next or Remove/Next. Selecting Save/Next will mark the serial in the serial entry field as present. Selecting Remove/Next will unmark the serial in the serial entry field so that it will be considered missing. Once the counter is satisfied that all of the serials that were found have been entered in correctly, the counter can select Done which will bring them back to the previous page. The counter can then save the count entry and either continue with the count or exit out of the count and navigate back to the menu.

Serial Discrepancies

Serial number discrepancy means that a serial was found in a location other than expected. That place may mean a different locator, or may be loose or packed in the same locator. This is allowed regardless of whether the count allows unscheduled entries. So, if a serial is ever found in a discrepant location, the system can account for that and transfer the serial so that it is in the new location. To do this, serial discrepancies must be allowed. This will update the existing count entry for that serial with the new subinventory and locator from where it was found. On the desktop this works by modifying the subinventory, locator and LPN of the existing entry rather than creating a new entry. On mobile this works by automatically determining if there's a discrepancy; the existing entry is similarly modified as in the desktop. Additionally, when the adjustment is processed, the serial will be transferred to the new location. The adjustment is either processed immediately or it is sent for approvals. In a multiple serial count, all of the serials for that multiple serial entry can either be found where it was scheduled, or it can all be found in a new location. In the case where they are found in a new location, all of the serials will also be transferred to the new location once the adjustment has been processed.

There could also be combinations of serial and LPN discrepancies where a serial was found in a new location packed within an LPN or found loose when it should have been packed within an LPN. All of these discrepant cases should be taken care of by mobile cycle counting. This will help ensure inventory accuracy where LPN and serialized items are stored. Serial and container discrepancies must be allowed first, otherwise you can only count items where the count entry generated thinks that the item is.

Common Problems

Many issues result from users scanning in information without realizing that all of the information is interdependent. That is, when you scan in a particular item, the

rest of the fields will be restricted based on that item. Similarly, when you scan in a certain lot number and the item is lot and serial controlled, the serial numbers available are also limited. Each of the fields on the mobile page are restricted based on the cycle count header options first, and by previous information entered in other fields second. If unscheduled entries are allowed, the LOVs will display more values since you are no longer restricted to those entries which have been scheduled. The mobile is supposed to take the place of a user entering in quantity information on the desktop. On the desktop, the user can view all the entries that have been generated and input them appropriately. However, on the mobile the user directs the count and the system will match the count information with the scheduled count entries. Thus you must make sure first that a count you have made matches exactly with that of the scheduled count entry. The subinventory, locator, item, revision, lot, and serial all have to match properly otherwise the matching will be processed incorrectly or you can encounter other problems.

Debugging Notes

If the user has made sure that everything is properly set up but errors still occur, then there are a last few things that the user can do. There are really two stages in performing a mobile cycle count. The first involves the front end data collection side. Verify details such as:

- What the unscheduled entry option is for the cycle count header
- Whether or not those entries exist that the user wants to count
- Whether the serial has a valid status to be counted
- and so on

Cycle count messages are also printed to the mobile server log that is generated wherever the mobile application server was started. The log will display information about which field it was in, what values were passed in as the LOV statement for a field, what error messages occurred when calling the backend PLSQL procedures, and so on. This log is basically for the front end Java side for collecting the data for the count entry. It will then pass all of the collected count entry information to the backend. This will call the `process_entry` method. If the user that is trying to debug an issue has access to the database, and can view the files, they can query up the LOV statements and see if there is a reason why the user isn't seeing a particular value on a field. For detailed information, consult the component document for mobile cycle counting. Note that the log file will be of the format `<port number>.INV.log`.

The `process_entry` method will first match the count entry information with the particular cycle count entry generated. Once it has found a match, it will update and process that particular cycle count entry. However, if no match is found, it will try to insert a new Cycle Count entry if unscheduled count entries are allowed for that particular Cycle Count. The backend processing will log messages into the filename as specified by a profile value for the user in the log directory. The profile parameter for this is `INV: Debug file (Including the complete path)`. The log directory is based on the `init.ora` parameter value. For cycle counting, the lines in the log related to the cycle count will be prefixed with `'INV_CYC_LOVS'` to indicate that those debug log lines were entered through the PLSQL package `INV_CYC_LOVS` which is the mobile cycle counting backend package. Common problems that occur when trying to process a count entry usually involve serial numbers. Serial numbers might not have a valid status for certain transactions or they could be marked so they are not available to be transacted. The log file should indicate where the error occurred.

The final stage to complete a mobile cycle count after the data has been collected on the front end side, the data has been passed into the database server side for processing, is the cycle count adjustment stage. This is the final stage where the transaction manager is invoked to process the cycle count adjustment and actually make the changes in quantity information or perform a subinventory transfer for LPN's and serials. The transaction manager can also error out and it too will produce a log file. The log file can be viewed to see at which stage it generated an error. The file is also stored in the log directory, generally set by a profile and has a name like `trx_<user name>.log`.

With these three logs, you should be able to figure out at which stage the transaction failed and possibly what error occurred that caused it to fail. Note that logging isn't always on and it does depend on the user and profile values. However if you encounter an error, you should be able to turn logging on and send the logs to the support team.

Frequently Asked Questions

1. Where do I set the profile options and the form function parameters related to cycle counting?

There are two form function parameters that can be set for Cycle Counting. The first parameter is the type of count. The parameter is called `COUNT_OPTION` and can have the values: `BOTH`, `DETAIL`, or `SUMMARY`. This specifies the types of LPN counts that the user is allowed to do. The other form function parameter is called `SERIAL_TYPE`. The possible values are `SINGLE` or

RANGED. This specifies whether the user must enter each serial number individually or by specifying the FROM and the TO serial number in the range. Form function parameters are set on the desktop forms as with other form function parameters. You will need to set this for the mobile cycle counting page which has a name CycleCountFunction. The profile for where log files from the mobile server is located in the init.ora file. There you can set the log directory for where backend PLSQL files write their logs to.

2. What do I do if the scheduled and generated cycle count doesn't appear in the Cycle Count list of values in mobile?

First, make sure that the concurrent request to generate count requests completed successfully and did not error out. Next, check that some count requests were actually generated. On the application forms, you can navigate to the count entries form and query entries for that Cycle Count that you have defined. If there were no entries created and unscheduled entries are not allowed for your cycle count, then that cycle count header will not be displayed in the cycle count LOV. If you are using Cycle Count Task Dispatching, check the WMS Control Board to see the status of the tasks created after the Cycle Count is generated. If the count that you are looking for has a status of Dispatched then it will not be available on regular Cycle Count menu or desktop Cycle Count Entries form.

3. I defined a cycle count and had scheduled and generated entries to be counted but I don't see my cycle count in the cycle count LOV anymore. I know that count entries did exist before but I can't see them anymore.

If you had generated count entries but only partially completed the cycle count, the remaining uncounted entries will not be active if they are late. This is the same whether you are performing the Cycle Count from the task menu or from the regular Cycle Count menu. Count entries, when generated, have only one day to be counted plus the amount of days until a count is considered late. This is specified when defining the cycle count header on the application form. Late count entries that are past the count due date are no longer allowed to be updated and entered. You will need to reschedule the count requests. The cycle count LOV will only display cycle counts which allow unscheduled entries or, if not, it will only show cycle counts which have active entries to be counted.

4. My cycle Count is scheduled to be counted but it is not generating any counts to be counted.

Entries will be generated only for items which you have defined within the scope of your cycle count. These are the cycle count items and entries will be generated to count those items only. Scheduled entries will also only be

generated if those items are on-hand in the system. Make sure that if a count entry was not generated for a particular item that the item was included in the scope of the cycle count. Also for unscheduled counts, only items that are defined within the scope of your cycle count will be allowed.

5. What happens if I select F2 in the middle of entering a count?

F2 will bring the user to the previous menu. Thus if you accidentally hit that key in the middle of entering a count, any information you had in that count will not be saved or processed. You have to make sure that you hit F2 only if you really want to quit out of the count entry. A confirmation is required though before you will be brought back to the previous menu. This behavior is the same for counts entered from the regular Cycle Count menu as well as the counts entered as tasks.

6. Can I enter zero quantity for missing items and LPNs?

Yes. This behavior is the same for counts entered from the regular Cycle Count menu as well as counts entered as tasks.

7. How can I enter nested LPNs during a cycle count from the regular Cycle Count menu?

There is a parent LPN field which would be the outer LPN and if that LPN contains child nested LPNs, it will display another LPN field on the mobile device. If the parent LPN entered does not contain any nested LPNs, this field will not be displayed. The child LPN field will be for LPNs which are direct children of the parent LPN.

8. Can I approve partial LPN?

Yes, you can approve partial LPNs if an LPN contains several items within it and some of the items need adjustments while others do not. However, if the LPN is found in a discrepant location (for example it is found in a subinventory/locator that doesn't match the system) you cannot perform partial approval of an LPN count entry. Note that count approvals are all currently being performed on the desktop forms since the responsibility and task of approving count adjustments is usually separate and distinct from performing the count itself.

9. Can I enter LPN count on desktop?

Yes, even with Mobile Supply Chain Applications, you can still perform all of your cycle counts the same way as before. Everything you can do on the desktop, you can do on the mobile and vice versa, except that LPNs cannot

entered on the desktop forms. However, items found with in an LPN can be entered on the desktop forms.

- 10.** Can I populate lot and serial attributes for newly found serial and lots during a cycle count?

Yes, if unscheduled count entries are allowed for your cycle count, you can dynamically count new lots and serials during a cycle count. The lots and serials will be generated automatically and you can populate the lot and serial attributes for these new lots and serials. This is only available from the regular Cycle Count menu on the mobile.

- 11.** What cost group is assigned to newly found items?

For newly found items, unscheduled count entries will need to be created. However, since they do not exist on-hand in the system, the cost group ID will be assigned using the Cost Group rules engine. For negative adjustments, when a miscellaneous issue is performed or for a subinventory transfer as a result of cycle count adjustment, the Cost Group rules engine will not be called.

- 12.** What will happen if I again schedule a partially completed cycle count?

If a cycle count entry already exists, is not yet counted, and hasn't past the due date, then the concurrent program to generate count requests will not again generate the same count entry. It will however generate new count requests if those cycle count entries have been completed already.

- 13.** How do I enter serials for "multiple serials per request"?

On the desktop, when you are counting serialized items with the multiple serials per request option, you first enter the total quantity for that particular item, revision, and lot. You then proceed to the Serial Detail window. There is a similar way of handling this on the mobile device. After entering the quantity information, instead of inputting into the serial number LOV, you will be prompted to choose a serial detail button. This will bring you to a new page for entering multiple serial information where you can query which serials have been scheduled to be counted. You can also mark or unmark those serials that are present and accounted for. During this counting process, the user can enter the serial entry LOV and perform a query to see which serials are currently marked by the counter as present. Once the counter has completed counting and marking the serials found, they will choose Done and return to the previous page. Note that the quantity counted must match what was entered in the previous page otherwise a mismatch error will occur.

- 14.** How do I enter newly found serials for "multiple serials per request"?

Currently we do not support unscheduled count entries for multiple serials per request count option. This is a future enhancement, but since it is not a critical functionality, it has not been included. Generally we believe that serialized items are kept track of very closely. If a new serial is found, a new cycle count can be generated to count it, but with the “single serial per request” option instead.

- 15.** How can I enter serial discrepancy of serials packed inside LPN and serial option is “multiple serials per request?”

For multiple serials per request which are packed within an LPN, discrepancies are allowed only if container discrepancies are allowed. This is the scenario where serials packed within an LPN, and the LPN is found in a discrepant location. The cycle count entries generated will contain subinventory and locator information which does not match where the LPN is actually found. The user can still count the serialized items by just specifying where the LPN was found, and then entering the serials that were found within it. As with all LPN related transactions, items stored within an LPN are done relative to the LPN. The actual location of the LPN does not matter. So in this case, the user can enter the multiple serial detail information as if the LPN was found in the location specified by the system. When the count is processed, a subinventory transfer will be issued for the LPN to move it from where it was before to where it was found. Additionally, all of the items packed within the LPN will also be moved along with it.

- 16.** I am trying to enter a count for a serialized item but I do not see the serial number in the LOV. Why can't I see it?

If you do not allow unscheduled count entries and an entry was created for that particular serial for single serial per request count option, there are a few reasons why this might be the case. One thing to keep in mind is that the LOVs are intelligent LOVs in that what they display is determined by what the user has entered in previous fields. So for a serial to be displayed in the serial number LOV, the item, revision, and lot must match for that particular serial number. If that does not match, the serial number will not be displayed. Another possibility is that the serial number has been marked by another transaction and is being used by someone else. This serial will not be available to others to transact until it has been unmarked. It is possible that the serial was marked by another transaction and it did not properly unmark the serial after it was done with it. If this is the case, the serial will need to be unmarked first before you can perform a cycle count on it.

- 17.** How do I know that all the scheduled entries have been entered for a cycle count, on the mobile device?

After you have saved an entry, the system will check to see if there are anymore scheduled entries to be entered. If there are none left, it will display the message "All scheduled entries have been entered" on the status bar. You are made aware if all the entries for that particular cycle count have been counted and completed.

- 18.** Why can't I enter an unscheduled count for an item that I found in a particular subinventory?

First, verify that, for this particular cycle count, unscheduled count entries are allowed. Second, make sure that this item is included in the scope of the Cycle Count. Finally, make sure that the subinventory in which you found the item also exists within the scope of the cycle count. Only items and subinventories which are defined within the scope of the cycle count are considered.

- 19.** Are reservations created when a subinventory is scheduled for cycle counting?

No. Reservations are not created during the cycle count scheduling process. Cycle Count reservations are usually created during a picking process when you pick short and report an inventory discrepancy. When a cycle count is processed, it will delete all reservations tied to it, but it does not create actual reservations.

- 20.** I am receiving the error "Error Processing Tasks". What can I do?

This is one of those errors for which there is nothing much that can be done to resolve it. This error will appear when things are really out of control and there is a major bug. You should view the log and find out what is going wrong. Check to see if other tasks are processed correctly.

- 21.** I am receiving the error "Unexpected Error." What can I do?

This error is a system error and is most likely not a Cycle Count specific error, nor a Cycle Counting setup error. This error may be caused by several reasons.

- 22.** The scheduled and generated Cycle Count is not being dispatched as tasks. What can I do?

There may be several reasons for this happening. You should start debugging in the following manner:

- If you are regenerating the same count, verify that there are no open entries for that count. Check to see that the count is complete (counted and approved).
- Verify that the Cycle Count is scheduled and generated correctly.

- Verify that the setup is correct. You should be logged on as the user who is enabled to perform the Cycle Count. You should be in the correct organization. Check to see if there are multiple Cycle Count task types, there should NOT be multiple Cycle Count task types. Check to see if there are multiple users who can perform a Cycle Count. If this is the case then the Cycle Count task may have gone to the other logged-on user who can perform Cycle Counts.
 - If none of the above solves the problem, log a bug or TAR.
- 23.** I am receiving the error "Transaction Failed | Failed to Pack/Unpack item | Unpacking update error | WMS_CONT_NEG_ITEM_QTY. Press any key to continue." What can I do?
- Typically, this error should not appear. This error appears when there is an issue with pack and unpacks of LPNs. There is nothing much that you can do about this error. Log a bug or TAR.
- 24.** I am receiving the error "The total number of serial numbers marked, as present does not match the quantity entered for this count request. Press any key to continue."
- This error will appear while entering multiple serials in a Cycle Count. Typically the user will enter a quantity of 5 in the Total Quantity field and when the user is brought to the Entering Serials page on the mobile, the user will enter either more or less than 5 serials. The user should ensure that the quantity entered on the main page and the number of serials entered on the serials page match.

Dock Management

Topics covered in this chapter include:

- [High Level Overview](#) on page 8-2
- [Setup](#) on page 8-2
- [Implementation](#) on page 8-4

High Level Overview

Functional/Business Flow Description

Material enters the warehouse through the receiving dock and exits through the shipping dock. In some cases, the same set of dock doors could be used for both receiving and shipping. Upon receipts or prior to shipping, activities such as assembly of loads, consolidation of inventory transfers, and scheming efficient warehouse material flow occur in the staging lanes that lies in the proximity of dock doors.

There is an opportunity for logistics involving plan, control, and execution of the activities in the docks and staging area. Outbound docking logistics pertains to shipments while inbound docking logistics involves handling receipts. Docking logistics includes scheduling and assignment of dock doors to inbound receipts, outbound shipments, and associating staging lanes to receipts or shipments.

Dock management provides a form for the warehouse manager to assign dock doors to outbound trip stops, inbound unloading activities, and other activities. Dock door and staging lane associations can be established. For outbound shipments, staging lanes will be suggested for picking tasks based on dock appointment, staging lane/dock door association, and staging lane availability.

Setup

Locator Classification

Dock door and staging lanes are modeled as locators in warehouse management. The inventory locators are classified into the following types:

- *Stock Locator*: Inventory stock locators that are used for storing inventory.
- *Dock Door*: Dock doors are inventory stock locators where carrier trucks could be docked.
- *Staging Lane*: Staging Lanes serve as an interim stock locator, just before loading.

Staging Lane - Dock Door Association

A staging lane stages material that is to be loaded to many loading docks. Similarly, a loading dock loads material staged in many staging lanes.

A multiple-to-multiple relationship between dock doors and staging lanes can be established through Dock Door to Staging Lane Assignment Form.

Default Staging Lane (Subinventory and Locator)

A default staging subinventory and default staging locator can be set for an organization from Shipping Parameters Form. This information will be used by pick release process as the last resort if staging lane can not be derived from dock appointment and staging lane is not specified during pick release.

Dock Scheduling and Trip Planning

Trip - Dock Door Association

For outbound activities, during trip planning, each trip will be assigned with a dock door from which the truck will be loaded. A dock appointment can be created from Dock Assignment form for this purpose. Inbound unload activities or other activities can be scheduled to a particular dock door as well. These appointments are for informational purpose only. They do not drive any WMS functionality.

Pick Release

During pick release process staging lane (drop off subinventory and locator) needs to be provided to WMS allocation engine before the engine can determine the picking location. Following is the logic for deriving a drop off staging lane.

In Release Pick Waves form, staging subinventory and locator will be defaulted from shipping parameters and the user can override it to any other staging lane. If this is specified then it will be used for allocation. If the user leaves these fields blank, the system will try to derive the staging lane based on dock appointment, given the fact a dock appointment has been created for the trip of this wave. If a dock appointment does not exist, or a trip has not even been created, or for any other reasons the staging lane cannot be derived from a dock appointment, the default staging lane in Shipping Parameters will be used.

Derive Staging Lane for Trip from Dock Appointment

If a trip has been created for this wave, and a dock appointment has been created for this trip, the staging lane can be derived from the dock appointment. The following is an example of the logic:

First of all if the staging lane has been previously assigned for this trip, the same staging lane will be used. If the trip has not been associated with any staging lane yet, and a dock appointment has been created for this trip, the staging lanes associated with this dock door become candidates. The system will search for a staging lane that has not been assigned to any trip through dock appointment and

return this staging lane. If all of the staging lanes have been associated with trips, the system will return the staging lane that will be finished loading the earliest.

Implementation

Setup

Locator Classification

Dock door and staging lanes are modeled as locators in Oracle WMS. Locator type can be specified in Stock Locators form under Setup > Warehouse Configurations > Warehouses manual.

Refer to the *Oracle Warehouse Management User's Guide* for detail on setting up locators.

Staging Lane - Dock Door Association

The multiple-to-multiple relationship between dock doors and staging lanes can be established through the Dock Door to Staging Lane Assignment form under Setup > Warehouse Configurations > Warehouses manual.

Refer to the *Oracle Warehouse Management User's Guide* for detail on setting up Staging Lane - Dock Door Association.

Default Staging Lane (Subinventory and Locator)

Default staging subinventory and default staging locator for an organization can be set from the Shipping Parameters form under Setup > Warehouse Configurations > Warehouses manual.

Refer to the *Oracle Warehouse Management User's Guide* for detail on setting up default staging lanes.

Dock Scheduling and trip planning

Trip - Dock Door Association

Dock appointments can be created for outbound trips from the Dock Appointment form under Outbound Logistics.

Refer to the *Oracle Warehouse Management User's Guide* for detail on creating and modifying dock appointments.

Release Pick Wave

A sales order or wave can be released through the Release Pick Waves form under Outbound Logistics Manual. On the Inventory tab, the Default Staging Subinventory and Default Locator will be populated from shipping parameters after specifying the Warehouse field. The user can override these fields or clear them. If these fields have values, picking tasks being generated will honor these values as drop-off locators. This can be verified through the WMS Control Board. If these fields are left blank, the drop off locator will be derived from one of the staging lanes associated with the dock door that has been scheduled for this trip. If there is not any dock appointment scheduled for this trip, the drop off location will be defaulted to the shipping parameters.

Refer to the Picking Execution chapter of this guide and the *Oracle Order Management User's Guide* for more detail on sales order pick release and trip planning.

Inbound Process

This chapter illustrates how to setup your warehouse to receive material to suit your business process and includes detailed implementation notes, examples, common problems, and supporting debugging scripts. Topics Include:

- [System Inbound Process](#) on page 9-2
- [Functional/Business Flow Description](#) on page 9-2
- [Implementation](#) on page 9-8
- [Common Problems](#) on page 9-18
- [Debugging Notes](#) on page 9-23
- [Frequently Asked Questions](#) on page 9-24

System Inbound Process

Overview

Oracle Warehouse Management provides a full-suite of highly automated RF hand-held computer based transactions that enable a warehouse to receive incoming material. Incoming material enters the warehouse from the following sources: suppliers, distribution centers, or returned material from suppliers or customers. Oracle Warehouse Management uses Radio Frequency (RF) technology, material handling rules, container management, and storage constraints to improve the efficiency of the warehouse. Oracle Warehouse Management supports the following inbound processing features:

- System suggested put-away locations
- Opportunistic cross-docking
- Lot and serial based inspection capabilities
- Express receipts for material from trusted suppliers
- User configured discrepancy actions
- Capability to print highly configurable labels

Functional/Business Flow Description

Warehouse Management supports the following: receipt, inspection, and put away for material from a supplier purchase order, material sent from an internal warehouse against a Shipment Number or Internal Requisition, or material returned from a customer against a Return Materials Authorization (RMA) number. You can use express receipts if you receive an Advanced Shipment Notice from a trusted supplier or material from an internal warehouse.

Warehouse Management enables you to configure receipt inspection if you must inspect received material before you receive the material into inventory through the receipt routing. When you receive material, Warehouse Management uses rules in the Rules Engine to determine the cost group, accounts, and the optimal inventory storage location for a put away. This enables you to focus on the execution of material handling.

Warehouse Management supports a variety of business flows and practices that enable you to model your business requirements. You can receive material through different routings depending if the material require inspection, and if the material

needs to be counted as on-hand immediately after receipt checkin. You can use substitute items to receive items against a blanket purchase order releases and the supplier item code. The system gives you real-time responses about tolerance violations. Opportunistic cross docking allows material to be put away immediately to an outbound staging lane or staged to manufacturing shop floor if backordered sales order lines or WIP component demand exist for the material. You can receive material directly into an inventory storage location in a single step or receive it into a receiving area for later inspection and/or put away.

Functional Area

When material reaches the warehouse, you receive the check-in against the matching document number. The document number can be the purchase order number, internal requisition number, Inter-org shipment number, or RMA number. Along with the document information, you scan the information of the material you receive. This information includes the part number, revision, lot numbers, and serial numbers. The revision, lot number, and serial number are required based on the configuration of the part in the system. For example, if the part number is revision and lot controlled, the system prompts you to enter the revision and lot number. However, if the part number is not revision controlled, lot controlled or serial controlled, the system does not require the information. The inbound process directly correlates to part setup controls, and the document type you use for receiving and the inbound process setup. The window dynamically generates based on the details of the received material, the inbound process, and the type of document you use for receipt of material. This allows you to focus on entering the fields that appear on the window.

Receipts

Warehouse Management allows you to receive material against multiple document types such as PO, ASN, requisition or a shipment number for inter-org material transfers, RMA, etc. It also allows you to receive material against a blanket PO. You can use the existing desktop forms in purchasing to perform receipts in a warehouse management enabled organization. Please see the purchasing users guide for additional details. However keep in mind that if receiving is carried out in desktop, the subsequent receiving functions such as inspection and delivery must be carried out in the desktop forms. In a warehouse management organization, receipts can also be carried out using mobile forms. In mobile forms you can initiate material receipt by document, or item.

Document Receipt

Use a document initiated receipt when you know the document number at the time of receipt. Warehouse Management utilizes an interface that enables you to receive material against some or all of the document types. If you use multiple document types to receive material, you do not have to change windows to receive material that use different document types. You control which document types to allow for receiving material for a particular receiving menu option.

Item Receipt

Use item initiated receipt when you do not know the document number for the incoming material. Enter the item in the receipt screen to initiate the receipt process. This populates the list of values in the document number field from where you can pick the document number to receive against.

Mobile Receipt Process

WMS mobile forms allow you to receive material into a license plate number (LPN). LPN is mandatory in mobile receipt forms except in the following circumstances:

- Received Item is an expense item
- PO has direct receipt routing

In order to perform a receipt using warehouse management mobile forms, you can use a pre-generated license plate number, generate a license plate number during receipt, or receive material into an existing license plate. You can use the LPN to track the material (part, revision, lots and serials) throughout the warehouse. You must use LPN for receipts, if the inbound process involves receipt of materials into a receiving area prior to inspection and putaway. LPNs can be containers other than a carton or pallet. For instance, if you do not use LPNs throughout the warehouse, you can use a cart as an LPN. You can receive material into the LPN, and putaway the LPN into your storage areas. If you designate all subinventories as non LPN controlled, warehouse management forces material to be put away loose and the cart (modeled as an LPN) is available to receive more material into. Similarly, you can model an area on the receiving dock as a LPN, and receive material into that LPN and put away from that LPN into inventory storage.

If the item is lot and/or serial controlled, you must enter lot and serial information when you receive parts. If necessary you can configure the system to prompt you to enter lot and serial attributes during item receipt. You can then use the information to build put-away logic. For example if you receive two different lots of a part number in two shipments, you can set up rules that determine the putaway location based on lot.

Warehouse management mobile receipt allows you to receive material using the internal part number or the Global Trade Item number (GTIN), or supplier part number. You can scan either the GTIN or the supplier part number instead of the internal part number to receive material in to the warehouse. See the section on [Profile Options](#) for additional information. In order to facilitate future receipts, you can also dynamically create a relationship between the vendor part number and the internal part number the first time you receive a part order. You can also receive a different part number as a substitute part.

Express Receipt vs. Standard Receipt

You can perform an express receipts within warehouse management. You can perform express receipts against material for which there is previous knowledge - a Purchase Order shipment with ASN, or a shipment from another warehouse. To perform an express receipt use a mobile device to complete the following steps:

1. Enter the ASN Number, or Internal Shipment Number
2. Enter the LPN if necessary
3. Enter the PO if necessary.
4. Enter the Subinventory if necessary
5. Enter the Locator if necessary.
6. Select Done.

You do not have to use express receipts to receive material against an ASN or Internal shipment. You can use the standard receipt menu to perform a confirmed receipt. If you choose to use a standard receipt, enter the information at receipt time regardless of prior knowledge. This enables you to confirm the exact details of the received material.

Inspection

If the material requires inspection, warehouse management requires you inspect the LPN before it allows you to putaway the material. You scan the LPN to initiate inspection and then inspect the contents. If the material is under lot or serial control, enter the lot and/or serial numbers as you inspect the items.

Receiving Inspection Modes

Warehouse management supports two modes of receiving inspection - Oracle Purchasing Inspection, and Oracle Quality Inspection. If you use Oracle Purchasing

Inspection, warehouse management requires you to enter the accepted and rejected quantities and quality codes and reasons for each. If you use Oracle Quality Inspection, warehouse management requires you to enter data according to a collection plan set up in Oracle Quality. See *Overview of Collection Plans* *Oracle Quality User's Guide* for more information on setting up a collection plan to be used with Oracle Warehouse Management.

LPN Storage of Inspected Material

Warehouse management requires you pack accepted and rejected material in to separate LPNs at inspection time. This facilitates the putaway process and allows for easier processing of rejected material. The logic of the inspection page assumes that accepted material remains in the original LPN while rejected material is moved to a separate LPN. This logic controls the field defaults but you can override it at inspection time.

Inspecting Items under Serial Control

Warehouse management supports two modes of inspection for serial controlled items: individual and range. This is controlled via a form function parameter. If you choose to inspect items using serial individuals, you must scan each serial before inspection. Enter 1 or 0 to accept or reject the serial numbered item. If you choose to inspect serial controlled items using serial ranges, enter a range of serial numbers, and accept, or reject the entire range.

Putaway

Putaway of an LPN can be directed by you or the system. The following paragraphs contain descriptions of each type of putaway.

System Directed Putaway

In a system directed putaway you scan the LPN and the Oracle Rules Engine suggests an optimal put away location for the material. See: [Directed Picking and Put away](#) on page 13-2. During the putaway process you confirm material attributes as the quantity, UOM, Put away location, and lot if applicable. Optionally, you can enter a "To LPN" to drop the material into an LPN.

You can choose to accept the default LPN, generate a new LPN, enter an existing LPN, or leave the field blank. If the system suggests you putaway an entire LPN in the same place, the "To LPN" field automatically defaults to the original LPN. If the material to put away is only part of the LPN, the "To LPN" field remains blank. You can leave the "To LPN" field blank to putaway material without associating it to an

LPN. If the destination subinventory is not LPN Controlled, the “To LPN” field is hidden. However system directed putaway may force you to split LPNs, especially LPNs with mixed items or locators with capacity constraints.

User Directed Putaway

User directed putaway allows you to put away an entire LPN in a single scan. Select “User Drop” on the putaway window to initiate user directed putaway. Optionally, the rules engine validates the locator you select to ensure the restrictions are met even if the locator is not optimal for each item. You can also setup rules to suggest the initial locator, as long as the entire LPN can be put away at once. In addition, you can disable the “User Drop” button if required.

Cross-Docking

If you enable cross-docking for your organization during putaway, warehouse management suggests the material be put away directly to the staging area for immediate outbound shipment or WIP issue. Opportunistic cross-docking is only available during a put away after a Standard or Inspection routing receipt. If you perform a put away after you perform a direct routing receipt, you cannot cross-dock the material. You also cannot cross-dock material rejected material. Warehouse management uses the rules engine to putaway this material.

Returns and Corrections

You can perform returns on material received through the mobile user interface. Warehouse management supports two modes of returns: a two-step return process, and a one-step return process. You can configure the return process as a one-step express return or a two-step return using a profile option (refer to the section of Profile option for additional information).

One-step Returns

For one-step returns, you use the return window from Oracle Purchasing to create the return. Additional warehouse management functionality allows you to query returnable lines by receiving LPN. In addition, the fields, 'To LPN' and 'From LPN' allow return of material that resides in an LPN. The material being returned to the vendor comes from the 'From LPN'. The physical container that is used to return material to the vendor is the 'To LPN'. You can use any LPN that is 'Defined but not used' or 'Resides in Receiving' as the 'To LPN'. Material can be either returned directly to the 'supplier' or to an intermediate 'receiving' area before being returned to the supplier.

Note: You must associate all material that resides in receiving with an LPN. Therefore if you return material from Inventory to Receiving, you must specify a “To LPN” for the material. You do not have to specify a “To LPN” if you return the material directly from inventory to the supplier.

Two-step Returns

You initiate two step returns through Oracle Purchasing as well. However, when the record is saved, the return transaction does not complete. You must verify the return through the mobile return screen before the return transaction is saved. You must scan the LPN that contains the material return and confirm the return of the material inside the LPN. After the confirmation, the return transaction posts.

Corrections

Corrections to material received in warehouse management process through the Corrections window in Oracle Purchasing. You can correct a Receipt, Inspection, or Delivery transaction. Additional warehouse management functionality allows you to query receipt lines by LPN, and correct LPN information for received material. Similar to returns, corrections are also recorded using 'From LPN' and 'To LPN'. However the meaning associated with 'From LPN' and 'To LPN' is different in correction context. A 'To LPN' is the LPN where the received material currently resides and needs to be corrected. A 'From LPN' is the LPN that will hold the corrected material after correction has been posted. Corrections post immediately when after you save the record from the desktop. Unlike returns, there is no two-step correction process.

Implementation

Form function parameters for Receipt and Inspection Page

The easiest way to change the behavior of receiving forms is using the form function parameters. The following table lists the form function parameters and the impact of their values on the behavior of receiving forms:

Table 9–1 Form Function Parameters for Receiving

Parameter Name	Allowed Values	Remarks
SERIAL_TYPE	RANGE, INDIVIDUAL	If this parameter is set it to RANGE then the form accepts a range of serial numbers. The form will show two serial number fields - From SN and To SN on the mobile page. The serial numbers within that range are assumed to be continuous and not missing. If the form function parameter was set to "INDIVIDUAL" then in that case only one serial number field is displayed and the user needs to enter all the serial numbers one at a time.
ATTACHMENT_DISPLAY_MODE	YES, NO	Controls if document attachment should be displayed on receipt.
SHOW_COO	YES, NO	This form function parameter controls the display of Country of Origin field
DOCTYPE	ALL, PO, INTSHIP, ASN, RMA	This form function parameter controls the document type used for receipt e.g. if the parameter value is set to "PO", only Purchase Orders can be used to receive items from the form.
ITEM_CONTROLLED	YES, NO	If this form function parameter is set to "yes", the receipt page is configured for item-initiated receipt. In such a case, user enters the item and then selects the document number to receive the item. If the value is set to "no", document initiated receipt is assumed.
TRANSACTION	ALL, PO, INTSHIP, ASN, RMA	Control allowed transaction types in for Inspection in MSCA inspection menu. No relevance for WMS. Default to ALL

Table 9–2 Form Function Parameters for Putaway

Parameter Name	Allowed Values	Remarks
SUGGESTION	RULES, USER, BOTH, LINES	This form function parameter controls the visibility of buttons on the drop page and also controls if automatic consolidation on drop is enabled. If the rules engine suggests a single location for all contents within an LPN, automatic consolidation implies that the user is not asked to individually confirm each item, locator and quantity being dropped. Instead the user just needs to confirm the sub and locator for the entire drop once. The behavior for different values of this parameter is as follows: RULES: displays <Load> & <Drop> buttons. The <User Drop> button is not displayed. Automatically consolidates one location suggested for entire LPN USER: Displays only <User Drop> button. Used for user-directed putaway. Automatically consolidates one location suggested for entire LPN BOTH: displays <Load>, <Drop> and <User Drop> buttons. Allows user to perform system directed or user directed putaway. Automatically consolidates one location suggested for entire LPN LINES: displays <Load> & <Drop> buttons. Used for system-directed putaway. This option forces the user to confirm each line individually even if all items in the LPN are going to the same locator. Default value: BOTH
VALIDATE	YES, NO	This parameter is applicable only if “User Drop” button is activated and therefore it is applicable only if SUGGESTION is set to either BOTH or USER If this parameter is set to “Yes”, the sub-inventory and locator is validated to see if violate a constraint defined in putaway rules. No rules engine validation is performed if this parameter is set to “No”.

Profile Options

WMS: Express Returns You can perform returns as a one-step express return or two-step return. The mode of return is determined by the profile 'WMS: Express

Returns'. If this profile is set to 'YES', then one-step returns are used. If this profile is set to 'NO' then two-step returns are used.

INV: Cross-Reference Type You can use item cross references to define the relationship between Vendor item and Internal part. The cross-reference type that is used to maintain this relationship is stored in profile option INV: Cross-Reference Type. When a vendor item is scanned in the item field of receipt the window a lookup is performed against the cross-reference type entered in the profile option.

INV: GTIN Cross-Reference Type You can use cross references to define the relationship between Global Trade Item Number (GTIN) and Internal part reference. The cross-reference type used to maintain this relationship is stored in profile option INV: GTIN Cross-Reference Type. The cross-reference value could be one of the constituent data structures of GTIN (i.e. EAN-8, EAN-13, UCC-12 and EAN/UCC-14), a 14 digit number left padded with zeros. When a GTIN is scanned in item field of receipt form, a lookup is performed against the cross-reference type entered in the profile option.

See Also

Form Functions Window, *Oracle Applications Developer's Guide*

Receipt Routings

The following receiving types are available in warehouse management: Standard, Direct, and Inspection. When implementing warehouse management, you decide which routing type to use based on the receiving item and the available document information. This section discusses how warehouse management picks the routing when the document types differ for received material.

For purchase orders, the routing used for receipts is stored on the PO Line Shipment. The shipment routing defaults based on the default routing for the Item, Supplier, and Organization of the PO. However you may change the default routing when you create the PO.

Mixed Receiving Types

However if there are multiple shipments for the same Purchase Order / Item / Organization combination, and each have different routings, warehouse management uses the most restrictive routing of an Approved, Open for Receiving shipment at time of receipt. If any of the shipments require inspection, when you attempt to receive the shipments against the purchase order, warehouse management requires you to inspect the shipments. If none of the shipments require

Inspection, but some are marked as Standard and some are marked as Direct, warehouse management receives the material using standard routing. Warehouse management uses Direct routing only if all shipment lines for the PO / Item / Organization combination use a Direct routing.

Return Receipts

For RMA receipts, if the RMA Inspection Required flag is checked for the returned item, you must inspect the item. You set the Inspection Required flag at the item level. If you do not set the Inspection Required flag, warehouse management uses the default routing for the item. If a default routing for the item does not exist, warehouse management uses the default organization level routing.

In-transit Shipments

For in-transit shipments warehouse management first determines if a default routing for the item exists. If there is no default routing for the item, it determines if a routing exists at the Shipping Network, and routes the item accordingly. If neither exist, warehouse management uses the default routing for the receiving organization.

Advanced Shipping Notice Express Receipts

For ASN express receipts, the routing is determined based on the information entered on the purchase order. Material is received from the ASN according to the receipt routing of the PO Line Shipment associated with the ASN line. If part of the material requires inspection, you must inspect those LPNs before you can putaway the shipment. If an LPN is specified at time of express receipt, then the shipments on that LPN are used for making the decision.

If you receive the ASN through an express receipt, the required lot and serial attributes defaulted based on the default set for the required attributes. If the attributes are different from the defaults, you can choose not to do an express receipt or change the attributes after you perform the receipts. Warehouse management requires default values for required attribute segments in order to use Express Receipts. If default values are not defined the transaction does not process.

Since the routing is determined after you enter the item and the LPN was entered previously, it is possible that the receiving LPN is deemed invalid after you scan the item. For example, you cannot perform a direct receipt into an LPN that has a status of Resides in Receiving. You can perform direct receipts in new LPNs or LPNs that contain space with the status Resides In Inventory. If the item is restricted to a set of locations within inventory, the putaway LPN must also reside within the set of locations.

The LPN must also be in a location that allows the delivery transaction. If the delivery transaction is not allowed for the location, you receive an invalid LPN message when you exit the item field. If you entered an LPN with an invalid state for the receiving transaction, you receive an error message that indicates the LPN has an invalid state for this transaction. You must enter a different LPN before you can continue.

Warehouse management does not support the Oracle Purchasing Profile, Allow Routing Override when you perform receipts on the mobile device. You must perform receipts according to the proper routing when you use the mobile device.

Labeling

The entire inbound process integrates with label printing. The business flows for label printing that associate with the inbound flow are:

- Receipt for receipts against all document types- Warehouse management creates label requests when you select Next Item or Done from the Receipt lines page.
- Inspection for the completion of the inspection transaction
- Put Away for the completion of the put away transaction
- Cross-Dock for the cross-docking put away transaction.

Receiving Other Items

Warehouse management enables you to receive all types of items - Supplier items, substitute items and expense items. You must define Expense Items to receive with an Item Master. Expense Items are items that are not designated as Inventory Items and are not transactable in Inventory, but can be received into the warehouse.

At the time of receipt, warehouse management enables you to scan the Vendor Items or Substitute Items in the Item field on the mobile device. The receiving process is very similar to receiving normal items, except when you deliver the substitute item after receiving, it is the substitute item that is received in inventory and transacted throughout the warehouse. When delivering material received using the Vendor Item Number, it is the internal item number that is transacted. When receiving the supplier item or the substitute item, the warehouse management honors the tolerances of the original item. See: *Defining Receiving Options, Oracle Purchasing User's Guide* for more details on how to setup substitute items and supplier items.

For receiving a substitute item when you create a shipment for the item in your purchase order, verify the Allow substitute item check box is checked in the

receiving controls window. This field defaults from the setting on the item and organization. You must define the substitute item in the Item Relationship form. See *Defining Item Relationship, Oracle Inventory User's Guide*.

When you receive a supplier item, you can specify the substitute item number on the purchase order line. This defaults from the System Item/Vendor Item relationship. But, you can specify the supplier item number without specifying that relationship and receive it using the supplier item number. See: *Defining the Supplier Item Attributes, Oracle Purchasing User's Guide*

Direct Receiving and Put Away Issues

While performing a direct receipt, the subinventory and locator fields default if possible. If you are doing a direct receipt into an existing LPN in Inventory then the subinventory and locator default with the LPN. If the receiving LPN is new, the subinventory defaults from the purchase order distributions from the PO receipt and the shipment lines for an intransit shipment receipt. For the subinventory and locator to automatically default, the distributions and shipment lines must have the same subinventory and locator. Finally, the subinventory and locator can default from the transaction default values if no other information exists. You can override the default values if no default information is available. See: *Defining Subinventories, Oracle Inventory User's Guide*.

When you perform a putaway following a direct receipt, you cannot use a rule which requires any PO, RMA or Internal Requisition references. Since you received the material into Inventory, the reference information is no longer available. A put away after a Direct Receipt is considered a move order subinventory transfer transaction. Because of this, in order for the putaway to be successfully allocated, there must be a Picking Rule that successfully allocates in order for the putaway to allocate. Make sure to have a Picking Rule for the material in the receiving staging area if you plan to put away from that inventory location into final storage.

Locator Capacity

If a discrepancy exists in reported locator capacity, and actual locator capacity, you can run the concurrent report Update Locator Capacity to verify the locator capacities against the on-hand table and correct any errors. During initial implementation it is suggested that you run this at least once a week.

QA Inspection

If you purchased Oracle Quality, set the profile QA: PO Inspection to Oracle Quality and have a collection plan defined, during item inspection you use the Oracle Quality inspection flows. If the material requires inspection and, you do not have a collection plan, the profile option QA: PO Inspection to Oracle Quality, is not set or you do not have Oracle Quality installed you use the default Oracle Purchasing Inspection flow.

Shortages and Cross-Docking

At the time of receipt, warehouse management enables you to check for material shortages. If you want to see a material shortage message verify the Check for Material Shortage check box is checked in the Item Master window. In addition you must set the PO Receipt transaction to allow shortage notification through the transaction type setup. Finally, you must set the Shortage Parameters to indicate the types of shortages to check.

Warehouse management enables you to receive material and when performing a putaway it checks if a cross docking opportunity exists. If a cross docking opportunity exists, warehouse management suggests a cross dock. Warehouse management checks cross docking if you enable the cross docking on the Organization Definition form. Warehouse management considers back ordered delivery detail lines and backordered manufacturing equipment as cross dock candidates. The system searches to see if a back ordered line exists for the putaway quantity. If the back ordered quantity exceeds the putaway quantity, a new back ordered delivery detail is created for the unfulfilled quantity. The status on the original delivery detail line is then updated to Released to Warehouse.

If the putaway quantity exceeds the back ordered quantity, the system creates two tasks - one for the cross dock and one for normal putaway. When performing a cross dock, the material is dropped into the default staging lane set in the shipping parameters window, or to the job or supply subinventory defined for the job. After you drop off the material, the system creates a new reservation and updates the delivery detail line with the LPN id. The status on the delivery detail is also updated to Staged.

Special Rule Considerations

There are a few rule parameters that use constants to refer to different conditions, the following section addresses those constraints.

To set up a Put Away or Cost Group Assignment rule based on inspection result, you can use the Object 'Actual Transaction' and the parameter 'Inspection Status' and compare it to a constant character. A value of '1' indicates that the material is not inspected. A value of '2' indicates you accepted the material after inspection. A value of '3' indicates you rejected the material after inspection.

Use reference parameters for receiving rules based on document type. The reference parameter has the following values: - PO_LINE_LOCATION_ID for a PO receipt, ORDER_LINE_ID for a RMA receipt, SHIPMENT_LINE_ID for an internal requisition receipt. These objects pertain specifically to putaway rules.

Lot and Serial Numbers

Warehouse management allows you to generate a lot number or a serial number with a configurable key. You can generate lot and serial numbers only if the transaction enables you to generate a new lot number or a new serial number. For example, if you receive a PO of a lot or serial controlled material you can always generate a new lot or new serial number for that material. However if you receive an RMA receipt for an item with serial number control of pre-defined, you cannot generate a serial number, and must use the serial number issued out of stores.

Receiving Tolerances

While perform a receipt, it is possible the received material exceeds the receiving tolerances. If you set the Over Receipt Quantity Action to warn, you receive a message that indicates you exceeded the tolerance, and the system asks you if you want to continue. If you set the Action to reject, you receive a message that indicates you cannot proceed because of a tolerance violation. If a single tolerance is exceeded by a receipt, you receive a message that indicates you exceeded the tolerance. If multiple tolerances are exceeded, you receive multiple messages.

However, it is possible that different parts of a single receipt line can violate different tolerances because you can match the receipt against multiple shipments. For example if you receive a quantity of 25 items against two shipments with a quantity of 10 each and the first shipment has a tolerance of warning set for location tolerance and second shipment has a warning set for quantity tolerance, when you receive the 25 items, you receive 10 items against the first shipment and receive a location tolerance warning and 15 against the second shipment and receive a quantity tolerance warning. If you use a mobile device you receive a general warning message that indicates the tolerances were exceeded. However, if you set the tolerances as error, then an error message displays and you cannot process the receipts.

Matching Algorithm

When you perform a PO receipt, you have the PO Number and the item. When you perform an in-transit shipment receipt, you have the shipment number and the item and for an RMA receipt you have the RMA number and the item. In the case of a PO, you receive quantity against one of the shipments, in the case of an RMA receipt you receive the material against one of the order lines and similarly for the in-transit shipments. This requires the system to match against the appropriate shipment when you perform the receipt.

The system matches a shipment for a purchase order against the first promised shipment. The system then queries all the open approved shipments. The shipments are ordered based on the promise date and quantity. The system also takes the tolerance receiving tolerances in to account. If a shipment does not satisfy either the location tolerance or the quantity tolerance then the quantity is not consumed. If it satisfies the tolerances, then the quantity is consumed against the shipment if the quantity is less than or equal to the tolerance. If there is extra quantity, if tolerance allows it, the extra quantity received is adjusted against the last shipment and not consumed across all the valid shipments even though other shipments may exist that would allow you to consume the quantity. Similar logic applies for in-transit shipments and RMA.

Transaction Processing

Warehouse management uses the RCV: Processing Mode profile to determine the processing mode of the transaction. If the profile is set to Immediate or Batch, the transaction processes by spawning a concurrent request in the background and immediately returns control to you. If the profile is set to Online, the transaction processes on-line on the mobile device and you cannot do anything until the transaction completes.

See Also

Describing Business Objects, *Oracle Warehouse Management User's Guide*

Setting Up Lot and Serial Attributes, *Oracle Warehouse Management Use's Guide*.

Setting Up Serial Number Control, *Oracle Inventory User's Guide*

Setting Up Lot Control, *Oracle Inventory User's Guide*

Defining Shortage Parameters: *Oracle Inventory User's Guide*.

Defining Items: *Oracle Inventory User's Guide*

Overview of Collection Plans: *Oracle Quality User's Guide*

Common Problems

1. I cannot generate a LPN for the Express receipts and confirmed receipts after giving the shipment number or the ASN but I can generate in all other LPN fields. Why?

Express receipts / Confirm Receipts - On the first page you cannot generate a LPN as that is the field in which you can select the LPN which was shipped as part of the shipment/ASN. You can only do a Ctrl + L.

2. I am unable to perform an express receipt of a lot/serial controlled item. Why?

If you are not able to express receive a lot controlled or a serial controlled item from mobile for an in-transit shipment then please verify the attributes. It is possible that the attribute definitions are different in the two organizations. In such cases if you have a required attribute, it should always have a default value associated with it. If the default does not exist for a required attribute, you will encounter an error while doing an express receipt of an in-transit shipment. To successfully perform an express receipt, there must not be any required attributes without defaults in the receiving organization that aren't also in the sending organization.

Express in-transit shipments can also error out if the item is revision controlled and the revision you are receiving is not defined in the receiving organization in which case you will get an error saying invalid item revision.

3. I am trying to perform an inspection and I receive the message No result found when I scan the LPN. Why?

If on inspection you get the message No result found when you enter the LPN, verify that the receipt you performed did happen. Perform the inquiry on the LPN and verify if the LPN exists in receiving. You cannot perform an LPN inspection if the LPN is not In Receiving or it does not require inspection. To verify this, re-query your purchase order and select the item you are attempting to receive. Then click Shipments, then Receiving Control. The receiving control should be set to Inspection.

Note: Receiving control is set on per shipment. A purchase order can not only have different lines being received with different routings but within the same lines you can have different shipments being received with different routings.

4. While performing a receipt I receive the message Online transaction failed. Press any key to continue. What should I do?

If while performing the receipt you receive the following message Online transaction failed. Press any key to continue, you should do the following:

Verify whether the transaction managers are running. Log on as system administrator, query the managers. You should see two entries - Receiving Transaction Manager and RCVTM. Against each of these there should be a non zero value for the actual processes. If it is not, please consult your system administrator to look into the problem. If that is all right then you should log on to the desktop and there are a couple of things you could do. You can try and perform the same receipt on the desktop. On the desktop it will not ask you for the LPNs so you will be doing a loose receipt so should go ahead and complete that receipt from the desktop. You will not be able to put away. If you still get an error, please log a bug with the error message against Oracle Purchasing. If that goes through fine the problem could be more involved and needs to be debugged. Please see the debugging section on what all you can do for debugging. If this message is followed with the following message - The item was not found at the specified location, then that is just a warning message.

5. I get the following message stating - INV_ALL_SQL_ERROR . What is the problem?

If you get a message like - INV_ALL_SQL_ERROR, most likely there is an invalid PL/SQL package. If you are unable to find it then please file a bug with the entire message.

6. I am unable to see the purchase order in the purchase order LOV. Why?

If you are not able to see your purchase order in the LOV while trying to perform a receipt, check the shipment record when the purchase order was created. The shipment record for each of the lines has a ship to organization field and it should be set to the organization you want to receive the purchase order in. The purchase order must also be approved and have shipment lines that are Open for Receiving for the current organization.

7. I am unable to find my blanket purchase order when I am trying to perform a receipt. Why?

If you are not able to see your blanket purchase order on the mobile when you try to receive against it, please make sure that you have created a release for the same before you are ready to receive it.

8. For a RMA receipt I receive a No result found message when I scan the RMA. What could be the reason?

If you receive a No result found for a RMA receipt then please verify that the RMA has the shipping organization set to the receiving organization. For this you will have to look at the shipping tab on the sales order pad. Also verify that the RMA is booked and that it hasn't already been received against.

9. I am performing an RMA return and it is not stamping the right cost group and I have a cost group based on the return reason. What could be the problem?

For RMA returns if there exist a cost group rule based on the return reason then make sure that it is marked on the sales order that was created for the return. There is a return reason on each line - make sure that the reason for the line you are receiving against is what you are expecting.

10. I cannot press the down arrow or the tab key on the Lot number field. Is this a bug?

The down arrow or the tab key does not work on the lot number field or the serial number field. Only the enter key works. Generally the users should only be using the enter key. It is a technological limitation since there can be attributes associated to these which may require going to a new page. This is only possible with an enter key so the other keys to leave the field have been disabled except the up arrow.

11. I am trying to perform a transaction but I am losing the connection to the server. What could be the reason?

If anytime you loose the connection to the host while performing a transaction, it may be because the class file was not recompiled when one of the base classes was recompiled and changed. So you need to recompile the class file and start the server again.

12. I am unable to perform any receipts. Why?

Make sure that the purchasing and the inventory periods are open before performing any receipts. You can open the purchasing periods from Purchasing Super User responsibility, Setup, Accounting and the inventory periods from Inventory responsibility in Accounting, accounting periods.

Also make sure that the receiving parameters are set for the organization you are receiving the material in. For this please log on as Purchasing Super User and then navigate to Setup, Organization, Receiving Options. Please make sure that you have at least set up the receiving inventory account and there are other default receiving parameters which are required and should be setup prior to receiving.

- 13.** My location is not defaulted in the location field when doing a receipt. What am I missing?

When defining the organization please make sure you have given a location on the Organization form otherwise the location will not be defaulted when you are receiving the material.

- 14.** I am trying to putaway after performing a direct receipt but it is failing. I have the putaway rules defined. What could the reason be?

If you are trying to perform a put away after a direct receipt, it might fail if you have not defined a default picking rule that can be fulfilled. This is because, after you perform a direct receipt, the material is already on hand and you will need to have a picking rule and a put away rule for the allocation to be successful.

- 15.** I receive an error message when I scan the LPN for putaway. Why?

While trying to perform a putaway after a receipt if you get LPN not inspected after scanning your LPN, make sure that you first go and inspect the LPN you are trying to putaway. You cannot perform a put away until you have inspected your receipts that require inspection. You cannot over ride routing during the receiving process.

- 16.** I am unable to generate a LPN/Lot or a Serial Number.

The LPN, lot or serial generation may fail because there may not be a sequence assigned to Organization and Item. You need to assign the starting sequence for these. These are again available when you are defining the Inventory Parameters for your organization. The serial number has to be padded when giving the starting serial number with the number of zeroes equal to the number of digits you want to keep for your serial numbers.

- 17.** I just performed a receipt but I am not able to see the transaction on the desktop. What could be the reason?

If you don't see the just completed transaction in the view transactions form, please make sure that the processing mode for receiving transaction is online. Please refer to the purchasing manual to see how to set this. It is possible that even though the transaction has been completed, it is still in the interface table waiting to be processed if it has not errored out already.

It could be that the transaction failed in the background if the processing mode is set to a background mode. Check the Receiving Transaction Summary form to see if there are any transactions that have errors.

- 18.** I am trying to perform a direct receipt but I am getting the error message Invalid LPN. Why is my LPN invalid?

If while trying to perform a direct receipt, after scanning the item you get the message saying Invalid LPN then it might be because you are trying to receive the material into a LPN that has a status of Resides in Receiving. To perform a direct receipt, you must use either a new LPN or an LPN that has a state of Resides in Inventory.

- 19.** I am unable to receive a substitute item. Is there a setup I am missing?

Make sure that you have a substitute item relationship defined for that item in the receiving organization. Also ensure that the Allow Substitute Receipts is checked on the Shipment line for the receipt you are performing.

- 20.** What should I do if I am not receiving the shortage messages when performing a receipt?

If you are not receiving material shortage messages, please make sure that the Check Material Shortage check box is checked in the Item Master form. Also ensure that the transaction type you are performing, PO Receipt into Inventory is marked to enable online shortage messages. Lastly, check that the Shortage Parameters are set up to check for the shortages you would like - either WIP shortages or Order Management shortages.

- 21.** I do not see any of my receipt transactions after I pressed <F2>. What could have gone wrong?

The transaction is committed only when you select <Done> on the receipt header or receipt information page. Until you do that, you will not see any transaction. Selecting <F2> rolls back all the data you entered after you entered the transaction from the menu and before going back to the menu.

- 22.** I am unable to see my ASN in the ASN LOV on the mobile device.

It is possible the ASN import process failed. Check the progress of the ASN using Oracle Purchasing to determine if there were errors in the ASN processing.

- 23.** I'm unable to see any LPN information for my ASN.

If the LPN, lot, or serial information from the ASN could not be processed because it violated uniqueness constraints, you must receive the ASN using an ASN confirmed receipt. If the LPN, lot, or serial already existed in the system at the time of import, that part of the import ASN process would have failed. The rest of the ASN import process would succeed, but if any of that information is missing from the ASN information, you cannot perform an Express Receipt on

that ASN - the confirmed Receipt must be used so that all the information can be properly collected.

- 24.** The LPN is not cross-docked when putaway is performed. What could be the reason?

For an LPN to be cross-docked, the following conditions must be met:

- Cross-docking is enabled for the organization
- LPN context must be 'Resides in Receiving' or 'Resides in WIP'. You cannot cross-dock Items received for POs with direct receipt routing.
- Backordered sales order lines exist for the item
- LPN is not reserved to a sales order, or the LPN is reserved to a sales order with backordered delivery lines
- All backordered delivery lines are reserved to other sources of supply
- Putaway rule does not restrict putaway drop to outbound staging lane. The staging lane is always determined based on the default staging locator for the organization.

Debugging Notes

You should set the debug profiles to ON for the mobile users. To set the profiles log on as System Administrator, and query the profiles for the mobile user having the problem. The profiles for debugging should be set to - INV: Debug Trace set to Yes, INV: Debug Level set to 9, and INV: Debug File set to a database writable file. After setting these up, perform the transaction again and you should see the log messages in your log directory (from the Debug File profile) in the file INVMWA.log. Go to the end and you may see the reason why the transaction was failing. It may be a set-up issue in which case you will see a detailed message as to why it was failing. If it still does not make sense, please provide the last 100 lines of the log file. These log message would be prefixed with INV_RCV.

If you can only process the transaction from the desktop, and not a mobile devices compare the values of the two rows in RCV_TRANSACTION_INTERFACE. The values for the columns in RCV_TRANSACTION_INTERFACE both for the desktop and the mobile should be the same. When debugging please make sure that the receiving transaction processing mode is set to online as it gives you more information on why the error is occurring.

Frequently Asked Questions

1. Why did my put away fail with the message Could not allocate space or materials?

There could be many reasons for this:

- Check to make sure that there are valid Put Away Rules defined for the current situation and that they are assigned properly. If the rules have been changed recently, log off the mobile UI and re-login and try the put away again.
- If you are trying to put away material from Inventory (i.e. after a direct receipt), make sure there is a Pick Rule that will allocate successfully against the material being put away.

2. How can I query material that has been received under a Standard or Inspection routing but not yet Put Away?

You can query such material through the Material Workbench by using the View By LPN setting and querying for LPNs that have a state of Resides in Receiving.

3. Why hasn't my on-hand inventory increased after doing a receipt transaction?

The on-hand inventory doesn't increase until the put away has been completed, if the receipt routing is Standard or Inspection Required. If the receipt routing is Direct then the on-hand inventory should be incremented immediately after the receipt has been completed.

4. When should I use Standard or Direct receipt routings?

If it is essential that your inventory on-hand balance be incremented immediately after the receipt transaction has been completed, you should use Direct receipt routing.

However, if some material requires inspection, you should use Standard routing for material that doesn't require inspection and Inspection Required routing for material that does require inspection. Additionally, if you plan to make use of the opportunistic cross-docking functionality, you should use Standard receipt routings, as that functionality is not available using the Direct receipt routing. Also, if it is necessary to have put away rules based on the supplier or information stored on the purchasing document, you should use Standard routing.

Label Printing Integration Kit

Topics covered in this chapter include:

- [Label Printing Integration Kit](#) on page 10-2
- [Implementation](#) on page 10-4
- [Technical Implementation](#) on page 10-11
- [Common Problems](#) on page 10-14
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Label Printing Integration Kit

Warehouse Management provides an integration kit to 3rd Party Label Printing Software packages that enables you to print labels directly from within the warehouse management environment. The kit integrates with the leading providers of label printing software and provides multiple modes for printing applications with more complicated requirements. The integration is handled through XML messages - either through an XML file dropped into a specific folder, or through an XML parameter of a direct PL/SQL API. This chapter discusses the full implementation of the integration kit from the perspective of warehouse management. For specific information about integrating to a particular printing software supplier, contact your supplier.

Functional Process Overview

Warehouse Management provides the ability to print specific label formats for particular circumstances through either a real-time synchronous integration or a asynchronous integration.

Definition of Terms

- Oracle Warehouse Management: The Oracle Warehouse Management system application including windows accessible through the desktop user interface as well as windows accessible through the Mobile Applications user interface on a mobile RF terminal.
- 3rd Party Printing Software: The label printing software that integrates with Warehouse Management. The functions this software provides include label design, acceptance of XML label request, and label print service. A single software package may or may not perform these functions. Some integration strategies may require multiple software packages to address these functions.
- Label Type: A broad category of labels that specifies the superset of available data elements that may be included on a single label. Warehouse management recognizes the following Label Types: *Material*, *Serial*, *License Plate Number (LPN)*, *LPN Contents*, *LPN Summary*, *Location*, *Shipping*, *Shipping Contents*, *Flow Contents*, and *WIP Contents*. Multiple Label Formats may be defined per Label Type.

Example: The Material Label Type includes information such as Part Number, Description, Unit of Measure, Quantity, Hazard Code, Lot Number, Lot Expiration Date, Lot Attributes, and so on.

- **Label Format:** A single design of a label that may include fixed data (such as field prompts) and variable data (such as Part Number). A Label Format is associated to a Label Type. It includes a subset of the available data elements from a particular Label Type. A label type can have multiple label formats, however each Label Format belongs to only one label type. Label Formats are registered within warehouse management after you create the label design in the 3rd Party software package.

Example: Two label formats, HAZMAT and Standard have been defined for the Material label type. The HAZMAT Label Format includes the Part Number, Hazard Code, Unit of Measure, and Quantity. It also includes a large Hazardous Material stamped across the label. The Standard Label Format includes the Part Number, Unit of Measure, and Quantity, and does not have additional text stamped on the label.
- **Business Flow:** An identifiable business process that occurs as part of material handling within warehouse management. Warehouse management recognizes a pre-determined list of Business Flows you can set up to include label printing as part of the transaction processing.
- **Synchronous Mode:** A real-time integration mode between Oracle warehouse management and the 3rd Party software vendor that is handled through a PL/SQL API. When using this mode, the 3rd party supplier is able to return success or failure messages regarding the status of the label print request. Warehouse management stores those messages in the label print history so label printing problems can be easily identified and diagnosed.
- **Asynchronous Mode:** An integration mode between warehouse management and the 3rd Party software supplier that is handled through dropping an XML file into a watched directory. When using this mode, warehouse management has no knowledge of the status of the print request after creation of the XML file.

Functional Process

Warehouse Management supports two modes of label printing integration. Using the *Synchronous Mode*, warehouse management calls a PL/SQL API that is shipped as an empty stub. It is the responsibility of the integration partner to implement the API to process the print request and return the status to warehouse management. Using the *Asynchronous Mode*, warehouse management creates an XML file in a specified directory that contains the print request instructions. It is the responsibility of the integration software to monitor the directory for new files,

retrieve the XML file that warehouse management creates, and process the label print request.

You can print labels through warehouse management in one of several ways. You can initiate a manual print request from the mobile device, or a label can be automatically printed as part of a business flow. Also you can reprint labels printed in either of these two ways via a mobile window or a desktop window. You can redirect reprint requests to a different printer, or request a different number of label copies. The manual request and reprint functionality is useful if you require a label to be printed for a particular License Plate if the current label is damaged or unreadable.

For any print request, whether it comes through a manual request or an automatic business flow, warehouse management determines the printer and label format to use if these are not already provided as part of the label printing request. The printer is determined by querying the current printer assignments. Printers can be assigned to the entire Site, Responsibility, Department, Subinventory, Equipment, or individual User. See: [Assigning Printers](#) on page 10-6. The Label Format is determined through the Rules Engine. You can model business logic that determines the best label format to print for a given request in the Rules Engine. You can construct individual rules to specify that a certain Label Format be used if certain criteria are met. Those rules are given weights to determine the execute sequence when looking for a Label Format. Each Label Type also has one default Label Format that is used for a label request whenever the Rules Engine fails to pick a Label Format. For more information on setting up labeling rules, see: [System Rules Engine](#).

Once the system determines the printer and *Label Format* warehouse management constructs the XML print request. According to the integration mode, the XML is passed to 3rd Party software through the *synchronous* API call, or through a file created in a specific directory.

The 3rd Party software processes the print request and, if running in *synchronous* mode, returns the print status to Oracle warehouse management.

Implementation

This section discusses the label setup in warehouse management. The set up steps include setting warehouse management Profiles, creating and assigning printers, defining label formats, and assigning label types to business flows. For information on designing label formats and managing the XML import process, refer to documentation from the 3rd Party software being used as an integration partner.

Warehouse Management Profile Options

The warehouse management Label Printing integration kit uses the following three profiles. You can set all three profiles at the Site, Application, Responsibility, and User levels.

- **WMS Label Print Mode:** This profile determines the label print mode for the integration. The choices for this profile are Synchronous and Asynchronous. Depending on the setting of this profile, the label print request will be processed according to the mode selected.

Note: As of August 2003, only Zebra and Software have synchronous printing solutions certified by Oracle. In order to use the Zebra XML printer or the Software Connector, this profile option must be set for synchronous printing.

- **WMS Label output directory:** This profile is only used if the Label Print Mode is Asynchronous. It determines the directory the XML files are written to for the 3rd Party software to pick up and process. Both the Oracle database and the 3rd party software must have read / write privileges to the directory. Furthermore, the directory must be in the list returned by the following SQL statement:

```
select value from v$parameter where name = 'utl_file_dir'
```

- **WMS Label file prefix:** This profile is only used if the Label Print Mode selected is Asynchronous. The profile determines the prefix for the XML files written to the output directory. Label print file names are generated according to the following format: PPPNNN.xml where PPP is the prefix specified in this profile and NNN is a sequential integer generated for each new label print request. Note that it is possible to distinguish the user who generated a particular print request by setting this profile at the user level.

Creating Printers

Printers for label printing are setup in the same way they are normally setup within Oracle Applications except you do not need printer drivers for the label printers since the 3rd Party software processes the actual print request. The printer needs to be setup within Oracle Applications solely for the purpose of choosing the correct printer for a particular print request and then identifying the selected printer by its name in the XML produced by the system.

Use the System Administrator responsibility to create printers. First, a printer type must be created, then individual printers can be created.

Create a type called Label and give it a description. This printer type does need to have associated styles or drivers.

Create a new printer with a unique name of printer type Label. You can now assign the printer to use as a part of the Oracle Warehouse Management Label Print Integration

Note: The name that you give the printer in this setup step must correspond to the name of the printer as recognized by the 3rd Party printing software. The XML that contains the label request will refer to this printer using the name setup here and the printing software must be able to recognize this printer name to successfully process the print request.

Assigning Printers

The system searches for a printer assignment in the following sequence: User, Subinventory, Responsibility, Application and Site level. When you make a label request, warehouse management looks for printer assignments for the requested Label Type and uses the printer assigned to the Label Type at the most specific level. If you do not assign printers, to Label Types, you cannot print labels.

See Also

Choosing Printers for Shipping Documents and Labels, *Oracle Shipping Execution User's Guide*.

Defining Label Formats

Some 3rd party packages do not recognize special characters or spaces in variable names. For instance, instead of using ITEM NUMBER or S/N use ITEM or SN. In general avoid using all special characters unless directed by the 3rd party documentation.

Note: Not all label fields for a given label type are available during all business flows. In some situations, the data is only available at certain times and cannot be obtained during other business flows. In other situations, the data is located in different places depending on the business flow and not all locations of the data have been implemented yet. Please refer to the Common Problems section for additional details.

Note: The variable names that you give to the fields in this setup step must correspond to the names of the variable names that the 3rd party printing software expects. If these names do not match exactly, Oracle will identify the XML data with one variable name, but the 3rd party printing software will be expecting a different name that is not defined in the data. Thus, the label will be printed with null values for this data.

See Also

Compliance Labeling, *Oracle Warehouse Management User's Guide*

Defining Label Formats with Multiple Records

The LPN Summary and Shipping Contents label formats support designs that include more than one row of data on a single label. This enables you to print a single label that may contain multiple lines of content information for an LPN or outbound shipment.

You can enter multiple lines for the same data element to print multiple record labels on the fields window for defining label formats. For instance, if there is space on one label for 2 rows of information for a LPN Summary label, the following data fields may be defined in the Fields section of the Label Format form:

Table 10–1 Data Field and Variables

Data Field	Variable
LPN	LPN
Item	ITEM1
Quantity	QTY1

Table 10–1 Data Field and Variables

Data Field	Variable
Item	ITEM2
Quantity	QTY2

In this example if you make a print request for an LPN Summary that contains three rows of record information, the print request API recognizes that two records can fit on one label based on the label format design. Because the data elements Item and Quantity each have two variables associated to them, the first two rows returned for the current LPN pass into those variables. Therefore, two labels are printed. The first label contains the LPN information and the first two rows returned for the LPN Content information. The second label contains the LPN information repeated and the third row returned for the LPN Content information.

Assigning Label Types to Business Flows

Multiple Label Types can be assigned to a single Business Flow if it is necessary for multiple labels to be printed. However, multiple label types print only if there are multiple assignments for the business flow at the same level.

For instance, if both the LPN and LPN Content Label Types are assigned to print during a Miscellaneous Receipt for a particular user, both label types print. However, if the LPN Label Type is assigned to a responsibility and the LPN Content Label Type is assigned to a user, even if the user logs in under that responsibility, only the LPN Content Label Type prints. The following table lists the available business flow label type assignments.

Table 10–2 Business Flow Label Type Assignments

Label Type	Material	Serial	LPN	LPN Content	LPN Summary	Location	Shipping	Shipping Content	WIP Content	Flow Content
Cartonization	Yes		Yes	Yes	Yes		Yes	Yes		
Cost Group Update	Yes		Yes	Yes	Yes					
Cross-Dock	Yes	Yes	Yes	Yes	Yes		Yes	Yes		
Cycle Count	Yes		Yes	Yes	Yes					
Delivery	Yes	Yes	Yes	Yes	Yes					

Table 10–2 Business Flow Label Type Assignments

Label Type	Material	Serial	LPN	LPN Content	LPN Summary	Location	Shipping	Shipping Content	WIP Content	Flow Content
Dynamic Locator						Yes				
Flow Line Operation										Yes
Flow Line Start										Yes
Flow / WOL Assembly Completion	Yes	Yes	Yes	Yes	Yes					Yes
Import ASN										
Inspection	Yes	Yes	Yes	Yes	Yes					
Inter-Org Transfer	Yes		Yes	Yes	Yes					
Inventory Putaway Drop	Yes		Yes	Yes	Yes					
Lot Split / Merge	Yes		Yes	Yes	Yes					
LPN Correction	Yes		Yes	Yes	Yes					
LPN Generation			Yes							
Material Status Update	Yes	Yes	Yes	Yes	Yes	Yes				
Misc. / Alias Issue	Yes	Yes	Yes	Yes	Yes					
Misc / Alias Receipt	Yes	Yes	Yes	Yes	Yes					
Pack / Unpack / Update LPN	Yes		Yes	Yes	Yes					
Physical Count	Yes		Yes	Yes	Yes					
Pick Drop	Yes		Yes	Yes	Yes		Yes	Yes		

Table 10–2 Business Flow Label Type Assignments

Label Type	Material	Serial	LPN	LPN Content	LPN Summary	Location	Shipping	Shipping Content	WIP Content	Flow Content
Pick Load	Yes		Yes	Yes	Yes		Yes	Yes		
Put Away Drop	Yes		Yes	Yes	Yes					
Putaway Pregeneration	Yes	Yes	Yes	Yes	Yes					
Receipt	Yes	Yes	Yes	Yes	Yes					
Replenishment Drop	Yes		Yes	Yes	Yes					
Replenishment Load	Yes		Yes	Yes	Yes					
Serial Number Generation		Yes								
Ship Confirm	Yes	Yes	Yes	Yes	Yes		Yes	Yes		
Subinventory Transfer	Yes		Yes	Yes	Yes					
WIP Completion	Yes	Yes	Yes	Yes	Yes					
WIP Pick Drop	Yes		Yes	Yes	Yes				Yes	Yes
WIP Pick Load	Yes		Yes	Yes	Yes				Yes	Yes
WIP / Flow Putaway Drop										Yes

See Also

How to Associate Label Types to Business Flows, *Oracle Warehouse Management User's Guide*.

Creating Label Format Rules

Creating label format rules is an optional step. Some implementations may require only a single label format for each label type. If this is the case, the system picks the

default label format for each type. The system also picks the default if there are no applicable rules. If the implementation requires more than one label format for a label type label format rules are necessary.

See Also

[System Rules Engine](#) on page 13-2

How to Define Label Format Rules, *Oracle Warehouse Management User's Guide*

Completion of Setup

Before you can print labels, the 3rd party software may require additional setup. The 3rd Party software must recognize the Printers registered within warehouse management, the defined Label Format names, and the Field Data Variables. It must be able to read the XML format warehouse management generates. If the integration mode is Synchronous, you must load the implemented PL/SQL API into the Oracle database. If the integration mode is Asynchronous, the 3rd Party software must be set to scan the appropriate directory for XML files to process them as print requests

Technical Implementation

XML Formatting

Oracle and the 3rd party supplier need to agree on the XML format so that the XML contents are understood, parsed and printed as a label. An XML Document Type Definition (DTD) defines the XML tags used in the XML file. Warehouse management generates XML files according to this DTD and the 3rd party software translates the XML according to this DTD.

XML DTD

The following is the XML DTD the system uses to create the XML. It defines the elements used in the XML file. The following is a list of their attributes and the next level elements:

```
<!ELEMENT labels (label)*>
<!ATTLIST labels _FORMAT CDATA #IMPLIED>
<!ATTLIST labels _JOBNAME CDATA #IMPLIED>
<!ATTLIST labels _QUANTITY CDATA #IMPLIED>
<!ATTLIST labels _DUPLICATES CDATA #IMPLIED>
```

```

<!ATTLIST labels _PAGES CDATA #IMPLIED>
<!ATTLIST labels _PRINTERNUMBER CDATA #IMPLIED>
<!ATTLIST labels _PRINTERNAME CDATA #IMPLIED>
<!ELEMENT label (variable)*>
<!ATTLIST label _FORMAT CDATA #IMPLIED>
<!ATTLIST label _JOBNAME CDATA #IMPLIED>
<!ATTLIST label _QUANTITY CDATA #IMPLIED>
<!ATTLIST label _DUPLICATES CDATA #IMPLIED>
<!ATTLIST label _PAGES CDATA #IMPLIED>
<!ATTLIST label _PRINTERNUMBER CDATA #IMPLIED>
<!ATTLIST label _PRINTERNAME CDATA #IMPLIED>
<!ELEMENT variable (#PCDATA)>
<!ATTLIST variable name CDATA #IMPLIED>

```

Sample XML

The following is an example of XML file that is generated according to the above DTD. The content of the XML files lies between <labels> and </labels>, which correspond to a group of labels. The content between <label> and </label> has the information to print one piece of label. Each <variable> and </variable> pair gives the value of one variable on the label. The printer name and label format are given in the <labels> tag initially, different printer name and/or label format can be set at the level of each label, which is given in the <label> tag. Unless new values are given the <Label> tag, the attributes (such as printer name, label format, and quantity) at the <Labels>

```

<?xml version="1.0" standalone="no"?>
<!DOCTYPE labels SYSTEM "label.dtd">
<labels _FORMAT ="Material" _QUANTITY="1" _PRINTERNAME="Printer 1" _
JOBNAME="LBL101">
<label>
<variable name= "ITEM">AS54888</variable>
<variable name= "ITEMDESC">Desktop</variable>
<variable name= "LOT">10292</variable>
<variable name= "QTY">2</variable>
<variable name= "UOM">Ea</variable>
</label>
<label>
<variable name= "ITEM">AS12345</variable>
<variable name= "ITEMDESC">Mouse</variable>
<variable name= "LOT">10200</variable>
<variable name= "QTY">10</variable>
<variable name= "UOM">Ea</variable>
</label>

```

```
</labels>
```

Synchronous API Specification

When you set the print mode to synchronous, the XML content passes directly to the 3rd party software to be processed and printed. Oracle warehouse management provides the stub of the API and 3rd party company implements the necessary code to process the XML string and print it out. The following is the specification of the synchronous printing API:

```
--
-- Copyright (c) 1999 Oracle Corporation, ----- Redwood Shores, CA, USA
-- All rights reserved.
--
-- FILENAME
--     INVSPRQS.pls
-- DESCRIPTION
--     Spec of package INV_SYNC_PRINT_REQUEST
--
SET VERIFY OFF
WHenever SQLERROR EXIT FAILURE ROLLBACK;
CREATE OR REPLACE PACKAGE INV_SYNC_PRINT_REQUEST AS

PROCEDURE SYNC_PRINT_REQUEST
(
  p_xml_content IN LONG
  ,x_job_status OUT VARCHAR2
  ,x_printer_statusOUT VARCHAR2
  ,x_status_typeOUT NUMBER
);
END INV_SYNC_PRINT_REQUEST;
/
--show errors;
COMMIT;
EXIT;
```

The API takes XML content as input parameter and returns the job status, printer status, and status type. The job status has meanings such as success, pending, error. The status type has meanings such as online, out of stock, heads up, etc. The status type shows whether it is an error, warning, log, or success status message. You can control the type of printing messages to display on the mobile device.

Common Problems

The following section contains common problems that may occur, causes, and hints on how to fix them. Please contact technical support if you need more information.

1. Label does not print out

Reason: Setup problem

Fix: Check the following configurations:

- Verify you set the label printing profiles correctly. Verify the database can write to the directory you specified in the label file output directory profile.
- Assign and enable the printer at the user level or higher level for each label type you want to print.
- Assign label type(s) to the business flows at the user level or at a higher level, and they are enabled.
- Verify each label type has a label format defined, and each label format has a variable defined.

Reason: Information not available to print

Fix: Verify the appropriate information is available. For example, if an item is not serial controlled, the serial label is not available; at time of Receipt and Inspection in an Inventory organization, serial number is not available.

Reason: Hardware problem or printing service problem

Fix: Check the printer and 3rd party printing service. Oracle warehouse management only provides the content for the label, the actual printing is done by the 3rd party label printing supplier. Please make sure their printing service is ready and hardware, such as printer, network connection, is ready as well.

2. Label prints out, but the data has problem

Reason: Setup problem

Fix: If you see a variable on the label is not replaced by any data, check Define Label Format setup window and verify you add all the variables on the label to the label format and their variable names match. If a variable is printed on the label but not listed in the label format, the XML content does not have information for that variable, then it is missing on the label.

If the data is shown but you believe the value of the data is not correct, please contact support for further help.

Reason: Data not available.

Explanation: For instance, the Supplier field on the Material label type can only be printed on the label if the print is initiated from the Purchase Order Receipt business flow. After the material is put away to inventory, the material link back to the supplier is lost. Therefore, all Material labels printed for material that resides in inventory, whether manually initiated or initiated as part of a business flow, do not include the supplier and that field is null on any label format you have defined.

In other circumstances, the data may be available in the system, but stored in a way that is not accessed by the current label printing code. For instance, the Shipping Content label is printed based on the link between the delivery detail and the license plate. Thus, even though there may be a reservation between a sales order and a license plate, until the LPN is picked and staged, and that link created, it is not possible to get that label.

Some of these limitations depend on the particular way in which label printing was implemented, while other limitations exist because the data model simply does not store the requested data. Before logging a support ticket with Oracle for a missing data field, please check to see if it is even possible to get the data requested for the label.

Debugging Notes

This section provides some hints and tips to aid in debugging problems in the label print integration setup and execution.

There are two log files that will be able to help debugging problems in label printing setup and execution, they are located in the Inventory log directory as specified by the INV: Debug File profile.

MWA Log Files

Inventory Log

This log file has information about each step of the label printing execution. From this information, you can find whether each step is executed successfully and the errors that occur. This helps you find setup or code problems. For example, the log files list the label types printed for the business flow or manual request, if the number of label types is zero, then probably you did not assign label type to business flow properly. The log file also notes the printer for the label, the label

format for the label type, and how many variables it finds for the label format. This information helps you find whether there are problems in the setup of printer, label format, and variables for each label format. It also has log messages within each label type. You can find out whether there is error occur when it is retrieving the actually data to print in each label type.

Frequently Asked Questions

1. What is the difference between the LPN Content and LPN Summary Label Types?

The LPN Content label type lists all the content information for the contents of a particular LPN. If there are multiple contents within an LPN (such as more than one Item, lot, revision or nested LPNs,), then separate LPN Content labels will be printed for each of the contents of that LPN.

The LPN Summary label type allows content information to be summarized for a particular label format. Multiple rows of content information can be included on a single label format. If there are multiple contents within an LPN, they will be printed on as many labels as need to be used, depending on how the labels have been set up for multi-record printing. If there are nested contents within an LPN, the nested contents will be summed up and displayed in summary form as a content line for the outermost LPN. For more information on printing multiple records using an LPN Summary label type, refer to the discussion in the Implementation section.

2. Is it possible to add additional Label Types in my implementation?

It is not possible to add Label Types in an implementation without code customization. Each Label Type is designed using a single PL/SQL package to collect the appropriate information from the references passed to it.

If there are data elements missing from a Label Type for your business needs, or if there are Label Types missing, please contact Oracle Support or Oracle warehouse management Development to inquire about adding the required functionality into the label printing integration kit.

3. What are the advantages and disadvantages of using the Synchronous or Asynchronous integration mode?

The advantages of using the Synchronous print mode are in the direct interaction with the 3rd Party printing software. When the functionality to provide feedback through the mobile device is included in a future release of

Oracle warehouse management, the users will have the ability to receive instant feedback regarding the print job they submitted.

The disadvantages of the Synchronous print mode is that it requires greater effort to integrate and it may have performance issues because the mobile user must wait for the print job to be processed before continuing to work.

The advantage of the Asynchronous print mode is that it is the easiest to implement. If you set the directories and profiles within Oracle warehouse management and the monitoring level for the 3rd party printing software, you can implement label printing with no new code. In addition, this method may have better performance, since Oracle warehouse management does not have to wait for a response from the printing software.

The disadvantages of the Asynchronous print mode are the loss of visibility to any feedback that the print job may have generated. Oracle warehouse management cannot have any visibility to the status of the printer or print job since the implementation is achieved through the creation of a flat file.

4. What is the average size of the XML file created by Oracle warehouse management?

The XML files generated by Oracle XML range in size from about 300 bytes up to 1 Kilobyte. The size depends on the number of data filed on each label.

5. Who are the certified integration partners with Oracle warehouse management for label printing?

Oracle WMS Development has tested and certified the following partners for label print integration as of August 2003:

- Loftware (www.loftware.com)
- JetForms (www.adobe.com)
- FormScape (www.formscape.com)
- Optio (www.optiosoftware.com)
- Zebra (www.zebra.com)

All packages have been tested and approved for use with label printing for warehouse management and mobile supply chain applications. Zebra enables Oracle to integrate directly with the label printers, without the need for a print server. FormScape, JetForms, Loftware, and Optio use print servers to manage print requests.

The capabilities of these packages differ with respect to whether they are a label solution, or a cross-application document management system, what platforms they run on, the printers they integrate with, and the features they include with which to design labels. In addition, different vendors have implemented synchronous or asynchronous support, while some have implemented both.

3rd Party Vendor	Synchronous	Asynchronous
Loftware	Yes	Yes
JetForms	No	Yes
FormScape	No	Yes
Optio	No	Yes
Zebra	Yes	No

Refer to the respective partners for additional information.

Because the warehouse management label printing integration kit is a generic integration, other 3rd party label printing software suppliers should be able to integrate with warehouse management as well. Depending on their support for XML technology and/or PL/SQL implementations, integration can be achieved fairly easily.

6. What must be done to ensure that XML files can be written by Oracle Applications and read by the 3rd party label printing software?

The directory for the XML files must be specified in the appropriate profile for warehouse management label printing. That directory must be able to be written to from the database. That is, the directory must be on a file system that is accessible to the database and the directory must be included in the 'v\$parameter' list for 'utl_file_dir' on the database.

In addition, many 3rd party label printing packages need the ability to delete the XML file after processing it. Therefore, the permissions on the file directory must be set such that the software has access both to read the XML file and delete the file after processing.

7. When does the system record the label history?

The system records the label history whenever a label is printed. A record is populated in the label history table even if no XML file was produced in the output directory. This makes the history a useful debugging tool, because if the

label and XML are visible here, that can narrow a problem to writing the XML to the file system, rather than generating the xml in the first place. Reprint requests include a link to identify the label printing request that produced the original label.

Summary

Warehouse management provides label printing that enables specialized printing, compliance labeling, and automatic label generation. The integration is a standard, generic integration that can be implemented by any integration partner.

Material Status Control

Topics covered in this chapter include:

- [Warehouse Management Material Status Control](#) on page 11-2
- [Implementation](#) on page 11-5
- [Common Problems](#) on page 11-9
- [Debugging Notes](#) on page 11-10
- [Frequently Asked Questions](#) on page 11-12

Warehouse Management Material Status Control

Material Status Control makes it possible to control the movement and usage for portions of on-hand inventory that may have distinct differences due to grade, quality, or maturity level.

Some of the most popular requirements for status control are whether or not material can be picked or shipped on an internal order, picked or shipped to a customer, or issued for a production job. In addition, some material may be quarantined until some activity such as inspection is performed on it.

Material Status Control provides the user flexibility in specifying allowable transactions. You can indicate with a high degree of granularity the actions to be allowed or disallowed, the statuses that are applicable to their warehouse or facility, and the entities that are assigned to various statuses. Note that, like lot and serial attributes, material status functionality is available for all organizations, if WMS is installed, regardless of whether WMS is enabled for that particular organization.

Material Status Control vs. Item Status Control

Oracle Inventory currently offers functionality that enables the user to specify an item status at the item or organization level. This status controls two different elements: the particular documents on which the item can be used, and whether the item can be transacted within inventory.

Specifying the allowable documents for an item effectively models the product lifecycle that an individual item progresses through. Oracle Applications fully supports pending item status, where the system automatically progresses an item to the next status. This can be used to manage the product lifecycle, from R&D through beta, production, and obsolescence.

However, this item status offers no functionality for specifying the status of material within the warehouse. That is, if a particular lot of an item should not be transacted in a particular manner because of quality or maturity issues, there is no way to prevent the system from allowing a transaction. Material Status Control solves this problem.

Overview

Material status controls the movement and usage of material in a warehouse. A material status is defined by the set of transactions that it disallows. Material status can be assigned to lots, serial numbers, locators, or subinventories.

Material takes on the behavior of a material status in one of two ways. In the case of lot controlled items and serial controlled items, status control may be enabled for that item. If enabled, a material status may be assigned to particular lot numbers or serial numbers. Or material may be located in a subinventory or locator with a material status associated with it. In this second case, the material is not assigned the material status, but rather, takes on the behavior indicated at the subinventory or locator level.

The set of disallowed transactions is cumulative. If a lot controlled item with lot status Hold is in a locator with locator status Inactive, then transaction types disallowed by Hold, in addition to transaction types disallowed by Inactive, will not be permitted for that lot.

Material statuses are given to lot or serial controlled material when it first enters the warehouse. Often, the user will accept the default material status associated with the item at the item definition. However, it is possible to override the default at receipt. Material statuses are given to subinventories and locators when they are first defined, and may be updated as necessary.

Oracle Inventory will check the lot and serial material status of an item being transacted, if applicable. Oracle Inventory will also check the locator and subinventory status of that item. If a status is found that disallows the desired transaction, then that attempt will fail. That is to say, all disallowed transaction types for statuses that apply to that material will be disallowed. If material exists within an LPN, all the contents of that LPN will be checked to transact that LPN. If any of the contents have a status that prevents that transaction, the attempt to transact the LPN will fail.

All users will be able to query the status assigned at any of the four levels. However, only users with the appropriate authority can update material status. Update ability can be restricted to just lot and serial updates, which may be performed by operators authorized to review material. Warehouse managers, however, may be given full access to update the material status of subinventories and locators, as well as lots and serials.

Business Cases

Before covering setup and operation in depth, two business cases that take advantage of material status will be discussed.

Inspection Line

Suppose a warehouse has different material statuses applied to different locators. One status allows material to be transacted, picked and shipped; this is applied to

the finished goods subinventory. A “quarantine” status is applied to a locator in the Material Review Board subinventory where items that require further inspection are placed. This status prevents picking, shipping, and issuing to WIP.

As material comes off a production line, it may be subject to a preliminary inspection. If material is suspected to have quality issues, it is stored in that quarantined location until it can be fully inspected. The user does not want material in the quarantined location to be picked or shipped or used in later production lines. By using Material Status Control, the user can set up Oracle Inventory to prevent that material from being picked for a sales order or shipped to a customer. That material will not be used anywhere else in the organization until it is removed from that location.

Without Material Status control, the only way to accomplish this quarantine location would be to specify an entire subinventory as a non-reservable subinventory. While that would prevent reservations from being made against that material, the system could not prevent transactions from occurring on it.

Immature Product

Material status can also be used to control products that need to age, such as wine or cheese. When a specific lot of cheese comes out of the manufacturing plant, the user may assign a status of Immature. This status would allow shipping the material to an internal customer to be stored until distribution, but would prevent shipping the material to an external customer to be sold immediately. As the lot approaches maturity, a status of Almost mature could be assigned, allowing the lot to be picked for external sales orders and staged on the shipping dock, but not yet shipped. This type of control was not available prior to Material Status Control.

Sample Material Statuses

These are four example statuses that businesses might use to control material in their warehouse.

Active

This could be the default status which would not disallow any transaction types. Material with this status acts as it does without status control.

Hold

This status might be used for material that needs to be inspected or whose quality is suspect. No transactions could take place on this material until it is changed to a different status.

Immature

This status would be useful for material that needs to age in the warehouse before being picked or shipped on an order to a customer. It may allow internal orders to move the material through the distribution chain, but picking and shipping this material for orders to customers should be prevented.

Almost Mature

This material has a very short aging process or is nearing the end of its immaturity. By assigning material this status, picking and staging may be allowed, but the material may not be shipped. When the material is completely matured, it can be assigned a status of Active and shipped immediately.

Implementation

There are four steps to the setup that must be performed to take full advantage of material status control in the warehouse. Oracle Warehouse Management comes with some data already seeded, so that the first two steps may not be necessary for all implementations. To change the initial setup, however, all four steps are necessary.

Status Control of Transaction Types

The first step is to determine which transaction types will be restricted by material status control. Any preseeded (system defined) transaction type can be restricted by material status.

While it is possible to place all transaction types under material status control, there may be some transaction types that should never be disallowed or some transaction types may never be used by a particular warehouse. By selecting only a subset of all transaction types to be used in material status control, system setup and maintenance becomes much easier. Some of these transaction types will already be set up for material status, but users may want other less common transaction types enabled for status control.

There is a check box on the Transaction Types form labeled Status Control. When this option is enabled, the corresponding transaction type will appear in the Define Material Status form. The descriptions of the transaction types will be used on the Define Material Status form, so it is helpful for the descriptions to accurately reflect the transaction type.

Once material statuses are defined, adding status control to additional transaction types places the transaction type on the list of allowed transactions. Statuses that are currently assigned in the warehouse (to a lot, serial, subinventory, or locator) cannot be modified; this prevents data corruption and operator error. Therefore it is important that all transaction types that should be disallowed by a material status are placed under status control before that material status is used.

Transaction types can always be removed from status control, even if they are currently disallowed under one or more statuses currently in use. A warning will be given indicating that the transaction type is under status control, but the system will not prevent an operator from removing transaction types from status control.

Define Material Status

Oracle Inventory ships with only the Active material status seeded. In this step, you set up customized statuses that reflect the precise needs of your business. You can assign transaction types to be disallowed by certain statuses. In this way, you can control the exact behavior of material. You may choose to allow picking material for a sales order but prevent shipping that material, or, you may choose to disallow picking material for an order to a customer, but allow picking that material for an internal order.

In addition to assigning the transaction types allowed by different statuses, users can define the usage they want to enable for certain statuses. In this way, a status can be set up that can only be used by subinventories and locators but not lots and serials, or, statuses can be enabled for all entities. If a status is assigned to a business object, then that status cannot be disabled for that type of business object. That is, if a locator within the warehouse is set to status On Hold then the user will not be able to disable the status On Hold for use on locators.

Statuses can be disabled if they are not yet ready to be used, or when they will no longer be used. However, Oracle Inventory will not allow users to disable a status if material in Inventory is assigned that status. Similar to the restriction above, if a locator within the warehouse is set to status On Hold then the user will not be able to disable the status On Hold.

Define Material Status Control of Item

Material status can be assigned to a serial or lot at receipt. At this point, the user can accept the default status suggested by the system or use another status. These defaults are setup at the item level. Any material status defined and enabled for lots can be set as the default material status of a lot, and similarly, any material status defined and enabled for serials can be set as the default material status of a

serial number. These defaults can be over-ridden at receipt; they are used to determine which material status should initially appear on the receipt when the material is received.

Some lot or serial controlled items may not require material status control. Material status control can be turned off at the item level for lot or serial controlled items. If the material is not status-control enabled, then the user will not be prompted for material status at receipt, and will not be able to assign a status to lots or serials of that material. However, the material will still be subject to the transactions disallowed by the locator or subinventory it resides in.

Assign Material Status Control to Subinventories and Locators

The final step in setting up material status control is to assign material status to the subinventories and locators. Although maintaining the settings can be done using the mobile device, they should be given initial values via the forms when the subinventories and locators are first created.

Subinventories are assigned a material status in the Subinventories form, and they are also given a default locator material status. This default locator status is used in two situations. When locator control is set to prespecified (that is, all locators in the subinventory must be defined before they can be used), the default status is used to default the locator status. However, this status can be changed for each locator as it is defined. When locator control is set to dynamic (that is, locators need not be defined in advance, but will be created on-the-fly as users create new locators as part of transactions), the default locator status will be used for these newly defined locators. If a subinventory with dynamically defined locators is given a default locator status that disallows miscellaneous receipts, for instance, users will not be able to dynamically create a new locator by a miscellaneous receipt transaction. However, locators could be dynamically created by inventory sub-transfers.

Operation

Assign Lot/Serial Status at Receipt

After the initial setup, the most common way to assign material status to material will be when the lot or serial is first entered into the system at receipt. Whenever a new lot is created, if the item is under material status control for lots, the user must assign a status from the list of the predefined statuses. New serial numbers must be given a status as well. Therefore, an item under lot and serial status control may have two (possibly) different statuses assigned to it. If multiple statuses apply to different parts of a lot, then the lot must be split and the appropriate material status

assigned to each subplot; an individual lot can only have one material status assigned to it.

Update Material Status via Mobile User Interface

Material status can be updated on the mobile by users with the proper access. There are three levels of access to view and update material status: inquiry only, limited access, and full access. The access levels are set up via the form function parameters when the menus and responsibilities are defined.

Users with inquiry only access will not be able to update any material status, but they can inquire on the status of any object. Users with inquiry only access will still be able to set the status of lots or serials at receipt, but do not have the ability to update that status after the receipt transaction has been completed. For this level of access, the form function parameters must include `LEVEL=QUERY_ONLY`. This access level could be used for most warehouse operators who may need to view the material status, but have no need to update it.

Users with the need to update the status of lots and serials only will have limited access. They cannot update the material status of locators or subinventories. For this level of access, the form function parameters must include `LEVEL=LIMITED_ACCESS`. This access level could be used for those on the material review board who are responsible for updating the material status of material with potential quality issues, but have no need to update the material status of subinventories and locators.

Users with the need to update any material status will have full access. They have the ability to change lot, serial, locator, and subinventory material status. For this level of access, the form function parameters must include `LEVEL=FULL_ACCESS`. This access level could be used for warehouse managers, who needs the ability to update any material status in the warehouse.

Note that, as material status can be defined and updated on the desktop by anyone with access to the proper forms, access must be restricted here as well if necessary for security reasons. Specifically, users with access to the Define Subinventories form can update subinventory material status. Users with access to the Define Locators form can update locator material status. Users with access to Maintain Lot Numbers or Maintain Serial Numbers forms can update lot or serial status respectively.

Users must specify a reason code for a material status update on the mobile. This reason code is used solely for reporting purposes

Material Status Inquiry on Desktop

The ability to query by a specific status is included with the Material Workbench. Users will be able to create custom queries to locate the material they are interested in. If users query for all material under some status, all material within a location under that status will be displayed as well as all lots or serial numbers with that status. Users may also query for all items of a certain status, material of a certain status in a certain location, or other standard inquiries.

Status History Report

Reporting functionality on material status will also be provided. Users can see all historical actions taken on a particular object in regards to its status. Information such as the date and time of change, user who changed the status, and the method of change are included in the report.

Implementation Considerations

Subinventory Attributes

Material Status control prevents transactions for material, but it does not prevent the material from being visible as available to transact, nettable, or reservable. These three attributes are controlled at the subinventory level.

Therefore, material that is on quality hold must be placed in a subinventory with the appropriate attributes to prevent reservations, for instance. Otherwise, material will be seen as on-hand and available to transact which cannot be transacted.

Common Problems

1. Transaction does not honor material status

Several settings need to be checked. Start by verifying that the material under question has the material status expected. This can be checked on the mobile via a material status inquiry, or on the desktop via the Material Workbench. Next, verify that the transaction type that you are performing is disallowed by the material status. This must be performed on the desktop, by querying on the material status definition. This can also be performed on the Material Workbench, which provides a complete list of disallowed transaction types for all material.

2. Cannot disable a material status

Only material statuses that are not in use can be disabled. That is, a material status that is assigned to any lot, serial, subinventory, or locator, cannot be disabled. Query for all entities with a particular material status using the material workbench, and then update the material status of those entities. Once all of these entities have been assigned to a different status, the status can be disabled.

A similar problem occurs when disabling the usage of a material status for a particular entity. For instance, a status cannot be disabled from use on subinventories if it is assigned to a subinventory. The material workbench can be used here, as well.

3. Cannot assign particular material status to a lot or serial

Verify that the desired material status is enabled. Also, verify that material status is defined for usage in lot numbers or serial numbers.

4. Not prompted for material status at receipt of new lot or serial

Verify that the item is lot- or serial-status enabled. This flag can be found on the inventory tab of the organization and master item.

5. Not invoking the workflow when entering the reason for updating status

The workflow associated to the reason code is not invoked for material status updates. The reason code is only used in the material status history report

Debugging Notes

There are four tables for material statuses.

MTL_MATERIAL_STATUSES_B is the base table for material status definitions.

MTL_MATERIAL_STATUSES_TL is the translation table for material status definition. MTL_STATUS_TRANSACTION_CONTROL stores the information on whether the status allows the transaction type or not. MTL_MATERIAL_STATUS_HISTORY stores the status update history for subinventories, locators, lots and serials.

The view MTL_MATERIAL_STATUSES_VL will provide the complete definitions for all material statuses in the current environment language.

The material statuses for subinventories, locators, lots and serials are stored respectively in MTL_SECONDARY_INVENTORIES, MTL_ITEM_LOCATIONS, MTL_LOT_NUMBERS and MTL_SERIAL_NUMBERS as column STATUS_ID.

The following scripts can be used to help debug. All the arguments preceded by an ampersand should be replaced with the data required, bracketed by single quotes.

Status Control of Transaction Type

Use this script to display a list of all transaction types that are under material status control. Note that this check is not organization specific, so no parameters are necessary.

```
select transaction_type_name, description
from mtl_transaction_types
where status_control_flag = 1
```

Item Material Status Control

Use this script to display the status control settings of items. Specifically, given the three letter organization code and an item number, this script shows whether that item is under lot or serial material status control, and the default lot and serial status if applicable.

```
select distinct concatenated_segments as item, organization_code as org,
lot_status_enabled, lot.status_code as default_lot_status,
serial_status_enabled, ser.status_code as default_serial_status
from mtl_system_items_kfv, mtl_parameters,
mtl_material_statuses_tl lot, mtl_material_statuses_tl ser
where default_lot_status_id = lot.status_id (+)
and default_serial_status_id = ser.status_id (+)
and organization_code = &org
and mtl_parameters.organization_id = mtl_system_items_kfv.organization_id
and concatenated_segments = &item
```

Transaction Type Disallowed by Material Status

Use this script to display the list of all disallowed transaction types for a given material status.

```
select distinct status_code, transaction_type_name
from mtl_status_transaction_control control,
mtl_transaction_types types, mtl_material_statuses_tl status
where control.status_id = status.status_id
and types.transaction_type_id = control.transaction_type_id
and is_allowed = 2
and status_code = &status_code
```

Frequently Asked Questions

1. What material statuses are seeded within Oracle Warehouse Management?

The only material status that is seeded is Active, which does not disallow any transaction type.

2. May I change status Active?

The status name can be changed at any time without impacting the system. We recommend never changing the definition of the Active status because it will make debugging the system difficult. Recall that once a material status is used anywhere in the system, it cannot be changed, so that changing Active on a fresh install will make it nearly impossible to change it back to the original definition.

3. What status is defaulted for new entities?

The default status for new subinventories is Active, but can be changed at the time of subinventory definition. The default status for locator is derived from the corresponding subinventory setup. Default lot and serial status can be setup in the item level.

4. For upgrades to WMS, what status will be defaulted?

When upgrading from Oracle Inventory to Oracle WMS, a material status must be added to the tables for subinventories and locators. All subinventories and locators will be given the Active material status as the default.

5. Can material statuses apply to user-defined transaction types?

No. Only system defined transaction types are supported. However, user-defined transaction types used in miscellaneous transactions such as subinventory transfers, issues, receipts, and organization transfers are automatically disallowed if their corresponding system-defined transaction type disallows the transaction by material status.

6. Why do some lists-of-values give a Status invalid message while others do not even contain that entry?

Lists-of-values, or LOVs, can be displayed on the mobile device in many fields, such as item, lot, and LPN. The LOV is generated intelligently whenever the necessary validations will not noticeably impact the performance of the application. The validation is simple to do for lots, serials, locators, and subinventories, for instance, so those LOVs for a particular transaction will never show any of those entities that are disallowed by a material status.

The necessary validation for LPN, however, is much more complex because LPNs can be nested infinitely deep and contain an arbitrary number of unique lots and serials. Therefore, the material status validation for an LPN is done after the LPN is entered or scanned; at this point, a message will be displayed informing the operator that the status of contents in the LPN disallow that transaction. The delivery LOV on EZ Ship is handled in the same way.

Physical Inventory

Topics covered in this chapter include:

- [Physical Inventory](#) on page 12-2
- [Implementation](#) on page 12-3
- [Common Problems](#) on page 12-6
- [Debugging Notes](#) on page 12-6
- [Frequently Asked Questions](#) on page 12-8

Physical Inventory

High Level Overview

Physical inventory involves counting of all the items in a subinventory or a organization to ensure accuracy of inventory quantity and value. All the transactions are stopped while the physical inventory is done. Physical inventory functionality has now become more accurate with Oracle Warehouse Management system (WMS). The most significant change that WMS introduces in the Physical inventory functionality is the way the counts are entered. WMS uses mobile radio frequency (RF) devices to enter counts. Because of using RF devices the information can be scanned, and the database is updated instantly. So there’s no latency between performing the count and entering the count. Entering the count via RF gives the counter the flexibility of entering the count at two different levels:

- 1. Summary count - The counter believes all the contents within an LPN are intact, for example sealed LPNs, and scans the outermost LPN only. In such a type of entry the system assumes everything within that LPN is intact and updates the database accordingly.
- 2. Detail count - The counter counts and enters the counts for each LPN and items within that LPN. Details of the business flow are given in the next section.

Functional/Business Flow Description

The functional flow of Physical Inventory is as given below:

Table 12–1 Functional Flow of Physical Inventory

Defining Physical Count	Desktop
Taking snap shot	Desktop
Generating Tags	Desktop
Entering Counts	Mobile
Approving Counts	Desktop
Launching Adjustments	Desktop
Reports	Desktop

The core functionality has not changed for WMS. Only the way the count is entered has changed. All the other steps are the same.

Functional Area

There are no major changes made to the Physical Inventory desktop forms, except for some new fields that have been added to the Physical Inventory Tag Counts form. These new fields are Cost Group, Outer LPN, and so on. There's also a new tab Container Details, which gives the details of the LPNs that have been counted during the Physical Inventory. Similarly in the Physical Inventory Adjustment & Approvals form there's a new tab added for Container Details. All the LPN entries can only be made from mobile RF devices. LPN entries can only be viewed from the desktop forms like Tag Counts and Approval Adjustment forms. LPN options for this functionality can be effective for WMS enabled organizations.

Implementation

Setup

Once the physical inventory has been defined on the desktop and tag entries have been generated, there is no further setup required for using the mobile. Please refer to the *Oracle Inventory User's Guide* on setup details for physical inventory. As stated previously, the mobile portion of physical inventory enables the user to perform a user directed counting of the tag entries that were generated. The user can still enter counts through the desktop just as before. However with the mobile, the user doesn't have to perform the matching process between counting an item and inputting the values into the appropriate count entry. You print out a physical tags listing report to see what to count, and then proceed to the specified locations and count the items on the list.

One of the major differences between entering physical counts on the desktop and on the mobile is that with the mobile, the user directs the counting. That is, counter simply counts items and doesn't have to match that count with the specific tag entry that was generated for it. On the desktop, in the Physical Inventory Tags window, each record corresponds to an active tag entry generated. There is no need to match entry information since this is done explicitly. On the mobile, the information that the user inputs is matched with an entry in the MTL_PHYSICAL_INVENTORY_TAGS table. It will search for a record for that particular Physical Inventory ID, subinventory, locator ID, inventory item ID, revision, lot number, and serial number for Physical Inventory tag entries. This matching is done in the PLSQL backend in the process_tag method. The inputs that the user enters are

matched with an existing tag entry and then that record is processed in a manner similar to how it is done on the desktop.

Figure 12–1 Physical Inventory Sample

The screenshot shows a software window titled "Physical Inventory Sample (ADN)". It contains a form with the following fields: Name (ADSPH101), Snapshot Date (05 JUL 2002), and Physical Count or Stock, Mts. Val. (ARLENES PHY. INV COUNT). Below the form is a table with columns: Tag, Item, Location, Cost Group, Parent LPN, UOM, and Qty. The table lists items 0001 through 0014, all of which are AMS100 located at AMSP101.1.1 with a cost group of CG.0631. The UOM for all items is "Ca". At the bottom of the window, there is a "Item Description" field containing "PLAIN" and two buttons: "Void All" and "Invoice All".

Tag	Item	Location	Cost Group	Parent LPN	UOM	Qty
0001	AMS100	AMSP101.1.1	CG.0631		Ca	
0004	AMS100	AMSP101.1.1	CG.0631		Ca	
0010	AMS100	AMSP101.1.1	CG.0631		Ca	
0011	AMS100	AMSP101.1.1	CG.0631		Ca	
0012	AMS100	AMSP101.1.1	CG.0631		Ca	
0013	AMS100	AMSP101.1.1	CG.0631		Ca	
0014	AMS100	AMSP101.1.1	CG.0631		Ca	

LPN Related Counts

If your count contains an LPN, you can alternatively do a summary count or a detail count. Note that these options might not both be available depending on the user that is set as a form function parameter. A detail count means that the user will open up the LPN and count items stored within it. A summary count means that the user is sure that everything inside the LPN agrees with what the system thinks is inside it. This is useful if the LPN is sealed and the user doesn't want to open the LPN just to count the items if it's highly likely that it matches what the system thinks it should have. Therefore if you do a summary count, all of the items packed within it will be counted automatically.

Figure 12–2 Example of a Detailed Count

```

[Physical Counting]
{Name '***>AMSPH101
{Sub '***>AMSP101
{Loc '***>AMSP101.1
{ParentLPN>C100554W
<{Detail '***> '***>
<{Summary '***> '***>

[Physical Counting]
{Name '***>AMSPH101
{Sub '***>AMSP101
{Loc '***>AMSP101.1
{ParentLPN>C100554W
Item+>AGS100
Desc*+ :Alan's va
UOM+>Ea
Qty*+ :45
<{Save/Next Item '***
<{Done '***> '***>
<{Cancel '***> '***>

```

In the screen shot shown above Physical Inventory counter is entering count for Physical Inventory AMPH101. The counter is currently in subinventory: AMSP101 and locator: AMSP101.1.1. This entry for LPN: C100554W. Once a LPN is entered the counter is given the flexibility of entering a detail or a summary count. In this case the user is entering a detail count. He is then prompted to enter the item: AGS100 (item description field is defaulted depending on the item selected in the previous field). Counter then enters the UOM and the quantity: 45.

Figure 12–3 Example of a Summary Count

```

Physical Counting (W)
Name >AMSPH101
Sub >AMSP101
Loc >AMSP101.1.
ParentLPN>C100554W
<Detail>
<Summary>

Physical Counting (W)
Name >AMSPH101
Sub >AMSP101
Loc >AMSP101.1.
ParentLPN>C100554W
<Save/Next Item>
<Done>
<Cancel>

```

In the screen shot shown above, the Physical Inventory counter is entering a count for the Physical Inventory AMPH101. The counter is currently in subinventory: AMSP101 and locator: AMSP101.1.1. This entry is for LPN: C100554W. Once an LPN is entered, the counter is given the flexibility of entering a detail or a summary count. In this case the counter is entering a summary count. After they select the Summary option they are not prompted to enter values of items, UOM, and so on. The system assumes everything that is supposed to be in that LPN is actually there. The counter can then enter the next count.

Serial Counts

When you perform a serial count, a tag entry is generated for each and every serial number. The counter will scan in the item, revision, lot, and quantity information. Then counter will enter the serial number field. Depending on the form function parameter, either single or ranged serials will be displayed. For single serial, if the counter claims that he has found 10 serials, he will need to scan in each individual serial for a total of 10 scans. However if ranged serials is allowed, then the counter will just need to scan in the first and the last serial number. For ranged serials, there will be a From and a To serial field. That will amount to a total of 2 scans by the counter. However, it is implied that all of the serials in the range exist, no gaps exist, and the total amount equals the quantity that the counter had entered in earlier. Once all of the serials have been entered either one by one or in a range, the user can process all of the entries at once.

Common Problems

Many issues would result from people scanning in information without realizing that all of the information is interdependent. That is, when you scan in a particular item, then the rest of the fields will be restricted based on that item. Similarly when you scan in a certain lot number and the item is lot and serial controlled, the serial numbers available are also limited. Each of the fields on the mobile page, are restricted based on the physical inventory options first and by previous information entered in other fields second. If dynamic tags are allowed, the LOVs will all display a lot more values since you are no longer restricted to those tag entries which have been generated.

Keep in mind that the mobile is supposed to take the place of a user entering in quantity information on the desktop. On the desktop, the user can see all of the entries that have been generated and input them appropriately. However, on the mobile the user directs the count and the system will match the count information with the generated tag entries. Thus you must make sure first that a count that was made matches exactly with that of the generated tag entry. The subinventory, locator, item, revision, lot, and serial all have to match properly otherwise the matching will be done incorrectly or encounter problems.

Debugging Notes

If the user has made sure that everything is properly set up but things are still erroring out, then there are additional items that the user can do. First is understanding that there are really two stages in performing a mobile physical

inventory count. The first involves the front end data collection side. If there is a bug here, then it's usually due to the user not realizing how things are setup. That is, user might want to count a certain item or lot or serial but it is disallowed for some reason unknown to the user. The user should check things like what the dynamic tags option is for the physical inventory, whether or not those tag entries exist that the user wants to count, whether the serial has a valid status to be counted, and so on. If there is a bug at this phase, you can always check the log. This will be in the mobile server log generated wherever the mobile application server was started. Within the log, it will display information generally about which field it was in, what values were passed in as the LOV statement for a field, what error messages occurred when calling the backend PLSQL procedures, and so on. This log is basically for the front end Java side for collecting the data for the count tag entry. It will then pass all the count tag entry information collected to the backend. This will generally call the process_tag method. If the person trying to debug an issue has access to the database and can view the files, the user can query up the LOV statements themselves and see if there is a reason why the user isn't seeing a particular value on a field. For detailed information, consult the component document for mobile physical counting. Note that the log file will be of the format <port number>.INV.log.

The process_tag method will first match the tag count entry information with the particular physical inventory tag entry generated. Once it has found a match, it will update and process that particular physical tag entry. However, if no match is found, it will try to insert a new physical tag entry if dynamic tag entries are allowed for that particular physical inventory count. The backend processing will log messages into the filename as specified by a profile value for the user in the log directory. The profile parameter for this is INV: Debug file (Including the complete path). The log directory is based on the init.ora parameter value so the administrator should be able to find the file. For Physical Inventory counting, the lines in the log related to the physical inventory will be prefixed with 'INV_PHY_INV_LOVS' to indicate that those debug log lines were inputted through the PLSQL package INV_PHY_INV_LOVS which is the mobile physical inventory backend package. Common problems that occur when trying to process a tag entry usually involve serial numbers. Serial numbers might not have a valid status for certain transactions or they could be marked so they are not available to be transacted. The log file should indicate where the error occurred.

With these two logs, you can figure out at which stage the transaction failed and possibly what error occurred that caused it to fail. Note that logging isn't always on and it does depend on the user and profile values. However if you encounter an error, you should be able to turn logging on and send the logs to your support team.

Frequently Asked Questions

1. Where do I set the profile options and the form function parameters related to physical inventory?

There are two form function parameters that can be set for physical inventory. The first parameter is the type of count. The parameter is called COUNT_OPTION and can have the values: BOTH, DETAIL, or SUMMARY. This specifies the types of LPN counts that the user is allowed to perform. The other form function parameter is called SERIAL_TYPE. The possible values are: SINGLE or RANGED. This specifies whether the user must enter each serial number individually or by specifying the FROM and the TO serial number in the range. Form function parameters are set on the desktop forms as with other form function parameters. You will need to set this for the mobile Physical Inventory page which has a name PhyInvFunction. The profile for where log files from the mobile server is located in the init.ora file. There you can set the log directory for where backend PLSQL files write their logs to.

2. Are reservations created for inventory when that inventory is scheduled for physical inventory?

No, reservations are not automatically created when doing a physical inventory count. They could be created prior to the physical inventory count but that is done usually during a picking process and you're picking short.

3. How do I know that all the scheduled entries have been entered for a physical inventory, on mobile RF device?

Right now there is no way to tell if all the tag entries have been counted. This is because in a physical inventory, all entries are considered to be missing until counted. Each user is usually assigned a certain number of Physical Inventory Tags to count. With mobile counting, this process can be divided up so users count everything in certain areas such as a particular subinventory and/or locator.

4. Can discrepancies be entered via mobile RF device?

No, a physical inventory differs from a cycle count in that there are never any discrepancies. An item either is at the location where it was found or it is not. However, if you do have a dynamic tag, you can create a new tag for the item where you found it if a tag was not automatically generated for the item in that particular location.

5. Can missing quantities be reported from mobile RF device?

No, in physical inventory, all items are assumed to be missing. It is only when the user goes to count an item that it is considered to be found. Thus for mobile physical inventory, all the user needs to do is to count what he/she finds and not what he/she doesn't find.

6. Can a partially entered LPN be approved?

Yes. There is no restriction against partially approving LPNs since a user doesn't count an LPN specifically. The user counts items stored within an LPN. It is those tag entries that are updated. Since there are not such things as container discrepancies in physical inventory counting, this is not an issue.

7. What Cost Group is stamped on new found lot and serials during a physical inventory?

For newly found items, dynamic tag entries will need to be created for them. However, since they do not exist on-hand in the system, these items do not contain a proper cost group ID. The cost group ID will be stamped on the dynamic tag entries using the cost group rules engine.

8. Are bar-coded tags generated during the physical inventory tag generation process?

No. Generating bar coded tags for performing physical inventory is not supported. Currently you can print a physical inventory tag listing report and go against that when performing a physical inventory count.

9. What happens if I select <Cancel> in the middle of entering a count?

<Cancel> is a key that will bring the user to the previous menu. Thus if you accidentally select that key in the middle of entering a count, any information you had in that count will not be saved or processed. You have to make sure that you select <F2> only if you really want to quit out of the count entry. A confirmation is required though before you will be brought back to the previous menu.

Warehouse Management Rules Engine

Topics covered in this chapter include:

- [System Rules Engine](#) on page 13-2
- [Rules Engine Methodology](#) on page 13-4
- [Top Down Approach](#) on page 13-8
- [Implementation](#) on page 13-9
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System Rules Engine

Warehouse Management Rules Engine

Warehouse Management provides a full-suite of tools that enable a warehouse to effectively dispatch tasks and manage inventory. Currently, many decisions within a warehouse are left for the operator to perform, demanding a high degree of operator training, but yielding suboptimal results and occasionally serious mistakes. Material handling rules, customer requirements, and storage constraints place complex demands on the warehouse. The Rules Engine provides a flexible repository for the many different types of rules and restrictions to effectively manage a warehouse. This chapter illustrates how the rules engine can automate this decision making process and includes detailed implementation notes, examples, common problems, and supporting test scripts.

Overview of Capabilities

The Rules Engine enables directed picking and put away, assigns newly received material to a cost group, ensures customer compliant labeling, assigns tasks to a resource with the appropriate training and equipment, and selects the correct operation plan for a task. Rules can be based on nearly any attribute in the database, including user-defined flexfields. Strategies, or a collection of rules, can be organization specific, customer specific, item specific, or specific to one of many additional business objects.

Directed Picking and Put away

The Rules Engine provides intelligent suggestions for put away locations of new material, based on virtually any business process. Some common processes the rules are capable of modeling include: minimizing item fragmentation, requiring no lot commingling in a locator, directing hazardous materials to a corresponding hazardous storage location, or placing seasonal items in a subinventory dependent on time of year. Other put away possibilities include: basing the location on inspection results, purchase order type, or item category. Put aways, to intelligent locations suggested by the Rules Engine, can also be performed for any items anywhere within the warehouse.

When the system releases a pick wave to the warehouse floor, the rules engine determines the allocation suggestions. You can create picking rules to model as many business practices as put away rules. Some examples are: to ensure stock rotation, meet customer requirements such as stock condition or quality, lot

expiration date, or country of origin. You can allocate material by a simple FIFO or FEFO (first expired, first out) rule at the organization level, picking rules that pick to deplete a location to free up additional warehouse space, or rules to pick by cost group ownership. You can also model customer requirements so a single lot fills an entire order, or warehouse preferences so an item is picked from a single locator.

Task Type Assignment

Task type assignment captures the skill sets and equipment required for a warehouse task so work is assigned to appropriate users. Operators can sign onto a mobile RF device, optionally specifying the equipment available to them. Tasks are assigned to operators based on the operators skill set, equipment requirements and capacity, or the subinventory in which the task occurs. For example, you can assign hazardous tasks to personnel with the appropriate HAZMAT training, and limit put aways to the top racks to operators who signed on with a high-reach forklift.

Cost Group Assignment

Cost groups capture the material valuation accounts necessary for tracking inventory value. For instance, you can set up different accounts for refurbished, consigned, and company-owned inventory. You can also keep different cost groups for different sales channels. When you receive new material into the warehouse the owning cost group must be determined.

Material handlers should not make Cost group decisions. The Rules Engine automates this decision making, removes complexity from the floor and still provides material valuation accounts tracking. Cost group assignment can be made by inspection results, with a failed item assigned to a Hold for MRB cost group. Cost groups can also be assigned by supplier site, item category, or by item. The system uses default cost group of the items storage subinventory when it cannot find a rule for the transaction.

Label Format Assignment

Compliant labeling is becoming increasingly important, but also increasingly difficult as different customers or carriers may require a different label format. The Rules Engine can select the appropriate label format based on customer, carrier, item category, or transportation method. These formats are associated with the required information, barcode symbologies, and appropriate layout for each item or container. Additionally, odd sized items may require different label types, or some order types may require weather-resistant labels. The Rules Engine can print different labels for different freight carriers or shipment types. The Rules Engine can

also select label formats for use inside the warehouse. When you receive lot controlled items, the rules engine can print the appropriate lot stickers automatically.

Operation Plan Assignment

Operation plans determine the routing, packing, and consolidation operations that a task must go through. Some outbound processes may require LPN-based consolidation, whereby the system suggests which LPN to consolidate a delivery into when dropping an LPN in a staging lane, while other deliveries do not use this LPN consolidation. The operation plan selected during task creation controls these options as well as several additional features. The Rule Engine selects the operation plan based on the source subinventory, destination staging lane, customer class, or item type, or any number of different criteria.

Rules Engine Methodology

The Rules Engine is a very powerful and complex tool, but approaching it from the top down can ensure an efficient, streamlined system of rules. You can share rules among strategies and organizations. Several well-defined rules can take the place of dozens of more restrictive rules. Improper planning can lead to unnecessarily restrictive and complex rules that make the system more difficult to setup, debug, and maintain.

Definitions

Rules have been used as a generic term for the way the intelligence is encoded in the Rules Engine. However, for the Rules Engine, they have a much more concrete meaning.

Rule A rule is one or more restrictions that must be fulfilled to satisfy a business or customer requirement. Picking and put away rules also have an optional sort criteria to place an ordering on the list of put away or picking allocations that meet the restrictions. Picking and put away rules also have a quantity function, which specifies the function used to determine the material available for picking, or the space available for put away.

Example: Put away into any empty locator. Use the minimum of the destination locators volume and weight capacity to determine the amount of space available. Order the locators in ascending row, rack, and bin.

Picking rules also have optional consistency restrictions, to model requirements such as a pick must be for a single grade code, a single lot, or from a single subinventory. Picking rules also have an allocation mode, which controls whether allocations should be based on a pick unit-of-measure, and whether allocations should be made to the LPN detail level, or just to the locator level.

The following rules are used to develop a complete put away example.

1. Put away into any empty locator.
2. Put away into a locator, but do not commingle different lots of the same item.
3. Put away into any locator.
4. Put away into a refrigerated location.
5. Put away into any locator with a rack number greater than 3.
6. Put away into any locator with a rack number less than or equal to 3.

Cost group, task type, operation plan and label assignment rules have a return value instead of a quantity function. If all the restrictions are met, then the return value provides the name of the task type, label format, operation plan or cost group.

Example: If an item has a HAZMAT code, then return the task type *hazardous*.

Strategy A strategy is an ordered sequence of rules that are used to fulfill complex business demands. The system traverses the rules of a strategy in sequence until the put away or picking task is fully allocated, or until a cost group that meets the restrictions is found. Strategies are not used for task type, operation plan and label format assignments.

Some distinct strategies are as follows:

1. Default put away strategy: First try to put away into an empty locator. If that fails, try to put it in any locator, but do not commingle different lots of the same item. Finally, if that still fails, put into any locator.
2. Never commingle strategy: First try to put away into an empty locator. If that fails, try to put it in any locator, but do not commingle different lots of the same item.
3. Refrigerated strategy: Put away into a refrigerated location.
4. On season strategy: First try to put away into any locator with a rack number less than or equal to 3. If that fails, put it in any locator.
5. Off season strategy: First try to put away into any locator with a rack number greater than to 3. If that fails, put it in any locator.

Business Object A business object is any entity with attributes and parameters used by a business and tracked by Oracle, such as an organization, an item, or an item category. The Rules Engine comes seeded with the most common business objects.

Some of the most common business objects used within rules are as follows:

- Item
- Item Category
- Organization
- Subinventory
- Customer

Strategy Assignment A strategy assignment is a strategy you associate to an instance of a particular business object. You specify an instance by naming both the type of business object (e.g.: item category), and the name of the instance (e.g.: winter seasonal).

Some distinct strategy assignments are as follows:

1. For the organization WH1, whenever there is a put away task, use the default put away strategy.
2. For items in the item category perishable, use the refrigerated strategy.
3. For the item PR11568, whenever there is a put away task, use the never commingle strategy.
4. For items in the category summer seasonal, use on season strategy if it is March to September, and use off season strategy if it is October to February.
5. For items in the category winter seasonal, use off season strategy if it is March to September, and use on season strategy if it is October to February.

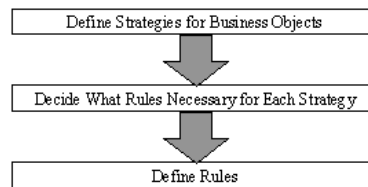
Execution for Rules with Strategies

You assign Strategies, or sequences of rules, to one or several business objects in the Rules Workbench. When a pick, putaway, or cost group assignment strategy is required, the Rules Engine evaluates all the strategy assignments in the Rules Workbench, returning the first strategy where the attributes of the strategy assignment match the attributes of the transaction for which the strategy is required. The system filters strategy assignments so the Rules Engine considers only enabled assignments that are currently effective.

Although you must set up the Rules Engine from the bottom up, starting with the rules, the best way to understand the Rules Engine is to approach it from the top down. You should use the most general restrictions at each level. Setup is slightly different for cost group assignments, picking, and put away rules than from the other three types of rules.

The three steps are defining strategies for each business object, deciding which rules belong in the strategies, and defining the rules:

Figure 13–1 Top Down Approach



Task Type, Label Format and Operation Plan Rules

Task type rules, label format rules, and Operation Plan rules are not assigned to strategies, but are automatically linked directly to the organization. The rule weight determines the search order. You set the rule weight for each rule, and higher weights take precedence.

For example, an organization has these types of tasks:

- HAZMAT task - required whenever item has a HAZMAT code
- high reach - required whenever item is in a locator with rack number > 4
- default task - for all other tasks

Assuming that the HAZMAT task takes priority (i.e.: if a task is both a HAZMAT task and a high reach task, then HAZMAT task should be returned), three rules are required:

1. High weight rule: If item has a HAZMAT code, return HAZMAT task
2. Mid weight rule: If item is in a rack > 4, return high reach task.
3. Low weight rule: Return default task.

Top Down Approach

In the top down approach, you must first determine the different strategies required for the different business objects. Perhaps three different customers have the same restrictions on lot quality, and all other customers do not have any preference on lot quality. This means you may need two different strategies for the two different groups of customers. If one of the customers requires lots of a certain quality for most items, but of a different quality or with different attributes for a different item, you may need two different strategies for that one customer.

List out all the common strategies that are required - for picking sales orders, picking manufacturing requirements, picking replenishment tasks, and so forth. You may find that the strategies you use when allocating material for different documents are all very similar, or they may all be different. Look for the common attributes in the strategies to see where you can reuse the same strategy, and where you may require different strategies. Conduct a similar analysis for putaway and cost group setup. The output from this step is two elements for each of the rule types: what strategies are needed, and to which business objects those strategies are assigned.

Note: You should generally avoid combining mutually exclusive conditions in a single strategy because you may often be able to separate them into two smaller strategies to get exactly the same functional behavior from the Rules Engine, but with better performance.

Grouping Similar Instances

Another way to simplify rules is to group instances using defining attributes. For instance, instead of creating different rules for each item at the item hierarchy level, you can create a rule for a category of items.

Example: You can assign the *refrigerated strategy* to each of the dozens or hundreds of individual items within the item category of perishable, but the rules and strategies are much easier to maintain if you group these items by item category and assign a strategy at the item category level.

Effective Dates

You can assign effective dates to Strategies and strategy assignments so you can create time dependent strategies.

The following are some of the allowed effective date types, and examples of each:

1. Always, when the strategy is not time dependent
2. Full date, to specify a particular starting and ending date
- June 1, 2001 through July 15, 2002
3. Date, to specify starting and ending dates applicable to every year
- June 1 through July 15
4. Month, for seasonal strategies
- June through July
5. Day, from Monday through Thursday
6. Shift, for shift dependent strategies

Implementation

There are three steps you must perform to set up the Rules Engine for picking tasks, put away tasks, and cost group assignment rules. The steps are:

- Creating rules
- Creating strategies out of rules,
- Assigning strategies to business objects.

Label format, operation plan task type assignment only require setting up rules.

Rules

Use the Rules window to setup Rules. You build Strategies out of one or more rules, and you can reuse rules for multiple strategies. While it is much easier to think about strategies from the top down, you must build strategies from the bottom up. Rules are slightly different for picking and put away tasks than they are for cost group, task type, operation plan and label formatting assignments. For instance, picking and put away rules require a quantity function and use an optional sort criteria, while the assignment rules require a return value.

Figure 13–2 Rules Window

The screenshot shows the 'WMS Rules (W1)' window. At the top, there are input fields for 'Type', 'Name', 'Description', 'Return Value', and 'Allocation Mode'. Below these are three checkboxes: 'User Defined' (checked), 'Enabled', and 'Common to All Orgs'. The main section is titled 'Restrictions' and contains a table with columns: Seq, And/Or, (, Object, Parameter, Operator, Object, Parameter / Value / LOV, Value, and). The table is currently empty, with a vertical scrollbar on the right side.

Restrictions

All rules have restrictions. Picking and put away rules apply these restrictions or constraints on the set of all possible locations to pare down the full list of locators from which material can be picked or put away. The assignment type rules evaluate the restrictions and return the value defined in the rule if all the restrictions are met.

For putaway rules, the restrictions answer the question “of all possible locators” in which this material could be put away to, what criteria must those locators have?” For picking rules, you can think of this as of all the locators in which this material is stored, and of all the different revisions, lots, and serials that are on-hand and available, what attributes must that material have in order to be allocated? For task type, label format, and cost group assignment rules, you can think of restrictions as the list of all the requirements that have to be met in order to select that specific task type, label format, or cost group.

You usually define restrictions by comparing two different attributes. For instance, a putaway restriction that puts material away to the subinventory named BULK equates the destination subinventory with the text “BULK”. The following are some of the different ways you can use elements to build restrictions:

Basic Operators The most common operators used in rule restrictions are equality (=) and greater than / less than (<, <=, >, and >=). Other basic operators verify if the attribute is null or not null; these two operators require only one attribute.

Value Sets You can define value sets to use in rule restrictions to meet complex customer requirements. For instance, a customer of a semiconductor warehouse may require microchips to be manufactured in one of an approved set of countries. The customer may change this list of countries over time and may give pending requirements to the warehouse, such as “on this coming July 15, we will begin accepting product from Thailand”, or “at the end of this year, we will no longer accept product from Taiwan”. Instead of creating multiple rules to define these changing requirements and setting up effectivity dates for these rules within a strategy, you can define a value set with values that have pending effectivity dates. In order to use a value set, use the IN operator and specify the name of the value set in the rule restriction.

Expression Occasionally, the Rules engine must model logic that does not correspond exactly to the seeded objects and attributes, or perhaps mathematical functions or custom user-defined tables must be referenced in the rule. By using a user-defined expression, a rule based on any data that can be accessed can be built. In order to use an expression, one of the basic operators defined above must be used, and the object on the right hand side should be set to Expression. Several examples on using expressions in rules are available from the Rules Examples paper available from Oracle *Metalink* note number 232247.1.

Sort Criteria

Picking and putaway rules have sort criteria. For putaway rules, the sort criteria determine which locators with available capacity to use. For picking rules, the sort criteria determines which specific on-hand quantity of an item to select for allocation among all the locators in which the material is stored and all the lots, serials, and revisions that are on-hand and available.

Consistency Requirements

Picking rules have consistency requirements. These are used to indicate that some characteristics must be identical across all allocations for that material request.

Allocation Mode

Picking rules have an allocation mode. The allocation mode controls several different ways in which the system can allocate material. Selecting the correct

allocation mode allows a warehouse to take best advantage of the way in which material is packed and stored. The four allocation modes are as follows:

- No LPN Allocation
- No LPN Allocation Prioritize Pick Unit of Measure
- Allocation LPN and Loose
- Allocate Entire LPN Only

For instance, if items are typically stored in standard pack quantities, which are not modeled as LPNs, then the No LPN Allocation or Prioritize Pick UOM allocation mode should be used. Or if LPNs are used for storage, but the quantity stored within an LPN varies and multiple lots can often be found in the same LPN, then Allocate Entire LPN Only might be a good fit for the warehouse requirements.

No LPN Allocation In this allocation mode, the Rules Engine considers loose and packed material equally. The allocation is not made to the LPN level, so the rules ignore the LPN. If the allocation is made to a locator where packed material exists, select specific LPNs unaided by the Rules Engine, though other attributes of the allocation such as particular lot or revision numbers must still be honored. If you defined a pick unit-of-measure and assigned it to the locator or subinventory, it is prioritized after the sort criteria that are defined on the rule.

No LPN Allocation Prioritize Pick Unit of Measure Packed and loose material is considered equally and the Rules Engine does not make allocations at the LPN level. However, the Rule Engine does prioritize the pick unit-of-measure above the sort criteria. Pick unit-of-measure attempts to minimize the number of picks required for a task, subject to the rule restrictions. Units-of-measure and conversions are defined in Oracle Inventory, and optionally assigned to the subinventory and locator.

Pick unit-of-measure can be thought of as the process by which a store clerk makes change for a cash transaction. Suppose the clerk has to return \$0.99 to the customer. The clerk likes to make the customers happy by giving them the shiny coins first (sort criteria). The pick unit-of-measure are the different coins: quarter, dime, nickel, and penny.

If the first allocation mode is used, where sort criteria is prioritized before pick unit-of-measure, then the customer might end up getting 99 brightest pennies in the cash drawer. If there are quarters, nickels, and dimes that are just as clean and shiny as the pennies, then sort criteria cannot differentiate between which coin to select first, and the pick unit-of-measure will take precedence, as follows.

However, if the No LPN Allocation, Prioritize Pick UOM allocation is used, then pick unit-of-measure is honored above sort criteria. The customer will get the three shiniest quarters, then the two best dimes, and finally, the four brightest pennies, for a total of \$0.99. If there are fewer than three quarters available, the operator then tries to find more dimes, or if necessary, more nickels, and finally, if necessary, more pennies.

The only difference between this example and how the Rules Engine actually allocates material using this allocation mode is when the clerk would be unable to make exact change. If there were only four quarters and five dimes in the clerk's cash drawer, it would be impossible to get exactly \$0.99. The Rules Engine would allocate three quarters and two dimes as before. But when it fails to find any pennies for the last \$0.04, it would roll back up to larger coins, on the assumption that while the warehouse does not want to break up those larger units-of-measure, it can if necessary to avoid a customer backorder.

Again, see that for both No LPN Allocation, and No LPN Allocation, Prioritize Pick UOM, both the sort criteria and the pick unit-of-measure can come into play; the only difference is which takes precedence. If the item is lot or revision controlled, the system does not group the different lots or revisions together when it tries to allocate full units-of-measure. Therefore, this allocation mode works best for material without lot or revision control that is stored in a standard pack size.

Allocate LPN and Loose This allocation mode considers packed and loose material equally. However, the Rules Engine selects a particular license plate if it allocates from a locator where packed material resides. Instead of allowing operator to select one of the LPNs that contain the required item, the Rules Engine chooses a particular LPN. You can define restrictions or sort criteria that restrict or prioritize packed material or loose material. The system displays the allocated LPN to the operator when the task is performed, and the allocated portion of the LPN is not available for other transactions. This allocation mode can allocate partial LPNs, so the operator can select LPNs with mixed items. When this allocation mode allocates packed material, the allocation is made to the innermost LPN.

Allocate Entire LPN Only The system considers only LPNs that can be completely consumed by the current allocated move order line. The system does not consider LPNs that contain multiple items, are partially allocated or reserved to other move order lines, or have a quantity greater than the required quantity. In addition, if only part of the material in the LPN meets the rule restrictions, then the system does not allocate the LPN because the move order line cannot completely consume it. As in the Allocate LPN and Loose mode above, this allocation mode allocates only the innermost LPN.

Exercise caution when you use this allocation mode as the only rule in a strategy, or in conjunction with consistency requirements. When it is the only rule (or last rule) in a strategy, the move order is not allocated if the allocation cannot completely consume the LPN. Unless the warehouse requires that only complete LPNs be picked and sales orders be backordered in the absence of complete LPNs, a rule that allocates packed or loose material should follow a rule with this allocation mode. This allows the system to allocate move orders with partial LPNs, or loose material, even if the system cannot allocate complete LPNs.

Suppose on-hand and available are three LPNs with quantities of 2, 3, and 4, and the Rules Engine attempts to allocate a sales order for quantity of 5. If the Rules Engine comes across the LPN with 4 first, due to sort criteria or other reasons, the system allocates that complete LPN. However, it is then unable to allocate the remaining quantity of 1. This allocation mode does not perform a “best fit” algorithm.

Using consistency requirements with Allocate Entire LPN Only allocation mode compounds the possibility to backorder, because if a consistency requirement is included the Rules Engine, the Rules Engine does not make any allocations if the entire allocation cannot be met. For instance, using the same example above, if the Rules Engine allocates the LPN with 4 first, the remaining quantity of 1 cannot be allocated, and the entire quantity of 5 is backordered.

The frequency of these issues is reduced if LPNs with standard sizes are used, or if rules that use this allocation mode, and particularly rules with this allocation mode that have consistency requirements, come in a strategy where subsequent rules loosen some of the allocation requirements.

You also need to consider the impact of reservations on this allocation mode. The rules engine applies reservations and rule restrictions together to make an allocation, and only if the requirements in both are met is an allocation made. The Rules Engine processes allocations one-by-one, before it attempts to gather additional unreserved material to allocate. When the Rules Engine attempts to allocate one reservation via a rule with this allocation mode, only LPNs that can be fully allocated by a single reservation are allocated. For example, if one LPN has a single item with multiple lots, and LPN-level reservations exist for all the lots in the LPN to a single sales order line; the LPN is not allocated with this allocation mode. When honoring the first reservation, the Rules Engine does not know additional unprocessed reservations will allow the remainder of the LPN to be allocated. This problem arises when multiple detailed reservations to a single LPN for a single source line are created in advance of allocation.

Allocate Entire LPN Only can be incredibly powerful when LPNs contain mixed lots, particularly when those lots have different attributes that are excluded or

preferred by certain customers. It is also useful for manually reserving specific LPNs to sales orders when that LPN contains only a single lot or item without any controls, or when other attributes of an LPN are relevant during allocation and the warehouse wishes to best leverage the way the material is currently packed.

Quantity Function

Picking and putaway rules include a quantity function, although for picking rules, there is only one available quantity function that automatically defaults in the window and is not editable. The quantity function determines how the Rules Engine calculates availability of the item or of locators. For picking, material availability is calculated by the Available to Transact (ATT) quantity, which considers other allocations and reservations. For putaway, locator availability can be calculated in one of many ways that consider the locator capacity with respect to units, volume, or weight, or that use a custom, user defined, function to determine locator capacity.

Return Value

Task type, label format, operation plan and cost group assignment rules have a return value. This is the single value returned by the rule that specifies the format of the label, the specific cost group to assign, or the user-defined task type to assign if all the restrictions in the body of the rule are met.

Weight

Task type rules and label format rules are not assigned to strategies and do not have strategy search orders. The Rules Engine traverses all rules available under the organization, ordered by descending weight, when attempting to assign a task type to a task or selecting the correct label format.

Strategies

Strategies are a sequence of rules with which the Rules Engine tries to allocate material or space to fulfill a request. You construct strategies in the Strategies window from one or more rules. You can reuse rules for multiple strategies. In the case of the cost group assignment rules, the Rules Engine returns a value as soon as the Rules Engine comes to a rule where all the restrictions pass. For pick and put away tasks, the Rules Engine stops traversing additional rules as soon as the entire task is allocated. Therefore, unless the strategy fails if specific criteria are not met (and the task is unallocated or unassigned), a general default rule should always be the last rule in the strategy.

Figure 13–3 Strategies Window

You can assign rules after you choose the type of strategy to create and enter a name and description. The sequence number specifies the order in which the rules are executed. The rules available to be assigned to the strategy are the rules that are the same type as the strategy, and are further limited by the current organization.

You can allow partial success for pick and put away rules. If the rules engine cannot fully allocate a pick or put away task within a rule, partial success allows a task to be allocated across several rules.

Example: Suppose the warehouse preferred put away tasks to go first into subinventory A, then into subinventory B - but only if the task can be entirely allocated to that subinventory. Only if no space is available in those two subinventories should the task be allocated to any subinventory (including A or B) where space is available. Then there are three rules to the strategy:

- Put away to subinventory A, do not allow partial success
- Put away to subinventory B, do not allow partial success

- Put away to any available locator, allow partial success

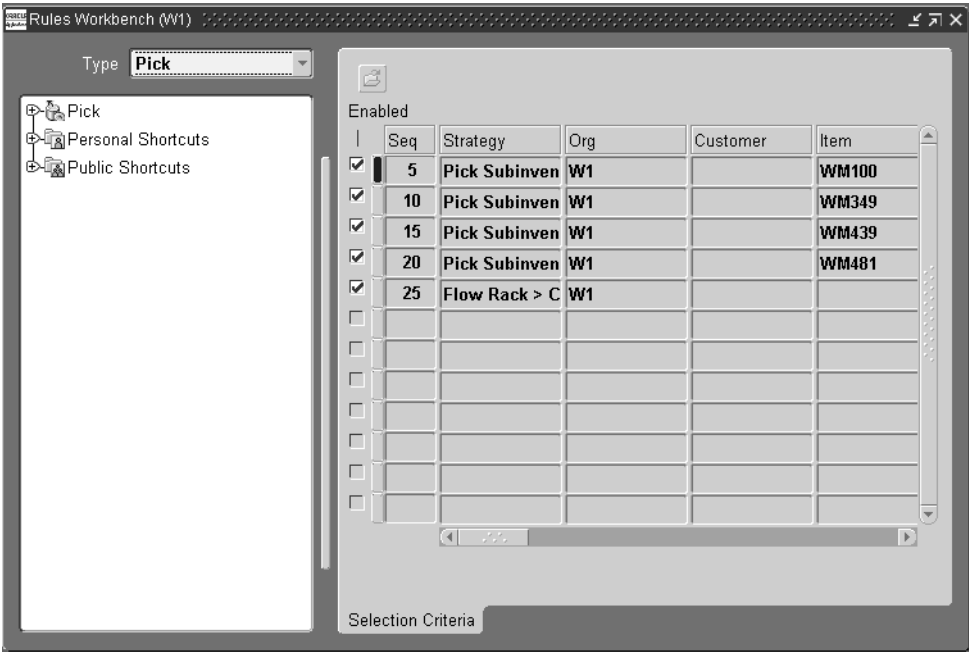
You can also set up rules to be valid only during specific periods of time, as is necessary for seasonal rules or for rules begin some time in the future. *Always* is also an option for the effective date. A complete listing of the effective dates can be found in [Appendix B - Rules Engine](#) on page B-1.

The User Defined check box in the Strategies window is similar to the one in the Rules window in that it differentiates rules that have been seeded with the application from those that you define. You cannot modify seeded strategies. You cannot change an enabled strategy. You also cannot disable rules in an enabled strategy. You must disable all strategies that use a particular rule before disabling a rule; this prevents potential data corruption problems.

Strategy Assignment

You use the Rules Workbench window to assign strategies to one or several business objects. As with rules within a strategy, the sequence number you assign to strategy assignments indicates the order in which the rules engine evaluates strategy assignments. The Rules Engine stops searching for a strategy as soon as it finds an applicable strategy in the Rules Workbench. A strategy is applicable if the assignment is enabled and currently effective (based on the date effectivity of the strategy assignment) and all the assigned business objects match the values of the transaction being performed.

Figure 13–4 Rules Workbench Window



For instance, in the Rules Workbench, a picking strategy may be assigned to a particular customer and item category, so that the strategy executes for material allocation of items in that item category when an operator picks for a sales order to ship to that customer. There may be a generic organization policy for picking material for outbound sales orders, so you can assign the strategy to the sales order picking transaction type. However you must assign the generic strategy a sequence number higher than the customer-specific strategy assignment.

In the Rules Workbench window, the sequence numbers must be unique within the rule type and organization. Strategy assignments are specific to the current organization to which you have logged in to, so the organization assignment is always made for all new strategy assignments.

Only the objects to which strategy assignments are necessary should be displayed in the Rules Workbench. Use the folders feature to hide the columns for the other objects of the window, and make the folder the default folder.

Note: You can hide only folders that do not have assignments in any organization.

Implementation Considerations

Because the Rules Engine can model complex business logic, you must consider several areas when you set up rules so the Rules Engine works properly.

Staging Lane Put away Rule

For any move order that has an inventory source and destination to be allocated, there must be applicable picking and applicable put away rules. For the Rules Engine to allocate pick wave move orders, a put away rule must exist that has the staging lane as an acceptable put away location.

However, a put away rule with no restrictions assigned just to the organization is not appropriate, in that it would allow put away from a purchase order receipt of, say, refrigerated material into the staging lane when instead, it should be placed in a refrigerated locator. Instead, this default put away rule should be specific for sales order staging transfers. The easiest way to set this up is to assign a strategy with a single rule (without restrictions or sort criteria) to the transaction types of Internal Order Pick and Sales Order Pick in the Rules Workbench. In order to support transfers to supply subinventories of pull items pick released for manufacturing requirements, assign this strategy to the Backflush Subinventory transfer transaction type as well.

Staging lanes for sales orders are determined by: any trip planning / dock appointments, the default staging subinventory and locator on the Pick Release window, or the default staging subinventory and locator on the Shipping Parameters window. If the staging lane is selected by one of these three methods prior to getting to the Rules Engine, then the Rules Engine validates the staging lane capacity is sufficient and that the material status of the staging lane does not disallow this transaction.

Note: It is recommended you leave the capacity fields null to define staging lane capacity as infinite. Otherwise pick release may backorder sales order line because staging lane capacity is unavailable.

It is possible to leave the locator field blank on the Shipping Parameters window, and in the absence of dock appointments or other defaults on the Pick Release window, the Rules Engine selects the staging lane among all the staging lanes that are in the staging subinventory. In this case, staging lane selection rules can be built based on the customer, ship method, freight carrier, or any number of other attributes related to the sales order. In these scenarios, it may make sense to model staging lane capacity as well.

Some move orders do not have both an inventory source and an inventory destination. Examples include purchase order receipt put aways (source is receiving), putaway from manufacturing completion (source is WIP), and requisition move order issues (destination is an account). The Rules engine allocates and validates only the inventory portion of the move order.

See Also

Defining Shipping Parameters, *Oracle Order Management Suite Implementation Manual*

Allocating and Transacting Move Orders, *Oracle Inventory User's Guide*

Manual Reservations

Any reservations of material that you make manually must meet the restrictions the rules create. Manual reservations do not override the Rules Engine, but are combined with the Rules Engine to further restrict potential picking and put away locators.

Example A: A reservation for a sales order is manually placed on material in source subinventory of Case Pick. However, the applicable strategy for this pick has only one rule: pick from subinventory Each Pick. Therefore, because there are no rules that agree with the reserved subinventory, the pick fails and no pick wave move order lines are allocated. The delivery line is backordered.

Example B: A reservation for a sales order is manually placed on material in source subinventory of Bulk Pick, and source locator of A.1.2 (Row, Rack, Bin). There is enough material in subinventories Each Pick, Case Pick, and Bulk Pick.

The applicable strategy for this pick has two rules. The first rule restricts picks to the Each Pick subinventory. The rule fails because this does not agree with the reserved subinventory. The second rule has no restrictions. Therefore, all three subinventories pass the rule restrictions. However, the Rules Engine suggests only Bulk Pick A.1.2 because it is the only locator that satisfies the rules and agrees with the reserved subinventory and locator.

Example C: A reservation for a sales order is manually placed on lot A10, which has a lot expiration date six days in the future. However, the applicable picking strategy has only one rule which requires that all expiration-date controlled items have at least thirty days of life remaining to be picked for a sales order. Therefore, because there are no rules that agree with the reserved lot, the pick will fail and no pick wave move order lines will be allocated. The delivery line will be backordered.

Reservations can be made to the LPN detail level either manually by a reservation you create in the Reservations window, or systematically by an LPN-based completion of a work order tied to a sales order. Typically, this scenario applies in an ATO / CTO shop where LPN-based completions are used, or if a particular LPN must be reserved to a customer because of labeling or other packaging requirements.

Whenever a reservation is made to the LPN detail level, the Rules Engine allocates to the same level of detail, regardless of the allocation mode on the rule that made the actual allocation. However, other rule restrictions are still honored.

Performance

The performance of the Rules Engine is critical for large warehouses with complex requirements. You can set up the business scenarios the Rules Engine models in several different ways, with varying impacts on performance. A slight change in the way a rule is defined can effect how the rule performs. There are several general guidelines when defining rules to help improve the Rules Engine performance. It is important to stress-test the rules with the expected transaction volume prior to go-live.

Strategy Depth

The Rules Engine can select the correct strategy to execute almost instantly, while evaluating rules within a strategy takes considerably longer. That means more strategy assignments, where each strategy has fewer rules, are generally preferable to fewer strategy assignments with deeper strategies. This type of change may be

the most difficult to implement, but if done correctly can achieve exactly the same business logic in a much more efficient fashion.

The most common way you can make strategies shallower is when they contain several different mutually exclusive rules, and the attributes that differentiate the rules are available as business objects in the Rules Workbench. For instance, you can define business logic to putaway purchase orders to different subinventories based on the supplier in two ways. A single strategy like the following, with three rules, can be assigned to the purchase order receipt transaction type

Figure 13–5 Rule Name Putaway to Subinventory INSP for Acme

Strategy Base putaway from purchase order receipt on supplier					
Strategy Description Put material to sub INSP for Acme, sub HOLD for Business World, and to sub BULK for all other suppliers					
Rule Name: Putaway to sub INSP for Acme (Always)					
R	Supplier	Vendor Name	=	Constant Character	Acme
R AND	Destination	Subinventory Name	=	Constant Character	INSP
D	Subinventory				
Rule Name: Putaway to sub HOLD for Business World (Always)					
R	Supplier	Vendor Name	=	Constant Character	Business World
R AND	Destination	Subinventory Name	=	Constant Character	INSP
D	Subinventory				
Rule Name: Putaway to sub BULK (Always)					
R	Destination	Subinventory Name	=	Constant Character	BULK
	Subinventory				

Alternatively, you can assign three different single-rule strategies as follows. This strategy is assigned to the purchase order receipt transaction type, and the vendor Acme:

Figure 13–6 Rule Name Putaway to Subinventory INSP

Strategy Putaway to subinventory INSP					
Strategy Description Putaway to subinventory INSP					
Rule Name: Putaway to sub INSP (Always)					
R	Destination	Subinventory Name	=	Constant Character	INSP
	Subinventory				

The second strategy assigns the purchase order receipt transaction type and the vendor business world.

Figure 13–7 Rule Name: Putaway to Subinventory HOLD for Business World

Strategy Putaway to subinventory HOLD
Strategy Description Putaway to subinventory HOLD
Rule Name: Putaway to sub HOLD (Always)

R		Destination Subinventory	Subinventory Name	=	Constant Character	HOLD		

The final default strategy, used for all other vendors is assigned only to the purchase order receipt transaction type. This strategy assignment has the highest sequence number of the three strategy assignments.

Figure 13–8 Rule Name: Putaway to Subinventory Bulk

Strategy Putaway to subinventory BULK
Strategy Description Putaway to subinventory BULK
Rule Name: Putaway to sub BULK (Always)

R		Destination Subinventory	Subinventory Name	=	Constant Character	BULK		

The Rules Engine can quickly find an applicable strategy. It can almost instantly select the correct rule for an inbound receipt putaway with the latter setup. However, with the first setup where a single three-rule strategy was used, the Rules Engine must evaluate the first two rules for all receipts where the vendor is neither Acme nor Business World before finding the correct rule to use. Also, the rules are simpler and more generic in the second example. They need only refer to the destination subinventory and not to the vendor. This allows rules to be re-used more frequently, simplifies setup and maintenance, and makes it easier to understand the existing setup from the Rules Workbench. While this process may not always result in single-rule strategies, it nonetheless can usually greatly shorten many strategies and make the Rules Engine execute more quickly.

Minimize Use of OR

Avoid using the connector OR in rule definitions because they are more difficult for the database to evaluate than AND.

If you use OR to indicate multiple values are valid, then you can use the operator IN with a single restriction rather than multiple restrictions. For instance, you can replace the two restrictions below with a single restriction that does exactly the same things:

Figure 13–9 Rule Name: Putaway to BULK and CASE

Rule Putaway material to either BULK or CASE					
Description Putaway material to the BULK and CASE subinventories					
R	Destination Subinventory	Subinventory Name	=	Constant Character	BULK
R OR	Destination Subinventory	Subinventory Name	=	Constant Character	CASE

You can replace these two restrictions with the following single restriction that avoids the use of OR:

Figure 13–10 Rule Putaway Material to either Bulk or Case

Rule Putaway material to either BULK or CASE					
Description Putaway material to the BULK and CASE subinventories					
R	Destination Subinventory	Subinventory Name	IN	Expression	'BULK','CASE'

If OR is used to group several mutually exclusive scenarios together and these strategies cannot be divided into separate smaller strategies as indicated above, the Rules Engine performs better if these mutually exclusive scenarios are broken apart into separate rules in a single strategy. This runs counter to minimizing strategy depth. However, in combination with correct rule sequencing, this performs significantly better than a single complex rule. The following provides an example of a complex rule with multiple mutually exclusive sections. This putaway rule, used for staging lane selection, puts the LPN into staging lane 1 for shipment priority code of HIGH, lane 2 for shipment priority code of MED, and lane 3 otherwise:

Figure 13–11 Rule Strategy

Rule Stage material in lanes 1, 2, and 3 based on sales order line shipment priority code
 Description Sales orders lines with shipment priority code HIGH, MED, and other go to lanes 1, 2, 3 respectively

R	(Destination Locator	Rack	=	Constant Number	1	
RAN	Sales Order Line	Shipment Priority	=	Constant Character	HIGH	)
D		Code				
ROR	(Destination Locator	Rack	=	Constant Number	2	
RAN	Sales Order Line	Shipment Priority	=	Constant Character	MED	)
D		Code				
ROR	(Destination Locator	Rack	=	Constant Number	3	
RAN	Sales Order Line	Shipment Priority	<>	Constant Character	HIGH	)
D		Code				
RAN	Sales Order Line	Shipment Priority	<>	Constant Character	MED	)
D		Code				

You can model this scenario more effectively using the following three strategy rule:

Figure 13–12 Rule Name: Stage material in lane 1 if sales order line shipment priority code is 1

Strategy Description Sales orders lines with shipment priority code HIGH, MED, and other go to lanes 1, 2, 3 respectively
 Rule Name: Stage material in lane 1 if sales order line shipment priority code is 1 (Always)

R	Destination Locator	Rack	=	Constant Number	1
RAN	Sales Order Line	Shipment Priority	=	Constant Character	HIGH
D		Code			

Rule Name: Stage material in lane 2 if sales order line shipment priority code is 2 (Always)

R	Destination Locator	Rack	=	Constant Number	2
RAN	Sales Order Line	Shipment Priority	=	Constant Character	MED
D		Code			

Rule Name: Stage material in lane 3 if sales order line shipment priority code is not HIGH or MED (Always)

R	Destination Locator	Rack	=	Constant Number	3
RAN	Sales Order Line	Shipment Priority	<>	Constant Character	HIGH
D		Code			
RAN	Sales Order Line	Shipment Priority	<>	Constant Character	MED
D		Code			

Note: Dividing the single three-rule strategy into three separate single-rule strategies would provide better performance, but that is not possible because Shipment Priority Code is not available as a business object in the Rules Workbench.

Rule Sequencing

In some picking, putaway, and cost group strategies, and for many of the rules defined for label format, operation plans and task type selection, the logic defined by the rules is mutually exclusive and cannot be broken up into separate strategies in the Rules Workbench because the business objects that would make that possible are not available. For instance, two task type assignment rules might be set up to assign one task type if the pick is from the lower racks, and a separate task type if the pick is from the higher racks. Because it is not possible for any task to meet the restrictions in one of these two rules, the two rules are mutually exclusive.

One of the mutually exclusive scenarios may occur more often than the other. The Rules Engine continues to evaluate rules until it has found an assignment rule for which the restrictions are met, or until it completes the entire allocation. If you rearrange the rules and place the more frequently used rules before the less frequently used rules, or if you change the rule weights, the Rules Engine does not have to evaluate as many rules overall, and you improve system performance without changing the business logic.

For instance, continuing the shipment priority code example above, suppose that priority code LOW was the most frequently used priority code, representing about 55% of sales orders, while about 30% of orders had priority code MED, and the remaining 15% were priority HIGH. Then the strategy would be more efficiently written as follows, with the rule returning the more frequently used scenario placed first in the strategy. For an average 100 sales order lines, the previous strategy that did not consider sequencing, would have evaluated a total of 240 rules, while the strategy below would end up evaluating 160 rules - a performance gain of over 30%:

Figure 13–13 Strategy Stage material in lanes 1, 2,3

Strategy Stage material in lanes 1, 2, and 3 based on sales order line shipment priority code, sequenced by frequency

Strategy Description: Sales orders lines with shipment priority code HIGH, MED, and other go to lanes 1, 2, 3 respectively

Rule Name: Stage material in lane 3 if sales order line shipment priority code is not HIGH or MED (Always)

R	Destination Locator	Rack	=	Constant Number	3
RAN	Sales Order Line	Shipment Priority	<>	Constant Character	HIGH
D		Code			
RAN	Sales Order Line	Shipment Priority	<>	Constant Character	MED
D		Code			

Rule Name: Stage material in lane 2 if sales order line shipment priority code is MED (Always)

R	Destination Locator	Rack	=	Constant Number	2
RAN	Sales Order Line	Shipment Priority	=	Constant Character	MED
D		Code			

Rule Name: Stage material in lane 1 if sales order line shipment priority code is HIGH (Always)

R	Destination Locator	Rack	=	Constant Number	1
RAN	Sales Order Line	Shipment Priority	=	Constant Character	HIGH
D		Code			

In the previous example, the three rules in the strategy were essentially equally expensive to evaluate. However, if some of the rules in the strategy require expensive custom restrictions or parameters, the average performance may be better if those expensive rules were later in the strategy rather than earlier, so that they were evaluated less frequently even if that meant that other, much simpler rules had to be evaluated more frequently.

Note: This rule sequencing improves the average performance of a large pick release batch, even though the individual performance of a particular allocation may not improve or may even get worse by changing the rule sequencing. Stress testing under loads that approximate a production environment will provide the best guidance on the exact rule sequencing. And of course, not all strategies can be re-sequenced in this way.

Sort Criteria

You can define sort criteria for picking and put away rules. Sort criteria significantly slow down the performance of rules because the database must gather all the rows that meet the restrictions before beginning to sort. If you do not define sort criteria, the database returns the first rows that meet the restrictions without scanning the entire table. However, from a functional perspective, sometimes sort criteria is critical to correctly modeling the required logic, while at other times, the sort criteria may add only marginal value, or perhaps it does not help with warehouse

efficiency at all. You must weight the benefit sort criteria can add to rules against the performance impact it has on the Rules Engine.

Sometimes you can use multiple rules in a strategy to achieve the same logic that sort criteria provide. For instance, suppose you assign lot attribute, Grade, values A, B, or C, and a sort criteria indicates a preference of A, then B, and finally if necessary, Grade C. Instead, you use three rules in sequence to model the same scenario. The first rule indicates Grade A is valid; the second rule indicates Grade B is valid, and the third rule indicates Grade C is valid. Often, these three rules without sort criteria execute faster than the first rule with the sort criteria, if the Rules Engine is able to find sufficient material with the first rule. However, because this leads to a deeper strategy, use data comparable to a production instance to evaluate the performance of both scenarios to provide realistic statistics on which setup would be faster.

Restrict Locators

You can add additional rule restrictions that can decrease the number of locators the Rules Engine query returns. This improves the performance for all picking and putaway rules, but is more helpful for picking and putaway rules that include sort criteria. For instance, if you can logically segregate items into several different categories and each category is directed to a different subinventory for putaway, the Rules Engine only needs to sort a fraction of the locators in the warehouse. Often, an operator performing the receipt knows the subinventory in the warehouse in which the item should be stored, but just does not know the specific locator. In this case, the operator could perform a direct receipt into a temporary staging locator. Different inbound staging locators be set up for each of the different areas in the warehouse to which material should be directed, with a strategy as follows:

Figure 13–14 Strategy Putaway Material Staged in Locator 1

```
Strategy Putaway material staged in locator 1 to subinventory LGITEMS, and 2 to SMITEMS
Strategy Description Putaway to different subinventories based on temporary staging lane selected by operator
Rule Name: Putaway material to subinventory LGITEMS if staged in locator 1 (Always)
    R    Source Locator    Rack    =    Constant Number    1
    RAN  Destination      Subinventory Name =    Constant Character    LGITEMS
    D    Subinventory
Rule Name: Putaway material to subinventory SMITEMS if staged in locator 2 (Always)
    R    Source Locator    Rack    =    Constant Number    2
    RAN  Destination      Subinventory Name =    Constant Character    SMITEMS
    D    Subinventory
```

You could determine the subinventory based on the item category, so seasonal and non-seasonal items are directed to different subinventories to greatly reduce the number of locators the Rules Engine needs to evaluate. Rules could then restrict the list of valid locators based on the staging locator in which the material is located.

These types of restrictions enhance the speed of the Rules Engine, in some cases enabling use of sort criteria that would otherwise be too performance intensive to include in the rules.

Rule Expressions

Most of the seeded objects and attributes correspond directly to tables and columns. For instance, for a picking task, the input to the Rules Engine is a move order line. From the move order line, the system can join directly to the table `MTL_SYSTEM_ITEMS`, which contains attributes about the items. The attribute `Width` on the object `Item` in the Rules Engine corresponds to the column `UNIT_WIDTH` in this table.

You can include an expression you defined in a rule, where you can enter additional unseeded attributes, use mathematical expressions, or join to additional tables in ways to model some specific business logic. In developing the Rules Engine, the joins to all the required tables were made as direct as possible, slower views such as key flexfield views were avoided, and indices were added when necessary to ensure that the database could efficiently get the required data. When you define custom expressions, inefficient SQL can severely hinder the performance of the Rules Engine. For instance, expressions that require full table scans must be avoided for all but the smallest lookup tables. Joins should be made on identifiers when available, rather than on item or customer names.

If a rule with a user-defined expression is performing poorly, have a DBA familiar with the Oracle data model and database performance review the expression.

Inefficient Attributes

While most of the seeded attributes correspond directly to columns in the database, some of the attributes are PL/SQL functions that perform complex calculations. The attribute `Number of Other Items`, counts the number of unique values of `INVENTORY_ITEM_ID` in the table `MTL_ONHAND_QUANTITIES_DETAIL`, restricted by the current organization and locator the Rules Engine is examining. This data cannot be obtained directly unless the database is denormalized. Using this attribute leads to slower rules.

There is no direct way from the desktop interface to determine which attributes are seeded and which are PL/SQL functions. However you can retrieve this information from the database. If rules are performing slowly, evaluate if any of the

attributes are PL/SQL functions, and if they are required to model the business logic or if you could use different attributes.

Note: A PL/SQL function in sort criteria causes more performance problems than a PL/SQL function in rule restrictions.

Update Locator Capacity

Several frequently used attributes were denormalized so you can access the data available to the Rules engine directly from a table. You do not require a PL/SQL call or additional join to determine the data. The following four attributes are now part of the locator definition:

- Empty Flag
- Only Item in Locator
- Item Resides in Locator
- Mixed Items

These attributes are automatically updated upon every material receipt. For instance, a locator that is currently empty has the Empty Flag set to 'Y'; upon a material receipt, the system updates it to 'N'. However, the attributes are not automatically updated on material issues; that would simply move the performance problem from the Rules Engine to the transaction processing stage. For instance, on issuing an item from a locator, the system would have to perform the same validation as described above for the Number of Other Items, scanning the MTL_ONHAND_QUANTITIES_DETAIL table.

These attributes are updated by a schedulable concurrent request, Update Locator Capacity. The frequency with which this report should be scheduled depends on the transaction volume of the warehouse, the system resources available, and how significantly a less-than-optimal locator selected by the Rules Engine affects the warehouse efficiency. Note that, because of the way these attributes are updated by transactions, a rule that uses the Empty Flag to find only empty locators will only return empty locators; it just may exclude other locators that were emptied since the last time the concurrent request was run.

It should be noted that in addition to updating these four attributes, the Update Locator Capacity concurrent program also updates the locator capacity. While locator capacity is automatically updated on every transaction (including receipts, transfers, and issues), some data updates, such as assigning a container item to an LPN that already resides in a specific locator, or changing physical attributes of the

items on the desktop Item Master window, will not be automatically reflected by locator capacity. After running this report, the locator capacity will be updated by the most current item attributes and based on the current LPN container items.

Lot and Serial Attributes

Rules that are based on lot or serial attributes only apply to those items which have those attributes defined; they will fail to generate allocation suggestions for items that are not lot controlled or serial controlled, or which use a different context mapping for the flexfields. Therefore, strategies which are to be used for both lot-controlled and non-lot-controlled items should contain rules that address each case.

Example The general warehouse policy is that no item with less than thirty days before the lot expiration date will be shipped. However, the warehouse also carries other items that are not expiration date controlled. This can be handled by using two different rules within a single strategy. A shelf life code of 1 means there is no expiration data control, while values of 2 and 4 indicate expiration date control. Therefore the following two-rule strategy implements the organization policy efficiently.

Figure 13-15 Rule Strategy

R	Lot	Expiration Date	>	Date	Current Date	+30
R AND	Item	Shelf Life Control	IN	Expression	2,4	
D		Code				
R	Item	Shelf Life Control	=	Constant Number	1	

See Also

[Appendix B - Rules Engine](#) on page B-1

Performance Impact of Serial Attributes

The Rules Engine can allocate individual serial numbers. The standard approach for serial items is for the Rules Engine to direct the operator to locations where sufficient material can be found, based on any applicable rules, but not to allocate specific serial numbers. When the operator performs the picks, the operator specifies which serials were picked. This is sufficient when all serials of an item are identical, all serial attributes for a given item are identical within a single locator, or there are no material statuses assigned to serials that disallow picking.

However, individual serial numbers can be allocated if necessary. You can use this if business practices require allocation by serial attribute, or when statuses that disallow picking are assigned to serials. This causes a significant performance reduction in the Rules Engine whenever serial controlled items are allocated. Do not use serial allocation unless particular business practices require it. To turn on serial allocation, check the Allocate Serial Numbers check box on the Organizations Setup window.

Note: It is possible to base rules on serial attributes even when serial allocation is disabled. The Rules Engine would honor the rule restrictions, allocating only from locators that have serials with the correct attributes, but would not specify the specific serials on the allocation. It would then be left to the operator to pick the correct serials from the allocated revision, lot, and locator; the system would not validate the serials selected by the operator. Therefore, if selecting specific serials based on attributes is important and serial selection should not be left to the operator, serial allocation should be enabled for the organization.

Customization

The Rules Engine contains dozens seeded of business objects, and comes with hundreds of attributes from which you can build rules. However, it is possible that in very complex scenarios, the basic Rules Engine does not suffice. You can customize the Rules Engine with non-invasive changes in three different ways.

If the seeded objects and attributes from which rules are defined cannot completely model the business scenario, you can write custom expressions that grab onto additional attributes and tables. If you cannot model a business scenario even with these custom expressions, you can custom define the entire rule. Put away rules use a capacity calculation you can base on volume, weight, dimensions, and units of the item in comparison to the physical capacity of the locators. In situations where more complex capacity algorithms are necessary, you can customize the capacity calculation. Detailed explanations on each of these areas, including how to implement them, are included below.

Custom Expressions

Often, a rule may seem to fit within the framework of the standard restrictions, but the required object or attribute is not available, or perhaps requires some

mathematical or character manipulation to retrieve the right logic, or the data is stored in a custom table.

User-defined expressions can support all these possibilities, and are a completely non-invasive way to build a rule. A rule with a user-defined expression is handled exactly the same as other rules. You can define it on the desktop Rules window, and recompile it via the Generate All Rules concurrent program.

Defining Expressions

When the Rules Engine executes a rule, the user defined restrictions are appended to the where clause in the rule body. The Rules Engine translates the restrictions on the window to A OP B, where A is the attribute is the first attribute, and B is the second attribute. For instance, the restriction Destination Subinventory / Subinventory Name = Constant Character / BULK in a put away rule would be appended as `omsei.SECONDARY_INVENTORY_NAME = 'BULK'`. The column, `SECONDARY_INVENTORY_NAME`, is the name of the column on the table `MTL_SECONDARY_INVENTORIES`. The alias, `omsei`, is hard-coded in the seed data so whenever the Rules Engine needs to join to this table, the same identifier is used.

An expression replaces the second object with the SQL entered on the rule, exactly as you enter it. Therefore, you can manually code the exact same logic if, instead of entering the restriction Destination Subinventory / Subinventory Name = Constant Character / BULK, Destination Subinventory / Subinventory Name = Expression / 'BULK'. The rule body would be identical.

However, the expression can be much more complex than an alphanumeric constant. Suppose you assign a particular lot controlled item to an attribute context, mapping two columns `N_ATTRIBUTE1` and `N_ATTRIBUTE2` to two attributes that indicate the flammability of this particular lot. Different locators throughout the warehouse have different safety ratings, and the system stores the safety as a number on a locator flexfield column `ATTRIBUTE1`. Because of how the safety rating relates to the two lot attributes, a locator can store any lot so long as the product of the two attributes is smaller than the safety rating; otherwise, a hazardous situation results.

While there is no rule attribute to get at the product of `N_ATTRIBUTE1` and `N_ATTRIBUTE2`, this restriction can be easily modeled via a rule restriction with a user-defined expression. The restriction is as follows: `Destination Locator / ATTRIBUTE1 < Expression / mln.N_ATTRIBUTE1 * mln.N_ATTRIBUTE2`. Of course, this expression only works if both attributes are always populated for the

item; if they are optional attributes, the function NVL should be used to control what should happen if they are null.

Table Aliases

The table aliases are hard-coded in the seeded data. The easiest way to get the table alias is directly from the database, with the following query:

```
select name, description, table_alias
from wms_db_objects wdo, wms_objects wo
where wdo.db_object_id = wo.object_id
```

Another way to get the alias is to view the rule body of a rule that references the required object. For instance, define and compile a rule with only the restriction `Lot / Lot Number = Lot / Lot Number`. Get the rule identifier for this rule, and then view the package body of the package named `WMS_RULE_<number>`. Look for the section where the user defined rules restrictions are added, and use the same table alias used by the rule.

For performance reasons, tables are added to the rule body only when they are required by the rule restrictions. The Rules Engine analyzes the seeded rule attributes to determine which tables to add to the base query when compiling the rule; it does not analyze any user-defined expressions. In the example above, if the only restriction in the rule is the one line `Destination Locator / ATTRIBUTE1 < Expression / mln.N_ATTRIBUTE1 * mln.N_ATTRIBUTE2`, then the table `MTL_LOT_NUMBERS` will not be added to the base, and thus the alias `mln` is not defined in the rule body. This rule does not compile.

In order to compile this rule, you must add an additional restriction to force the Rules Engine to define the alias `mln`. You can add a dummy restriction to the rule which is always true, joined to the real restriction by `AND`. The simplest dummy restriction is equating any attribute of the required object to itself, such as `Lot / Lot Number = Lot / Lot Number`.

Joins to Additional Tables

You can refer to the table alias to access tables part of the base query, and embed a select statement in an expression to access tables that are not part of the base query. However, when you join to additional tables, several considerations must be made. Make sure you completely define the join conditions, and if you use an operator such as `=`, `<`, `<=`, `>`, `>=`, or `LIKE`, that the expression returns exactly one row. If you use the operator `IN`, the expression can return none, one, or many rows.

Finally, be sure to assess the performance impact of any user-defined expressions. Selecting additional columns from tables that are already in the base query or

performing simple mathematical operations on those columns has little performance impact. Joining to new tables not referenced in the base query could potentially degrade performance, depending on table size and table indices. Finally, embedded PL/SQL functions, such as unit-of-measure conversions, can be used, but should be avoided unless the performance degradation is tolerable, and the scenarios in which they are used are limited.

Custom Rule Definition

The rule is the lowest level unit for the Warehouse Management Rules Engine. Each enabled rule has a corresponding PL/SQL package, named `WMS_RULE_####`, where `####` is the rule ID. For a picking or put away rule, this package contains the SQL query and corresponding logic to return a list of valid locations. The rule package for a cost group assignment, task type assignment, or label printing rule also contains a main SQL statement, but in these rules, the query is used to determine if these rules are valid for this transaction.

Because each rule has a different package, it is easy to customize the code for individual rules to meet your specific business needs. You can create and enable a rule through the user interface and retrieve the rule `rule_id` (see the tables `WMS_RULES_B` and `WMS_RULES_TL`). When you enable the rule, a PL/SQL the system creates the package on the database. You can then change the rules package to carry out whatever additional processing is necessary. The rule package can make calls to custom APIs, or carry out extra validations.

This can be a fairly powerful and non-invasive way to customize the Warehouse Management Rules Engine, but there are two caveats to this customization approach. If you regenerate a rules PL/SQL package, the system overwrites the customizations. Regeneration of a rule package happens in one of three ways: First, the rule can be disabled and then re-enabled through the window, or you can select Regenerate Rule Package from the Tools menu on the Rules window, or you can launch the Generate All Rule Packages concurrent program.

Second, the procedures in the rules package are expected to accept and return certain values. Customizations can change the logic of the procedures in the PL/SQL package, but changing the parameters or return values of the procedures causes errors in the Rules Engine.

All of the rule packages share some things in common. All have three procedures: `open_curs`, `fetch_one_row`, and `close_curs`. `Open_curs` is called once at the beginning of the rule execution, and `close_curs` is called once at the end of each rule execution. For picking and put away rules, `fetch_one_row` can be called multiple

times; for all others, `fetch_one_row` is only called once per rule. The package specifications for the different rule type codes are different.

Picking and Put away Rules

Picking and put away rule packages basically function the same, and they have the same package specifications.

```
CREATE OR REPLACE PACKAGE WMS_RULE_#### AS
    PROCEDURE open_curs (
        p_organization_id          IN NUMBER,
        p_inventory_item_id        IN NUMBER,
        p_transaction_type_id       IN NUMBER,
        p_revision                  IN VARCHAR2,
        p_lot_number                IN VARCHAR2,
        p_subinventory_code         IN VARCHAR2,
        p_locator_id                IN NUMBER,
        p_cost_group_id             IN NUMBER,
        p_pp_transaction_temp_id    IN NUMBER,
        p_serial_controlled         IN NUMBER,
        p_detail_serial             IN NUMBER,
        p_detail_any_serial         IN NUMBER,
        p_from_serial_number        IN VARCHAR2,
        p_to_serial_number          IN VARCHAR2,
        p_unit_number               IN VARCHAR2,
        x_result                     OUT NUMBER);
    PROCEDURE fetch_one_row (
        x_revision                  OUT VARCHAR2,
        x_lot_number                OUT VARCHAR2,
        x_lot_expiration_date       OUT DATE,
        x_subinventory_code         OUT VARCHAR2,
        x_locator_id                OUT NUMBER,
        x_cost_group_id             OUT NUMBER,
        x_uom_code                  OUT VARCHAR2,
        x_serial_number             OUT VARCHAR2,
        x_possible_quantity         OUT NUMBER,
        x_consist_string            OUT VARCHAR2,
        x_order_by_string           OUT VARCHAR2,
        x_return_status             OUT NUMBER);
    PROCEDURE close_curs;
END WMS_RULE_####;
```

Without customization, these three procedures manage interaction with a SQL cursor. This SQL cursor returns eligible locations to pick from or put away to. `Open_curs` and `close_curs` are called once per rule to open and close the SQL cursor.

Fetch_one_row is called continuously until either all of the transaction quantity is allocated or no more rows are returned from the SQL cursor.

Without customization, open_curs is called once per rule to open the SQL cursor. This procedure also populates all the variables used by the sql statement. When customizing, open_curs is a good place to take care of any setup processing, as it is called at the beginning of the rule engine processing. Here are the parameters for open_curs:

Table 13–1 Parameters for open_curs

Parameter	Parameter Type	Description
p_organization_id	Number	The current organization (primary key for MTL_PARAMETERS)
p_inventory_item_id	Number	The item to be allocated (primary key for MTL_SYSTEM_ITEMS)
p_transaction_type_id	Number	Identifies the transaction type (primary key for MTL_TRANSACTION_TYPES)
p_revision	Varchar2 (Length 3)	Identifies revision to be allocated, as specified on move order line or pre-existing reservation. If no specific revision has to be picked, this value is -99.
p_lot_number	Varchar2 (Length 30)	Identifies lot number to be allocated, as listed on move order line or pre-existing reservation. If no specific lot number has to be picked, this value is -9999.
p_subinventory_code	Varchar2 (Length 10)	Identifies subinventory to pick from or put away to (depending on type code of rule), as listed on move order line or pre-existing reservation. If no specific subinventory has to be used, this value is -9999.
p_locator_id	Number	Identifies locator to pick from or put away to (depending on type code of rule), as listed on move order line or pre-existing reservation. If no locator has to be used, this value is -9999.
p_cost_group_id	Number	Identifies cost group to be allocated, if listed on move order line. If no specific cost group has to be allocated, this value is -9999.

Table 13–1 Parameters for open_curs

Parameter	Parameter Type	Description
p_pp_transaction_temp_id	Number	Identifies a unique record in WMS_TRANSACTION_TEMP and WMS_TRX_DETAILS_TMP_V (view based on above table). This record is used by the SQL cursor.
p_serial_controlled	Number	1 if item is serial controlled item, 0 otherwise.
p_detail_serial	Number	1 if allocation engine should generate suggestions for serial numbers; 0 if allocation engine should suggest locations, but not specific serial numbers
p_detail_any_serial	Number	1 if allocation engine should suggest any serial eligible serial numbers; if any other value, allocation engine should suggest only serial numbers between p_from_serial_number and p_to_serial_number. Corresponds to MTL_PARAMETERS.ALLOCATE_SERIAL_FLAG
p_from_serial_number	Varchar2 (Length 30)	If p_detail_any_serial is not 1, and p_detail_serial is 1, then all suggested serial numbers should be between p_from_serial_number and p_to_serial_number
p_to_serial_number	Varchar2 (Length 30)	If p_detail_any_serial is not 1, and p_detail_serial is 1, then all suggested serial numbers should be between p_from_serial_number and p_to_serial_number
p_unit_number	Varchar2 (Length 30)	Identifies unit number of serial numbers to pick from, as specified on the move order line. If no specific unit number has to be picked, then this value is -9999
x_result	Number	This output variable must be returned by open_curs. The value is 1 if success, 0 otherwise. If x_result = 0, the rules engine will exit with error

When customizing, it is important to return 1 for x_result if there is no error.

The rules engine calls fetch_one_row continuously until either all of the transaction quantity is allocated or there are no more rows to return from the SQL cursor. In the existing code, this procedure fetches a record from the SQL cursor and returns it to

the calling procedure. This location record is then used to allocate. The following table contains the parameters for the function.

Table 13–2 *fetch_one_row Parameters*

Parameter	Parameter Type	Description
x_revision	Varchar2 (Length 3)	The revision to pick or put away. If item is revision controlled, this value must not be NULL.
x_lot_number	Varchar2 (Length 30)	The lot number to pick or put away. If item is lot controlled, this value must not be NULL.
x_subinventory_code	Varchar2 (Length 10)	The subinventory code to pick from or put away to. This value must not be NULL.
x_locator_id	Number	The locator to pick from or put away to. This value must not be NULL.
x_cost_group_id	Number	The cost group to pick from or put away. This value must not be NULL.
x_uom_code	Number	The Pick UOM of the locator (as defined on the table MTL_ITEM_LOCATIONS). If the Pick UOM Code of the locator is NULL, this value should be equal to the Pick UOM Code of the subinventory (from MTL_SECONDARY_INVENTORIES). Alternately, if you do not want to use the Pick UOM functionality built into the Rules engine, then this value can always be equal to the Primary UOM of the item.
x_serial_number	Number	If p_serial_controlled = 1, p_detail_serial = 1, and p_type_code = 2, then this value should contain the serial number to pick. If p_type_code = 1, then this value is not used.

Table 13–2 *fetch_one_row Parameters*

Parameter	Parameter Type	Description
x_possible_quantity	Number	For picking rules, this is the total available quantity for these return parameters (revision, lot, sub, locator, cost group). If x_serial_number is not NULL, return 1. For put away rules, this should be the available capacity in the locator.
x_consist_string	Varchar2 (Length 1000)	This string is used when a rule has consistency restrictions defined. Records returned from the fetch_one_row with the same x_consist_string can be issued together. Return NULL to disable the consistency functionality built into the rules engine.
x_order_by_string	Varchar2 (Length 1000)	This string is used by the Pick UOM functionality. The value normally returned in this parameter is a concatenation of all the sort criteria values for this record. For example, if sort criteria is Lot number, and this record has a lot number of A, then x_order_by_string = A. If the sort criteria is lot number and lot expiration date, then x_order_by_string might look like A01-01-2001, a concatenation of the lot and the expiration date. Setting this parameter to NULL will affect the performance of the Pick UOM functionality built into the rules engine, causing sort criteria to be ignored.
x_return_status	Number	1 if record is successfully found and returned, and 0 if no more rows to fetch. If x_return_status = 0, all other return values are ignored.

Returning a record from fetch_one_row does not insure that this record is used to allocate. The rules engine checks availability of the material on picking rules and capacity of the locator on put away. The engine makes other checks and

orders records received from `fetch_one_row` based on `order_by_string` and `consist_string`.

The last procedure in the rule package is `close_curs`. Without customization, this is used to close the SQL cursor after the rules engine is finished with the rule. There are no input or output parameters. When customizing, this is a good procedure to carry out any cleanup or post rule processing that must occur.

Cost Group Rules

```
Create Or Replace Package WMS_RULE_#### AS
    procedure open_curs (
        p_line_id      IN NUMBER,
        x_result        OUT NUMBER);
    procedure fetch_one_row (
        x_return_status OUT NUMBER);
    procedure close_curs;
END WMS_RULE_####;
```

`Open_curs` and `close_curs` function the same way as those procedure do in the packages for picking and put away rules. However, the arguments for `open_curs` are different:

Table 13–3 *open_curs Argument Parameters*

Parameter Name	Parameter Type	Description
<code>p_line_id</code>	Number	Primary Key for an entry in <code>WMS_COST_GROUPS_INPUT_V</code> . This record represents either a move order line or a transaction temp record.
<code>x_result</code>	Number	This output variable must be returned by <code>open_curs</code> . The value is 1 if success, 0 otherwise. If <code>x_result = 0</code> , the rules engine will exit with error

Unlike the picking and put away rules, `fetch_one_row` only returns a status. If `x_return_status = 0`, then the cost group for this rule will not be used. If `x_return_status >= 1`, then the cost group rules engine will assign to the transaction the cost group associated with this rule.

Task Type Rules

```
CREATE OR REPLACE PACKAGE WMS_RULE_#### AS
    procedure open_curs (
        p_pp_transaction_temp_id      IN NUMBER,
```

```
        x_result                                OUT NUMBER);  
        PROCEDURE fetch_one_row (   
            x_return_status                    OUT NUMBER);  
        PROCEDURE close_curs;  
  
    END WMS_RULE_####;
```

The procedures in the task type rules package behave exactly like the cost group rules. If `x_return_status >= 1`, then the task type associated with that rule is used. The parameter `p_pp_transaction_temp_id` corresponds to a single entry in the `MTL_MATERIAL_TRANSACTIONS_TEMP` table.

Label Printing Rules

```
CREATE OR REPLACE PACKAGE WMS_RULE_#### AS  
    procedure open_curs (   
        p_label_request_id                    IN NUMBER,  
        x_result                                OUT NUMBER);  
    PROCEDURE fetch_one_row (   
        x_return_status                    OUT NUMBER);  
    PROCEDURE close_curs;  
  
    END WMS_RULE_####;
```

The procedures in the label rule package behave like the procedures for cost group and task type assignment rules. The only difference is the parameter `p_label_request_id`. This value is the primary key for the table `WMS_LABEL_REQUESTS`, corresponding to the column `label_request_id`.

Operation Plan Rules

```
CREATE OR REPLACE PACKAGE WMS_RULE_XXXXX AS  
    procedure Get_OP (   
        p_pp_transaction_temp_id                IN NUMBER,  
        x_return_status                    OUT NUMBER);  
  
    end WMS_RULE_XXXXX;
```

The procedures in the operation plan rule package behave like the procedure task type assignment rules. The parameter `p_pp_transaction_temp_id` is the `transaction_temp_id` of the task in `mtl_material_transactions_temp`. If `x_return_status >= 1`, then the operation plan associated with that rule is used.

Custom Capacity Calculation

When determining locations eligible for put away, the rules engine examines the capacity of the location. Current capacity for each location is stored on the `MTL_ITEM_LOCATIONS` table. The Rules Engine looks at these numbers to determine how much is available to put away. There are three ways that capacity is measured - by weight, by volume, and by units.

Depending on the quantity function on a put away rule, the Rules Engine uses available capacity by weight, volume, units, or some combination thereof, on the locator definition to determine the locator's capacity for the given item. An additional quantity function is Available Capacity by Customer-Specific Algorithm. This function should return the capacity for the given item in that item's primary UOM. The Rules Engine takes the minimum of that quantity, and the available capacity where units, weight, and volume also considered, to be the available locator capacity for this transaction.

You can also use capacity information in the restrictions and sort criteria of a put away rule. The Subinventory/Locator, contains four parameters which call customized functions.

Table 13–4 Object Subinventory/Locator Customization Parameters

Parameter Name	Function Name	Description
Available Capacity by Customer-Specific Algorithm	WMS_RE_CUSTOM_PUB.GetAvailableLocationCapacity	The unoccupied capacity in a locator that is not already reserved for other put away allocations
Occupied Capacity by Customer-Specific Algorithm	WMS_RE_CUSTOM_PUB.GetOccupiedLocationCapacity	The capacity taken up by material currently in the locator
Remaining Available Capacity by Customer-Specific Algorithm	WMS_RE_CUSTOM_PUB.GetRemainingLocationCapacity	The available capacity of the locator after the current transaction
Total Capacity by Customer-Specific Algorithm	WMS_RE_CUSTOM_PUB.GetTotalLocationCapacity	The overall capacity for the locator, regardless of what is currently occupied or available

Without customization, these functions return 0.

Maintenance

If a strategy search fails or if all the rules within a strategy fail, the Rules Engine cannot assign or allocate the task, or assign a label or cost group. If you do not set up the rules, strategies, or correctly, the Rules Engine returns an illogical or

suboptimal result. To track the causes of these problems, Oracle Warehouse Management provides the following diagnostics features:

- [Rule and Strategy of Transaction](#)
- [Rule Where Used](#)
- [Simulation](#)

Rule and Strategy of Transaction

Determine which rule strategy the Rules Engine used. The Rules Engine stamps the rule and strategy that generated each pick and put away suggestion on the transaction. You can view this from the desktop View Material Transactions window after the transaction completes.

Rule Where Used

To determine which strategies use a particular rule, the Rule Where Used window provides a view of all strategies that use that rule, within that organization. If a rule is common to all organizations, you must perform this check must in each organization that uses the rule.

Simulation

The best way to debug the Rules Engine setup is to use the Rules Engine Simulator. The simulator takes an unallocated move order as input, and can display the allocation details that would be created with any enabled pick or put away rule or strategy. It can also simulate the entire strategy selection process to help debug the strategy assignments. Details about the allocation indicate why specific material or locators were not selected. See: Explaining the WMS Rules Engine Simulator, *Oracle Warehouse Management User's Guide*.

Common Problems

Common problems and their causes and solutions, including debugging scripts (if applicable) are discussed below.

1. No orders lines selected in pick release

This happens when no unreleased or backordered order lines meet the selection criteria specified in the pick release rule or Release Sales Order window. Selection criteria could include the order number, delivery number, trip

number, customer, order type, scheduled ship date, requested date, or order line status. Available order lines are limited to booked orders that are unreleased or backordered, so if no lines meet the specified criteria, no lines are released. You can check the pick release request log to confirm no lines are release. Search for text like:

No lines selected for organization V1

The system generates a request when pick release is run in concurrent mode, and the request number is given when Concurrent is selected. For additional information on pick release criteria, see Overview of Pick Release, *Oracle Shipping Execution User's Guide*.

2. Orders selected but lines backordered

Lines are backordered when no material is available that meet the picking rule restrictions, or when there is not enough capacity available in the selected staging lane. Model staging lanes as locators with infinite capacity (by leaving the capacity fields blank on the locator definition window) so that the latter problem does not occur. The former problem, however, indicates the rule restrictions are incorrect or too restrictive, or if they are correct, that there is no available material in the warehouse that meet those restrictions. Either problem will be indicated in the pick release request log with the text like:

Pick Release process could not allocate 12 of item JCNOSTK for order 5000726 as there was insufficient quantity available.

The first step in debugging this situation is to check the available quantity of the item using either the mobile item inquiry window or the desktop material workbench window. Picking allocates from available quantity, rather than on-hand quantity, because available quantity excludes material that has already been reserved.

If there is a material reservation of this item to the sales order, then the reservation quantity does not appear as available, but the Rules Engine still validates that the reserved material meets the picking restrictions. You can find Reservations in the Desktop Reservations window. A reservation could have been made manually or by Order Management during Auto-Scheduling. See Availability and Reservations *Oracle Order Management User's Guide*. If the reservation specifies a revision, lot number, subinventory, or locator, verify the reservation meets the rule restrictions.

If there is available material, determine which picking strategy should have been selected. This can be done by checking the strategy assignments in the Rules Workbench, and then searching for (currently effective) strategy

assignments that match the order line, or by pick releasing the sales order with Auto-Allocate disabled and using the Rules Engine Simulator to better understand why the sales order is not getting allocated.

Use the Rules Engine Simulator to determine exactly why a sales order is backordered. The most common cause is incorrect put away rules setup that does not validate the staging lane that is defaulted by the pick release process. See: [Staging Lane Put away Rule](#) on page 13-19. Other common causes are capacity limitations on staging lanes, incorrect effective dates on the rules or strategies, or mistakenly disabling the Partial Success Flag on the strategy definition. Other considerations to check for are the material status on the material, or the source and destination locators. All of these validations are displayed by the Rules Engine Simulator.

Check the selected strategy rule by rule to determine if the desired behavior is properly coded in the rule restrictions and consistency requirements (the sort criteria only impacts the order in which material is chosen, assuming that multiple material units are available). If consistency requirements are specified, verify that there is enough material available with those particular attributes. For instance, if consistent lot is specified, check if there is enough available in a single lot. If not, then that rule returns no allocations and the Rules Engine will go to the next rule in the strategy. Verify that the rule restrictions are correct and that if lot or serial attributes are specified, the correct attribute columns are referenced. The lot and serial attribute columns can be found in the descriptive flexfield definition window.

Other possible causes could be incorrect effective dates or incorrect selection of the partial success flag on the strategy definition. Verify that if any effective dates other than Always are used, that they encode the proper system behavior. Effective dates can be used in two places: rules may be effective only during certain periods on a strategy definition, and strategies may be effective only during certain period on a strategy assignment. Finally, unless a specific scenario exists where material must be allocated using entirely one rule, the partial success allowed flag on the strategy window should be enabled. Otherwise, even if partial allocations can be made using multiple rules within a strategy, no material will get allocated unless the allocation can be made entirely from a single rule.

Material may not get allocated if no strategy can be found and there is no default picking and put away rule defined on the Organization Parameters window.

3. Allocations Not What Expected

The picking and putaway strategy and rule that were selected by the system are stamped on the temp transaction prior to performing the transaction, and on the transaction history after the transaction has been completed. Therefore, the selected rule or strategies can be seen by a SQL query on mtl_material_transactions_temp prior to transaction, or via the View Material Transactions window on the desktop after the transaction has taken place.

4. Lines Allocated But Task Type Not Assigned

After the material allocation is made for a picking or replenishment task, task type assignment is performed. If the allocation was made but no task type was assigned, then no enabled task type rule was applicable. Note that a default task type rule can be specified at the organization level. This scenario can be detected with the following script, which returns all the task lines in the table mtl_material_transactions_temp of a given move order or batch number:

```
--Replace &batch with the pick release batch number within single quotes
select bom.operation_code as task_type, item.concatenated_segments as item,
       transaction_quantity as qty, transaction_uom as UOM,
       temp.subinventory_code as subinventory, loc.concatenated_segments as
locator
from   bom_standard_operations bom, mtl_material_transactions_temp temp,
       mtl_txn_request_lines mol, mtl_item_locations_kfv loc,
       mtl_txn_request_headers head, mtl_system_items_kfv item
where  temp.move_order_line_id = mol.line_id
and    item.inventory_item_id = temp.inventory_item_id
and    item.organization_id = temp.organization_id
and    mol.header_id = head.header_id
and    head.request_number = &batch
and    bom.standard_operation_id = temp.standard_operation_id
and    loc.inventory_location_id = temp.locator_id
```

Check for null entries in the task type field. To debug this scenario, determine which rules should apply to the line, and verify that the rules are enabled. A list of all enabled task type rules of a given organization, in the sequence they are applied, can be seen with the following script:

```
--Replace &org_code with the 3 character within single quotation marks
select rule_weight, name, description, type_hdr_name
from   wms_rules_v rule, mtl_parameters mtl
where  type_code = 3
and    rule.organization_id = mtl.organization_id
and    organization_code = &org_code
and    enabled_flag = 'Y'
order  by rule_weight
```

5. Task Type Assigned But Task Not Available to User

The most common cause of this problem is problems with the task type setup, such as the resource or employee definition. See [System Task Management](#) on page 25-1 for additional information.

6. Rule Cannot be Compiled

The system performs several syntax checks on a rule when you enable it. The system checks parentheses to make sure they match and are closed properly. Also, if the rule includes a user-defined expression, the system verifies that the expression is correctly defined. For custom expressions, verify that the correct table aliases are used, and that the tables identified by the aliases would be included in the rule. Recall that a dummy restriction may need to be added for some user-defined expressions; refer to [Custom Expressions](#) on page 13-32 for more information on table aliases.

If the rule still does not compile, there may be a problem with the seeded objects. If the rule has multiple restriction (or sort criteria) lines, make a copy of the rule and remove the restriction or sort criteria lines one by one; attempt to compile the rule at each removal. (Ensure that the parentheses match at all times by removing all parentheses, even though this does not correctly model the rule logic.) If, after removal of a particular line, the rule can then be compiled, that attribute is the offending component. Contact Oracle Support and provide them with that particular restriction line, and with the entire rule.

7. Rule Not Available for use in Strategy

Only enabled rules can be used in strategies; verify that the rule is enabled. If both the Rules window and the strategy window are open at the same time, the enabled rule must be saved before the rule will be available for strategies. Rules are organization specific, unless they are shared across all organizations by checking the Common To All Orgs check box. Also, rules can only be used in strategies of the same type. For instance, a put away rule cannot be used in a picking strategy.

8. Strategy Not Available for use in Strategy Assignment

Only enabled strategies can be used in strategy assignments; verify that the strategy is enabled. If both the strategy and the strategy assignments window are open at the same time, the enabled strategy must be saved before the strategy will be available for strategy assignments. Strategies are organization specific, unless they are shared across all organizations by checking the Common To All Orgs check box. Also, strategies can only be used in a strategy assignment of the same type. For instance, if the selected strategy type on the strategy assignments window is picking, then only picking strategies appear in the list of values.

9. Cannot Disable rule

A rule can only be disabled if it is not used in any enabled strategies; all strategies in which that rule occurs, even if the strategy is in a different organization, must first be disabled. The rule where used window indicates in which strategies a particular rule is used.

10. Cannot Disable Strategy

A strategy can only be disabled if it is not used in any enabled strategy assignments in the Rules Workbench. All strategy assignments in which that strategy is used, even if in a different organization, must be disabled or deleted before that strategy can be disabled.

11. Unable to Allocate Error

This error occurs on the mobile device from a user-triggered LPN put away. This indicates one of the following:

- None of the locators chosen by the rules in the selected put away strategy have available capacity
- The restrictions on the rules do not return any locators even before capacity considerations
- No put away strategy was found and no organization default put away rule was defined on the Organization Parameters window.

This may also indicate that the current locator of the LPN is a valid locator returned by the rules engine. A user-triggered LPN put away creates a move order in the background, and a move order cannot have the source and destination locators be the same.

Finally, this may indicate that the current location of the LPN is not a valid picking location for that item. Both picking and put away rules are used for every move order, so if current LPN locator does not meet the restrictions in any of the rules of the applicable picking strategy, then the system cannot allocate the move order. The best way to ensure that the source of a move order validates is to assign a pick strategy with a single rule with no restrictions to the transaction type Move Order Transfer. However, this is used for both requisition move orders and put aways initiated on the mobile device, so verify this is the logic desired. Perhaps some material should not be allocated for these move orders and thus should be excluded by rule restrictions (or material status); this material could still be moved by a user initiated subinventory transfer.

12. Allocation violates consistency restrictions on rule

When multiple manual reservations are created on a single sales order, the consistency rules may not work as expected. The system treats each reservation as a different input record for the Rules Engine, meaning that allocations occur separately for each reservation. Since allocation for each reservation occurs independently of allocation for the other reservations, the system does not check consistency restrictions across reservations.

Example: Customer JBC orders quantity 20 of item K100. JBC specifies that they want 10 from lot A and 10 from lot B. The user creates 2 reservations on the sales order - one for quantity 10 on Lot A and one for quantity 10 on Lot B.

The first rule encountered when the rules engine is run says Pick from a consistent subinventory. The rules engine could allocate 10 of Lot A from subinventory EACH and 10 of Lot B from subinventory STORES.

- 13.** The Rules Engine suggest a putaway locator but commingle occurs error on dropping

Cost group commingling is supported in a single locator as long as there is some differentiable characteristic of the material other than only its cost group, such as its innermost LPN if packed, lot, serial, revision, or item number. Therefore, because Rules Engine based material movement generally occurs with LPNs, there is only one circumstance when a cost group commingling error could occur from a directed putaway.

If the destination subinventory is non-LPN controlled then the system attempts to unpack the LPN when the material is dropped. However, this implicit unpack transaction may remove the only characteristic (innermost LPN) that differentiated the material in transit from the material already in the locator. In this situation, the drop will fail and the user must select a different locator to put the material away to. Please refer to the *Oracle Workflow/Exception Management Technical Reference Manual* for further details on exception handling.

- 14.** Material not allocated in FIFO fashion even though the FIFO rule is used.

The way the system records the date that is used for FIFO depends on the setting of the profile option INV: FIFO for Original Receipt Date system chooses the oldest receipt date of lines with same item/sub/loc/lot/CG.

If the profile option is disabled, then the system records the receipt date as the earliest date at which that item / revision / lot / cost group was first received in that locator. Material movements that create new on-hand records reset the receipt date to the date at which the transaction occurred, so a subinventory transfer of material into a new locator sets the receipt date of that item in that new locator to be the transfer date.

If the profile option is enabled, then the system records the receipt date as the current date for transactions that create material, and as the receipt date on the on-hand record for material transfers. In this case, a subinventory transfer retains the original receipt date. To use true FIFO (to the extent that the system can distinguish the inventory), the profile option should be enabled, or set to Yes.

When the sort criteria Stock On-hand Receipt Date is used, the Rules Engine is looking at ORIG_DATE_RECEIVED, or if this is null, DATE_RECEIVED, in the on-hand record in MTL_ONHAND_QUANTITIES. DATE_RECEIVED is always the date at which that material was first received into the locator, while ORIG_DATE_RECEIVED is controlled by the profile option as described above.

Because material is consumed from MTL_ONHAND_QUANTITIES on a FIFO basis with regards to DATE_RECEIVED, there may be a mismatch between the consumption of the material via transactions and the allocation of the material by the Rules Engine. However, this potential mismatch only occurs when there are no other criteria beyond item, revision, lot, subinventory, locator, and cost group to uniquely track material, so there would be no way to indicate to the operator which material to select. With multiple MTL_ONHAND_QUANTITIES records, the system selects the oldest date from records with same item/rev/sub/loc/lot/CG.

15. After applying a patch, sales orders are backordered and/or put away fails.

When a rule is enabled, in the background, a PL/SQL package is generated with the rule restrictions and sort criteria. This is done so that pick release can run efficiently. The package includes SQL that references the tables and columns in the datamodel that are required for the rule. However, when patches are applied to the instance that change the data model, such as seed data changes or schema changes, these rule packages become invalid and must be recompiled. The Rules Engine will error and not allocate the move order if it attempts to apply a rule with an invalid package. (new paragraph) Run the concurrent request to regenerate all rules, available from Other ->Requests -> Requests -> Run -> Generate All Rules in the WarehouseManager responsibility. The PL/SQL package for all rules that are enabled will be regenerated by this request. Alternatively, there is an option in the Tools menu of the Rules form to regenerate the PL/SQLpackage for each rule individually.

Debugging Notes

Runtime Execution Trace

When you enable Runtime Logging from the logging preferences, the Rules Engine records a trace of all the strategies and rules that were evaluated, as well as which material or locators failed validation prior to coming to the final suggestion. Even when a move order is backordered, and no allocations are made, this data is recorded. You can view the data can be viewed in the Runtime Execution Trace window available from the desktop Warehouse Manager responsibility. The user-interface of this window and the type of information available is almost identical to that available in the Rules Engine Simulator. See: Explaining the WMS Rules Engine Simulator, *Oracle Warehouse Management User's Guide*.

Debug Message from the Rules Engine

The Warehouse Management Rules Engine records debug locations through the AOL Logging system. The debug messages record which rules and strategies were used to allocate and any reasons why allocation could not occur. This is the first tool Oracle Support and Development use to debug a TAR.

Logging of debug messages only occurs when logging is turned on for the rules engine. To turn on logging, you need to access the Debug Log Preferences screen.

In the window, make sure the Runtime Logging Enabled check box is checked. Set the logging level to Statement. Debugging messages are by default stored in the database. This messages can also be printed out to a file. Having the debug messages in a file is also helpful for Oracle Support. To print to a file, specify the path and the filename in the Filename field. The file will be created on the same machine as the forms server, and the forms server must have write access to that directory. To record only Warehouse Management debug messages, enter `wms.plsql.%` in the Modules Enabled field. Once you save your logging preferences, you must login again or change your responsibility in order for the preferences to be recognized.

If you do not log to a file, you can view the debug messages by navigating to the Debug Log Display screen.

Debugging slows down performance of the Rules Engine, so you should enable debugging only when you need it.

Frequently Asked Questions

1. When are picking/put away rules used?

The picking and put away rules engine is used for every move order within Warehouse Management-enabled organizations. This includes manual move orders, replenishment move orders, and sales order staging move orders. This also includes move orders which are created in the background via the mobile LPN put away page.

2. When are cost group rules used?

All material in the warehouse has a cost group. Therefore, the cost group rules are used whenever new material, or material that does not already have a cost group, is received into inventory. This occurs on miscellaneous receipts, purchase order receipts, RMA receipts, WIP completions, and WIP component returns, for instance.

3. When are task type rules used?

All tasks that are dispatched must have task types, and therefore use the task type rules. This includes replenishment, picking, and requisition move order tasks.

4. When are operation plan rules used?

Operation plan rules are used to assign an operation plan to sales order picking tasks. They are not used for other types of tasks.

5. When are label format rules used?

Label format rules are used for every label print request here the label format is not already specified by the user. This includes manual, user-triggered print requests, as well any labels that are triggered by transactions. To setup label formats and printers, see the *Oracle Warehouse Management User's Guide*.

6. How is the appropriate staging lane selected?

The put away locator for a sales order staging transfer is always a staging lane. The staging lane is selected by any dock door appointments, or by the default staging lane indicated on the pick release window or on the Shipping Parameters window. At a minimum, the Shipping Parameters window must have a staging subinventory defined. If no locator is defaulted, however, the Rules Engine can be used to select the best staging lane from the defaulted staging subinventory based on any number of criteria, such as freight carrier, ship method, or customer specific lane.

The Rules Engine is always used to validate the staging lane, regardless of how the lane was initially suggested. The Rules Engine verifies that the lane is valid based on any rule restrictions in the applicable strategy, and also checks staging lane material status and capacity.

7. Can the Rules Engine overallocate?

The Rules Engine cannot overallocate material in Warehouse Management. The Rules Engine allocates the quantity indicated on the order line, or less if some quantity needs to be backordered.

8. What does the Allocate Serial Numbers check box on the Inventory Organizations window do?

When this check box is checked, the rules engine suggests which serial numbers the operator should pick. When the check box is not checked, the rules engine just suggests the revision, lot number, subinventory, locator, and quantity for the material to be picked, and the operator enters the serial numbers during pick confirm. If serial allocation is turned off, the Rules Engine does not direct operators to serials with a material status that disallows picking or to serials that do not match any serial attribute (or other serial specific fields) specified in the rule restrictions. Enabling suggestions of serial numbers could result in poor performance, so the check box should be set only in certain business scenarios.

9. What if the contents of an LPN require put away to different locations?

It could be that the contents of an LPN must be put away to different locators. For instance, an LPN might contain two different items that need to go into different locators. Or an LPN may contain different lots of the same item, where the lots have different material statuses and the put away rule directs material to a locator of like material status. The system directs the operator to put away each content item, revision, and lot in the license plate separately.

10. How do consistency requirement, pick UOM, and sort criteria interact?

Consistency requirements are always maintained regardless of sort criteria or pick unit-of-measure. If the allocation mode No LPN Allocation, Prioritize Pick UOM is used, then the pick unit-of-measure of the locator is considered more important than sort criteria when choosing which material to pick. Sort criteria are still used to determine which material to pick, but only among locators that have the same pick unit-of-measure. If the allocation mode No LPN Allocation is used, then the sort criteria take priority over the pick unit-of-measure of the locator. Pick unit-of-measure is still used, but only to choose among material for which the sort criteria does not differentiate.

11. What rules and strategies come seeded?

The application has several common picking and put away rules and strategies seeded and ready for use. The strategy search order and strategy assignments still must be defined. Note that seeded rules and strategies cannot be disabled or modified, but can be copied and the copies can be modified. These picking and putaway rules and strategies are seeded in the application and do not depend on any organization or installation specific data. The list of seeded rules and strategies can be found in Appendix B.

12. What if only one range parameter is specified in an effective date?

The effective dates, assigned to rules within a strategy and strategies within a strategy assignment, have two optional fields for all date type except date type of Always. If both fields are entered, then the effective date is the range indicated, including the two endpoints. However, if only one parameter is entered, then the date range is treated as effective only up to, or effective beginning at that date, and ending at the end of the sequence for cyclical date types.

Example: Date type of Full Date, date range of 1/1/2000 - 12/31/2000 means the effective date is every day in the year 2000. If only 1/1/2000 is indicated in the From field, then the effective date begins on the indicated date, and continues indefinitely. Similarly, if only 12/31/2000 is indicated in the To field, then the effective date ends on the indicated date, and is applicable for all dates prior to that date.

Example: Date type of Day, date of Tuesday indicated on the From field but the To field left blank, assuming the week is defined as beginning on Monday, means that the effective date is from Tuesday to the end of the date type cycle, Sunday.

If both date parameters are left blank, then the date type acts as if Always were indicated.

13. How do the Oracle Inventory allocation rules relate to Rules Engine based allocation?

Oracle Inventory allocation rules are not used when Warehouse Management is enabled for an organization. However, Oracle Inventory allocation rules can be modeled with the Warehouse Management Rules Engine if the warehouse needs to maintain these allocation rules.

14. What are the differences in transactions when LPNs are allocated?

When an allocation has been made to the LPN detail level, some features of tasks behave differently. These are covered in greater depth in the WMS Users Guide, but a brief list of the differences is as follows:

- Transactions that invalidate the allocation, such as moving an allocated LPN to a different locator, are prevented
- Cartonization is skipped when an entire LPN is allocated, but is still performed if only part of an LPN is allocated, assuming that cartonization is setup and enabled for the subinventory
- Tasks that allocate LPNs are not merged for bulk picking, though they may still be split based on equipment capacity
- Allocations for different LPNs are always split into different tasks so that there is either zero or one allocated LPN per task
- Allocations are visible on the desktop Transact Move Order window, but they cannot be updated if an LPN has been allocated

15. How does the Rules Engine know when an LPN is full?

The Rules Engine does not have a concept of when an LPN is full or not. However, when using the allocation mode Allocate Entire LPNs Only, the Rules Engine considers only LPNs which can be entirely consumed by the allocation. So a pallet that is only half full based on the capacity of the pallet could be allocated in this mode, so long as the entire half pallet can be consumed. Note that it is possible, with user-defined expressions, to also encode that the LPN must be “full” in order to allocate it.

Warehouse Management Shipping Transactions

Topics covered in this chapter include:

- [System Shipping Transactions](#) on page 14-2
- [Overview of Shipping Transactions](#) on page 14-2
- [Implementation](#) on page 14-11
- [Common Problems](#) on page 14-13
- [Debugging Notes](#) on page 14-15
- [Frequently Asked Questions](#) on page 14-18

System Shipping Transactions

WMS Shipping Transactions

Oracle Warehouse Management system (WMS) provides a full-suite of tools that enable a warehouse to effectively manage outbound shipments. Several methods to ship are available, which differ primarily in the level of shipment planning they utilize. Shipments can be made on the mobile device for individual order lines, for order lines grouped into a common destination, and for entire trips consisting of multiple deliveries.

Shipment confirmation is the final step in the outbound process. The outbound flow includes the following steps, each is discussed in other technical manuals:

- Pick release & material allocation
- Cartonization
- Task type assignment
- Task dispatching and pick confirmation
- Shipment confirmation

This chapter describes in detail the functionality of the different shipment confirmation types, and serves as an implementation guide. It contains a list of solutions to common problems and troubleshooting information, and a list of frequently asked questions.

Overview of Shipping Transactions

Shipping is the point at which picked material leaves the warehouse for an order. All material is packed into containers, uniquely identified by a license plate number (LPN), at the pick confirmation step. Shipment confirmation is then simply confirming that all the LPNs picked for a staged for a particular order or trip are loaded onto a truck.

Definitions

Before continuing further, some terms must be more clearly defined. The shipping terms are the same definitions used by Shipment Execution with release 11i, so detailed explanations, including setup information, can be found in the *Oracle Shipping Execution User's Guide*.

- **Delivery-** A delivery is a collection of order lines that are going to the same customer and delivery address. A delivery can have many different items on it, and can span multiple orders so long as the orders have the same customer and delivery address. One order can be split among different deliveries. For example, a customer, Business World, placed two orders on different days for its Redwood Shores location, each with several different items on it. Even though the orders were placed at different times, they have the same requested delivery date so they were manually grouped into a single delivery so that they could be shipped together. Business World placed a third order for its San Jose location; this must be on a different delivery because the delivery address is different. A third delivery was created for the first order line on a large order placed by a different customer.
- **Trip-** A trip is a collection of deliveries that will be shipped on the same outbound truck. For example, all three deliveries will be leaving the warehouse on the same truck, so they are all assigned to a single trip.
- **Trip Stop-** A trip stop is created for each pickup and delivery address on the trip. For example, the trip above has four trip stops:
The initial pickup stop at the warehouse
The three drop-off stops for each of the three deliveries
- **Staging Lane-** A staging lane is a special type of inventory locator where picks are dropped off. A warehouse can have multiple staging lanes, which model the physical lanes in the warehouse. Picked inventory is temporarily stored here until the actual ship confirmation removes it from the staging lane and issues the inventory.
- **Dock Door-** A dock door is a special type of inventory locator where LPNs are loaded. A warehouse can have multiple dock doors, which model the doors in the warehouse. All LPNs in a dock door will be shipped together once all validation has been performed.
- **Ship Set-** A ship set is a group of order lines, linked by a common number, for which the entire quantity must be shipped together. Partial shipments of ship sets are not allowed.

Shipment Confirmation

The actual shipment confirmation transaction impacts many entities in the application, spanning Order Management, Shipping Execution, and Inventory. In Order Management, the order line is updated as shipped. In Shipping Execution, the delivery is closed and the pickup trip stop is closed. In Inventory, the on-hand

balance is decremented, serial numbers are issued (and also generated, for serial at sales order issue items), and the LPN is issued.

Shipment Types

Four different types of shipment confirmation can be performed on the mobile device with Oracle Warehouse Management:

- Quick Ship enables the operator to confirm an entire delivery by entering only the delivery number. It provides the fastest method of shipping, and only requires delivery planning. However, all the items must be staged prior to Quick Ship, and it does not allow shipment of serial at sales order issue items.
- LPN Ship does not require any shipment planning such as deliveries or trips, although it provides additional functionality if deliveries are created. With LPN Ship, the operator confirms which LPNs are to be shipped. If deliveries are used here, the system will prompt the operator for any missing LPNs or missing items.
- Dock Door Ship allows for loading of an entire trip. It includes the same exception handling as LPN Ship, and also provides for dock door appointment scheduling and system-directed staging in the most appropriate staging lane. With Dock Door Ship and LPN Ship, multiple users can load LPNs onto a dock door, and then all LPNs are ship confirmed with a single transaction.
- Direct Ship allows for shipments to be performed without the overhead of pick release and pick confirmation. This greatly streamlined process is most commonly used in ATO environments, where material is manufactured, reserved, and staged for specific sales orders and therefore, the picking and task management processes are not necessary.

All four methods enable the operator to enter any shipment-specific information, such as shipment gross weight, waybill number or shipment method. This data is posted to the shipment transactions form for management and reporting purposes.

LPN Ship and Dock Door Ship offer an additional mode for interfacing with a third party shipping solution. A verification mode provides the same interface, validation, and error-checking as the actual shipment page. Once the validation has been performed, however, instead of shipping the LPNs, the LPNs are returned to their pre-loaded state for the third party package to ship.

Quick Ship

Quick Ship is used to ship an entire delivery without confirming the individual LPNs. It requires that deliveries be set up, as it is triggered by the delivery number.

All the order lines on the delivery must be staged prior to performing an Quick Ship. The statuses of the staging subinventory, locator and the lots and serials contained in the delivery should allow the shipment confirmation. Also, no items that are serialized at sales order issue may be on the delivery. Any ship sets must be completely contained within the single delivery or the delivery will not be allowed via quick Ship. After entering the delivery number, the operator will be notified of any of the issues above. After the delivery number is entered, the screen where additional (optional) information is entered appears, and the shipment is complete.

Quick Ship provides the operator with a return option, which releases the reservations on all items that are contained on a delivery. This is the quickest way to cancel an outbound process if the customer order is canceled after all lines have been staged for shipping. This return to stock option does the following:

- Change the delivery line status from Staged to Ready to release
- Disassociate the LPNs with the delivery lines
- Unassigns the delivery detail lines from the delivery
- Deletes reservations for the material

At this point, the Rules Engine can be invoked via a manual putaway to put the LPN into the best storage location.

LPN Ship

LPN Ship is used to individually confirm the shipment of all LPNs on a delivery, or to create new deliveries and confirm the shipment of LPNs that do not yet have a delivery. An operator begins by scanning the dock door that the LPNs will be shipped out of. Then each LPN to be shipped is scanned. If the LPN cannot be ship confirmed because of a material status assigned to a lot or serial contained in the LPN or the staging subinventory and locator, the operator will be informed of this. Multiple operators can load LPNs for LPN ship to the same door. Loading the LPN changes the LPN context to Loaded to Dock. Operators enter serial at sales order issue information when an LPN that contains serial at sales order issue items is scanned. At this point, serial attributes (if applicable) are also given to the serials.

At any point during the process, the operator can check for missing LPNs or missing items required at any dock door. However, when the operator tries to continue to the next step, shipping all loaded LPNs, the system will not let the operator continue if there are missing LPNs or missing items. Missing LPNs are LPNs that have been staged, but not yet loaded, while missing items are lines which have not yet been pick confirmed or pick released. This check is performed for all deliveries that are loaded to the selected door. Note that if trip planning is used, but

LPN Ship is used for shipment confirmation, the check will be extended to all deliveries that are attached to any trip that is currently loaded at that dock door. The operator has the option of unassigning missing items from the delivery and continuing with the transaction, or continuing with loading but waiting for the missing items. Missing LPNs cannot be removed from the delivery via the mobile device; they must be removed on the desktop. When Ship is selected, the system checks for missing LPNs, items, and ship sets, verifying that the entire ship set is present. Operators will be informed with all the ship set names which are partially loaded.

Once the validation performs successfully, the deliveries and trips are created for LPNs that do not already have deliveries created using the delivery grouping rules. For each delivery that is at the dock, the operator can optionally enter the shipment weight, shipment method, waybill number, and other delivery specific information. This step completes the shipment confirmation process for LPN Ship.

Dock Door Ship

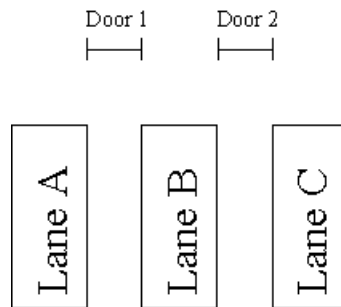
Dock Door Ship is used to load and ship entire trips. Dock Door Ship uses a dock schedule and dock door appointments to intelligently suggest the best staging lane for the material. To take advantage of these features, the trip and a dock door appointment must be set up prior to pick release. The process flow, and the required setup for Door Ship will be discussed. The staging lane selection algorithm will also be described in greater detail. The actual ship confirmation user-interface is nearly identical to that of LPN Ship, but will also be discussed in further detail.

Required Setup

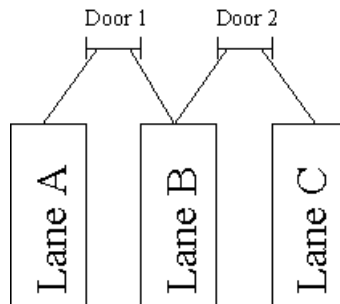
Prior to creating appointments for dock doors, the dock doors and associated staging lanes must be setup. Both dock doors and staging lanes are modeled as locators; the only difference between these locators and standard locators is a Locator Type field on the locator definition. For more information on setting up dock doors and staging lanes, see the *Oracle Warehouse Management User's Guide*.

After the special dock door and staging lane locators have been setup, the staging lane to dock door relationship must be established. A lane can be associated to multiple doors, and a door can have multiple lanes. This setup is done using the desktop form Dock Door to Staging Lane Assignment.

Example: Suppose there are three parallel staging lanes and two dock doors, as shown in this bird's-eye view of the shipping area of a warehouse:

Figure 14–1 Shipping Area Layout

One possible assignment is that the central lane is used for both dock doors, while the outer lanes are dedicated to their corresponding doors, so that each dock door has two lanes associated with it:

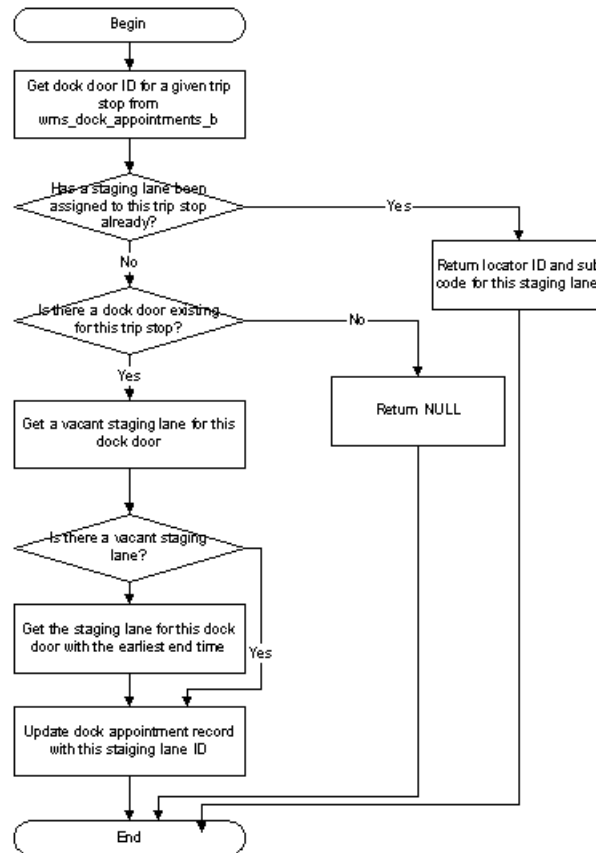
Figure 14–2 Shipping Area Dock Door / Staging Lane Assignments

As appointments are made with dock doors, after this association, the system knows which staging lanes feed to which dock doors.

Dock Door Appointment

For the system to suggest the appropriate staging lane for the material, a dock door appointment must be setup for the trip prior to pick release. After the trip has been created (see the *Oracle Shipping Execution User's Guide* for additional information on creating trips), an appointment is made for the trip with a particular door using the Dock Appointment form. Repeating appointments can be setup here as well.

Staging Lane Selection At pick release, the system checks the trip for dock door appointments, and assigns a staging lane to the pickup trip stop. The entire decision process is as follows:

Figure 14–3 Staging Lane Selection Process

Direct Ship

Direct Ship is typically used in ATO environments where specific LPNs are manufactured, reserved, and staged for specific outbound orders, and the pick release and pick confirmation process do not provide additional value. Any available LPN that resides in inventory can be selected for use in Direct Ship. Ship confirmation from Direct Ship automatically updates the delivery details from Ready for Release to Shipped, and closes any related delivery or trip stops.

Because Direct Ship can be performed directly on the mobile device without any manager intervention to run pick release and without any qualification-based task management, care should be taken to restrict access to Direct Ship in organizations where it will not be used. To that end, an organization parameter must be explicitly enabled to allow mobile users to access the Direct Ship page; failure to enable that parameter disables Direct Ship for the entire organization. In addition, Direct Ship is subject to the standard responsibility-based security, in that the mobile page can be removed from the menu option or selectively provided just to those users that require access and have been trained to use to Direct Ship.

An operator begins direct ship by scanning the dock door which will be loaded. Then each LPN to be shipped is scanned. At this point, material status is verified and serial numbers for serial at sales order items are collected. After entering the LPN, the operator will enter the sales order number and sales order lines for which the LPN will be shipped. At least one sales order line must be entered for each item in the LPN. Both under and overshipment are allowed. If a sales order line only partially meets the order line quantity, the order line will be closed if it is within the undershipment tolerance, or otherwise will remain open. If the quantity on a sales order line does not wholly consume the quantity on the LPN, overshipment tolerances will be checked, but if there is still additional quantity in the LPN that cannot be consumed even by applying these tolerances, the system will prevent the operator from loading the LPN without entering additional order lines to consume the extra LPN quantity.

However, if the LPN were reserved to particular sales orders in advance of attempting to load it for Direct Ship, then the user need not re-enter the sales order information. Rather, the sales order fields will be hidden from view. Note that if the LPN is only partially reserved, the user will be given the option of entering additional sales order lines or attempting to use the additional quantity for overshipment. As above, if the overshipment tolerances cannot wholly consume the LPN, the user will be unable to load the LPN. LPN reservations can be made manually in the Reservations form, or systematically via an LPN-based completion from a job or schedule that was reserved to a sales order, as is the case for ATO flows.

The same validation described for LPN Ship with respect to checking for missing items and missing lines applies to Direct Ship as well.

Direct Ship can be assisted by use of the Scheduled Shipment Report, which shows all shipments scheduled to be shipped in the user-specified time horizon of a particular sales order, delivery, or trip. In addition, this report can optionally include many attributes entered on the sales order line specific to ATO manufacturing environments.

Shipping Process Flow

The trip now has a staging lane and a dock door. The actual shipment loading is identical to the flow for LPN Ship, except that the process is initiated by the selection of a dock door with appointment, rather than by selecting any dock door. So rather than displaying all available dock doors, the operator will only be able to select from dock doors that have open trips during the current time.

From here, the user-interface is identical to that in the LPN Ship. One or more operators can load LPNs on that trip, and missing LPNs or missing items can be viewed at any point. Because all outbound transactions with this process are assigned to a trip, the validation is also performed at the trip level. Once the validation is completed, the Ship button enables the operator to enter delivery specific details, and then the shipment is complete: LPNs are issued, inventory is decremented, order lines are completed, and the departure trip stop is closed.

Verification Mode

For implementations that integrate with third-party shipping solutions, other software packages may perform the issue, decrement the inventory, and close the order lines, as well as perform other updates. For these situations, Oracle WMS should not change the status of any entity, though the validation for material status, missing items, and missing LPNs, and the serial and attribute entry for serial at sales order issue items, may still be necessary. For these cases, both the LPN Ship and the Dock Ship forms have a verification-only mode. The user-interface is identical to the actual shipping mode with the following exception: instead of selecting the Ship button when complete, the operator selects Verify. When Verify is selected, the system checks for missing items, missing LPNs and ship sets. If everything is in place, then the LPN context is reverted back to Resides in Inventory from Loaded at Dock, and the shipment is ready for third-party shipping. By returning all LPNs to their previous state, the validation step becomes optional and the decision to use it becomes part of the business process.

Implementation

Setting Up Windows

There are four distinct types of shipping: Quick Ship, LPN Ship, and Dock Ship. LPN Ship and Dock Ship have a shipment mode and a verification-only mode, as described earlier. These combine to give six different flavors of shipment confirmation on the mobile. The Quick Ship and Direct Ship modes have their own

page, but the other modes are setup using different form function parameters of the same page. The forms and the parameters are included below:

Table 14–1 Mobile Shipping Forms and Parameters

Mode	Form	Parameters
Quick Ship	Mobile Quick Ship	None
LPN Ship	Mobile LPN Ship Confirm	DOCK=N VERIFY_ONLY=N
LPN Ship Verification	Mobile LPN Ship Confirm	DOCK=N VERIFY_ONLY=Y
Dock Door Ship	Mobile LPN Ship Confirm	DOCK=Y VERIFY_ONLY=N
Dock Door Ship Verification	Mobile LPN Ship Confirm	DOCK=Y VERIFY_ONLY=Y
Direct Ship	Mobile Direct Ship	None

Note that the default form function parameters are VERIFY_ONLY=N and DOCK=N, giving the LPN Ship page.

All the shipment modes support entering serial numbers for serial at sales order items except Quick Ship. Serial numbers for these items can be entered either individually, or by specifying a range. This functionality is controlled by a form function parameter called SHIP_SERIAL_TYPE, that can take on one of two values: RANGE, and INDIVIDUAL.

Transaction Processing Modes

After the shipment confirmation is submitted, there are two process steps. First, the delivery status, delivery line status, and pickup stop status are immediately updated. This prevents the order from being shipped repeatedly. A concurrent request is spawned which is submitted to the Inventory / Order Management interface. This concurrent request updates the items’ on-hand quantities, reservations, and LPN context, as well as the order line status. For this reason, transaction processing mode, set via profile options for other forms, is irrelevant to the shipping forms; shipping transactions are always processed as a combination of online and immediate concurrent processes.

To process the inventory interface, the inventory concurrent manager the Inventory Remote Procedure Manager must be running.

Scale Integration for Weight

The delivery gross weight can be entered before ship confirmation. The weight can be entered manually, or can be captured by an integrated scale. To the mobile device, the scale would essentially appear as just another input device, triggered when the user enters the weight field. Please refer to the *Oracle Mobile Application Developer's Guide* for details on integrating with scales or other data collection methods.

Common Problems

1. Invalid material status message

Shipping transactions honor material status: if any material status that disallows shipment confirmation applies to the material under shipment, the transaction cannot be completed. Material status can be assigned to a subinventory, locator, lot number, or serial number, so verify the material statuses of the staging lane and the subinventory of the staging lane, as well as all the lots and serials of the LPNs being shipped. With LPN Ship and Dock Door Ship, the material status check for the LPN is made immediately after the user exits the LPN field, and the LPN will not be accepted if the material status is invalid. With quick Ship, the material status check is made for all LPNs tied to the delivery immediately after the user exits the delivery field.

2. LPN not available to ship

There are several reasons that an LPN may not be in the list of values when shipping.

First, check that the status of the delivery line with which the LPN is associated is Staged; this can be verified on the Shipping Transactions form. If the line is Released to Warehouse, that indicates that the line has not yet been pick confirmed. It may only be pick loaded, for instance. Only staged LPNs are available for shipment.

Next, verify that the LPN under consideration is assigned to the trip that was selected, if using Dock Door Ship. The form limits the operator to only loading LPNs associated with the selected trip. However, there may be multiple overlapping trips scheduled for the same dock door in which case the operator may mistakenly choose the incorrect trip.

Verify that the delivery status is Open or Packed. This can also be checked on the Shipping Transactions form. Finally, make sure that the LPN is not already loaded or shipped by checking the LPN context. The LPN context can be

verified on the desktop via the Material Workbench, or on the mobile via LPN Inquiry.

3. LPN not available to ship for Direct Ship

Only LPNs that reside in inventory are available to ship with Direct Ship. Furthermore, the LPN must be available. It cannot be allocated for a move order, nor can it be reserved to any demand other than the sales order for which it is about to be shipped.

4. Sales order or order line not available for Direct Ship

Sales order or order line not available for Direct Ship Only booked and scheduled sales orders that have not yet been pick released are eligible for Direct Ship. That means that the associated delivery details must be in status "Ready to Release", and not "Released to Warehouse" or "Backordered". In addition, verify that the LPN being loaded contains the item on the sales order line you are trying to enter.

5. Unable to access Direct Ship page

Because Direct Ship transactions can be performed without any manager direction such as that required to trigger Pick Release for LPN Ship, and because shipment transactions are not easily reversed and trigger external events such as billing and invoicing, access to Direct Ship is restricted by an Organization Parameters flag that comes seeded disabled. Unless this flag is enabled, the Direct Ship mobile page cannot be accessed.

6. Delivery not in list of values for quick ship

Verify that the delivery status is Open or Packed. This can also be checked on the Shipping Transactions form. Also verify that the delivery contains at least one line that which is staged, as deliveries which do not have any lines staged cannot be ship confirmed.

7. Dock door not in list of values for dock door ship

The most common cause for this issue is that the current time is outside the appointment time window. The Dock Door Ship page limits the user to selecting only those trips for which the appointment is current. However, if an appointment was missed and the truck is arriving late, the appointment time can be revised on the desktop.

Also verify that the trip status is open on the Shipping Transactions form.

8. Missing item

A missing item message indicates that an item that is on the trip or delivery has not yet been pick confirmed. It may still be loaded on an operator's equipment and not yet dropped, or it may have been backordered. Check the line status of the missing item in the Shipping Transactions form. Query by the trip or delivery in question, and check for any status other than Staged; these would be considered missing items. Missing items can be unassigned from the delivery or trip by the operator on the mobile or on the desktop.

Also, because a dock door can have multiple deliveries staged to it, the missing item message may refer to a different delivery that has been loaded but not yet shipped. Verify the delivery number displayed on the missing item page.

9. Missing LPN

A missing LPN message indicates that an LPN that has been staged for a trip or delivery has not yet been loaded. The operator may simply have missed it on the staging lane, or it may have been staged to another staging lane. Note that even if the LPN has been staged to a different lane, it can still be loaded using the ship confirm process.

Also, because a dock door can have multiple deliveries staged to it, the missing LPN message may refer to a different delivery that has been loaded but not yet shipped. Verify the delivery number displayed on the missing LPN page.

10. Unable to unload LPN from dock door from Unload page

LPN load transactions can be reversed by using the LPN Unload transaction. However, there are two different Unload screens to access depending on the mode in which the LPN was loaded. If the LPN was loaded using Direct Ship, use the LPN Unload page available in the Direct Ship menu option. If the LPN was loaded using LPN Ship or Dock Ship, use the LPN Unload page available from the same menu where the load page was accessed.

Debugging Notes

All mobile shipping related Java files are in the same package `oracle.apps.inv.wshtxn.server`. The server side code is in `INVPSHPS/B.pls` and `WMSPSHPS/B.pls`. There are several ways to debug.

For Java code, there are several log files for the mobile transactions. See the mobile installations guide to find the log files. The log files will indicate where the error or exception occurs and the problem is. Then trace back to the Java files to find out what exactly the issue is.

For concurrent request to ship confirm, turn on the profile OE:DEBUG to view details in the request log files. The log file will indicate how many lines are inserted to the MTL_TRANSACTIONS_INTERFACE table and if the INV and OM interfaces are successful. If it fails in the inventory transaction manager, the message 'MTL_ONLINE_TRANSACTION_PUB.process_online returns false' will be logged in the log file. A detailed error message should also be displayed.

For Inventory Transaction Manager, set up all the following three profiles to see the log files:

Table 14–2

Profile	Setting
INV:Debug Trace	Yes
INV: Debug file	provide the complete path for the log file
INV:Debug Level	set a value larger than 1

Trip Verification

This query the dock door appointment from the trip, the dock door id, dock door name, appointment time frame and pick up stop id and status can be gotten. The status of pick up stop should be OP (open) and the appointment time frame should fall into the current time. Then the trip can be loaded from the appointed dock door.

```
select distinct wda.dock_id,
               milk.concatenated_segments DOCK_DOOR_NAME,
               wda.start_time,
               wda.end_time,
               wda.trip_stop pickup_stop_id,
               wts.status_code pickup_stop_status
from wms_dock_appointments_b wda, mtl_item_locations_kfv milk,
wsh_delivery_legs wdl, wsh_Trip_stops wts, mtl_parameters org
where wda.dock_id = milk.inventory_location_id
and wda.organization_id = milk.organization_id
and wda.trip_stop = wdl.pick_up_stop_id
and wdl.pick_up_stop_id = wts.stop_id
and wts.trip_id = &TRIP_ID
and org.organization_id = milk.organization_id
and org.organization_code = &ORGANIZATION_CODE
```

All staged LPNs

This query returns all the LPNs in the current organization for a given pick up stop which are not yet loaded. The query can be used to check why one particular LPN can't be loaded. This query can be manipulated to fit your needs, for example the `released_status` and `inv_interfaced_flag` can be changed to different values to satisfy different requirements.

Display LPNs in organization staged but not loaded

```
select distinct wlpn.license_plate_number Master_lpn_name,
               nvl(wda.delivery_id,0)
from wsh_delivery_details wdd, wsh_delivery_assignments wda,
wms_license_plate_numbers lpn,
wsh_delivery_details wdd2, wms_license_plate_numbers wlpn
where wdd2.delivery_detail_id = wda.parent_delivery_detail_id
and wdd.delivery_detail_id = wda.delivery_detail_id
and wdd2.lpn_id = lpn.lpn_id
and lpn.outermost_lpn_id = wlpn.lpn_id
and wlpn.lpn_context <> 9
and lpn.organization_id = &ORGANIZATION_ID
and wdd.released_status = 'Y'
and (wdd.inv_interfaced_flag <> 'Y' or wdd.inv_interfaced_flag is null )
```

Display LPNs in organization staged but not loaded for particular trip stop

```
select distinct wlpn.license_plate_number Master_lpn_name,
               wnd.delivery_id,
               wnd.name delivery_name
from wms_license_plate_numbers lpn, wms_license_plate_numbers
wlpn, wsh_new_deliveries wnd, wsh_delivery_legs wdl,
wsh_delivery_details wdd, wsh_delivery_assignments wda,
wsh_delivery_details wdd2
where wdl.pick_up_stop_id = &PICK_UP_STOP_ID
and wdl.delivery_id = wnd.delivery_id
and wnd.status_code in ('OP', 'PA')
and wnd.delivery_id = wda.delivery_id
and wdd.delivery_detail_id = wda.delivery_detail_id
and wdd2.delivery_detail_id = wda.parent_delivery_detail_id
and wdd2.lpn_id = lpn.lpn_id
and lpn.outermost_lpn_id = wlpn.lpn_id
and wlpn.lpn_context <> 9
and wdd.released_status = 'Y'
and (wdd.inv_interfaced_flag <> 'Y' or wdd.inv_interfaced_flag is null )
```

View Loaded LPNs

Query on what are loaded in a given dock door currently. Here we have two cases. One is for dock loading (based on dock door and trip) and the other is for LPN Ship (only based on dock door). All the related information will be retrieved from WMS_SHIPPING_TRANSACTION_TEMP which includes trip, delivery, delivery detail, and LPN information.

Display loaded LPNs when using Dock Ship

```
select milk.concatenated_segments DOCK_DOOR_NAME,
       wstt.delivery_name,
       wstt.delivery_detail_id,
       wstt.parent_lpn innermost_lpn_name,
       wstt.outermost_lpn master_lpn_name
from WMS_SHIPPING_TRANSACTION_TEMP wstt,
     mtl_item_locations_kfv milk
where wstt.organization_id = &ORGANIZATION_ID
and wstt.trip_id = &TRIP_ID
and wstt.dock_door_id = milk.inventory_location_id
and wstt.organization_id = milk.organization_id
```

Display loaded LPNs when using LPN Ship

```
select wstt.trip_id,
       wstt.delivery_name,
       wstt.delivery_detail_id,
       wstt.parent_lpn innermost_lpn_name,
       wstt.outermost_lpn master_lpn_name
from WMS_SHIPPING_TRANSACTION_TEMP wstt,
     mtl_item_locations_kfv milk
where wstt.organization_id = &ORGANIZATION_ID
and wstt.dock_appoint_flag = 'N'
and wstt.dock_door_id = milk.inventory_location_id
and wstt.organization_id = milk.organization_id
and milk.concatenated_segments = &DOCK_DOOR_NAME
```

Frequently Asked Questions

1. How does the auto-pick confirm option affect the shipping process?

Auto-pick confirmation can be enabled for the organization, or it can be set at the time of pick release. When this option is enabled, the system automatically confirms all the suggested transactions without requiring individual confirmation from users.

All tasks picked via the mobile device must be packed into LPNs as part of pick confirmation, but all tasks that are auto-pick confirmed will be staged loose without any LPN association. Ship confirmation using either LPN Ship or Dock Ship requires that staged lines be packed in LPNs, so auto-pick confirmed lines cannot use either of these shipment methods. However, the mobile Quick Ship process does not require any reference to LPN, and so the Quick Ship method can still be used when auto-pick confirm is used. Also, desktop shipping via the Shipping Transactions Form can also be used when auto-pick confirmation is used. More information about the desktop shipment confirmation process can be found in the *Oracle Shipping Execution User's Guide*.

2. What documentation is generated during shipment confirmation?

Shipment confirmation with WMS supports printing the same documents previously printed from the desktop. For details on the documents and how to setup document printing, refer to the *Oracle Shipping Execution User's Guide*.

In addition, label printing is supported at shipment confirmation. Please refer to the *Oracle Warehouse Management User's Guide* or the Label Printing chapter of this guide for more detailed information.

3. Exactly which of the loaded LPNs are shipped when the user selects Ship?

Multiple users can be loading LPNs to a single dock door. The loaded LPNs remain staged at the dock door until all missing items, missing LPNs, as incomplete ship set problems have been either remedied or overridden. Therefore, it is possible for one operator to be tracking down missing LPNs for a delivery that has been loaded to a dock door, while another operator is loading a new delivery to the same dock door. Selecting Ship on the mobile attempts to ship all LPNs that were loaded using the method the operator is currently in.

Specifically, if one user has loaded a dock using LPN Ship, and another user has loaded the same dock using LPN Ship, then if any user presses Ship from the LPN Ship page for that dock door, then the system will perform error checking for both deliveries and attempt to ship both deliveries. However, via the Dock Ship page, the dock door will appear empty.

If, however, one user has loaded a dock using LPN Ship, and another user has loaded the same dock using Load Dock, then pressing Ship from the LPN Ship page will only affect the delivery loaded via LPN Ship, and similarly, pressing Ship from the Load Dock page will only affect the trip loaded via Load Dock.

4. How can I tell when a delivery or trip has been fully loaded?

There are several ways to determine when a trip or delivery has been fully loaded. The simplest and quickest way is to select the Missing LPN or Missing Item button on the shipment page. Missing LPN will display any LPNs that have been pick confirmed and staged, but not yet loaded on the truck, for any deliveries or trips staged at that door, limited to deliveries or trips that have been staged with the same method. Missing Item will display any items that have not yet been pick-confirmed.

Note that while these checks can be initiated manually, they are performed automatically when the user chooses Ship, so that selecting Ship is another way to verify that the delivery or trip has been fully loaded. If it is fully loaded, the shipment will be shipped, while if it is not fully loaded the appropriate missing messages will be displayed.

Finally, a query can be performed on the Material Workbench on the desktop or via LPN inquiry on the mobile. However, to the list of LPNs that should be on a trip or delivery must be known to know which LPNs to perform the query on, and this in turn can be gathered from the Shipment Planning & Transactions form on the desktop.

5. Can a trip be shipped with LPN Ship?

A trip that does not have an appointment must be shipped via LPN Ship, while a trip that does have an appointment must be shipped via Load Dock.

6. Why can't an LPN be loaded to a particular dock?

The system prevents users from loading LPNs of a single delivery or a single trip to multiple different docks. Doing so would present a deadlock situation, in which each dock cannot be ship confirmed because each dock has missing LPNs at the dock door.

Warehouse Management Transactions

Topics covered in this chapter include:

- [Mobile Inventory Transactions](#) on page 15-2
- [Implementation](#) on page 15-7
- [Customization](#) on page 15-9
- [Common Problems](#) on page 15-14
- [Debugging](#) on page 15-16
- [Frequently Asked Questions](#) on page 15-16

Mobile Inventory Transactions

Warehouse management provides inventory transactions on a mobile RF device. It provides support for License Plate Numbers (LPNs) in all transactions. All transactions can be for either loose material or LPN triggered. LPN triggered transactions require less data entry because an LPN has its current subinventory, location, and item contents all associated with a single identifier. The benefit of an LPN triggered transaction is greater when it contains serial controlled items because the amount of data entry is greater.

Supported Transactions

Warehouse management supports two basic categories of transactions on the mobile device. These two transaction categories are differentiated by whether or not they have document tracking. These two categories deal with material movement: receipts, issues, and transfers. A third category of transactions, LPN transactions, includes miscellaneous pack and unpack transactions but does not receive, issue, or move material to different locators.

Non-Document Based Transactions

Miscellaneous receipts allow you to receive material without a purchase order number. Miscellaneous issues allow you to issue material without a sales order number. You can transfer Inventory organization items without using an Internal Requisition/Internal Sales Order through Direct Organization Transfers or In-transit organization transfers. Subinventory transfers allow you to transfer material to a different subinventory or locator a document number.

Document Based Transactions

Move Orders enable requisitioning and document tracking tool for material transfers within an inventory organization and for material issues. If material needs to be requested from another inventory organization, use internal requisition.

See Also

Overview of Inventory Transactions, *Oracle Inventory User's Guide*
Transferring Between Subinventories, *Oracle Inventory User's Guide*
Performing Miscellaneous Transactions, *Oracle Inventory User's Guide*
Inter-organization Transfers, *Oracle Inventory User's Guide*
Overview of Move Orders, *Oracle Inventory User's Guide*

Generating Move Order Requisitions, *Oracle Inventory User's Guide*

Performing Inventory Transactions with LPNs, *Oracle Warehouse Management User's Guide*

How to Perform a Miscellaneous LPN Issue, *Oracle Warehouse Management User's Guide*

How to Perform a Subinventory LPN Transfer *Oracle Warehouse Management User's Guide*

How to Perform a Direct Inter Organization Transfer, *Oracle Warehouse Management User's Guide*

How to Perform Move Order Transactions, *Oracle Warehouse Management User's Guide*

LPN Transactions

LPN transactions allow movement of material in to and out of LPNs and enable you to manually create nested LPNs. The available LPN Transactions are as follows:

- Pack transaction- The Pack transaction enables you to pack loose material into an LPN.
- Consolidate transaction- The Consolidate transaction enables you to nest a child LPN inside a parent LPN.
- Unpack transaction- The Unpack transaction enables you to unpack either material or a nested LPN from a parent LPN.
- Split transaction- The Split transaction is essentially an Unpack and Pack combined together, creating a new LPN with some material from another LPN.
- Update LPN transaction- The Update LPN transaction enables you to update the weight, volume, and container item of an LPN. As in all other transactions, LPN transactions of lot, serial, or revision controlled material requires you to enter the item controls.

Pack

A pack transaction takes loose material and moves it into an LPN. You can use an existing LPN, or generate a new LPN in the following ways: with a hotkey, via a desktop concurrent request, or enter manually. If you use an existing LPN, the subinventory and locator of the material default from the current LPN location. A pack transaction does not change the on-hand or available quantity of the item. It

changes how much of the material is packed in LPNs and how much is loose within the locator.

Consolidate

The consolidate transaction packs one LPN into another LPN, and creates a nested LPN, or parent-child relationship. You can have an unlimited amount of nested LPNs. If you consolidate two existing LPNs, they must both exist in the same locator. However, you can use a new parent LPN (generated with a hotkey, entered manually, or pregenerated on the desktop) for nesting an existing LPN into an empty outer LPN.

Unpack

Use unpack to unpack any of the immediate contents of an LPN, including both items and other nested LPNs. Identify and enter the LPN to be unpacked which can, itself, be an inner LPN in a nested relationship. Like packing, unpacking does not change the on-hand or available quantity of the item, only how much of the item is packed in LPNs and how much is loose within a locator.

Split

A split transaction splits an existing LPN into two LPNs. A split transaction is an unpack and pack combined into a single transaction, though it is a separate transaction type. You can split the contents of an LPN into existing LPNs or into new LPNs.

Update

You can use LPN Update to change, any of the physical attributes of an LPN including the weight, volume, and corresponding units-of-measure. Furthermore, if the LPN is not associated with a container item, you can use LPN Update to make the association.

Bulk Packing

Bulk Packing allows you to specify a number of loose items or LPNs and automatically determine the number and type of containers / LPNs that this material should then be packed into. The system makes the container type determination using the cartonization process where predefined container load relationships and category-based container grouping are considered. See: [Warehouse Management Cartonization](#) on page 5-2. You can also specify a value for the level, which controls how many levels up the cartonization hierarchy the

system shuttlecock. LPNs will only be generated for the topmost level. Also, note that only LPNs that are also associated with container items to define the weight, volume, and dimensions of the container, can be bulk packed.

Transaction Features

Most transaction features supported on the desktop are also supported on the mobile device. In addition, some additional features which enable faster or more controlled data entry are included with the mobile user interface.

Defaulting Account and Type

Warehouse management supports user-defined transaction types defined for specific reporting needs. If a limited number of transaction types and accounts are used in an organization, you can define the menu structure so the transaction type and adjustment account default for the transaction through the menu definition.

Multiple Lots and Serial Range

Warehouse Management also supports transacting multiple lots in a single transaction, and generating new lots when receiving new material. You can perform receipt of serial controlled items by specifying either individual serial numbers or serial ranges. Transfers of serial controlled material is serial triggered, since a guaranteed range of serial numbers does not exist. Like lot numbers, you can generate serial numbers at receipt.

LPN Triggered Transactions

You can generate LPNs in new material receipts. An LPN can contain multiple serials, lots, or revisions of a single item, and a heterogeneous combination of items as well. The entire contents of an LPN are moved whenever the LPN is transacted.

Data Identifiers

All transactions support data identifiers, which you can use to support out-of-order data entry on the mobile device. See: [Using Bar Code Standards with Oracle Mobile Applications](#) on page 18-1.

Transaction Processing Mode

Mobile devices support online, concurrent, and background processing. The actual processing mode used depends on the inventory transaction processing profile settings. Online processing means the transaction manager begins processing the

transaction immediately, when you select Save. You relinquish control of the device while the transaction manager processes. The system returns control to you when the transaction manager completes. With concurrent processing, the transaction manager begins processing the transaction immediately, but you retain control of the device. In background processing, the transaction manager processes all transactions accumulated over the last interval you determined.

With online processing, you see any error messages encountered during transaction processing. With both concurrent and background processing, you do not have visibility to any errors. The system displays different success messages to you, depending on the transaction processing mode:

Table 15–1 Success Messages

Processing Mode	Success Message
Online Processing	Transaction Success
Concurrent Processing	Transaction Submitted
Background Processing	Transaction Queued

LPN Controlled Subinventory

If a subinventory has the LPN Controlled flag disabled, it cannot store LPNs. LPNs moved into this subinventory are automatically unpacked. Miscellaneous receipts into this subinventory must be for loose material, and material in this subinventory cannot be packed.

Non-LPN controlled subinventories can be used for several different reasons, but two common scenarios are forward picking areas and backflush subinventories.

In a forward picking subinventory, material is always picked in small quantities, but is replenished with cases. By making a forward picking area non-LPN controlled, the system automatically unpacks any LPN moved into the area, saving you from performing an additional unpack transaction. Cartonization is most likely used in a subinventory that has only loose material.

Backflush subinventories are where material is automatically pulled for jobs, either as assembly pull or operation pull on the bill of material. Because the system keeps an accurate count of items that are in each LPN, if backflushing is setup from a locator that has multiple LPNs, the system will not know which LPN to pull material from. For that reason, operation and assembly pull material is always taken from the loose on-hand quantity. Therefore, to ensure that these areas always have loose material, a subinventory where backflushing is to occur should be

non-LPN controlled. Note that this need not be the case, but that it will simplify inventory tracking.

Implementation

Form Function Parameters

The following form function parameters are used to setup the various transactions:

Table 15–2 Form Function Parameters

Form	Parameter	Valid Parameters	Description
Mobile Inventory Issue	TRANSACTION	ALIAS_ISSUE MISC_ISSUE	Determines if the operator must enter an account alias or an account number for an issue transaction. If no parameter provided, defaults to ALIAS_ISSUE
Mobile Inventory Receipts	TRANSACTION	ALIAS_RCPT MISC_RCPT	Determines if the operator must enter an account alias or an account number for a receipt transaction. If no parameter provided, defaults to ALIAS_RCPT
Mobile WMS Pack/Unpack	TYPE	PACK UNPACK SPLIT CONSOLIDATE UPDATE	Determines if the transaction is a pack, unpack, split, consolidate, or LPN update transaction. A value for this parameter must be provided.

Table 15–2 Form Function Parameters

Form	Parameter	Valid Parameters	Description
Mobile Inventory Issue	TXN_TYPE_ID	Any valid transaction type id from MTL_TRANSACTION_TYPES.TXN_TYPE_ID that have the same transaction action and transaction source type as the applicable system defined transaction type	Defaults the transaction type and hides the transaction type field from the operator if a parameter is provided.
Mobile Inventory Receipts			
Mobile Sub Transfer			
Mobile Org Transfer	ACCOUNT	Any valid account alias as defined in CONCATENATED_SEGMENTS.MTL_GENERIC_DISPOSITIONS_KFV defined within the current organization	Defaults the transaction account and hides the account field from the operator if a parameter is provided. Note that this can only be used for Alias Issues and Alias Receipts.
Mobile Inventory Issue			
Mobile Inventory Receipts	SERIAL_TYPE	INDIVIDUAL RANGE	Determines if the serials are indicated by ranges or individual numbers. If no parameter provided, defaults to INDIVIDUAL
Mobile Sub Transfer			
Mobile Org Transfer	QTYTRG	Y N	Indicates if the lot and serial quantity is cross-checked for lot / serial transactions (Y), or if the transaction quantity is calculated from the lot / serial quantity (N). If no parameter provided, defaults to Y.

Transaction Processing Mode

You can set the transaction processing mode differently for each window. You can also set it at the site, application, responsibility, and user levels as a standard profile option. The profile options are the same as those used for the desktop windows. You can set the profile TP:INV Transaction Processing Mode to On-line processing,

Immediate concurrent processing, Background processing, or Form level processing. This profile controls the behavior of all forms. If you select Form level processing the system checks the individual options at the form level. You can find all applicable profile options by performing a blind query using TP:INV%.

If background processing is used, the time interval with which the transaction manager should run must be set up. Because warehouse management uses the same transaction manager as Inventory, setup for warehouse management does not differ from inventory.

See Also

Profile Options, *Oracle Inventory User's Guide*

Customization

Throughout the application, warehouse management provides several stubs and other methods for easy customization supported on any upgrade path.

Customizing Hot Keys and Prompts

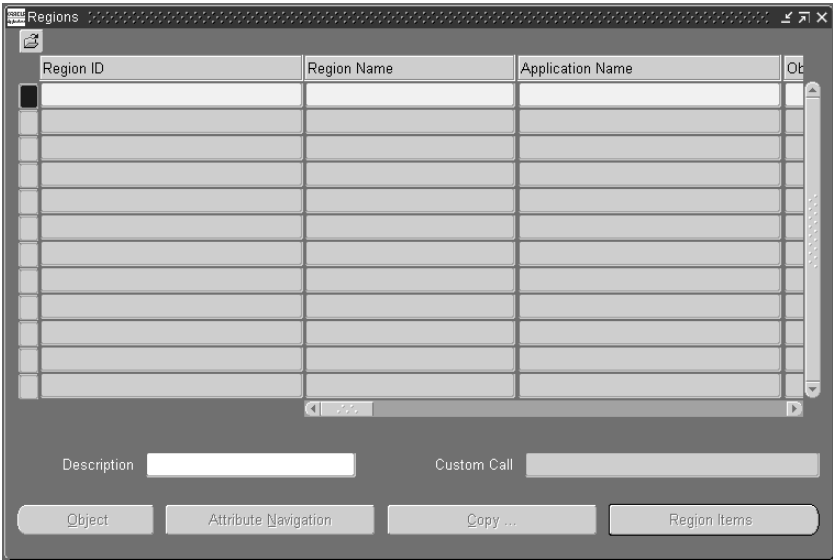
You can edit the hot keys you use, and the prompts displayed on the mobile device. To access the hot keys, press the **Esc** key followed by the highlighted letter on the button on the mobile device or keyboard. To edit the hot keys and prompts complete the following procedure:

To Change the Hot Key and Prompts:

1. Navigate to the Define Regions window.

Note: To access the Define Regions window, you must log in under the Application Developer Common Modules Responsibility.

Figure 15–1 Regions Window



- 2. Query for the INVRESOURCETABLE in the Region ID field.

Figure 15–2 Regions Resource Table

Region ID	Region Name	Application Name	
INVRESOURCETABLE	INVRESOURCETABLE	Oracle Inventory	IC

Description Custom Call

[Object] [Attribute Navigation] [Copy ...] [Region Items]

- ### 3. Choose Region Items.

Figure 15–3 Region Items

Region Items

Application

Oracle Inventory

Object Name

ICX_PROMPTS

Region Name

INVRESOURCETABLE

INVRESOURCETABLE

Attribute Type

Attribute

Application

Oracle Inventory

Attribute Name

INV_ALLOCATE_PROMPT

Sequence

229

Item Style

Text

Attribute

Oracle Inventory

INV_FIND_PROMPT

330

Text

Attribute

Oracle Inventory

INV_INSPECT_PROMPT

360

Text

Attribute

Oracle Inventory

INV_LOT_ATTRIBUTES_PROM

385

Text

Attribute

Oracle Inventory

INV_MORE_PROMPT

389

Text

Attribute

Oracle Inventory

INV_NEXT_ITEM_PROMPT

400

Text

Attribute

Oracle Inventory

INV_PREVIOUS_PROMPT

405

Text

Attribute

Oracle Inventory

INV_QUERY_PROMPT

410

Text

Attribute

Oracle Inventory

INV_RETURN_TO_LINES_PRO

502

Text

Attribute

Oracle Inventory

INV_RETURN_TO_STOCK_PR

503

Text

Custom Call

LQV Relations

4. Make the desired changes to the Long Label field.

The Long Label field contains the text that displays on the mobile device. An ampersand precedes the hot key character. You can change the text, and the position of the ampersand.

Only prompts that are used for buttons have ampersands for hotkeys. Prompts that are used as page titles or field labels do not use hotkeys and any ampersand inserted into a prompt are automatically stripped if the label is used as a page title or field label.

Figure 15–4 Long Label Field

Align	H Align	Display Leng	Display Heig	Long Label	Long Label M
op	Left	14	1	&Allocate	9
op	Left	15	1	&Find	5
op	Left	20	1	&Inspect	8
op	Left	30	1	&Lot Attributes	15
op	Left	15	1	&More	5
op	Left	18	1	&Next Item	10
op	Left	16	1	&Previous	9
op	Left	10	1	&Query	6
op	Left	30	1	Re&turn to Lines	16
op	Left	30	1	&Return to Stock	16

Note: The system may truncate long text labels depending on the width of the screen, and very short labels may not be clear enough. If multiple buttons on the same page use the same hot key, the mobile device responds only to the first hot key with that label.

Note: Whenever you apply patches that include new or changed prompts, the system reloads the resource table INVRESOURCETABLE based on the definition seeded by development, overwriting any changes you have made. That means that any changes that you have made will be lost. Typically, this seed data does not change with small bug fixes, but frequently does change with new releases. However, to be safe, you should keep track of the modifications you make either manually, or by making a copy of the resource table prior to all patching and then comparing the entries in the two tables, updating the recently overwritten table when necessary.

5. Save your work.

Transaction Manager Stub

The transaction manager calls an empty stub when each transaction processes, regardless of processing mode. It can include any additional business logic to perform for each record in the transaction interface tables. The API specification is as follows:

```
CREATE OR REPLACE PACKAGE INV_TXNSTUB_PUB AS
/* $Header: INVTPUBS.pls 115.0 2000/02/25 01:30:26 sdirisal noship $ */

/**
 * p_header_id          = TRANSACTION_HEADER_ID
 * p_transaction_id     = TRANSACTION_ID
 * x_return_status      = FND_API.G_RET_STS_*;
 * in case of an error, the error should be put onto the message stake
 * using fnd_message.set_name and fnd_msg_pub.add functions or similar
 * functions in those packages. The caller would then retrieve the
 * messages. If the return status is a normal (predicted) error or
 * an unexpected error, then the transaction is aborted.
 */
PROCEDURE postTransaction(p_header_id IN NUMBER,
                        p_transaction_id IN NUMBER,
                        x_return_status OUT VARCHAR2);

END INV_TXNSTUB_PUB;
```

Common Problems

The following are a list of common problems, when they may occur, and how to fix them. Miscellaneous transactions interact with many other entities, including label printing, lot and serial attributes, and material status.

Cost Group Commingling Error

A cost group commingling error arises whenever multiple cost groups exist in the same locator which cannot be otherwise differentiated by item, lot, serial, revision, or innermost LPN. See: [Frequently Asked Questions](#) on page 15-16. If the transaction causing the error is a pack or a subinventory transfer, check the cost group of the transacted material and the cost group of the material in the destination locator and LPN. If there are no other differentiating attributes, then the

items can not be stored together. The transaction can take place, however, if the item is packed into an LPN and then the LPN is moved to (or packed into) the destination.

Item Not Assigned to Destination Organization

To perform an organization transfer of an item, the item must be assigned to both the source organization and the destination organization. Items that are not assigned to both organizations do not appear in the list-of-values for transfers of loose material. When LPNs are transferred, an error indicates the LPN has contents which are not assigned to the destination organization. To eliminate this error, check which of the LPN contents are not assigned to the destination organization, and then make the assignment if desired, on the desktop.

Insufficient Quantity

For transactions that decrement inventory from a locator, such as issues and transfers, verify the result of the transaction does not drive the on-hand (packed or unpacked) or available quantity below zero. A parameter set at the organization level specifies whether negative balances are allowed. If negative balances are allowed, then a warning message is displayed and you can continue. If negative balances are not allowed, an error message is displayed and you cannot continue.

This check is made independently for both packed and loose on-hand quantities. The error or warning is displayed if a transaction drive either one of the quantities negative, even if the net on-hand in that locator is positive.

Transaction disallowed by Material Status

You can assign material statuses that disallow certain transaction types to lots, serials, locators, and subinventories. If you enter transaction data that violates the material status restrictions, either the value does not appear in the list of values (in the case of lots, serials, locators, and subinventories), or you receive an error message that indicates the transaction is disallowed (in the case of LPNs). Verify the material status of the affected entities on the mobile or via the Material Workbench on the desktop, and update the material status if appropriate. See: [Warehouse Management Material Status Control](#) on page 11-2.

LPNs Disallowed by Subinventory

You can set a subinventory to disallow LPNs by disabling the LPN Controlled flag on the subinventory definition. Packed LPNs are not allowed in these types of subinventories. Subinventory transfers and other material movement transactions

into that subinventory automatically unpack the LPN. The empty LPN is then available for re-use anywhere in the organization.

Miscellaneous receipts of packed material, as well as pack and bulk pack transactions are not allowed in these subinventories. In the case of a miscellaneous receipt, if you enter an LPN after selecting a subinventory, the system displays an error message that indicates this is a disallowed transaction. The message also displays for pack and bulk pack transactions.

Debugging

If you receive a Java error on the mobile device, it usually means either the package is invalid, or a code bug exists. To find code bugs, check the Transaction Manager log file, which can be located by viewing the profile option setting of INV: Debug file. Also, verify the following profile options to ensure that debugging messages are captured.

Table 15–3 Debug Profiles

Profile	Setting
INV: Debug Trace	Yes
INV: Debug file	provide the complete path for the log file
INV: Debug Level	set a value larger than 1

Frequently Asked Questions

1. When is the transaction saved if I use the <Save/Next> button?

The transaction is always committed on <Save>. For transactions that have <Save/Next>, the transaction is saved when you choose <Save/Next>. If you cancel a subsequent transaction, all prior transactions are saved; only the current transaction is canceled. A transaction is not committed when you choose <Next>. <Next> allows multiple records to be posted with the same header information.

2. Why can't I consolidate (or merge) two LPNs?

There may be several reasons that prevent the consolidation of LPNs. All LPNs must be in the same locator and packing must not be disallowed by material status. If either of these LPNs is staged for a delivery, then both must be staged for the same delivery; LPNs cannot be consolidated across multiple deliveries.

3. Why can't I unpack an LPN?

There may be several reasons that prevent the unpacking of LPNs. First, verify that there is no material status that disallows the unpack transaction. The more common cause, however, is the LPN has been staged for delivery. LPNs staged for a delivery cannot be unpacked because the tie between the material and the sales order is made via the LPN. However, staged LPNs can be split and consolidated to make any nesting relationship that is necessary to accurately model and efficiently perform the shipment.

4. What is a cost group commingling error?

Transactions that result in commingling of cost groups are prevented. Cost groups are considered commingled when there is no other distinction (such as lot, serial, revision, locator, item number, or LPN) that can be used to differentiate between them. For instance, within a single LPN, the same lot of an item cannot have two different cost groups. But if some of the material is outside the LPN and some of the material is inside the LPN, then the material can have different cost groups. A pack transaction of the loose material into the LPN, results in cost group commingling, so the transaction is not allowed. See: [Cost Groups](#) on page 6-2.

5. What becomes of an LPN when it is moved into a non-LPN controlled subinventory?

When an LPN is moved into a non-LPN controlled subinventory, the LPN is unpacked and the subinventory and locator are cleared from the LPN. In addition, the LPN context or state is updated to "Defined But Not Used", indicating that it is available for any transaction elsewhere in the organization. In this way, it can be considered a reusable tote

Directed Put Away on WIP Completion

Topics covered in this chapter include:

- [Overview](#) on page 16-2
- [Operation](#) on page 16-7
- [Implementation](#) on page 16-8
- [Common Problems](#) on page 16-10
- [Frequently Asked Questions](#) on page 16-11

Overview

Warehouse Management provides several features to enhance integration with Oracle Work In Process. One of these features is directed put away using the Rules Engine. Previously, on completion transactions, you entered the subinventory and locator to which the assembly was dropped. With warehouse management, the system can direct you to put away the material in a certain subinventory and locator based on criteria you define.

The system supports several additional features at WIP completion. The system can collect a material status and lot or serial attributes at transaction completion. The system performs completions into LPNs, so you only need to enter the lots and serials associated with the transaction once. The system can suggest the type and quantity of carton to pack the completed assembly into, based on rules you define. Crossdocking, exception handling, and other features, are integrated with the completion process when warehouse management and WIP are installed.

This chapter describes in detail the functionality of LPN-based WIP completion transactions. It contains a list of solutions to common problems and troubleshooting information, as well as a list of frequently asked questions.

Supported Features

WIP completion is when you indicate an assembly is completed and considered a finished good available for inventory. Previously, the completion transaction was operator-directed, and completed instantly. With warehouse management installed and enabled for the organization, the completion process is system-directed and has many additional features. These features are described in the following sections.

Note: All of these features are available only when using the mobile device, and are supported for discrete job flow work orderless completions.

Completion Into LPN

Work orders are completed into license plates, or LPNs. Any number of lots or serials of a given assembly can be completed into a single LPN. After the completion and packing transaction, you can enter a single number to transact the entire LPN, because the system associated the LPN with the contents (including lots and serials) and the location.

LPNs can be manually entered, generated on the fly with a user-defined hotkey, or pregenerated and preprinted. All three options are integrated with label printing.

When you create LPNs at the time of the completion transaction, you can print a label. However, if the LPNs are pregenerated, then the LPN labels are ready for use. See: Explaining License Plate Management, *Oracle Warehouse Management User's Guide*.

Prepacking

Rather than choosing the correct number and type of LPNs to pack for a given assembly, the system can select and prepack the LPNs prior to the completion transaction. Warehouse management uses grouping rules, physical attributes of the finished assembly, and box definitions, to make an intelligent suggestion of the containers to use. For instance, certain types of finished assemblies might require an insulated container or a container with certain hazardous material attributes. In this case, you use pregenerated and preprinted labels for the completion transaction. See: [Warehouse Management Cartonization](#) on page 5-2.

Directed Put Away

Warehouse management allows you to select the putaway locator, for a completed LPN, or allows the system to suggest the putaway location. If you suggest the location, you can choose to have the Rules Engine validate it. If system-directed, the Rules Engine is used to come up with the suggested locations. Some common processes that the rules are capable of modeling include:

- Minimizing item fragmentation
- Requiring no lot commingling in a locator
- Directing hazardous materials to a corresponding hazardous storage location
- Placing seasonal items in a subinventory dependent on time of year.

In addition, you can define a rule that suggests put away to the completion subinventory and locator defined in the job. See Overview of Rules Setup *Oracle Warehouse Management User's Guide*.

Exception Handling

When the system directs you to put away material in a locator, you may find that you cannot put away the material in the suggested locator. For instance, perhaps the location is full, or damaged. At the time of put away, you can override the Rules Engine suggestion. If you override the suggestion, you must select an exception

reason. You define the exception reasons that can trigger an Oracle Workflow to take corrective action. For instance, perhaps a cycle count must be scheduled to understand why the material could not fit as expected, or the location must be put on hold and a warehouse manager needs to be notified via e-mail. See: *Defining a Workflow Process, Oracle Workflow Developer's Guide*.

Multi-Step Process

With the completion integration, the process can be modeled as a one-step or a two-step process. The completion transaction can immediately direct you to the destination location, or can be a separate business process from the actual put away. For instance, if you perform the completion you do not have to perform the actual put away transaction. This is analogous to a standard receipt or a direct receipt with Oracle Purchasing. You make the decision of which option is available to the end user during initial menu setup. You can set the option different for different users.

Equipment Loading

You can load LPNs onto equipment before beginning drop off, or drop each LPN immediately. This decision is distinct from the one-step or two-step decision above, and is completely controlled by you. For instance, if the LPNs are pallets and you use a forklift, you can only drop one LPN at a time, so you would jump immediately to the drop part of a task for each LPN. However, if the LPNs are smaller boxes and you are using a cart, you can load multiple LPNs on the cart before you put them away.

Material Status

Material Status Control makes it possible to control the movement and usage for portions of on-hand that inventory have distinct differences due to grade, quality, or maturity level. Some of the most popular requirements for status control are to be able to control whether or not material can be picked or shipped on an internal order, picked or shipped to a customer, or issued for a production job. In addition, some material may need to be quarantined until some activity, such as inspection, is performed.

If an item is status controlled, you can assign a material status to lots and serials when they are initially created. When a lot or a serial of a finished good assembly is entered, the system prompts you to enter a material status. You can define put away rules to put the material away to different locations based on the material status. See: *Describing Material Status, Oracle Warehouse Management User's Guide*.

Lot and Serial Attributes

Some industries require tracking attributes of a particular lot or serial number. These attributes may include dates, such as manufactured date or best by date, numbers, such as weight or size, or text, such as country of manufacture, grade code, or color. These types of attributes do not warrant a separate part number, but are important to track for each individual lot or serial. Warehouse management provides facilities to define over 70 attributes for each lot and serial. The list of attributes can be different for each item as necessary, or can be the same for entire categories of items with minimal setup. Whenever a new lot number or serial number is used, the user will be prompted to enter those lot attributes or serial attributes that have been defined for that item. See: Explaining Lot and Serial Attribute Entry, *Oracle Warehouse Management User's Guide*.

Label Printing

Label printing features integrate with the completion transaction. You can print five types of labels at the time of completion, Material, Serial, LPN, LPN Summary, and LPN Contents. Material labels include: assembly information, including the revision, quantity, lot details, or other data pertaining to the item. Serial labels include the information on the material label, and any serial details. LPN labels include the license plate number, LPN weight, type, volume, and any other information pertaining to the type of LPN. LPN Content labels include the LPN label information plus all information related to the contents of the LPN. LPN Summary labels are similar to LPN Content labels, with the difference that LPN Summary labels can list multiple items and the contents at inner levels for nested LPNs.

Warehouse management supports compliance labeling, so you can print different label formats for different types of items. You can use any number of criteria to determine what label format to print. Warehouse management also selects the appropriate printer for printing based on criteria you define.

See: Explaining Manufacturing Label Printing *Oracle Warehouse Management User's Guide*.

Crossdocking

Warehouse management supports opportunistic crossdocking, if enabled, for the organization. This means that whenever backordered material exists and new supply arrives, from either a WIP completion or a PO receipt, the system directs you to stage the material for the appropriate order rather than put the material away in inventory. See: Explaining Opportunistic Crossdocking for Manufacturing *Oracle Warehouse Management User's Guide*.

Cost Group Assignment

A cost group is assigned to the completed material as soon as it is put away in inventory. You can use cost groups to keep different material in different material valuation accounts. In warehouse management organizations, material is not always given the valuation accounts of the subinventory in which it resides. You can assign a cost group to the material based on attributes of the job, or any other decision criteria relevant to the organization.

Assemble to Order Reservations

Assemble to Order (ATO) jobs are automatically reserved to sales orders when created. You can manually associate a job to one or more sales orders. When material from these jobs is completed, the reservation is automatically transferred from the job to the on-hand assemblies. If LPN-based completions are used and the job is completed into an LPN-controlled subinventory, then the reservation is created at the LPN detail level.

This allows the system to track the particular LPN marked for a particular sales order, rather than marking just a subinventory / locator, and as applicable, lot or revision. This level of detail on the reservation ensures the exact completed material from the job is picked for the sales order, in that the reserved LPN is allocated by the system when the sales order is picking released.

You can use subinventory transfers to transfer reserved LPNs. This automatically transfers the reservations to the destination subinventory. The system prevents transfers of reserved LPNs to non-LPN controlled or non-reservable subinventories so LPN reservation can be maintained.

Standard Features

Standard features of the LPN-based completion pages include support for revision control, expiration date control, and automatic backflush of assembly pull components. Furthermore, the LPN-based completion is optional, in that the standard Mobile supply chain applications completion without LPNs or Warehouse management features can be used instead, regardless of whether Warehouse management is installed at a site or enabled for an organization, so that these additional features need not be used if they are not necessary for your organization.

Operation

Prepack Request

Prepacked LPNs remove the decision of which carton to pack from you. Cartonization enables the system to best determine which type and how many cartons should be used for a given quantity of a finished assembly, and to preprint the labels for those LPNs. A prepack request is generated on the desktop by a concurrent request. The following notes will help ensure the prepack requests are successful.

When a revision controlled item is prepacked, you must indicate the revision on the request; it is not derived from the current effective revision. When a lot controlled item is prepacked, you can enter an existing lot if the lot field is left blank. The system uses the prefix and sequence numbers defined at the item level to generate a new lot. You can print the Lot number and revision on the labels generated by the prepack.

Individual serial items, however, are not prepacked because the serial numbers may be generated at the time of completion. Unlike a lot number for which there is generally only one per completion transaction, multiple serial numbers per a completion transaction are unavoidable. A prepack of serial control items specifies only the quantity of that item and relies on you to enter the serial numbers at the time of completion.

The container field on the prepack request is an optional field. If no container item is entered, then the system uses cartonization to determine the type and number of containers. If, however, the request specifies a container item here, then the system uses that container to prepack. If no container load relationship is setup, then the system assumes the entire quantity can be packed into a single container. Otherwise, the system uses the quantity on the container load relationship to determine the appropriate quantity to pack.

Completion Using Prepacked LPNs

You can enter prepacked LPNs at completion. The LPN list-of-values in the WIP Completion form contains the following: all pregenerated LPNs, all LPNs with context Resides in WIP, and LPNs prepacked with the assembly entered or on the job or schedule. You can also create new LPNs. You cannot use a prepacked LPN with a different assembly than the current completion transaction.

The system automatically enters the quantity after you choose the prepacked LPN. If over completions are not allowed, then you cannot use an LPN prepacked with a

greater quantity than is available to complete for a particular job. The system automatically uses the revision number of the contents. The system automatically enters the lot number that was prepacked. This cannot be changed. If the lot number is new, then you must enter lot attributes and lot status, but if the lot number exists, the system does not prompt you to enter a lot number. You must enter all serial numbers, including any applicable attributes or status, for a serial controlled assembly.

You cannot change the lot, quantity, revision, and item number of a prepacked LPN. However, as there is no tie between the prepacked LPNs and the job prior to the completion transaction, there is no need to use the prepacked LPNs for a particular job. You can generate new LPNs on the fly. The original prepacked LPN can remain unused and does not impact any current or future transactions.

Generating New LPNs at Completion

LPN prepack or LPN pregeneration is not required to use directed put away functionality at WIP Completion. You can generate a new LPN in the WIP Completion pages LPN field using the generation hotkey. You can then enter the completion details and the assembly is completed and packed into the new LPN.

Implementation

Setting Up Completion Windows

The LPN-based completion pages have two modes. One mode allows the completion transaction to be distinct from the put away operation. In this mode, the completion transaction is committed, pulling all the assembly pull material and decrementing the available-to-complete quantity on the work order, but not does increment the inventory. The LPN Resides in WIP. This is an interim state that corresponds to material received on the receiving dock but not put away. Then, as a second transaction, a different employee can put away the packed LPN. The other mode integrates the completion transaction and the put away transaction into one business process that cannot be separated.

These modes are established by using a form function parameter, TXNTYPE. The value DROP integrates the completion and put away transactions, while the value STOP makes the two operations distinct. The user-interface for the two modes is identical; the form function parameter only controls which buttons (<Load> and <Drop>, or <Save>) are displayed. If STOP is used, you can still use the directed

put away features by entering the put away form and scanning the newly completed LPN to be put away.

Note: You can only access the consolidated drop features when you use the two-step putaway mode. When you use the single-step putaway mode, when you select the <Load> or <Drop> directory from the WIP Completion page, only the system direction option without consolidation is available.

Setting Up Putaway Windows

The putaway process has several modes in which a putaway can be performed. These modes are configured by form function parameters set on the putaway page, and are as follows:

- User-directed rules validated putaway
- User-directed putaway without rules validation
- System-directed putaway with consolidation
- System-directed putaway without consolidation

The term consolidation refers to the system merging all the putaway suggestions into a single drop transaction if the rules happen to suggest that the entire LPN can be put away to a single location. If the consolidation mode is used but the Rules Engine suggests multiple locations for the LPN, the system automatically splits the putaway so you can confirm each destination individually. Only in this case, or in the case where the system-directed putaway without consolidation is used, is the operator able to enter quantity discrepancies for a putaway; in all other cases, the entire LPN is putaway to a locator by entering only the subinventory & locator to minimize data entry. Thus, if quantity discrepancies occur during putaway processes, use the system-directed putaway without consolidation.

Regardless of the mode, the system does the following: validates the destination locator and allows the transaction by material status subinventory or locator, honors item restrictions defined on the organization, ensures LPNs created for reserved jobs are putaway to reserveable subinventories, and ensures cost group commingling does not occur. Beyond these checks, the rules validation mode is the only mode in which the rule restrictions are enforced. In the rules suggested modes, you can override the Rules Engine suggestion (after entering a reason code).

The form function is controlled by two form function parameters. Suggestion can be set to one of the following four values:

- **USER:** Enter the destination subinventory & locator. The window displays the <USER DROP> button.
- **RULES:** The Rules Engine decides the destination subinventory & locator, and consolidates the entire putaway if it is to be dropped to a single location. The window displays only the <Load> and <Drop> buttons.
- **BOTH:** The window allows you to choose between the above two modes by displaying the three buttons <User Drop>, <Load>, and <Drop>. This is the default value if none is specified for the window.
- **LINES:** The Rules Engine decides the destination subinventory & locator, and you confirm each item / revision / lot individually, even if they are to be dropped in the same location. This makes putaway of mixed load LPNs cumbersome, but is the only option available if quantity discrepancies are required.

In addition, there is the additional dimension of whether the value entered by the user is validated by the Rules Engine. Currently, this option is only supported in the user-suggested modes. That is, this parameter is only applicable when the users elects <User Drop>, and <User Drop> is only available if Suggestion is Both or User.

- **YES:** Validate the destination on locator field exit against all the items in the LPN, verifying that the item can be stored in that locator and that capacity is available. Note that this does not validate that the selected locator is the preferred locator, only that it is a valid locator.
- **NO:** Do not perform any rules validation on the locator.

Common Problems

1. Unable to allocate space for put away.

The Rules engine may fail to allocate space in inventory for the LPN for several reasons. First, the selected strategy may not be able to allocate any space using any of the rules. Warehouse management must be enabled for the organization for the new put away features to be available, and all subinventories in the warehouse management organization must be locator controlled. The Rules engine can help you determine why a rule fails. See: [System Rules Engine](#) on page 13-2.

2. Put away fails.

Put away may fail for several reasons. The destination subinventory must be locator controlled; while locator control is enforced when new subinventories are created, migration of an existing inventory organization to warehouse management may allow subinventories without locators to be used. Putaway may also fail based on cost group commingling if the destination subinventory is non-LPN controlled and there is already material in that locator of the same item but different cost group that is not physically distinguishable by revision, lot, or serial. Or putaway may fail if the system tries to create a reservation to the completed material because the job was reserved to a sales order, yet the putaway was attempted into a non-reservable subinventory.

3. Employee not defined error.

Mobile users must be associated with an HR employee to access any of the put away screens, including the completion with drop options. This is necessary because when an LPN is loaded onto an operator's equipment, the LPN is tied to the employee. Therefore, if no employee is defined for a user, then the possibility to corrupt data exists. Note that users without employees assigned can access the two-step put away pages, and that this same limitation applies to the WMS Task menu as well as the Completion with drop WIP pages.

Frequently Asked Questions

1. How are lots prepacked?

The lot number must be known when an LPN is prepacked. You can enter an existing lot number, if the assemblies are to be completed into an existing lot. However, as is more likely the case, the assembly will be of a new lot. In this case, the lot number can be left blank on the prepack request and the system automatically generates a new lot number using the item's lot generation prefix and starting number. The lot number can then be printed on the label. Only a single lot can be prepacked in each request.

2. How are serials prepacked?

Individual serial numbers are not prepacked. This is because the system has no way to indicate to the user which serials are expected in each LPN short of printing a detailed LPN listing, which may not be set up. Therefore, a request is made to pack a particular quantity (and potentially lot and revision) of a serial controlled item, but the serials are only entered (and potentially created) at the completion.

3. Can the prepacked item, quantity, or lot be overridden?

No, the prepacked item, quantity, or lot cannot be overridden at time of completion. Nor can the revision or container item (type of container) be changed. For instance, an LPN with 25 of an item prepacked in it cannot be used for a completion of a job with only 24 remaining to complete, and LPNs prepacked with one item cannot be used for a completion transaction of another item.

However, as there is no tie between the prepacked LPNs and the job prior to the completion transaction, there is no need to use the prepacked LPNs; new LPNs can be generated on the fly. The original prepacked LPN can remain unused and will not impact any current or future transactions.

4. Why is the prepacked LPN not available or not in the list?

There are two reasons why a prepacked LPN cannot be used. An LPN prepacked with one item cannot be used for a completion transaction of a different item. Also, as indicated above, as the quantity cannot be overridden so an LPN prepacked with a quantity greater than the available to complete quantity cannot be used for a discrete job completion.

5. Why was I not prompted to enter lot attributes?

You should be prompted to enter lot attributes, expiration date, and status (as applicable) whenever a new lot is created. If, however, an existing lot was entered - either selected from the list at time of completion, or entered on the LPN prepack request - then you will not be prompted to enter the lot attributes as they were entered when the lot was initially created.

6. Why was LPN unpacked when I dropped it?

Subinventories have an attribute called LPN Controlled. Subinventories that are not LPN controlled do not allow LPNs in them: LPNs cannot be packed or created in them, and any LPN that is moved into them is automatically unpacked. Verify this setting on your subinventory.

7. At what point is the cost group assigned?

The cost group is assigned at put away, because as soon as the material is in inventory, the cost group ascertains its financial ownership.

8. At what point is the WIP completion transaction triggered?

The WIP completion transaction is triggered when the transaction is committed to the database. The point at which this occurs depends on the mode of use. When the *STOP* mode is used, the completion is posted when the user selects <Save>. When the *DROP* mode is used, the completion is posted when the user either selects <Load> from the Completion page, or when the user selects

<Done> from the Drop page. Therefore, note that if the drop transaction fails due to cost group commingling error or some other error, no completion transaction is posted.

Transaction Reasons

Topics covered in this chapter include:

- [Overview](#) on page 17-2
- [Functional/Business Flow Description](#) on page 17-2
- [Debugging Notes](#) on page 17-5
- [Frequently Asked Questions](#) on page 17-7

Overview

Transaction Reason Actions provide you with an alternate customizable flow to handle exceptions. For example, you may try to pick from a location that differs from the system suggested locations because you are unable to reach the suggested locator. The system prompts you for a reason. You can associate this reason with a workflow process, which automatically executes.

Functional/Business Flow Description

Transaction Reasons enable you to record and monitor exceptions to tasks. You must enter exceptions when you perform something unexpected during a task. You can optionally associate a Transaction Reason with a workflow process or Transaction Reason Action, which supports customized alternative process flows to automatically handle these exceptions.

The following is an example of a Transaction Reason Action:

- *Transaction Scenario:* You are asked to pick a quantity of three of a particular item from a locator, but when you go to the locator, there is only one item in the locator.
- *Reason for the Exception:* Inadequate quantity in suggested locator.
- *Action:* Execute a Workflow to request a cycle count on the locator.

Transaction Reason Setup

You setup transaction reasons in the Oracle Inventory Transaction Reasons window. See *Defining Transaction Reasons, Oracle Inventory User's Guide*. You can view reasons with an attached corrective action workflow. The workflow initiates upon completion of the task or transaction.

Cycle Count Workflow

The Cycle Count workflow process is seeded with the application. The workflow performs the following steps:

- *Cycle Count Reservations:* The cycle count workflow creates a cycle count reservation for the discrepant quantity when you initiate the workflow from the pick load page. The discrepant quantity is the difference between suggested task quantity and the actual quantity picked from the location. The reservation prevents the discrepant quantity to be re-allocated to other tasks until you perform a cycle count, and the inventory on-hand balance is correct. The

reservation includes the item, subinventory, locator, and as applicable, revision and lot number.

- **Generate Cycle Count Entries and Cycle Count Tasks:** The workflow schedules a cycle count for the discrepant item and locator, and a concurrent request for generating cycle count entries and cycle count tasks is submitted.
- **Alternate Task Generation:** The workflow generates an alternate task for the remaining quantity you can not pick due to a pick exception. The system creates an alternate task provided sufficient on-hand quantity exists and can be allocated elsewhere. If sufficient quantity does not exist at an alternate location, the system backorders the remaining quantity.

n-Step Putaway

The application also comes with a second seeded workflow to enable n-Step Putaway. Suppose you have a task to put away or replenish material from location A to location D. You are responsible for picking material from location A, but location D is at the other end of the warehouse and rather than travel the distance, you can drop the material destined for D at an intermediate staging location, called B, and another operator completes the movement from B to D.

In this case, you override the suggested drop location of D by indicating a drop location of B instead. When the system requests an exception reason, you indicate a reason associated with the workflow process of n-Step Putaway. The system automatically generates a task (of type replenishment) to move the material from B to D and automatically dispatches the task to a qualified operator. However, that operator may be able to move the material to location D, or may only be able to transfer the material from location B to location C, which generates another movement task.

Customized Workflows

In addition to the two seeded workflows, you can build your own custom workflows to automatically process any notifications or other exception handling you deem necessary.

Setup Example

Oracle Warehouse Management contains the workflow: *MTL Transaction Reasons Workflow*. This workflow contains over sixty input and output parameters you can use to create a custom workflow process using the Oracle Workflow Builder.

Alternatively, you can select either of the two seeded workflow processes attached to this workflow name, *Cycle Count*, or *WMS N Step Putaway*.

To create a reason that automatically triggers a cycle count process when an operator selects the reason from a picking task, create a new record in the Transaction Reasons window. Enter a name such as “Missing Quantity”, keep in mind that the display is a mobile handheld device and so the name should be as succinct as possible. The system also displays the description field. This is an optional field during setup.

The workflow type must be set to *MTL Transaction Reasons Workflow*, and the workflow process to *Cycle Count*. Other processes you associate with this workflow name are also be available here. Be sure to indicate a Reason Type of *Picking*. Only picking, putaway, and replenishment tasks support automatically initiating workflows on exceptions. The Reason Type is used to restrict which reasons you see in each type of transaction or task. Other transactions, such as a material status update, can use and record transaction reasons, but do not initiate any associated workflow.

Testing the Workflow

Use the following procedure to test the Transaction Reasons workflow:

1. Create and release a sales order for a quantity of three of an item.
2. Use the mobile device to sign on and navigate to the Pick Load Page.
3. In the pick load page there is a task to pick three items. When you reach the field confirm quantity, enter the quantity as one.
4. Select the Drop button instead of the Pick More button, to indicate that you wish to pick only one instead of the original requested quantity of three.
5. The audit page opens. Select the reason associated with the workflow process Cycle Count and select Done to continue.
6. Complete the task, including confirming the suggested drop location and select Done. Verify that the task is completed for the reduced quantity via the Warehouse Control board or the View Material Transactions window.
7. Verify the cycle count for the requested location. Navigate to the cycle manual requests window and enter the default cycle count header name associated with the organization where the quantity discrepancy exists. You should see a request for a cycle count in the Schedule Requests field.
8. Verify the workflow notification was sent.

9. Navigate to the Warehouse Control Board window and verify the creation of the cycle count task and alternate picking task if additional quantity was on-hand and available.

Debugging Notes

The seeded workflow processes, *Cycle Count* and *WMS N Step Putaway*, should always show up in the Workflow Process field in the Transaction Reasons window after the Workflow Name *MTL Transaction Reasons Workflow* has been selected. However, if a custom workflow process you have developed does not show up in this field, there are several things you can check.

You may not have saved the workflow process properly in the wf_runnable_processes_v table. The LOV query for the workflow process is:

```
SELECT DISPLAY_NAME, PROCESS_NAME, ITEM_TYPE
FROM WF_RUNNABLE_PROCESSES_V wf, MTL_TRANSACTION_REASONS mtr
WHERE wf.ITEM_TYPE = MTR.WORKFLOW_NAME
```

Also if needed, the LOV query to obtain the workflow name:

```
SELECT DISPLAY_NAME, DESCRIPTION, NAME
FROM WF_ITEM_TYPES_VL
```

If the workflow is visible in this window and you are able to assign it to a transaction reason, but the process did not execute, be sure you associated the reason with both a workflow name and workflow process, and that the user entered the correct reason. The system needs both the workflow name and process to execute the workflow.

When using the seeded *Cycle Count* workflow process, if the system sends a notification but does not request a cycle count, it is possible you did not define the default cycle count header on the organization parameter window.

Customization

Oracle Warehouse Management supports customization of new workflow processes. Only new workflow processes created under the workflow *MTL*

Transaction Reasons Workflow are supported. You can use the Oracle Workflow Builder to view the attributes and descriptions.

Workflow processes execute when the system prompts you for a *Reason* on the mobile device during task execution only. The *Reason* field appears in the following scenarios:

- Pick Load Page: when confirmed quantity is different from suggested quantity.
- Pick Load Page: when confirmed location is different from suggested location.
- Pick Drop Page: when confirmed location is different from suggested location.
- Putaway Drop Page: when confirmed quantity is different from suggested quantity.

Note: Although the Update Status Page requests that the user enter a reason, it does not execute a workflow.

The executed *MTL Transaction Reasons Workflow* workflow processes always have the following attributes:

- Reason Id
- Calling Program Name
- Source Organization Id
- Reason Name

The following paragraphs contain the default attributes for the associated *Reasons*.

Other than those attributes described below, the remainder of the attributes in the workflow may or may not populate depending on the transaction. For example, the *destination organization* attribute populates only if a putaway is done for an inter-organization transfer.

Populating the Item Attributes

The following are applicable for both picking and replenishment tasks:

- When the confirmed quantity differs from the suggested quantity. The attribute Transaction Quantity populates with the quantity actually picked.
- When the confirmed location differs from the suggested location. The attributes Destination Subinventory and Destination Locator populate with the new Subinventory and Locator respectively.

The following is applicable for both picking and replenishment tasks:

- When the confirmed location differs from the suggested location. The attributes Destination Subinventory and Destination Locator populate with the new Subinventory and Locator respectively.

The following are applicable for putaway tasks.

- When the confirmed quantity differs from the suggested quantity. The attribute Transaction Quantity populates with the actual putaway quantity.
- When the confirmed location differs from the suggested location. The attributes Destination Subinventory Destination Locator populate with the new Subinventory and Locator respectively.

Frequently Asked Questions

1. I can populate a reason code in tasks and transactions, as well as during material status updates. Will all of these initiate the workflow?

Only task exceptions initiate the corrective action workflow. Transactions and material status updates do not initiate a workflow process.

2. What changes can I make in a dispatched task?

You can change the subinventory and locator, and reduce the picked quantity. You cannot change the lot or, if enabled, the serial number.

3. Does Warehouse Management populate the workflow attribute *serial numbers* for picking and putaway exception handling?

The attribute *serial number* is not populated.

Using Bar Code Standards with Oracle Mobile Applications

Topics covered in this chapter include:

- [Overview](#) on page 18-2
- [Out of Order Scanning](#) on page 18-3
- [Seeded Data Field Identifiers](#) on page 18-7

Overview

This document discusses the implementation and use of different bar-code standards within Oracle Mobile Applications. Topics include: overview standards, support within Oracle Mobile applications, configuration, setup and usage. The setup section includes the setup steps for the hardware devices, the mobile server, and the setup within Oracle Applications.

Bar Code Standards

Warehouse applications use labels that comply with Bar coding standards for Automatic identification and data collection (AIDC). Bar code for data collection eliminates manual data collection, improves data collection accuracy, and reduces time and labor. Bar coding standards enable companies to encode, in bar code form, more information than basic product identification. Use this type of supplementary information (such as, Lot Number, Serial Number, License Plate Number, Quantity, etc.) to improve the management of the supply chain. Common application standards for bar coding are ANSI/FACT, EAN/UCC, SPEC2000, HIBCC, EIAJ, etc. Use the following features in Oracle Mobile applications to support bar-coding standards:

- Data Field Identifiers (DFIs)
- Customized Bar Code Scanning

Data Field Identifiers

You use Data Field Identifiers (DFIs) to identify the type of data embedded within a barcode. A DFI usually consists of one to three characters added to the beginning of the data encoded in the barcode. For example, a DFI for a Part Number might be 'P+'. If the part number encoded in a given barcode is 'AS54888', the barcode encodes the value 'P+AS54888' to indicate the barcode is for a part number and the part number is 'AS54888'.

DFIs help reduce errors caused by scanning the wrong barcode into a field on a mobile device. They also allow fields to be scanned out of order and values to be placed into the appropriate fields.

Oracle DFI Functionality

Oracle Mobile Applications provides DFI support for recognition of barcodes that contain DFIs and out-of-order scanning. You can use DFIs to effectively map ANSI/FACT data identifiers. You can also use DFIs to map Application Identifiers used in UCC/EAN-128 bar code standards.

Field Recognition

Oracle Mobile Applications recognizes a DFI included in a barcode and validates it in the proper field. If the DFI is required, a failed DFI validation results in an error message.

You can validate each field on the mobile application against one or more DFIs. If needed, you can optionally flag each field to require a DFI. If a DFI is required, a barcode you scan into this field must have at least one assigned DFI. If the system does not find a DFI, you receive an error message. If a DFI is not required, Oracle validates against a DFI if it is found, but if no DFI is found, the entire value of the barcode is inserted into the field.

Out of Order Scanning

Oracle also supports Out-of-Order scanning through DFIs. If you scan a field containing a DFI that corresponds to a field other than current field, the system enters the value of the barcode into the appropriate field. You can then scan the barcode that corresponds to the current field, or scan another DFI identified barcode.

The system validates the value inserted into the Out-of-Order field when you advance to the next field. Because field level validation generally depends on previous fields for validation to occur, you continue on the normal navigation path through the field to complete the transaction.

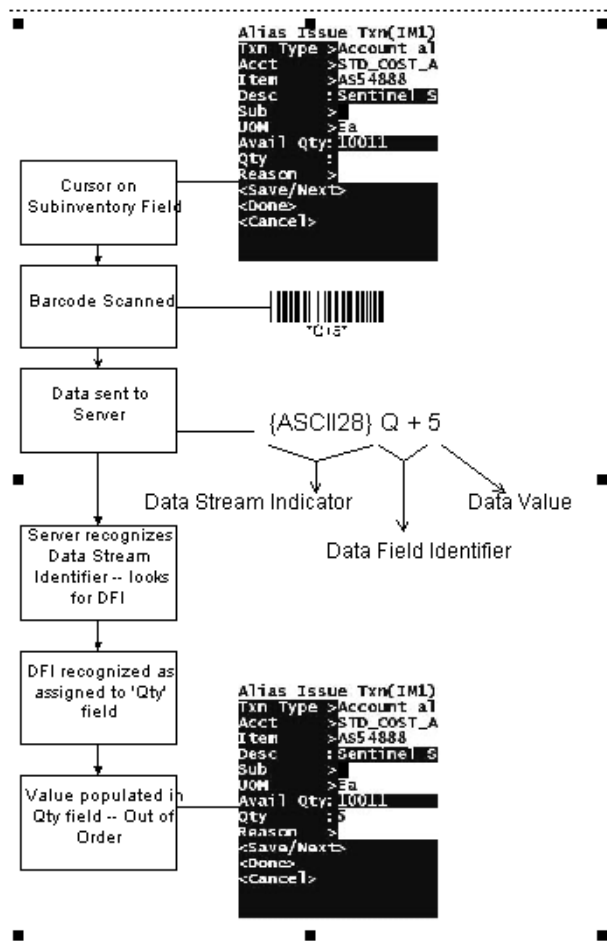
For example, if you use a mobile device to perform a Miscellaneous Issue of material, first you must scan the issued Part Number. The system validates the scan against a DFI of 'P+' for the part number. The next scan is a barcode with the value 'Q+10'. The system determines there is a field on the current page that uses 'Q+' as a DFI, and places a value '10' in the quantity field. You must then scan the issuing subinventory and locator. Then you advance through the quantity field and the quantity validates against the available quantity in the subinventory and locator scanned earlier.

Oracle Mobile Applications DFI Flow

When you scan a barcode, the mobile device prefixes an ASCII control character (the Data Stream Indicator) to the data that transmits to the server. The Oracle Mobile Server recognizes the Data Stream Indicator and searches for a recognizable Data Field Identifier in the barcode data. The system recognizes a DFI is assigned to a field on the current page. It extracts the value from the barcode and inserts it

into the field the DFI represents. The following diagram displays the flow behind Oracle DFI support.

Figure 18–1 DFI Example



Necessary Elements for DFI Support

To support DFI, the mobile device must support automatically pre-pending of an arbitrary character to any scanned entry. All the mobile devices certified for use with Oracle Mobile Applications support this functionality. You must configure the Oracle Mobile Server to support DFI scanning.

Finally, the specific Oracle Application the mobile device uses must support DFI functionality. Oracle Mobile Supply Chain Applications, Oracle Inventory Management and Oracle Warehouse Management provide full support for DFI functionality. Check with the specific product user's guide if you are unsure if DFIs are supported.

Setup for DFI Support

The setup to enable DFI support involves the following three steps:

1. Configure the mobile device to prefix an ASCII control character to every scan.
2. Configure the mobile server to recognize the proper ASCII control character as indicating a scanned entry.
3. Set up the Applications to recognize DFIs for each field on the mobile windows.

Hardware Setup

First, configure the mobile device to prefix the Data Stream Indicator to every scan. The Data Stream Indicator must be an ASCII control character (non-printable character). All certified Oracle Mobile Applications devices support this type of configuration. You can configure most scanners by scanning configuration barcodes, navigating to a configuration menu through the device keypad, or by using a remote configuration tool. Refer to the User's guide for the mobile device to determine configuration.

The default Data Stream Indicator is ASCII 28 – File Separator. Use this ASCII control character as the Data Stream Indicator unless there is a reason you cannot use it. You can use any ASCII as the Data Stream Indicator except for the following:

- Backspace (8)
- Horizontal Tab (9)
- Line Feed (10)
- Vertical Tab (11)
- Form Feed (12)

- Carriage Return (13)
- Shift Out (14)
- Shift In (15)
- Escape (27)

Mobile Server Setup

After you configure the device to prepend the Data Stream Indicator, you must configure the mobile server to recognize the appropriate Data Stream Indicator. Each device configuration can have a different Data Stream Indicator to support the capabilities of different mobile devices. The configuration setting is located in the device configuration file. The default device configuration setting (default_key.ini) that ships with the mobile server has the Data Stream Indicator set to the default: ASCII 28.

The character the device prepends to a scanned entry must match the entry in the.ini file for the device configuration in order for DFIs to be fully supported.

For more information on mobile device configurations and the configuration.ini file refer to the *Oracle Mobile Server User's Guide*.

Applications Setup

The AK Dictionary stores DFI information as well as the field labels for the mobile windows. If necessary, you can also make changes in the AK Dictionary to the field labels that appear on the mobile windows. To access the AK Dictionary, log on to Oracle Applications on the desktop and access the responsibility AK Developer. Contact your system administrator if you do not have this responsibility.

Navigating the AK Dictionary

DFIs may be registered at two different levels – the Attributes level or the Region Items level within the AK Developer Responsibility. Region Items are Attributes assigned to a Region. DFIs registered at the Region Items level take precedence over DFIs registered at the Attribute level.

To register DFIs at the Attributes level, open the Define Attributes window. From that window, you can access the mobile windows fields. You can query attributes by Attribute Name or Label. Enter the DFI string in the Default Varchar2 Value field. The details on the format of the DFI string are as follows: To register DFIs at the Region Items level, you must know the Resource table the specific mobile applications uses (for Oracle Inventory and Oracle Warehouse Management it is

INVRESOURCETABLE). You can query the Resource table in the Define Regions window. For example, to query the Oracle Inventory Resource table, query on Region ID = 'INVRESOURCETABLE.'

Once you find the appropriate Resource table, select Region Items. On the Region Items window, you can view all the AK Region Items used for mobile applications within the table. Locate the field that corresponds to the proper field on the mobile page, and enter the DFI string into the field Default Varchar2 Value.

Entering the DFI String

The DFI String should be entered into the field "Default Varchar2 Value" either on the Attributes level, or the Region Items level. Enter the text in the following format:

"DFI=Q+,q+,Q,q REQ=N"

The above text indicates you can use four DFIs for this field: the characters 'Q+', 'q+', 'Q', and 'q'. It also indicates this field does not require a DFI. To set the field to required, use the text "REQ=Y" after the DFI list. List DFIs in the proper validation order.

Note: Include DFIs that are subsets of other DFIs after the original DFI. For example, if the DFI 'Q' is listed before the DFI 'Q+' and you scan a barcode that uses the DFI 'Q+', the 'Q' is removed from the barcode, but the '+' remains as part of the field value and an error occurs.

Seeded Data Field Identifiers

The following chart lists the seeded Data Field Identifiers (DFI) in Oracle Inventory and Oracle Warehouse Management. The seeded identifiers are from the ANSI Data Identifier Standard, document reference ANSI MH10.8.2-1995.

Table 18–1 Seeded Data Field Identifiers

Mobile Prompt	Data Field Information
Card Num	DFI=15K REQ=N
SO Num	DFI=1K REQ=N
Sales Order	DFI=1K REQ=N
From Sub	DFI=1L,20L REQ=N

Table 18–1 Seeded Data Field Identifiers

Mobile Prompt	Data Field Information
Src Sub	DFI=1L,20L REQ=N
To Sub	DFI=1L,20L REQ=N
Sub	DFI=1L,20L REQ=N
Res Sub	DFI=1L,20L REQ=N
RMA Num	DFI=1R REQ=N
RMA	DFI=1R REQ=N
From Loc	DFI=21L REQ=N
Src Loc	DFI=21L REQ=N
To Loc	DFI=21L REQ=N
Locator	DFI=21L REQ=N
Res Loc	DFI=21L REQ=N
Location	DFI=2L REQ=N
Rev	DFI=2P REQ=N
ASN Num	DFI=2S REQ=N
ASN	DFI=2S REQ=N
Deliv UOM	DFI=3Q REQ=N
Rcpt UOM	DFI=3Q REQ=N
UOM	DFI=3Q REQ=N
Res UOM	DFI=3Q REQ=N
Line Num	DFI=4K REQ=N
Release	DFI=5K REQ=N
Rel Num	DFI=5K REQ=N
LPN	DFI=J REQ=N
ParentLPN	DFI=J REQ=N
&Create LPN	DFI=J REQ=N
Inner LPN	DFI=J REQ=N
Outer LPN	DFI=J REQ=N

Table 18–1 Seeded Data Field Identifiers

Mobile Prompt	Data Field Information
LPN	DFI=J REQ=N
Acc LPN	DFI=J REQ=N
Rej LPN	DFI=J REQ=N
From LPN	DFI=J REQ=N
To LPN	DFI=J REQ=N
Drop LPN	DFI=J REQ=N
Res LPN	DFI=J REQ=N
Child LPN	DFI=J REQ=N
PO Num	DFI=K REQ=N
Item	DFI=P REQ=N
Alloc Qty	DFI=Q REQ=N
Deliv Qty	DFI=Q REQ=N
Insp Qty	DFI=Q REQ=N
Lot Qty	DFI=Q REQ=N
Miss Qty	DFI=Q REQ=N
Rcpt Qty	DFI=Q REQ=N
Req Qty	DFI=Q REQ=N
Ship Qty	DFI=Q REQ=N
Total Qty	DFI=Q REQ=N
Ship Qty	DFI=Q REQ=N
Acc Qty	DFI=Q REQ=N
Rej Qty	DFI=Q REQ=N
Ea Lot Qty	DFI=Q REQ=N
Qty	DFI=Q REQ=N
Res Qty	DFI=Q REQ=N
Split Qty	DFI=Q REQ=N
Ret Qty	DFI=Q REQ=N

Table 18–1 Seeded Data Field Identifiers

Mobile Prompt	Data Field Information
From SN	DFI=S REQ=N
To SN	DFI=S REQ=N
SN	DFI=S REQ=N
Serial	DFI=S REQ=N
SN	DFI=S REQ=N
From Lot	DFI=T REQ=N
To Lot	DFI=T REQ=N
Lot	DFI=T REQ=N
Res Lot	DFI=T REQ=N
Loc	DFI=Z REQ=N

Customized Bar Code Scanning

Customized bar code scanning imbeds user-defined logic to handle scanned input from a bar code scanner. It supports the following scenarios:

- Bar coding standards not explicitly supported: These standards could be HIBCC, EIAJ, SPEC2000 etc. You can use the customized bar code scanning feature to write custom logic to handle scanned data when you scan a barcode that complies with one of these standards.
- Scanning of concatenated bar code symbol: Most bar coding standards including ANSI/FACT and UCC/EAN-128 allow concatenation of multiple fields to form concatenated bar code symbols. The concatenated bar code symbol may consist of multiple DFIs or AIS, and variable values. If you use customized bar code scanning features, you can write custom logic to handle scanned data from a concatenated bar code symbol. You can encode the customer logic to parse data from the concatenated bar code symbol on populate individual fields on a mobile applications window.

There are two ways to implement user-defined logic to handle scanned input. Customized bar code scanning functionality enables a scanned input to make either a PL/SQL or a java custom class callout. The java custom class is more scaleable and performs better. You must set up the hardware and the mobile server in order to use customized bar code scanning.

- **Java Call Out:** This option involves creation of a java class with embedded user defined logic. Verify this class is compiled with Oracle apps.zip in the classpath. After compilation verify that a file CustomScanManager.class is created. Move this file to \$CUSTOM_DIRECTORY/xxx/custom and add \$CUSTOM_DIRECTORY to the classpath of your mobile server. \$CUSTOM_DIRECTORY, can be any directory on the file system.
- **PL/SQL Call Out:** This option involves modifying the package INV_PREPROCESS_SCAN. This package also takes in the current_page_name and the value scanned and should return the value to replace the scanned value with. However, unlike the java example, this package does not have access to any fields but the current field. It is not possible to modify the values of any other field other than the current field based on the scanned input. It lacks the flexibility provided with the implementation of the above java class file.

The following figure shows a sample concatenated UCC-128 bar code symbol. A single scan of concatenated bar code yields values for multiple data fields and should populate multiple field values in the form. In the following example a single scan of the following bar code should populate the Item, Lot Number, Quantity and Unit of Measure as Kilograms. Standard DFI functionality in Oracle Warehouse Management does not handle this requirement.

Figure 18-2 Concatenated UCC-128 Bar Code Symbol



Data Field Identifier String Setup for UCC/EAN-128 Application Identifiers

The following identifiers are taken from the UCC/EAN-128 application identifiers standards, document reference ANSI/UCC4-1995.

Table 18–2 UCC/EAN-128 Identifiers

Mobile Prompt	EAN/UCC 128 AI	Data Field Identifier String
LPN	00	DFI=00 REQ=N
ParentLPN	00	DFI=00 REQ=N

Table 18–2 UCC/EAN-128 Identifiers

Mobile Prompt	EAN/UCC 128 AI	Data Field Identifier String
Create LPN	00	DFI=00 REQ=N
Inner LPN	00	DFI=00 REQ=N
Outer LPN	00	DFI=00 REQ=N
LPN	00	DFI=00 REQ=N
ACC LPN	00	DFI=00 REQ=N
Rej LPN	00	DFI=00 REQ=N
From LPN	00	DFI=00 REQ=N
To LPN	00	DFI=00 REQ=N
Drop LPN	00	DFI=00 REQ=N
Res LPN	00	DFI=00 REQ=N
Child LPN	00	DFI=00 REQ=N
PO Number	400	DFI=400 REQ=N
Item	01	DFI=01 REQ=N
Alloc Qty	30	DFI=30 REQ=N
Deliv Qty	30	DFI=30 REQ=N
Insp. Qty	30	DFI=30 REQ=N
Lot Qty	30	DFI=30 REQ=N
Miss Qty	30	DFI=30 REQ=N
Rcpt Qty	30	DFI=30 REQ=N
Req Qty	30	DFI=30 REQ=N
Ship Qty	30	DFI=30 REQ=N
Total Qty	30	DFI=30 REQ=N
Ship Qty	30	DFI=30 REQ=N
Acc Qty	30	DFI=30 REQ=N
Rej Qty	30	DFI=30 REQ=N
Ea Lot Qty	30	DFI=30 REQ=N
Qty	30	DFI=30 REQ=N

Table 18–2 UCC/EAN-128 Identifiers

Mobile Prompt	EAN/UCC 128 AI	Data Field Identifier String
Res Qty	30	DFI=30 REQ=N
Split Qty	30	DFI=30 REQ=N
Ret Qty	30	DFI=30 REQ=N
From SN	21	DFI=21 REQ=N
To SN	21	DFI=21 REQ=N
SN	21	DFI=21 REQ=N
Serial	21	DFI=21 REQ=N
SN	21	DFI=21 REQ=N
From Lot	10	DFI=10 REQ=N
To Lot	10	DFI=10 REQ=N
Res Lot	10	DFI=10 REQ=N

Sample Java Code

The following is sample Java Code for handling scanned input from a concatenated UCC-128 bar code symbol. Please note the following code has been provided to demonstrate the customizable bar code scanning functionality. Oracle is not responsible for maintaining it. The following code can be modified and distributed without permission from Oracle.

```

|+=====+
|  FILENAME
|      ScanManager.java
|  DESCRIPTION
|Class to manage the scans. It will pre-process the      | scans.
|
|  NOTES
|  DEPENDENCIES
|  HISTORY
|      10-Oct-02 Karun Jain      created.
|+=====*/
package xxx.custom;

import oracle.apps.mwa.container.*;
import oracle.apps.mwa.beans.*;

```

```
import java.util.*;
import java.sql.*;

/**
 * <code>CustomScanManager</code> is the customizable
 * call out to pre-process a scanned barcode.
 * It has reference to the current MWA Session, and the
 * page the scan was performed on. One can access the
 * database session using the MWA
 * session passed in. Please refer to the MWA API
 * documentation or the WMS Customization document for
 * more information and ways to customize the class.
 */

public class CustomScanManager {

    private void CustomScanManager() {};

    public static boolean isInputableField(FieldBean f) {
        if ((f instanceof InputableFieldBean) && (((InputableFieldBean)
f).isEditable()))
            return true;
        else
            return false;
    }
}

/**
 * This is a customizable method.
 */
/**
 * In this example we have scanned a concatenated UCC128
 * barcode which has Item, quantity, lot_number and
 * lot_quantity.
 * With one scan we want to populate all the above fields
 * on the PO Receipt page.
 * It returns the value to be set for the current field:
 * in our example is item.
 */
// curtPage passes the current MWA Page
// curtSession passes the java session
// val has the value that was scanned

    public static String processScan(oracle.apps.mwa.container.Session
curtSession,
        oracle.apps.mwa.beans.PageBean curtPage,
```

```

        java.lang.String val) {
// This will log a message in the server trace file if // you have the MWA
server running in the trace mode.
// Please preceede your messages with CTM.
    FileLogger.getSystemLogger().trace("CTM: Pre-preprocessing the scan");

    FieldBean curtBean = curtPage.getCurrentFieldBean();
    if (curtBean instanceof oracle.apps.inv.lov.server.ItemLOV) {
        int itemFieldIndex = curtPage.getCurrentFieldIndex();
        String itemValue = val;
        String [] curtFieldDFIs = null;
        int itemDFILength = 0;
        if (isInputableField(curtBean)) {
            curtFieldDFIs = ((InputableFieldBean)curtBean).getDFIs();
            int itemDFILength = 0;
            if (curtFieldDFIs != null) {
                // if prefix of value is in curt field DFI, strip it,
                // and setFieldValue
                for (int i=0; i < curtFieldDFIs.length; i++) {
                    int x = itemValue.indexOf(curtFieldDFIs[i]);
                    if (x == 0) {
                        // found a DFI in the value, let's strip it
                        itemDFILength = curtFieldDFIs[i].length();
                        FileLogger.getSystemLogger().trace("CTM: found matching Item DFI "+
                            curtFieldDFIs[i]);
                        FileLogger.getSystemLogger().trace("CTM: Item DFI Length: "+
                            itemDFILength);
                        break;
                    }
                }
            }

            // After stripping the DFI only the first 14 characters // are for item Process
            the remaining characters for the // remaining fields
            if (itemValue.length() > (14+itemDFILength)) {

                Vector fieldBeanList = curtPage.getFieldBeanList();
                int qtyFieldIndex = 0;
                int lotNumFieldIndex = 0;
                int lotQtyFieldIndex = 0;
                // Get the index for the other three fields from the
                // list of fields
                for (int i=itemFieldIndex; i<fieldBeanList.size(); i++) {
                    String name = ((FieldBean)fieldBeanList.elementAt(i)).getName();
                    if (name != null && name.equals("INV.QTY"))
                        qtyFieldIndex = i;

```

```
        if (name != null && name.equals("INV.LOT"))
lotNumFieldIndex = i;
        if (name != null && name.equals("INV.LOT_QTY"))
lotQtyFieldIndex = i;
    }

// Get the value for the item field
    String remainingValue = itemValue.substring(14+itemDFILength);
    itemValue = itemValue.substring(0, (14+itemDFILength));
    FileLogger.getSystemLogger().trace("CTM: Item value: "+ itemValue);
    FileLogger.getSystemLogger().trace("CTM: Remaining value: "+
remainingValue);

    String qtyValue = "";
// Found qty field so set the value for the quantity
    if (qtyFieldIndex > 0) {
        FileLogger.getSystemLogger().trace("CTM: Found the qty field");
        boolean doneQty = false;
        String [] qtyFieldDFIs = null;
        FieldBean qtyField =
((FieldBean) (fieldBeanList.elementAt(qtyFieldIndex)));
        if (isInputableField(qtyField)) {
qtyFieldDFIs = ((InputableFieldBean)qtyField).getDFIs();
        if (qtyFieldDFIs != null) {
// if prefix of value is in curt field DFI, strip it,
// and setFieldValue
            FileLogger.getSystemLogger().trace("CTM: Got the dfi for qty fld");
            for (int j=0; j < qtyFieldDFIs.length; j++) {
                int x = remainingValue.indexOf(qtyFieldDFIs[j]);
                FileLogger.getSystemLogger().trace("CTM: "+j+"th DFI:"+qtyFieldDFIs[j]);
                if (x == 0) {
// found a DFI in the value, let's strip it
                    qtyValue =
remainingValue.substring(x+qtyFieldDFIs[j].length(),
x+qtyFieldDFIs[j].length()+6);
                    ((InputableFieldBean)qtyField).setValue(qtyValue);
                    FileLogger.getSystemLogger().trace("CTM: Qty value:"+qtyValue);
                    if (remainingValue.length() >
(qtyFieldDFIs[j].length()+6)) {
doneQty = true;
remainingValue =
remainingValue.substring(x+qtyFieldDFIs[j].length()+6);
                    FileLogger.getSystemLogger().trace("CTM: Remaining value:"+remainingValue);
                } else remainingValue = "";
                break;
            }
        }
    }
}
```

```

    }
  }
}

// Set the value for the lot number and lot qty field
if (doneQty && lotNumFieldIndex > 0) {
FileLogger.getSystemLogger().trace("CTM: Found the lot Num field");

((InputableFieldBean) (fieldBeanList.elementAt(lotQtyFieldIndex))).setValue(qtyVa
lue);
FieldBean lotNumField =
((FieldBean) (fieldBeanList.elementAt(lotNumFieldIndex)));
String [] lotNumFieldDFIs = null;
if (isInputableField(lotNumField)) {
    lotNumFieldDFIs = ((InputableFieldBean)lotNumField).getDFIs();
    if (lotNumFieldDFIs != null) {
// if prefix of value is in curt field DFI, strip it,
// and setFieldValue
        for (int j=0; j < qtyFieldDFIs.length; j++) {
            int x = remainingValue.indexOf(lotNumFieldDFIs[j]);
            if (x == 0) {
// found a DFI in the value, let's strip it
String lotNumValue =
        remainingValue.substring(x+lotNumFieldDFIs[j].length());
((InputableFieldBean)lotNumField).setValue(lotNumValue);
FileLogger.getSystemLogger().trace("CTM: Lot value:"+lotNumValue);
            }
        }
    }
}
}
}
}
}
return itemValue;
} else {
return val;
}
}
}
}

```

Oracle EDI Inbound ASN Enhancement for Warehouse Management

Topics covered in this chapter include:

- [Overview](#) on page 19-2
- [Necessary E-commerce Gateway Setup Steps for WMS Enhancement](#) on page 19-6
- [EDI Import Process](#) on page 19-7
- [Process Trace](#) on page 19-11
- [Troubleshooting Tips](#) on page 19-11

Overview

Oracle Warehouse Management system (WMS) enhances existing Oracle EDI Inbound ASN transactions to enable a supplier to send License Plate Number (LPN), Lot Number, and Serial Number data on an inbound ASN. A new interface file level, Line Detail, has been added to ASNI transaction map defined by Oracle EDI. This new level of data maps to 4000 records on an inbound ASN flat file. Each record in this level is a child for an interface transaction line record. It may contain LPN, Quantity, UOM Code, Lot Number, or Serial Number data.

The following is a list of the Oracle Warehouse Management required fields, if your Oracle Warehouse Management is licensed, and wish to receive LPN data on the ASN. If the required data is not provided in the transaction, or the validation for the data fails, the Oracle Warehouse Management import process will fail to preprocess the LPN data from the ASN. The remainder of the import process may succeed without LPN data. As a result this ASN cannot be express-received. A Confirmed Receipt must be performed.

Refer to the *Oracle Warehouse Management User's Guide* for more information on License Plate Number management.

Table 19–1 Oracle Warehouse Management Required Fields

WMS Column Name	Record No.	Position No.	Note
LICENSE_PLATE_NUMBER	4000	10	LPN Number
LOT_NUMBER	4000	20	NULL for non-lot controlled
FROM_SERIAL_NUMBER	4000	30	NULL for non-serial controlled
TO_SERIAL_NUMBER	4000	40	NULL for non-serial controlled
QUANTITY	4000	50	Quantity on LPN
UOM_CODE_INT	4000	60	Internal UOM Code
UOM_CODE_EXT1	4000	70	External UOM Code if code conversion defined

License Plate Data (Line Detail)

LICENSE_PLATE_NUMBER

This column identifies the License Plate Number that identifies the container for this line of material. To be successfully processed, this number must be a new LPN number, not previously defined in Oracle WMS. If the number already exists, WMS import will fail and the ASN will be processed without LPN data. In that case, a Confirmed Receipt must be performed. One ASN can be packed in to more than one LPN. But one LPN cannot contain more than one ASN.

LOT_NUMBER

This column identifies the lot number of the material shipped. If this number violates the lot uniqueness constraints, WMS import will fail and a Confirmed Receipt must be performed. Note that lot expiration date is not sent with the ASN. If the lot expiration date for the item is shelf life based, the lot expiration date will be the current date/time of importing, incremented by the shelf life days. If the lot expiration date is pre-defined, the current date/time of importing will be used as the expiration date. You need to modify the lot expiration date through the Lot Number Maintenance form after a receipt has been performed against this ASN. The above discussion about the lot expiration date only applies to a new lot number.

FROM_SERIAL_NUMBER, TO_SERIAL_NUMBER

The two columns identify the serial numbers shipped. If the serial numbers violate the serial uniqueness constraints, WMS import will fail and a Confirmed Receipt must be performed.

QUANTITY

This column represents the quantity of material packed on this LPN. It is possible for more than one line detail record to exist for one interface transaction record. The total quantity of the line detail records that belong to one interface transaction line record has to match the quantity of that interface transaction line record. If the quantity does not match, WMS import will fail and a Confirmed Receipt must be performed. Detail of the quantity relationship will be presented below in an example.

UOM_CODE_INT

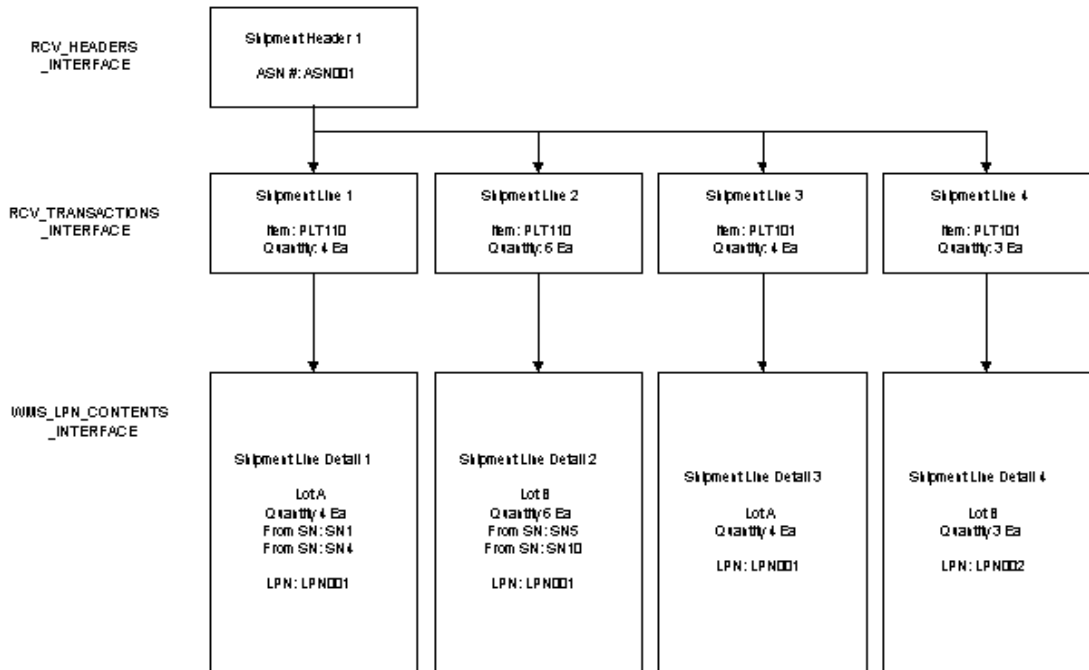
This column represents the internal UOM code defined in Oracle Applications. If the UOM code is left blank, UOM code will be derived from an external UOM code based on the UOM conversion definition. If the external UOM code is not populated, the UOM at the transaction interface line level will be used to derive it. If this UOM code is populated, it has to match the UOM of the parent interface transaction line record. If they do not match, WMS import will fail and a Confirmed Receipt must be performed.

UOM_CODE_EXT1 ... EXT5

These columns represent the external UOM code found in the transaction if code conversion is defined as such. If this external UOM code is populated, it has to match that of the parent interface transaction line record. If they do not match, WMS import will fail and a Confirmed Receipt must be performed.

ASNI Record Hierarchy - An Example

Figure 19–1 ASNI Record Hierarchy Example



AUTO_TRANSACT_CODE

This column is defined at the interface transaction line level (table name RCV_TRANSACTIONS_INTERFACE). It is addressed here because the value in this column identifies the type of incoming data and effects the behavior of the import process, in particular Receiving Open Interface. The valid values are:

- **SHIP** - tells the Receiving Open Interface to process the inbound ship notice as a ship notice only. You will need to execute the PO receipt process in Purchasing when the physical goods arrive at your dock. Use this setting if the physical goods are scheduled to arrive after the ship notice.
- **RECEIVE** (default) - tells the Receiving Open Interface to process the inbound ship notice as a ship notice and a PO receipt. Use this setting if the physical

goods are scheduled to arrive with the ship notice or this is a service PO that does not require a physical receipt.

- DELIVER - tells the Receiving Open Interface to process the inbound ship notice as a ship notice, a PO receipt, and delivery. Use this setting to receive and deliver the physical goods to the requester or to inventory. This option assumes you do not want to inspect the goods.

WMS currently only supports SHIP. Existing Oracle ASNI transactions support all three AUTO_TRANSACT_CODE for NON-lot, NON-serial controlled items only.

Necessary E-commerce Gateway Setup Steps for WMS Enhancement

You should consult the *Oracle e-commerce Gateway User's Guide* and Implementation Manual for complete instructions on setting up e-commerce Gateway. This section highlights the steps that usually cause problems if not properly performed.

Seed Date Reconciliation

Verify the Line Detail level has been created for the ASNI map

Responsibility: Manufacturing & Distribution Manager or e-Commerce Gateway

Navigation: EDI > Setup > Interface File Definition

To verify:

1. Query for ASNI in the Transaction field.
2. Choose the down arrow while cursor is in the master block.

You should see 3 master level records: Header, Line, and Line Detail.

For the Line Detail master record, the detail block should show WMS related fields, e.g. License_plate_number, and so on.

Run the Seed Data Reconciliation Concurrent Request

If only two master levels have been seen, you must submit the Seed Data Reconciliation concurrent request as follows:

Navigation: EDI > Process > Seed Data Reconciliation

To submit the Seed Data Reconciliation concurrent request:

1. Choose Single request, then OK.

2. Invoke LOV in the Name field, that leads you to the Parameters window.

Transaction Type: ASNI

Reserve Layout: No

Rest of the fields: Yes

3. Choose OK.
4. Submit the request.

Verify that the concurrent request completes normally, then go back to verify the line detail level.

If the concurrent request completes with an error or warning, view the log file and consult the e-commerce Gateway relevant document for a solution. Usually there is an issue with staged ASNI documents. Navigate to the EDI >Process >View Staged Documents form to delete the skipped documents for IN: Ship Notice/Manifest (856/DESADV).

EDI Import Process

There will be two concurrent programs being executed in sequence:

- IN: Ship Notice/Manifest (856/DESADV) - imports the inbound ASN into the Oracle Application open interface tables from a flat file
- Receiving Transaction Processor - optionally invoked by the first one, populates actual application tables.

IN: Ship Notice/Manifest (856/DESADV)

Navigation: EDI > Process > Import Program

1. Choose Single Request, then OK.

Name: IN: Ship Notice/Manifest (856/DESADV)

2. Tab out of the field, the Parameter window opens.

Inbound Datafile Name: file name

Execute Open Interface: Yes or No to determine if Receiving Transaction Processor will be called or not.

Map Code: EC_ASNI_FF

Debug mode: 0, 1, 2, 3

3. Choose OK.
4. Submit the request.

Note down the request ID and verify that the request completed normally.

Receiving Transaction Processor

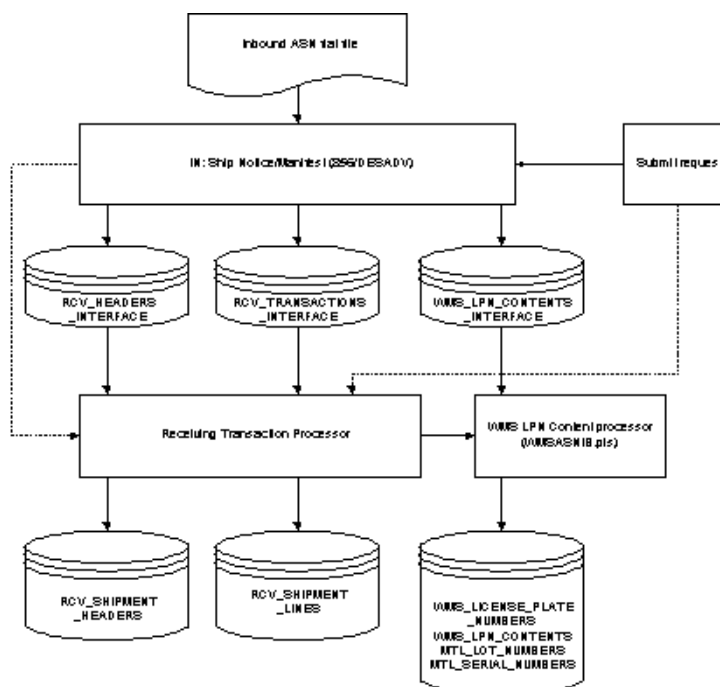
The Receiving Transaction Processor can be automatically invoked by the previous concurrent program as described above. A different request ID will be given for this concurrent request. It is recommended to use the All My Requests option in the Find Requests window to verify that both requests completed without error.

You can invoke the Receiving Transaction Processor manually after importing the ASN into the interface tables by following steps:

To invoke the Receiving Transaction Processor manually:

Navigation: Other > Requests > Run

1. Choose Single Request, then OK.
Name: Receiving Transaction Processor
2. Submit the request.

Figure 19–2 Technical Process Flow

Interface Table Definition

WMS uses the interface table `WMS_LPN_CONTENTS_INTERFACE` to temporarily store LPN content data imported through EDI. The LPN content processing program (`WMSASNIB.pls`) processes and validates records from this table, then populates the appropriate Oracle Application tables. The columns that are significant for WMS have been described in the first section of this chapter. The following is a summary of all the columns in this table.

Table 19–2 WMS_LPN_CONTENTS_INTERFACE

Name	Type
LICENSE_PLATE_NUMBER	VARCHAR2(30)
INTERFACE_TRANSACTION_ID	NOT NULL NUMBER

Table 19–2 WMS_LPN_CONTENTS_INTERFACE

Name	Type
GROUP_ID	NUMBER
LAST_UPDATE_DATE	NOT NULL DATE
LAST_UPDATED_BY	NOT NULL NUMBER
CREATION_DATE	NOT NULL DATE
CREATED_BY	NOT NULL NUMBER
LAST_UPDATE_LOGIN	NUMBER
REQUEST_ID	NUMBER
PROGRAM_APPLICATION_ID	NUMBER
PROGRAM_ID	NUMBER
PROGRAM_UPDATE_DATE	DATE
ITEM_NUM	VARCHAR2(81)
ITEM_DESCRIPTION	VARCHAR2(240)
ITEM_REVISION	VARCHAR2(3)
VENDOR_ITEM_NUM	VARCHAR2(25)
LOT_NUMBER	VARCHAR2(30)
QUANTITY	NUMBER
UOM_CODE	VARCHAR2(3)
FROM_SERIAL_NUMBER	VARCHAR2(30)
TO_SERIAL_NUMBER	VARCHAR2(30)
DOCUMENT_NUM	VARCHAR2(30)
DOCUMENT_LINE_NUM	NUMBER
SHIP_TO_ORGANIZATION_CODE	VARCHAR2(3)
SHIPMENT_NUM	VARCHAR2(30)
INTERFACE_TRANSACTION_ID	NOT NULL NUMBER

Process Trace

IN: Ship Notice/Manifest (856/DESADV) Trace

Different debug levels (0 to 3) can be set for IN: Ship Notice/Manifest (856/DESADV). The higher the debug level, more messages you will see in the current request log. Process trace can be viewed within the concurrent request log by clicking View Log from the Requests form.

WMS LPN Content Import Process Trace

The WMS LPN content import process trace can be found in the concurrent request log for the Receiving Transaction Processor. The following two profile options need to be set to view the process trace for WMS LPN content import process:

- INV: Debug Trace - Yes
- INV:Debug Level - 9

After setting these profiles, the process trace for WMS LPN content import can be viewed within the concurrent request log for the Receiving Transaction Processor. The reason why certain validations have failed for importing LPN, lot number, or serial number data can be found from the trace.

Note that Receiving Transaction Processor will have a different request ID than IN: Ship Notice/Manifest (856/DESADV).

Troubleshooting Tips

It is recommended that you run IN: Ship Notice/Manifest (856/DESADV) and the Receiving Transaction Processor separately for troubleshooting purposes.

After the first concurrent program is executed you should verify the following interface tables are populated:

- RCV_HEADERS_INTERFACE, RCV_TRANSACTIONS_INTERFACE
- WMS_LPN_CONTENTS_INTERFACE

After the second concurrent program is executed you should verify that the following application tables are populated:

- RCV_SHIPMENT_HEADERS
- RCV_SHIPMENT_LINES
- WMS_LICENSE_PLATE_NUMBERS

- WMS_LPN_CONTENTS

Optionally the following tables may be populated:

- MTL_LOT_NUMBERS
- MTL_SERIAL_NUMBERS

If necessary view the process trace for any validation or other failures.

Warehouse Management Picking for Manufacturing

Topics covered in this chapter include:

- [Overview](#) on page 20-2
- [Manufacturing Picking](#) on page 20-2
- [Implementation](#) on page 20-9
- [Common Problems](#) on page 20-14
- [Frequently Asked Questions](#) on page 20-18

Overview

Warehouse Management System is tightly integrated with the manufacturing modes supported by Oracle Work in Process and Oracle Shop Floor Manufacturing. Instead of using static paper-based picking lists to gather components required for a job or schedule, you can use the advanced features available from Oracle Warehouse Management. The integration is available for discrete, flow, repetitive, and lot-based manufacturing.

Supported features include:

- Rules Engine based allocation
- Task dispatching
- Opportunistic crossdocking
- Compliance label support
- Pick Methodologies

Picking for Manufacturing is completely integrated with warehouse management. Features such as material status control, pick slip grouping rules, task skipping, and device integration are applicable to manufacturing requirements.

Manufacturing Picking

The items and quantities required for a job or schedule are specified on the bill of materials. With this as a main exception, component pick release for manufacturing and sales order pick release follow nearly identical processes. If you are familiar with the Warehouse Management sales order pick release process, you will recognize the following steps performed by the manufacturing pick release.

- Allocate material using the warehouse management Rules Engine
- Identify unavailable material as backordered
- Determine the task type necessary to perform the task

The pick release process provides tasks associated to move orders (or material allocations). These tasks are then dispatched to you on the mobile device and sequenced by locator and subinventory picking order.

You then perform the task, and confirm the material identified in the allocation was picked. Depending on the supply type, performing the task either issues the material directly to the job, or moves the material to the supply subinventory and locator indicated on the bill-of-materials to be pulled later by an operation move or assembly completion.

Pick Release Process

You can view material requirements for a job when it is pick released. There are four different query windows available to use. The query window you use depends on the manufacturing mode. For example, you may use one window to query for a particular job number for discrete manufacturing, and use another window to query for repetitive manufacturing lines and assemblies.

Once the appropriate jobs are selected from the query criteria, you can view the material requirements for each job, and remove jobs from the pick release process. Select Release after you select the jobs.

A note appears on the desktop window that indicates if the Rules engine allocated all, some, or none of the material requirements. Material may not be allocated if none of the material available meets the rule restrictions. You can query the job in the Pick Release window to view the unallocated requirements. In addition, you can print the move order pick list report for the batch as part of the pick release process. The note includes the request number of the report.

Only jobs in a transactable status with open requirements appear in the Pick Release window. Transactable statuses are Released and Complete. Statuses such as On Hold, Pending, Cancelled, and Complete – No Charges are not transactable and jobs with these statuses are not returned by the query criteria. Because only open requirements display, jobs whose requirements are completely allocated by the pick release process, or fulfilled via material issues, are not returned by the query criteria. In addition, allocated and fulfilled material requirements on the bill of materials do not display in the Pick Release window. However unfulfilled requirements for the same job appear on the Pick Release window.

A concurrent process is available for each of the four manufacturing modes that release all requirements in a transactable state. If pick release of manufacturing requirements is done regularly and without any decisions of what to release, the concurrent request streamlines the process. The concurrent program picks up only transactable jobs.

Supply Types

Bills of Material supports several different supply types, including:

- Push
- Assembly pull
- Operation pull
- Phantom

- Supplier
- Bulk

Only push, assembly pull, and operation pull components can be pick released. The system ignores components with other supply types for the pick release process. However the other supply types behave the same as without Picking for Manufacturing. In addition, you can exclude pull components from the pick release process on the WIP Parameters window. If you exclude pull components, the system assumes they are replenished in the supply subinventory through some other means. See: *Defining WIP Parameters, Oracle Work in Process User's Guide*.

A requirement with supply type push and a null supply subinventory / locator creates a move order, where the source is inventory and the destination is the job. Transacting the task issues the material from the subinventory from which the allocation was made to the job.

A requirement with supply type of operation or assembly pull creates a move order, where the source is inventory and the destination is the supply subinventory / locator on the bill of materials. Transacting the task moves the material from the subinventory where the allocation was made to the supply subinventory. The material is pulled from the supply subinventory on the operation move or assembly completion. As the supply subinventory / locator are not required fields on the bill of materials, they default from the WIP Parameters form if they are left blank.

A requirement with supply type push and the subinventory / locator populated on the bill of materials creates a move order where the source is inventory and the destination is inventory. The only difference between this and a material requirement with supply type pull is that the material must be manually issued to the job. The job does not pull the material at assembly completion or operation move.

Allocation Rules

Move orders are created for the material requirements selected from the Pick Release window. The Rules Engine allocates material based on rules you define.

You can base rules on any attribute related to the job, inventory, organization, or other information related to the material requirement. For example, you may build rules that rotate stock, allocate a single lot, or clean near-empty locators. In addition, there are several objects that support attributes of the job. If you use these objects, you can allocate material from different subinventories based on the department, or inventory lots with particular attributes because of the comments on the bill of materials or routing indicate specific requirements for this job.

See: [Warehouse Management Rules Engine](#) on page 13-1 for a detailed explanation of the Rules Engine set up.

Task Type Rules

Once you create and allocate the move orders for the material requirements, you must assign the task type to the move order. Task types model the qualifications or skill sets required to perform a particular task. For example, a task in a high rack may require an operator trained to use the high-bay forklift, while a task of hazardous material may require an operator trained in HAZMAT material handling.

You can base task type assignment on any data related to the material requirement, job, organization, or other attribute. Task type assignment also uses the Rules Engine. See: [Warehouse Management Rules Engine](#) on page 13-1. You can use several of the additional objects used for allocation rules for task type assignment rules.

Loading Tasks

The task is now ready to be dispatched. Indicate the initial dispatch subinventory, the available equipment, and the devices to use. See: [Task Notification](#) on page 21-5.

To confirm the material allocation, confirm the allocated item, and if applicable, the revision, lots, and serials. If you confirm the pick with an LPN that matches the allocation, instead of loose material, you can skip the confirmation fields.

You also confirm the suggested subinventory and locator, however if desired, you can override the suggestions. You must also confirm the quantity picked, but can under pick if the required quantity is unavailable. Any exception to the allocation prompts you to enter an exception reason that can initiate a user-defined workflow.

You must load the task into an LPN if the material is loose or if only part of an LPN has been picked for a task. The LPN identifies the material picked for a particular task. You can load multiple requirements into the same LPN as long as they are for the same manufacturing mode.

You can also access information about the job that created the task from the load screen. After confirming the allocated material, you can load the material on to the equipment and continue with additional loads, or drop the task.

Dropping Task

The issue transaction is integrated into the drop only for push supply types where the task is dropped to the job. You drop a pull requirement to the supply subinventory indicated on the bill of materials, and a push requirement to the job. The issue transaction is integrated into the drop.

You can also record exceptions on the drop of pull material. You can override the suggested supply subinventory. The override reason you enter can trigger a corrective workflow, such as updating the bill of materials to pull the inventory from the new drop locator.

Pick Methodologies

Picking for manufacturing supports all the pick methodologies supported for sales orders. This includes cartonization / pick-and-pass picking, where the system suggests specific totes for tasks as part of the pick release process. It also includes pick slip grouping rules, where tasks are queued in groups, defined by user-specified criteria, such as job / schedule name, department, operation, source subinventory / locator, etc. As part of the pick slip grouping rules, bulk picking is also supported for manufacturing. Tasks for the same subinventory / locator, item, and revision, are merged into larger tasks. These larger tasks are then deconsolidated as part of the pick drop process. Manufacturing picking has full support for cluster picking, where the system dispatches you a pre-specified number of clusters of tasks with the first task.

Job Cancellation

You can cancel a job can at any point after the status has been changed to Released. If the job has not pick released, then no allocations or tasks exist and you do not need to take corrective action. However, if pick release was run for the job, then different corrective actions are taken depending on the status of the tasks.

The system deletes tasks in status of Pending, Queued, Hold, or Error and relieves the allocations. Completed tasks are not changed and manual intervention is required to return the material from the job to inventory, if appropriate.

Dispatched tasks enable you to load the material, but you cannot drop the material to the job. Similarly, you cannot drop loaded tasks. You must unload both loaded and dispatched tasks. You can view whether the job (or sales order) that created the loaded task was cancelled from the current tasks page. You also receive a message that indicates that dropping the LPN is not allowed.

You cannot drop push requirements without a supply subinventory because the destination of the task is the job, and you cannot issue material to a cancelled job. In

addition, pull requirements require manual intervention to return the inventory to its initial locator. Therefore, you can unload the loaded LPN. After the LPN is unloaded, the task is cancelled and the allocation is relieved.

Completed tasks for a cancelled job are not affected. If a job was cancelled, and then pick released again, only the uncompleted tasks and backordered requirements are allocated.

Change Management

Picking for Manufacturing supports limited change management beyond job cancellation. If the job quantity is increased, then the job can be re-released and the new material requirements for the additional job quantity will be allocated (or backordered). If the job quantity is decreased, then any backordered or unallocated requirements are reduced. When the job is pick released, material requirements are not created for the quantity that is no longer required.

Manual Material Issue

You can manually issue material to a job. If the job is not pick released, then the manual material issue reduces the open requirements (and the allocation quantity) when the job is pick released. If the job was pick released, then a manual material issue posts to the job in addition to the allocated or backordered quantity.

A manual material issue does not reduce the backordered quantity until the job is pick released again. This means that if a material issue is made for a backordered component, if the job is not pick released again, additional material may be crossdocked to the job. However, if the job is pick released again, the backordered quantity is reset. If you use both manual material issues and crossdocking ensure material is not over-issued to a job.

You can also use a manual material issue to issue material to a job when the supply type is push but the bill of materials contains a supply subinventory / locator.

Unloading Tasks

You can unload an LPN at any time. Unload reverses the load transaction and returns the task to a status of pending. If you cancel the job (or sales order) that created the task, then the task and allocation are cancelled as well.

If you loaded a complete LPN then you must unload the entire LPN. If you picked the items from loose material, then return loose material to the original locator. Please refer to [Common Problems](#) on page 20-14 for additional details and limitations of the unload operation.

There are several limitations to the unload process. A loaded LPN can contain several tasks, and you must unload each task individually. If you scan an LPN instead of selecting it from the list of values, the system assumes you mean to unload the first task associated with that LPN in the list-of-values. In addition, you cannot unload a loaded LPN that contains loose tasks unless you first unload the loose (or partial LPN) tasks. An example is provided in the [Frequently Asked Questions](#) on page 20-18.

Backordered Requirement

If you cannot allocate the material at pick release, the system backorders it. Backordered material requirements for jobs are similar to backordered material for sales orders. You can re-release backorders, or use opportunistic crossdocking to fill the demand. If you do not enable crossdocking, you can only fill backordered requirements by re-releasing the job.

The component Pick Release window queries jobs with at least one open (unallocated) material requirement. It displays only open material requirements so a job with multiple requirements displays the necessary requirements. If the system backordered one of the required components at pick release, you receive a message when you select the Release button.

Warehouse management does not support backordering component requirements for flow manufacturing. The component requirements for a flow schedule are allocated in total. If material is not available for one or more of the operations, the entire schedule is not allocated and a message appears on the desktop window.

Crossdock Support

Warehouse management supports opportunistic crossdocking to jobs. If you enable crossdocking for an organization, then when you put away from purchase order receipts, the system checks for backorders first before trying to put away to inventory. If there are existing backorders for the component, then the system directs you to drop the material to the job for push requirements or to the supply subinventory for pull requirements.

Multiple job backorders are filled in sequence of the material requirement date. You can also backorder an item for both a job and for a sales order. An organization parameter controls the fulfillment order.

Paper Assisted Picking

Warehouse management also supports paper assisted picking. Instead of the system dispatching you tasks on the mobile device based on task types, you can dispatch

tasks to yourself based on the task identifier on the Move Order Pick Slip Report. You can print the report for all untransacted move orders for jobs, as well as for other additional criteria. You can print the move order pick slip report automatically as part of the pick release process.

Label Printing

Label printing is integrated with the business flows, so you can print defined labels automatically as part of any transaction. Use the [System Rules Engine](#) on page 13-2 to determine the best label format of multiple different formats.

An additional label type, WIP Contents, can be printed automatically as part of the pick load or the pick drop process. This label includes details of the job or schedule, the LPN into which the material is packed, and attributes of the specific material requirement and operation for which the material has been picked.

In addition to the WIP Contents label, the LPN, LPN Contents, LPN Summary, and Material labels can be printed with these business flows. See: [Label Printing Integration Kit](#) on page 10-1.

Updating Allocation

You can update move orders allocated for job material requirements on the desktop Transact Move Orders window. You can change the quantity, allocated lots, allocated serials, or the destination subinventory. These changes are reflected in the task the system dispatches to you.

Updating Tasks

In addition to the allocations visible on the desktop, the tasks are also visible on the Control Board. You can re-prioritize and reassign tasks as appropriate. You can query tasks by job name or other criteria specific to discrete, flow, repetitive, or shop floor manufacturing.

Implementation

You must make several decisions when implementing Picking for Manufacturing that impact functionality.

Pull Requirements

An organization may not want to create tasks for individual pull requirements if it is easier to use a different method to replenish material. For example, if you define inexpensive fasteners as an assembly pull requirement, then min-max

replenishment of the supply subinventory is likely the more appropriate way to manage the pull material. However, an organization may want to create tasks for the pull material if the business processes requires this control.

Include Pull Components

The parameter “Release Backflush Components” controls if pull requirements are included in the pick release process. This flag is located on the WIP Parameters window and is organization specific. If pull components are not included in pick release, then they do not appear on the Pick Release window and no tasks will be created for them. Those components will be pulled from the supply subinventory at operation move or assembly completion. Note that this pull happens unchanged by component pick release. The system considers a job completely allocated, if all the push requirements are allocated, regardless of the status of the pull requirements. These jobs are no longer available on the pick release window.

Lot / Serial Pull Components

After performing a task to drop a pull material requirement to the supply subinventory, the material is backflushed automatically into the job as part of the operation move or assembly completion. However, the system loses visibility to which lots or serials were transferred for that particular job. Rather than pulling lots allocated by the Rules Engine, the system pulls lots based on the “Lot Selection Method” indicated in the WIP Parameters window.

You cannot pull serial controlled items from all of the mobile completion pages. The LPN based completion pages, the flow completion page, and the work orderless completion page support pulling serialized components. These pages require you to enter the serials to pull. However, the mobile operation Move and the mobile Non-LPN Based Discrete Job Completion window do not support entering serial numbers. Any requirements you must pull from transactions entered on these pages cannot be serial controlled. Warehouse management supports entry of serial numbers for backflushed components on the applicable desktop window. Lot based jobs do not provide mobile support for any transactions beyond those provided to perform component picking.

Because the job has no visibility to particular lots or serials allocated for pull requirements, if you must use specific allocation logic to allocate lots or serials setup the material requirement as a push requirement. Otherwise, with manual selection of the lots and serials for pull, it is possible that two jobs could stage different lots or serials of the same item to the same supply locator, and then each job may receive lots and serials that had been staged for the other job. However, this may not pose a problem if it does not matter which lot or serial goes into each job.

Supply Subinventory

The supply subinventory must be setup in a particular fashion for it to function properly.

As Oracle Work in Process only supports pulling loose (unpacked) material, the supply subinventory must not be LPN-controlled. All LPNs moved (or dropped from a task) into a non-LPN controlled subinventory are unpacked. The empty LPN is updated to the context 'Defined but not Used' so it becomes available for other processes in the warehouse.

The supply subinventory must also be non-reservable. This prevents picking of dropped and staged material from the supply subinventory for open requirements for other jobs or for sales order lines. When the system pick releases the job, the allocated material for the move order is no longer available for other transactions. However, once you drop the material, the allocation is transacted and there is no longer any connection between the dropped material and the job. In an ordinary subinventory, this material is available. The system can only avoid allocating other requirements from the supply subinventory if it is non-reservable.

These first two requirements are enforced during pick release. That is, if any of the supply subinventories for an operation pull or assembly pull component are reservable or LPN-controlled, the system halts pick release for the entire batch. The system makes this check prior to committing any allocations. After correcting the erroneous subinventory settings, you can use the same query criteria to build the batch. For the purposes of this validation, push components for which a supply subinventory / locator has been populated are treated identical to pull components.

The supply subinventory must be locator controlled. You can set the locator control to either dynamic entry or prespecified. However prespecified is easier to control and maintain for a supply subinventory.

Do not set capacity for the locators defined for the supply subinventory unless modeling capacity is critical. The bill of materials determines the supply subinventory / locator. The Rules Engine will not override it; it can only validate it. Therefore, if the supply locator is full, then no pull move orders with that supply locator are created. A null capacity value on the Stock Locator window indicates infinite capacity.

Allocation Rules

You can use any of the object the Rules Engine provides to build allocation rules. These objects include the following: lot number, the WIP bill of materials, and the bill of materials routing. Some of these objects may not be applicable for all jobs. For

example, a rule that uses the objects WIP Operations, BOM Operations, or BOM Routing applies only to jobs with routings. Rules that include the object WIP Repetitive Schedule are only applicable for repetitive manufacturing..

If no specific logic is necessary for allocating move orders for sales orders or jobs, the quickest implementation would be to define a single rule, perhaps with sort criteria to ensure stock rotation, and to assign the rule as the default pick rule in the Organization Parameters window. However, complex allocation logic can be modeled with the objects. Refer to the Rules Engine chapter of this guide for additional assistance in defining rules.

Along with picking rules, a dummy rule that validates the supply subinventory must exist. Each material requirement creates a move order. The source and destination of a move order that resides inventory goes through the Rules Engine. Even though the supply subinventory and locator on the bill determine a pull move order destination, the Rules Engine must validate the destination to ensure the material status and locator capacity are honored. Therefore, unless there are specific requirements for why pull move orders should not be created, the put away rules setup must have the supply subinventory as a valid destination. This is similar to the requirement for sales orders that the staging lanes be valid destination locators.

Task Setup

You must also perform task setup. This enables you to assign tasks with particular attributes to different task types. Only operators with the appropriate qualifications, or signed on with the required equipment, can perform the tasks. This setup is identical to that performed for outbound sales order tasks.

Setup steps include the following:

- Defining equipment items
- Defining resources
- Defining departments,
- Defining task types
- Assigning employees to resources,
- Defining task type assignment rules.

You can use job related attributes to define task type rules. For example, you can assign task types so only certain operators may pick components required for operations in a manufacturing department. See: [System Task Management](#) on page 25-1 for more information.

Pick Methodologies

Manufacturing picking supports the same pick methodologies supported for sales order picking.

A delivery grouping rule is used to stamp a carton grouping ID on the lines for both cluster picking and cartonization at sales order pick release. The system uses this rule to indicate which lines you can pack together, and includes criteria like Customer and Ship Method. However, the criteria are not relevant for manufacturing. All tasks for a single job or schedule are considered in the same group and eligible to be packed together (for cartonization) or picked as a single cluster (for cluster picking).

An organization may wish to control cartonization for sales order picking independently of cartonization for manufacturing picking. There are two flags on the organization parameters window to configure this functionality. You can perform cartonization for tasks coming from only one of those sources, both, or none.

Task dispatching uses pick slip grouping rules to queue all tasks with the same pick slip number to a single operator when the first task in that group is accepted. Some criteria on a pick slip grouping rule are applicable only for sales orders, other criteria are applicable only for manufacturing, and yet other grouping criteria are applicable for both manufacturing and sales orders. Only those criteria that are applicable for the mode in which the rule is used are honored by the system; other criteria that are not applicable are ignored. For instance, if a particular grouping rule indicates the sales order number is one of many grouping criteria, and that rule is used for manufacturing pick release, then the sales order grouping criteria is ignored, while any other criteria potentially applicable to manufacturing is honored.

Crossdocking

Crossdocked material is put away to the supply subinventory for pull requirements, but push material is crossdocked directly to the job. However, Oracle Purchasing requires a delivery be posted to a subinventory; a job is not a valid destination. Therefore, push material is received to a subinventory and locator, and then immediately issued to the job. This receipt and issue is invisible to the end-user; it appears as a single put away transaction to the job. A close examination of the transaction history shows the two transactions.

The Organization Parameters window provides the ability for the implementation team to determine what subinventory / locator these crossdock receipt and issue transactions post to. They need not necessarily be a subinventory or locator set up

particularly for this purpose, but the subinventory must be LPN controlled and must not have any material statuses assigned to it that would disallow purchase order receipt or issue to WIP transactions.

Common Problems

The following section contains the most common causes of the problems, and some basic debugging scripts.

Job not available in Pick Release Window

If the job is not available in the Pick Release window, there are several potential causes.

Verify the job status is either Released or Completed. If the job status is something else, it does not appear in the list of values.

If the job status is Released or Completed, and is in the list-of-values on the Component Pick Release window, open requirements for the job may not exist. Recall pull components are included only if indicated on the WIP Parameters window, and that Bulk, Phantom, and Supplier supply types are not included in component pick release. If applicable, check the autocharge flag. Discrete job and repetitive requirements with this flag disabled are not included in pick release.

For push and pull material requirements, view the job details to verify if any of the components were issued to the job. For discrete jobs, this information is available from the Components window. For lot-based jobs, the applicable window is Define Lot Based Jobs. Check for any material allocations on the Transact Move Order window. If the sum of the allocated material and the issued material is equal to the material requirement, then the requirement is not available on the component Pick Release window. If all the component requirements for a job are allocated or issued, then the job is not displayed on the Component Pick Release window, even though the job number is displayed in the list-of-values.

You can also check for open material requirements from the tables if the WIP_ENTITY_ID of the job in question is available. The following query shows all material requirements for a given WIP_ENTITY_ID:

```
select item.concatenated_segments as item,
       operation_seq_num,
       meaning as supply_type,
       required_quantity as reqt,
       quantity_issued as issued,
       nvl(quantity_allocated,0) as alloc,
       quantity_backordered as backorder,
```

```

        required_quantity
        -nvl(quantity_allocated,0)
        -quantity_issued
        as remaining_to_allocate
from wip_requirement_operations wro,
    mtl_system_items_kfv item, mfg_lookups
where wip_entity_id = &wip_entity_id
and item.inventory_item_id = wro.inventory_item_id
and item.organization_id = wro.organization_id
and mfg_lookups.lookup_type = 'WIP_SUPPLY'
and wro.wip_supply_type = mfg_lookups.lookup_code

```

Search for any record for the job where REMAINING_TO_ALLOCATE is greater than zero. If no records are present, then the job is not available to pick release because all requirements were issued or allocated. This script is also useful to view allocated and backordered job requirements.

Error Releasing Batch

Prior to allocating any material, the system verifies that all the supply subinventories are non-reservable and not LPN-controlled.

By performing these verifications you avoid potential problems further along in the supply chain. Verify the supply subinventories included in the release meet the requirements.

No move orders created from pick release

If the system did not allocate all of the requirements, you receive a warning in the component Pick Release window. If you query the Pick Release window with the same criteria, you can view the backordered requirements.

Picking setup

Backorders generally occur when the Rules Engine does not find enough material available to allocate to a job. The debugging steps are similar to the debugging steps required for sales order pick release. Verify that enough material is on-hand, and that material is available for allocation. The available quantity is visible on the desktop Material Workbench or on the mobile Item Inquiry window. Verify the available material is not restricted by any picking rules, and that it resides in a reservable subinventory.

Check the material statuses of the subinventories and locators where the material is located, and if applicable, the material statuses of the available lots and serials. Any material that has a material status that disallows the transaction types WIP

Component Issue or Backflush Transfer is ignored for push requirements or pull requirements.

In the case of pull materials, verify the material to allocate does not reside in the supply locator. If you create move orders for pull requirements, then the material must be available for allocation in a subinventory other than the supply subinventory. This is for two reasons: the supply subinventory is non-reservable, and also the Rules Engine cannot create a move order where the source and destination locator are the same.

Put away setup

Pull components are dropped to the supply subinventory. The Rules Engine validates the supply subinventory, for material status and capacity restrictions. If the material status of the supply subinventory or locator disallows Backflush Transfers, you cannot create pull move orders to this subinventory or locator.

If the supply locator has capacity restrictions, verify the capacity is not exceeded. It is suggested that you do not assign capacities to locators in a supply subinventory.

Finally, the destination locator (supply subinventory) must be a valid location for put away of the move order. Verify the setup of the put away rules allows put away to the supply subinventory.

Error on task drop

There are two main reasons you receive an error message when you drop a task to a job for a push requirement.

You cannot post material issues to a job that has a status other than Released or Completed. If the job was pick released, and then changed to a status other than Cancelled, then tasks for push material requirements error on the drop. If allocations (and tasks) need to be cancelled for a job, cancel the job before changing to the desired status. The only job status that impacts move orders and tasks after creation is Job Cancellation.

If you create a task and the supply type of the material requirement is push, but the supply type on the bill of materials is changed to pull, then the task errors on the pick drop. This prevents material from being doubly issued for a job. Two corrective actions can be made. You can revert supply type to push temporarily to allow the task drop to complete, and then make corrections which include a material return and changing the supply type back to pull. You can also cancel the job and unload the task. This cancels the task. You can then change the job status back to Released and pick release the job again.

Cannot load to a particular LPN

The last field on the pick load page is the LPN to which the task is loaded. You cannot load tasks with different manufacturing modes or for different document types to the same LPN. For example, you cannot load a sales order task and a discrete job component to the same LPN, nor could you load a discrete job component and an Oracle Shop Floor Management component to the same LPN.

Cannot unload a task line

The unload option enables you to reverse a pick load. This is useful if you start a task but cannot complete it by the end of the shift. You must also unload a task if you loaded it for a push requirement and the job was cancelled before the LPN was dropped.

The LPN list-of-values in the current tasks page contains an entry for each time you select **Load** for a task. This means if you load a full LPN that partially fulfills a single task, and load the remaining quantity loose into the same LPN, there are two lines in the current tasks list-of-values, even though you loaded one LPN. If you load additional to the same LPN, each **Load** adds one more entry to the current tasks list-of-values.

Entering an LPN to drop from the current tasks page drops all lines loaded to the LPN; this is the most common flow through the page. When you unload you must select an individual line. You have loaded the LPN may from multiple locators and only part of the process may need to be reversed. The LPN information may not be enough to determine which line to unload.

If you enter only an LPN to unload (rather than selecting a detail line from the list-of-values), the system selects the first line to unload. It directs you to drop the material exactly as it was picked.

This means that an LPN that was fully consumed or loaded intact for a task cannot be unloaded before any other tasks which were subsequently loaded to the same LPN are first unloaded. In the example above any additional tasks must be unloaded before the first pick load that loaded the full LPN can be unloaded.

Cannot print labels at pick load or pick drop

You can print the WIP Contents, LPN, LPN Contents, LPN Summary, or Material labels at either pick load or pick drop. Two business flows, WIP Pick Load and WIP Pick Drop, are available so the WIP Contents label can be printed for manufacturing picking tasks, but not for sales order picking tasks. If you do not print labels for manufacturing picking tasks, ensure the label types are assigned to the WIP Pick

Load or WIP Pick Drop business flows. Labels for manufacturing picking tasks are not printed for the business flows Pick Load and Pick Drop.

Frequently Asked Questions

1. Must a Warehouse Management enabled organization use picking for Manufacturing?

Picking for manufacturing is an optional feature. The WIP picking report that lists material requirements can be used in concert with the mobile or desktop manual material issue forms to continue with a fully manual process. However, in order to use the Rules Engine, tasks dispatching, and other warehouse management features, you will need to migrate to the component picking process. This migration can be done at any point

It is suggested that if this functionality is not going to be used for an organization, then the component Pick Release forms be removed from the menu to avoid mistakenly pick releasing a job.

2. Is any of this functionality provided without WMS?

Some of the functionality provided with Picking for Manufacturing is also available for an Inventory organization that is not WMS enabled. Material requirements are pick released in the same fashion. Instead of creating tasks that are dispatched to qualified mobile users, the system creates move orders that are available on the desktop Transact Move Orders window and on a new Mobile page (for Mobile Supply Chain Applications). The functionality here is very similar to allocating and transacting move orders for sales orders.

Many of the advanced functionality relies on features available only with Oracle WMS, such as opportunistic crossdocking, rules based allocation, exception handling, and task management. Please refer to the *Oracle Inventory User's Guide* or the *Oracle Mobile Supply Chain User's Guide* for more detailed descriptions of the functionality provided.

3. Which job statuses are transactable?

A transactable job is a job to which charges, such as resource usage and material issues, can be posted. Jobs in either a status of Released or Completed (not Completed – No Charges) are transactable. Only transactable jobs can be pick released, and material issue transactions can only be posted to transactable jobs.

4. Is allocated material available for other transactions?

Allocated material is not available for other transactions. It is not allocated to other material requirements, nor can it be issued or transferred. However, after

a pull task is transacted the material it transferred is no longer allocated. The only way to ensure the material staged in the supply subinventory is not available for other transactions is to make the supply subinventory non-reservable.

5. How are non-reservable items handled?

Non-reservable items are allocated in the same way as any other item. The pick release process creates an allocation for the item. No reservations are necessary to allocate this material.

6. How are by-products handled?

The pick release process ignores by-products. By-products are indicated by negative requirements on the bill of materials. The functionality surrounding by-products is not changed by the Picking for Manufacturing features.

7. Are non-standard jobs supported?

Non-standard jobs are fully supported with Picking for Manufacturing.

8. Must jobs have routings?

A job does not need a routing to be pick released. A routing provides additional detail on the requirement, including the department and operation sequence. This additional information is provided to the operator on the mobile pages when material is being dropped to a job. This information would not be available if the job does not have a routing.

In addition, several of the Rules Engine objects are related to the routing on the job, and no allocations would be made by a rule that uses a routing-related object for a job without a routing. However, other than these two limitations, jobs without routings behave identically to jobs with routings within the scope of Picking for Manufacturing functionality.

9. How do the autocharge and countpoint flags impact pick release?

If the autocharge flag, located on the bill of materials, is disabled for the material requirement, then the material requirement does not appear on the Component Pick Release window for discrete and repetitive manufacturing, and no move order is created. Flow and lot-based jobs still include these items for allocation.

Other than the impact of Autocharge to Component Pick Release, the behavior of countpoint and autocharge within pick release is not modified with this functionality.

10. What happens if the material pull occurs before the task is completed?

There is no restriction preventing the assembly completion or operation move from occurring before the task is dropped; the completion and move have no direct visibility to the status of the task that replenishes the supply subinventory.

Therefore, the pull is still attempted. If the organization allows negative balances, or inventory exists in the locator, the pull is successful. If the locator does not contain any of the required material and the organization does not allow negative balances, the pull fails and the operation move or assembly completion does not complete.

11. How does the system know which material should be pulled?

The system selects pulls material from the supply subinventory / locator indicated in the bill of materials.

If the material is revision controlled, the revision located on the bill of materials will be pulled. Note also that only the revision located on the bill of materials will be allocated as that revision is placed on the move order before the Rules Engine allocates the move order.

If the material is lot controlled, the lots are pulled into the job in the sequence determined by the Lot Selection Method on the WIP Parameters window. Note that because this selection method has only three options (receipt date, expiration date, and manual entry), it cannot capture the same decision criteria that the Rules Engine used to allocate particular lots. Therefore, if any of the automatic lot selection methods are used, lots that were allocated for a different job but are staged at the same locator could potentially be pulled into a job. It is suggested that manual selection be chosen as the lot selection method so that the operator can pull the appropriate lots into the job.

If the material is serial controlled, backflush transactions are only supported on the desktop. You must indicate which serials in the supply subinventory should be pulled into the job. Operation move and assembly completions are not supported on the mobile device if some of the material that will be pulled is serial controlled.

12. Are manual material issues still supported?

Manual material issues are supported. As component pick release is optional, if component pick release is not used then manual material issues is used to issue material to a job

Even if an organization is using pick release, manual material issues are still supported, but care must be taken to ensure that material is not doubly issued to a job. Manual material issues can be used to issue material above and

beyond the requirements to the job, of items that may not even be on the bill of materials. In addition, manual material issues of materials that are on the bill of materials that are performed before the job is pick released will reduce the requirements of that component for pick release.

However, manual material issues that are performed after the job is pick released will be added to the any components that have already been allocated or that have been backordered. To restate, backordered requirements will not be decreased based on material issues.

Note that manual material issues are a necessary part of the process flow when the supply type of a material requirement is push and a supply subinventory has been entered in the bill of materials, as the task will have been created to transfer the inventory to the supply subinventory and the material will not be pulled into the job.

13. How are material returns supported?

Manual material returns are supported. You can use a material return if the system issues excess material to a job, or if you need to return defective components to inventory.

A material return does not increase the quantity on the job to pick release. Specifically, if material is returned from a job, and then the job is pick released again, the quantity returned will not be considered as a material requirement. If additional material is required, a manual material issue must be performed.

14. Which revision of a revision-controlled item is allocated?

The currently effective revision of a component is allocated for the move order. The revision is not stored on the bill of materials, but the bill always displays the current revision of the component, and the Rules Engine does not override this restriction.

15. Is yield taken into account in the material requirements?

Yield is taken into account when calculating the material requirements. The quantity that you see in the form View Material Requirements is used as the quantity the Rules Engine attempts to allocate.

16. Is overpicking supported?

Overpicking is not supported for Warehouse Management or WIP. You cannot overpick tasks on the mobile device, and you cannot increase the allocation quantity on the desktop Transact Move Order window.

17. What happens when a task is underpicked?

Underpicked tasks backorder the missing requirements, so that they are available for re-release at a future time, or may be crossdocked to, if enabled. In addition, you must enter an exception reason at the time of underpicking. This exception reason is recorded in the task history and can be viewed from the Warehouse Control Board. The exception reason can also trigger a user-defined workflow, which might e-mail the material manager, request a cycle count, or perhaps even place the job on hold.

18. Will the task be split based on equipment capacity?

The task could potentially be split into multiple smaller tasks if the equipment required by the task cannot handle the weight and/or volume of the task.

19. Will the tasks be merged based on picking methodology?

Manufacturing picking supports bulk picking. Tasks that meet the bulk picking criteria, which includes same source subinventory / locator and item / revision will be merged into a larger consolidated task. You are directed to drop off the material from the larger task to the specific jobs or supply subinventories that require it.

20. What types of exceptions are allowed for tasks?

The same exception handling supported for sales order tasks are also supported for Picking for Manufacturing tasks. You can override the subinventory and locator from which the material was allocated. For pull tasks, you can override the drop subinventory and locator.

Ordinarily, the suggested drop locator is the supply subinventory / locator specified on the bill of materials. This is the subinventory / locator for which the material is pulled at the operation move or assembly completion. Overriding the drop locator does not update the supply locator on the bill of materials. Material is pulled from a different locator than where the material was staged, unless the bill of materials is manually updated.

21. Can the task be transacted on the desktop?

You cannot transact tasks on the desktop Transact Move Order window. You can only transact tasks on the mobile device. Only manual move orders can be transacted on the desktop. You can update allocations for any move order on the desktop Transact Move Order window.

22. Can tasks be prioritized?

Warehouse management supports manual task prioritization via the Warehouse Control Board. You can assign priorities to tasks, and tasks to users from the

task control board. Higher priority tasks are dispatched to qualified users before lower priority tasks. Queued tasks are always dispatched before pending tasks.

23. What types of change management are supported?

Once the job has been pick released, several attributes about the job can be changed. If the job has been cancelled, the move orders are deleted if possible. If the job quantity is increased, then re-releasing the job allocates the additional requirements. If the job quantity is decreased backordered (or un-allocated) requirements is reduced appropriately.

If the job is changed to a non-transactable status other than Cancelled after pick release, then tasks for push material fail when you attempt to drop them. You can unload the tasks, but the only way to cancel the allocations and tasks is to change the job status to Cancelled.

If the supply type of the material requirement is changed from push to pull on the bill of materials, then the task cannot be dropped. If the supply type has been changed from pull to push, then the task is dropped to the supply subinventory and a manual issue is required to issue the material to the job.

If the supply subinventory on the job has been changed after pick release, the move order does not recognize the new supply subinventory. However, the job pulls the material at operation move or assembly completion from the new supply subinventory.

For discrete jobs, a copy of the bill (and routing) is made when the job is created. When the bill is changed after the job has been created and pick released, the system considers the lot-based job to have changed. However, the discrete job is only changed when the copies have been changed; changing the bill for the assembly (rather than for the copy) has no effect on the job.

24. Do all tasks need to be loaded to an LPN?

If the LPN has been picked for a pull requirement, it will be dropped to a non-LPN controlled subinventory and thus unpacked as part of the transaction. If the LPN is picked for a push requirement, the material is emptied from the LPN and issued to the job. In both cases, the LPN is empty after the transaction is complete and thus is available for reuse. The subinventory and locator on the LPN will be blank, and the LPN will be given the context "Defined but not Used".

25. What happens to the LPN when it is dropped?

If the LPN has been picked for a pull requirement, it is dropped to the supply subinventory. The supply subinventory should be non-LPN controlled. The task

drop unpacks the LPN, and the LPN is left empty in the supply subinventory. You cannot pack material in to the LPN while it resides in the supply subinventory. You can reuse the empty LPN at a later point if you move it out of the non-LPN controlled subinventory.

If the LPN is picked for a push requirement, the material is emptied from the LPN and issued to the job and the LPN itself will get a context indicating that it can be reused: Defined but not used. The subinventory and locator on the LPN are null, so that the subinventory can be reused for any transaction, including another Picking for Manufacturing task.

26. What kind of receipts support crossdocking?

Put away from both standard routing and inspection routing purchase order receipts can be used for opportunistic crossdocking. In addition, completions for the LPN-based completion window, which support discrete and flow manufacturing, first check for crossdock opportunities before being directed to inventory. Direct purchase order receipts, as well as miscellaneous receipts do not check for crossdocking opportunities.

Material Handling Device Integration Toolkit

Topics in this chapter include:

- [Overview](#) on page 21-2
- [Defining Devices](#) on page 21-2
- [Assigning Devices to Business Events](#) on page 21-4
- [Task Notification](#) on page 21-5

Overview

Warehouse management provides seamless integration with 3rd party material handling devices such as conveyors, carousels, pick-to-light systems, and automated storage and retrieval systems (ASRS). Warehouse management uses either PL/SQL API, an XML flatfile, or a CSV flatfile to export necessary task information to the device.

Warehouse management enables you to associate material handling devices to Business Events to allow automatic exporting of the current task during the processing of an Business Event. For example, you can set up warehouse management to automatically export a list of totes and pick locations to a conveyor at the time of Pick Release. Also warehouse management can export the current pick location when you press a hot key on the mobile device to rotate a carousel to the proper pick location.

Additionally, warehouse management can notify the device once the task completes, and can retrieve information about the status of a task after completion. These two options provide interaction between warehouse management and the device. For example if you perform a task in a pick-to-light situation, then once you complete the task on the mobile device, a task notification tells the pick-to-light it can move on to the next task. Conversely, if the pick is automated using an ASRS, the system can inform warehouse management of the pick status through a device response API.

The functionality process for the Material Handling Device Integration Toolkit consists of these steps:

- Define material handling devices and their attributes
- Assign material handling devices to business events for exporting task information
- Initiate a business event and export the task information to the material handling device

Defining Devices

When defining devices, you specify the device name used to refer to the device within Oracle Applications as well as the integration method.

You need to enter a device name and Device type for each device. Currently supported device types are:

- Carousel

- Conveyer
- Pick To Light
- ASRS

These device types are for identification purposes. There is no functionality associated with different device types. You may also assign the device a model name to refer to the device model. This information is available at time of device integration so that the integration layer can identify the device syntax to use for sending commands to the device.

You can flag devices to require lot and serial export information if necessary. In general, material handling devices do not need information about the specific lot or serial associated to a task. However, if the particular device does require lot and serial information, you can select the Lot/Serial checkbox and the information is included on the data export.

Not all functions currently support exporting lot/serial information. Lot/Serial export is supported when exporting task information, but when exporting information directly from mobile pages (such as Misc Receipt), it may not be supported.

You must associate a device to an organization and you may associate a device with a subinventory.

Supported output methods are Extensible Markup Language (XML), Comma Separated Values (CSV), and API (using a synchronous API call). If the output method is set to either XML or CSV, an output directory must be specified for the flat file to be written as well as a prefix for the file that is written. You must include this directory in the database setting for output directories (as specified in the v\$parameter setting).

Figure 21–1 Define Devices Window



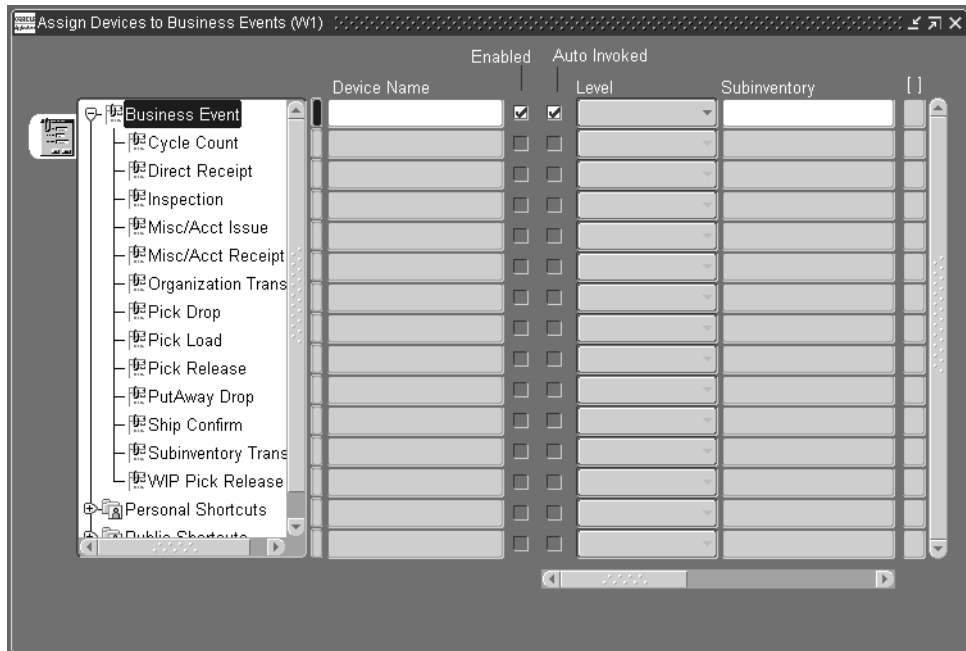
Assigning Devices to Business Events

After you define a device, you can assign it to a business event to enable data export. This is done through the Assign Devices window.

This window allows you to create associations between material handling devices and the business events. The window lists the supported Business Events in the tree structure. You can associate a business event to one or more devices. When the business event occurs, and the device is notified, if capable the device performs the task automatically, and returns a notification to warehouse management.

Device assignments can be made at the following levels:

- Organization
- Subinventory
- Locator
- User

Figure 21–2 Assign Devices to Business Events Window

Task Notification

The business process may mandate that warehouse management inform the device when you complete a task. As shown in the picture below, when defining devices, you can specify that the system sends a task notification to the mobile device. A typical scenario is when you are asked to pick material in a pick-to-light environment. You see the task on the screen and the device illuminates. However once you scan and pick the necessary material, the system must inform the device the pick is complete. If you enable this option when you define a device, the system sends a message to the device that informs it that the task is complete. This is relevant for Pick Load, Pick Drop, and Putaway Drop, and is invoked when you select Done/Next on the mobile device. The device integration logic references a submitted request when exporting data related to the event. This request appears in the Request History window as a new request record with any updated values from the original request.

Figure 21–3 Define Devices Window

Name	Description	Input Method	Model	Notify on Task Completion
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐

Hot Key

You can set the assignment as Auto-Invoked for business events that support device integration through a hot-key. For devices that are invoked through the hot-key, the integration information is sent when you press the hot-key assigned to device invocation. For devices that are Auto-Invoked, integration information is sent as soon as the mobile page is opened for that task. The Auto-Invoked option only works for business events that present a page with task instructions, such as *Put Away Drop*, *Pick Load*, and *Pick Drop*.

Device Response API

The Device Response API accepts information from a 3rd party, such as a warehouse control system, or another integration layer, for tasks completed outside of warehouse management. For example, in an ASRS environment where you do not use the mobile window to perform a task, warehouse management must inform the mobile device of the material to pick, and the ASRS must return the status of the completed transaction back to warehouse management. At this point the 3rd party device informs warehouse management about discrepancies in the transaction.

The public API WMS_DEVICE_CONFIRMATION_PUB is provided in a package. Warehouse management, or any 3rd party logic invokes the API to indicate the device performed a task. This API uses the existing global temporary table WMS_DEVICE_REQUESTS (WDR) to pass information to warehouse management. This table is populated with the details of the completed task s before calling the API. Some of the relevant fields the table requires are as follows:

- **RELATION_ID**: This is the request Id warehouse management generates for the completed task. Warehouse management uses the ID to validate the request based on the data in WMS_DEVICE_REQUESTS_HIST.
- **TASK_ID**: Task Id (Transaction_Temp_Id) of the confirmed request. There could be multiple tasks associated with one request in the case of a Pick Release business event. So Task_Id along with Request_Id (in Relation_Id) is necessary to uniquely identify the task within a request, the user (WCS) is confirming.
- **BUSINESS_EVENT**: Contains the new code for Task Response
- **TASK_SUMMARY**: Indicates whether this is a summary record or a detail record. It contains the details of Lots and Serials
- **XFER_LPN**: This is the LPN that contains the material after a pick. This LPN was suggested by the system as part of cartonization or generated using the public LPN-generation API WMS_CONTAINER_PUB.Generate_LPN.
- **DEVICE_STATUS**: This indicates device status after processing an operation.
- **REASON_ID**: This determines if a Work-Flow is triggered if there is a discrepancy in the confirmed details and the system suggestion. If the details of the task such as sub-inventory, locator, quantity are not populated by the calling procedure, warehouse management assumes there is no difference between the suggested-task and the confirmed-task. In this case warehouse management processes the transaction with the suggested values in MTL_MATERIAL_TRANSACTIONS_TEMP. However if the item is Lot or Serial controlled and there is a partial-pick, then all the details regarding Lots and Serials need to be passed.

The operations the API performs are as follows:

- Gathers and validates information from WDR information in WDRH
- When there is discrepancy, invokes the Work-Flow engine
- Updates the referenced tasks in MTL_MATERIAL_TRANSACTIONS_TEMP with the confirmed data.
- If the quantity is less than the suggested quantity, back-orders the remaining quantity. Calls the Transaction-Manager for the confirmed task.

- Generates a request_id and moves all the information from WDR to WDRH

Discrepancy Handling

The following are suggested task attributes you can override:

- Transfer Subinventory/Zone: Subinventory where the item was dropped
- Transfer-Locator: Locator where the item was dropped
- Transfer-LPN: LPN to which the item was dropped
- Quantity: This can be less than or equal to suggested quantity. If quantity is zero, then the line is back-ordered.
- Serial-numbers: You can specify serial numbers, However if the system suggests serial numbers, you can only confirm those numbers.

A discrepancy occurs for the confirmed task if you override the suggested values. In this case the Reason_Id determines if a Work-Flow triggers.

Request History

Once transaction processing completes, the details of the tasks move to the WMS_DEVICE_REQUESTS_HIST table and you can view the history on the history window. The system stamps a unique request_id for the records that originated for each invocation of the API. Dependant records that corresponding to task-request and task-confirm of one task have the same task_id and relation_id.

You can resubmit a record that has a status of Error from the request-history window. This re-submission facility supports all types of Business Events. For records with Business-Event of Task-Confirm, re-submission calls the DEVICE_CONFIRMATION_PUB API which in turn calls the transaction-manager to process a suggested transaction. For other Business-Events, re-submission invokes the SYNC_DEVICE_REQUEST API to resend request details to the device.

Error Handling

When the 3rd party device returns responses, the responses may error and you cannot process the transactions. View the Device Requests window to show a history of old device requests. The Device Requests window also shows the status of errored device requests. You can modify the transaction lines to allow the errored device responses to transact.

It is possible to set the form function parameter for the View Device Requests window to test the interaction of the device and warehouse management. If the

parameter is set to OPERATION_MODE=DEBUG then the window is fully editable and each modification to the window modifies WMS_DEVICES_REQUESTS.

However, if the profile is set to OPERATION_MODE=NORMAL then this window is for error handling of device responses. If this is the case, you can edit a limited number of fields on the View Device Requests window.

Sample Assignments

Suppose a warehouse uses carousels to pick from and store material. Whenever you pick material from a carousel, integration information needs to be sent to the carousel for it to rotate to the appropriate storage bin. This scenario uses an assignment of Carousel device. You associate the carousel device to the subinventory used to model the carousel made to the Business Event 'Pick Load' at the subinventory level.

In this example, every time you receive a Pick Load task for the subinventory that is associated to the carousel device, the system sends integration information to the carousel.

Oracle Warehouse Management Planning for High Availability and Performance

Topics covered in this chapter include:

- [Introduction](#) on page 22-2
- [Overview](#) on page 22-2
- [Warehouse Management Availability](#) on page 22-5
- [Performance](#) on page 22-9
- [Summary](#) on page 22-17

Introduction

Warehouses and distribution centers are the pivotal points in the supply chain that facilitate the balance between supply and demand. System performance and availability is an important consideration in the implementation of a warehouse management systems as any interruption may cause a ripple effect in the supply chain.

This chapter focuses on the system and network design to optimize performance and availability of the Oracle WMS application. The recommendations provided should be tailored to suit specific business requirements and rolled back into the overall deployment plan.

Overview

The goal of any Information Technology (IT) organization is to provide its customers with smooth and uninterrupted access to applications and system resources. It is therefore very important to minimize disruptions due to planned and unplanned downtime.

Because it is unpredictable, unplanned downtime is of primary concern to IT. Software and hardware related failures are the most likely to occur and account for 49% of all unplanned downtime. Human error, typically due to lack of training or inadvertent operator error ranks second, representing about 36% of unplanned downtime.

Although unlikely, disasters happen but account for only 3% of all unplanned downtime.

Planned downtime is periodic in nature and is necessary to provide good system performance and continuous operation. Regular maintenance activities include backups, upgrades, and data re-organization. The challenge of the IT organization is to minimize planned downtime.

Although traditionally not considered a part of system availability, system performance can be regarded as a type of Unplanned Downtime, in that it has a similar effect in reducing productivity. Here, the lost time is not in a contiguous block, but rather spread out as unproductive waits between user interactions. Often, this can be more frustrating to the user than a total downtime. Studies indicate that productivity is inversely proportional to response time (as response time reduces, productivity increases). Indeed the productivity of an expert user with poor (5 seconds or more) response time reduces to that of a novice user with good (below 1 or 2 seconds) response time. This is particularly true of “execution” type applications such as Oracle WMS.

Achieving both high availability and good performance usually requires an investment in a robust IT infrastructure. This includes both capital expenditures on hardware and networks, and in the management and operation of those resources.

This chapter covers some of the high availability tools that Oracle provides and how they can be applied to provide a reliable WMS application. In addition, it makes recommendations for the organization and sizing of the hardware and network resources to deliver good performance.

Table 22–1 Causes of Downtime

Unplanned Downtime	Planned Downtime
System Failures: Power outage, system crash	Routine operations: upgrades, patches
Data failures: Data corruption	Routine Maintenance: backups, defragmentation
Human Error: Deleted data, Administrator error	

Security

Warehouse Management Architecture

Oracle WMS is completely integrated with Oracle ERP and Supply Chain Management applications. It is a part of the e-Business suite and therefore provides all the functionality and tools of a regular e-Business installation. A typical Oracle WMS installation consists of the following components:

- Oracle9i database instance
- MWA application server
- Wide Area Network (WAN)
- RF network for mobile devices
- Printers

Figure 22-1 Typical Oracle WMS Architecture

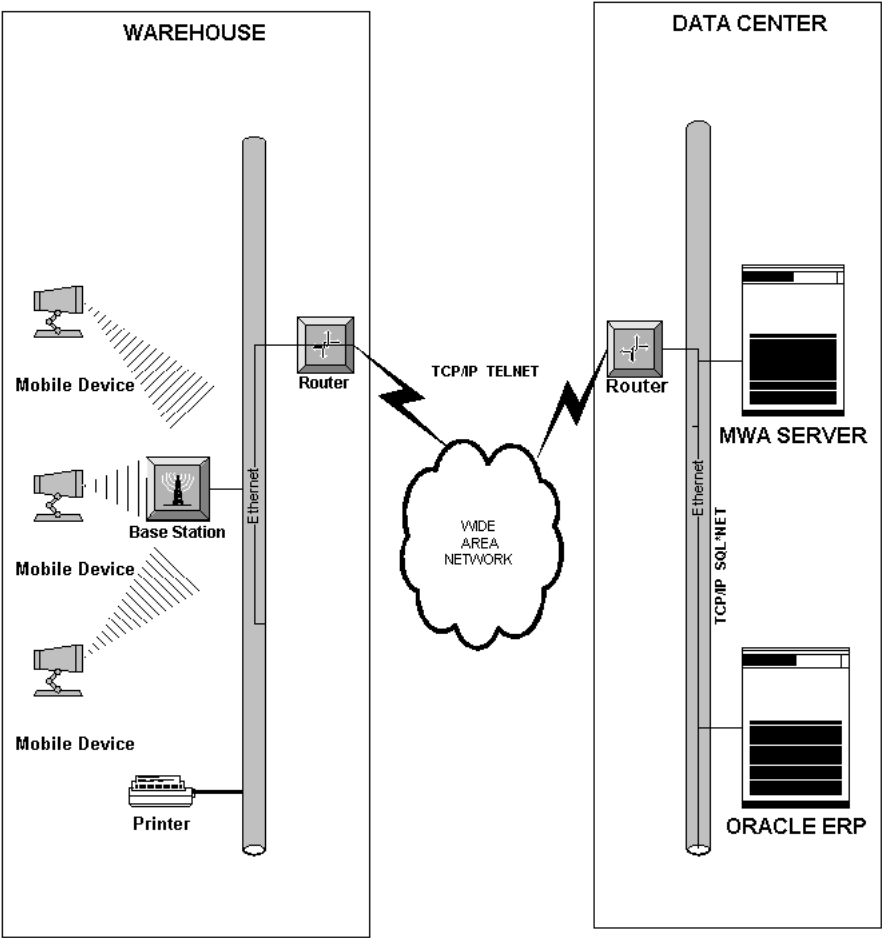


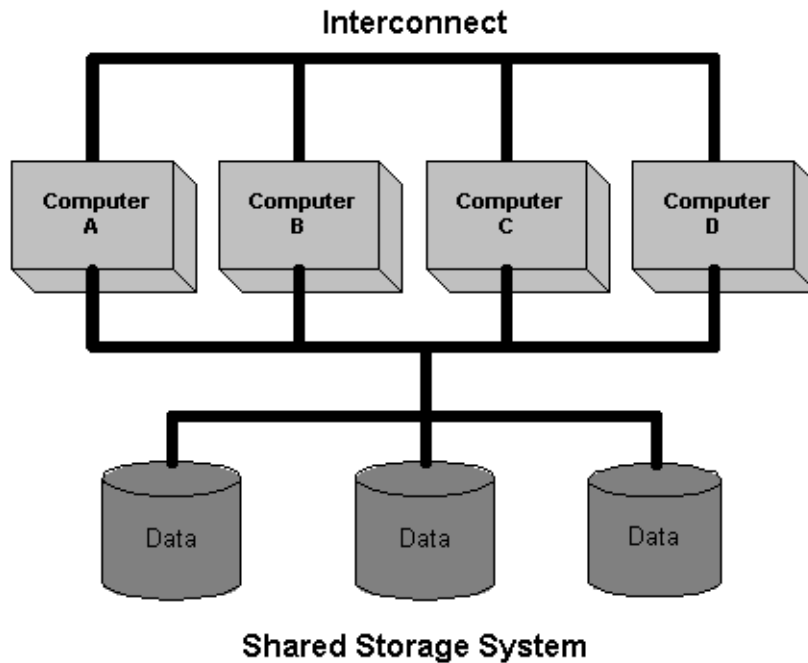
Fig. 1 Typical WMS Architecture

Warehouse Management Availability

System Failures

System faults and crashes are some of the most common causes of unplanned downtime. System faults are the result of hardware failures, power failures, and operating system or server crashes. The amount of disruption incurred depends upon the number of affected users, and the speed at which service is restored. High availability systems are designed to quickly and automatically recover from failures, should they occur. Oracle9i Real Application Clusters provides a highly resilient, fault-tolerant, flexible and scalable architecture that can virtually eliminate any unplanned downtime. A Oracle9i Real Application Cluster consists of a set of nodes (machines) that share a common set of disks. The nodes of the cluster are tightly integrated to provide a cooperative of servers. In the event of a node failure, users are transparently switched to another node in the cluster. The cluster performs a load balancing function and nodes can be added without any disruption to the cluster. Applications need not be modified to take advantage of this architecture. Oracle provides lower cost alternatives to Real Applications Cluster. They focus primarily on fast recovery from system faults, rather than fault-tolerance.

Media failures are another major cause of system failures. It is strongly encouraged to use RAID technology to protect against these types of failures. In the event of a disk failure, the RAID storage system automatically re-creates the lost data using its redundancy algorithms. Users of the system are unaware of the failure, although they may experience a slower response.

Figure 22–2 Oracle Real Application Cluster

Data Failures

It is extremely important to design a solution to protect against and recover from data and media failure. A system or network fault may prevent users from accessing data, but media failures without proper backups can lead to lost data that cannot be recovered. Oracle9i provides advanced features that guarantee that data will remain intact in the event of a media failure.

Oracle Recovery Manager helps IT managers create proper backup and restore procedures.

In addition, Oracle offers Data Guard, a comprehensive set of data protection and recovery tools.

Human Error

Many studies on system availability point to human error as one the major causes of unplanned downtime. A recent survey by the Disaster Recovery Journal estimated that some 36% of unplanned downtime is due to human error. Human errors include accidents (e.g. deleting important data), unintended outcomes (e.g. an action that monopolizes system resources), and even sabotage. The real challenge with human error lies in identifying the impact of the error then taking the fastest route to recovery. The Oracle9i Database arms administrators with the tools they need to quickly diagnose and recover from human error.

One of the major new features of Oracle9i is Flashback Query. Flashback Query enables administrators to view and reconstruct data that may have been accidentally deleted or changed.

Planned Downtime

In today's environment, businesses are rarely presented with a window during which users are not affected by system availability. Planned downtime can be as disruptive for users as unplanned downtime.

As the volume of stored data becomes increasingly large, so does the time required to perform regular maintenance operations. The Oracle9i Database has been designed to ensure these routines and maintenance operations can be carried out with little or no downtime at all. The Oracle9i Recovery Manager can make full and incremental backups of data while the database server is online and users are querying or updating data.

Another important feature is Partitioning. Partitioning of data with the Oracle9i Database enables administrators to divide large tables up into smaller more manageable chunks without having to change any underlying application code. This allows maintenance tasks to be performed at the smaller partition level, allowing the bulk of the data to remain unaffected during maintenance.

Users can take advantage off all the features mentioned above to protect their WMS instance against unwanted prolonged downtime.

RF Network Availability

The RF network is the network that supports the hand-held devices in the warehouse. Most suppliers of RF networks provide high levels of network redundancy. Oracle strongly recommends redundant RF networks, as disruptions to the network will result in disruptions in the warehouse operation. Please contact

your RF hardware vendor (Intermec, Symbol, LXE, and so on) to discuss these capabilities.

Printer Availability

Of all the components listed above, printers are the most likely to experience problems. Backup printers should be available and ready to be brought on line in case of malfunction of the primary printers.

Most printer control software solutions provide a simple way to re-assign an IP address to a different printer. The IP address of the malfunctioning printer can be quickly re-assigned to the backup printer with minimal disruption to the warehouse operation.

Effect Of Failures On Warehouse Management Availability

As described above, the Oracle WMS consists of several interrelated components. Failure of any component in this architecture will prevent users from accessing some pieces of the WMS functionality. User access to WMS functionality can be broken down into two parts:

- Configuration and control functions
- Warehouse operator functions

Configuration and Control Functions

These functions involve set-up tasks such as creating organizations, users, rules, and locators, as well as management tasks such the Materials Workbench and the Control Board. These functions are accessible through the desktop using a standard web browser. Users have access to these functions while the WMS instance and the Wide Area Network are running.

Warehouse Operator Functions

These functions involve all material movement tasks, such as picks and put away. These functions are only accessible through mobile devices. Users have access to these function as long as all components are running (the database instance, the MWA Server, the Wide Area Network, and the RF network).

Table 22–2 Effects of Failure to Users in WMS

System Component	Failure Prevention	Effect of Failure on WMS Availability
Oracle ERP instance	Oracle Real Application Cluster Oracle Fail-safe	WMS and desktop applications are unavailable.
MWA application server	Oracle Real Applications Cluster Multiple MWA servers on multiple machines	WMS application is unavailable through mobile devices. Desktop access to 11i applications is available through a browser.
Wide Area Network	Redundant Wide Area Network	WMS and desktop applications are unavailable.
RF network for mobile devices	Redundant access points and base stations	WMS application is unavailable through mobile devices. Desktop access to 11i applications is available through a browser.
Printers	Good maintenance program Backup printers	Unable to print LPNs and shipping documents.

Performance

Oracle WMS performance is primarily dependent on the following components of the architecture:

- MWA application server
- Wide area network

MWA Application Server

The MWA Application Server is written in java and acts as the middle-tier for the hand-held devices. It communicates through Telnet with hand-held devices and displays the screens and data to the users. To provide high availability, the MWA Application Server could be installed in a Oracle Real Application Cluster, or it could be installed on multiple non-clustered nodes. In a non-clustered configuration, Oracle recommends running the MWA server on a separate machine from the WMS database instance. However, these machines should be co-located (housed in the same data center) to provide users with optimal response time.

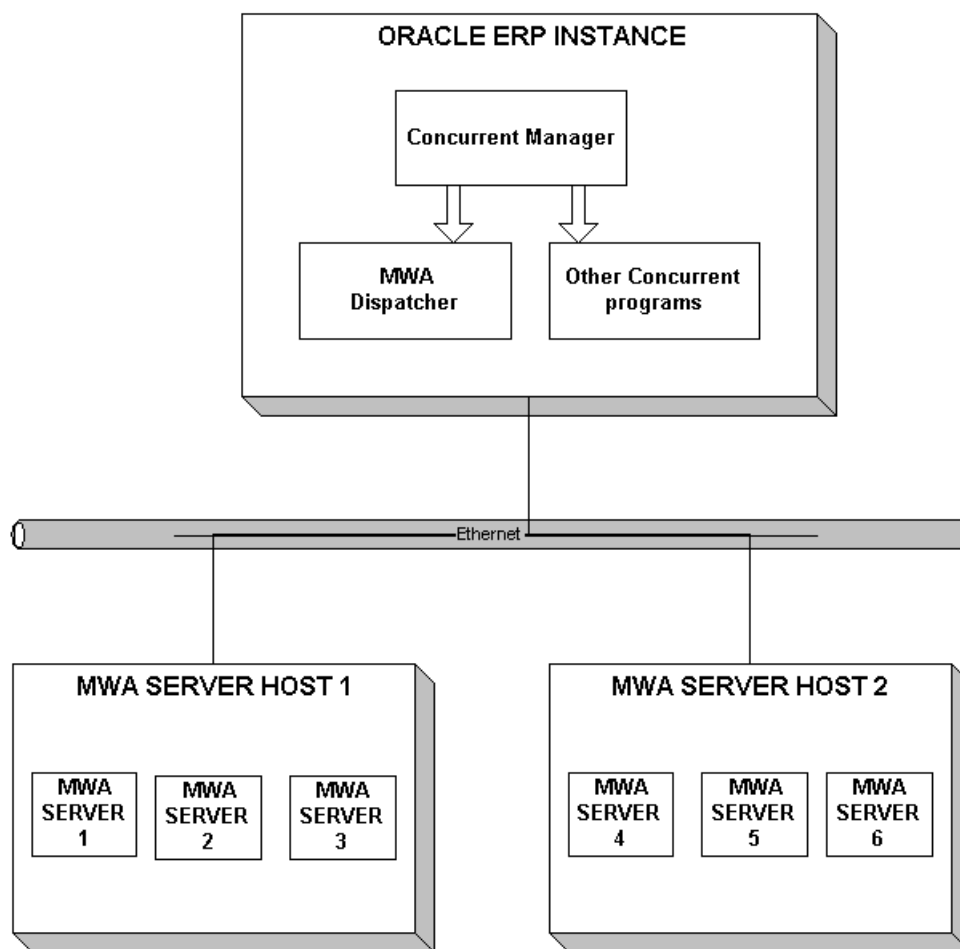
MWA is shipped with a dispatcher that provides a mechanism for load balancing as well as redundancy. When the user attempts to connect to a MWA server, the Dispatcher routes the connection to the proper MWA server following a round robin algorithm.

The dispatcher should be started from the Oracle Concurrent Manager. The Concurrent Manager will automatically re-start the dispatcher in the unlikely event that the Dispatcher experiences any downtime.

The RF devices should be configured to connect to the Dispatcher, NOT to the different instances of the MWA server.

To maintain high performance the MWA servers should be reset on a periodic basis. This will clear memory and reset the Java VM. The reset should happen during warehouse shift changes (8 or 12 hours). The reset should also be transparent to end users. For example, in a 3 shift warehouse operation the following reset schedule could be implemented via Shell/batch scripts:

1. At 6:30 a.m. start the MWA dispatcher
2. At 6:35 a.m. start MWA server instances MWA1, MWA2, and MWA3 for the 7:00 am shift. The dispatcher will load balance all new connections between the 3 WMA server instances
3. At 3:45 p.m., gracefully shutdown MWA server instances MWA1, MWA2, and MWA3 and start up MWA server instances MWA4, MWA5, and MWA6 for the 4:00 p.m. shift. This will cause the dispatcher to stop sending any new connections to the MWA1, MWA2, and MWA3 instances. As new shift operators connect to the dispatcher, they are routed to the MWA4, MWA5, or MWA6 instance. Once all users logged into MWA1, MWA2, and MWA3 have logged off, these server instances are signaled to shutdown.
4. At 11:45 p.m., gracefully shutdown MWA server instance MWA4, MWA5, and MWA6 and start up MWA server instance MWA1, MWA2, and MWA3 for the 12:00 am shift.
5. At 6:30 a.m. repeat step 1 and, so on.

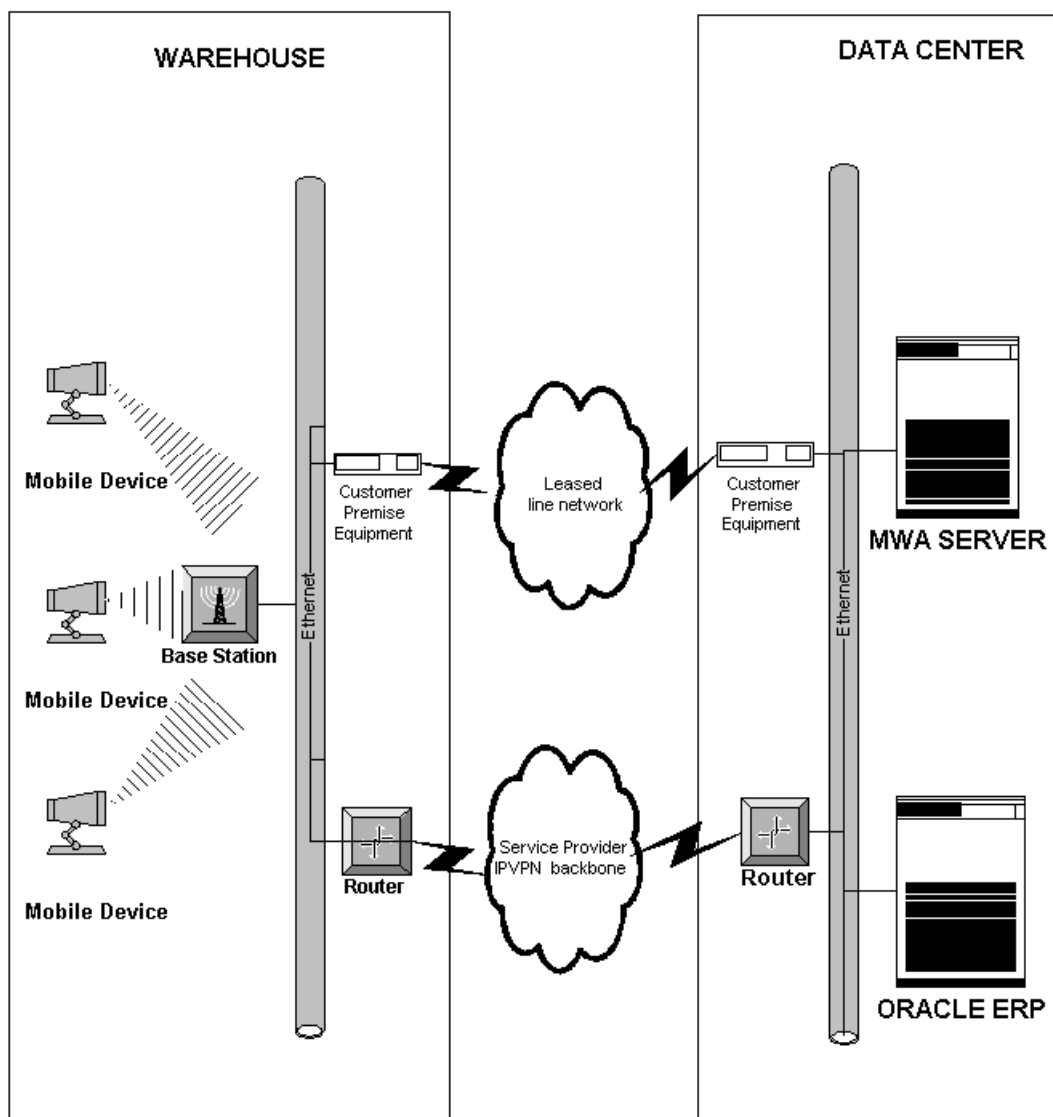
Figure 22–3 Typical MWA Server Setup**Fig 3. Typical MWA Server Configuration**

Wide Area Network

Today, most WANs provide T1 or fractional-T1 speeds and are highly resilient. Network latencies of 300 milliseconds are very attainable even in international

networks. Disruptions are rare and of short duration. Wide Area Networks are typically found in the form of leased lines or private customer networks. Network suppliers can provide a guaranteed quality of service (uptime and speed) based on your needs. Oracle recommends using dedicated leased lines as the primary channel of communication between the data centers and the warehouse.

There are more affordable alternatives to dedicated leased lines and private networks. Telecommunications companies are investing heavily into IP Virtual Private Networks (IP-VPNs) to provide small businesses and remote offices with low cost connectivity. Several categories of VPN services are available: dial-up, DSL, Frame Relay, and so on. They are differentiated by the Quality of Service offered by the service provider. Unlike Leased Frame Relay or T1 lines that use dedicated circuits, IP VPNs use the service provider's IP backbone. The network infrastructure is managed by the service provider and you only need a router at their premises. VPNs do not typically provide the same quality of service, performance, and predictability as dedicated leased lines. Oracle does not recommend using VPNs as the primary vehicle for data transmission for mission critical applications such as WMS, however, VPNs are a relatively cheap means of providing redundancy to a leased line WAN. You can lease a DSL VPN and only use it as a standby backup to the primary leased line network. In the unlikely event that the leased line experiences problems, critical network traffic can be diverted to the VPN.

Figure 22–4 WMS Configuration with a VPN Network**Fig. 4 WMS Network with IP-VPN redundancy**

Network Traffic

Since most of the network traffic takes place between the MWA server and the Oracle WMS instance, Oracle recommends co-locating the MWA server with the Oracle WMS instance in the data center, and accessing the application from the warehouse over a wide area network (WAN). The network traffic between the hand-held devices and the MWA server (at the data center) is much smaller than that between the MWA server and the database. It consists of data entered by users and data to be displayed on the screen and control characters to paint the screen. The average size of packets sent from the MWA server to the mobile device is less than 500 bytes and consists of control characters and regular ascii characters to paint the screen. The average size of packets sent from the mobile device to the MWA server is less than 200 bytes. It consists of the data entered/scanned by the user in each of the fields. This volume of traffic is far less than that generated by any equivalent browser based or traditional client/server application.

As a result, the principle consideration for achieving good performance on the hand-held device is how many packets need to be sent rather than packet size, and how long each packet takes to send. The MWA server and WMS application have been architected to minimize the number of packets generated by the user interaction with the screens. This leaves network latency rather than total bandwidth as the principle consideration for good response – though adequate bandwidth is required to eliminate any possible queuing delays.

Character vs. Block Mode

In the Oracle WMS architecture, the MWA server provides the function of an application server as well as a Telnet server. Handheld devices are configured to act as Telnet clients. Most suppliers provide Handheld devices that can operate in two modes:

- Character mode
- Block Mode

Character mode is the default Telnet operation mode. In character mode, any character entered by the user on the terminal (in this case the handheld device) is sent to the Telnet server (in Oracle WMS, this is the MWA server) and echoed back for display on the terminal screen. This results in a large number of packets being sent for each field. For example, if the user enters (or scans) the purchase order number: PO-ABC-12345, each character (P, O, -, A...) is sent in a separate packet to the Telnet server and echoed back to the handheld, resulting in 3 packets for each character (the character from the handheld, the Echo from the Telnet server and the Acknowledged from the handheld) for a total of 36 packets. Due to the dependency

between the number of packets and user response time, this increase in the number of packets due to standard Telnet Character mode is undesirable.

In contrast, in block mode, all the characters are sent in the same packet to the Telnet server when the user presses the Enter key. For the purchase order above, PO-ABC-12345, this would result in only 3 packets being transmitted (the characters from the handheld, the Echo from the Telnet server and the Acknowledge from the handheld).

Whenever there is significant network latency (over 200ms), Oracle recommends using handheld devices in Block Mode. This will highly improve the user experience.

There are some minor differences from a user prospective when using Block mode as opposed to Character mode:

- When choosing menu options using numbers instead moving the cursor to the menu selection (e.g. press the number 3 instead moving the cursor to menu selection number 3), press the <ENTER> key to proceed. This is because regular characters are not transmitted to the Telnet server until the user presses the <ENTER> key.
- When typing more characters than a field can hold, the field does not scroll to show the characters being typed. This is not an issue when users are scanning labels.

To illustrate the nature of the traffic between the handheld devices and the MWA server, this document shows the TCP/IP packets generated by a typical Oracle WMS receiving transaction.

The handheld device used in this test is an Intermec-2415 and was configured to operate in both Character and Block Mode. A network analyzer was used to capture packets exchanged between the MWA server and the handheld device.

The three data entry screens shown below are the screens the user interacts with on the handheld device to complete a typical receiving transaction.

The following tables show the Number of packets and their distribution according to packet size for both Block mode and Character mode:

Block Mode

Table 22–3 Block Mode

Source Node	Destination Node	Packets	Bytes
Handheld device	MWA server	62	4216
MWA	Handheld device	46	8406

Table 22–4 Block Mode - Packets

Packet Size (bytes)	Number of Packets	% of Total Packets
0-64	2	2
65-127	86	79.5
128-255	8	7.5
256-511	12	11
> 511	0	0

Character Mode

Table 22–5 Character Mode

Source Node	Destination Node	Packets	Bytes
Handheld device	MWA server	84	5712
MWA server	Handheld device	62	9184

Table 22–6 Character Mode - Packets

Packet Size (bytes)	Number of Packets	% of Total Packets
0-64	11	7.5
65-127	116	79.5
128-255	8	5.5
256-511	11	7.5
> 511	0	0

For this receiving transaction example, the character mode generates 35% more traffic than block mode (146 vs. 108 packets).

The difference in the number of packets exchanged increases as the number of character entered in each data entry field increases. For Oracle WMS, character mode will typically generate between 30% and 90% more traffic.

Network Traffic Priority

Prioritizing traffic, improves network latency by giving higher priority to traffic destined to specific IP targets (e.g. and MWA server).

For example, if typical network latency is around 500 milliseconds and varies widely, a high priority can be assigned to the telnet traffic between the MWA server and the routers that support the mobile devices. In most environment this will provide a consistent network latency that is considerably faster than non prioritized traffic. It is very likely that the latency would drop to about 350 milliseconds. This in turn results in improved response time on the mobile devices.

Network Performance Summary

Minimizing network latency is a key factor for ensuring good performance. A reasonable target is 300ms or better across the WAN. In situations where network latency is over 200 ms, system administrators can use Block mode as well as prioritize the Telnet traffic between the MWA server and the handheld devices.

Summary

Oracle WMS is a comprehensive warehouse management solution. It is an integral part of the Oracle e-Business suite and benefits from all the system management features available to the e-Business suite. Oracle recognizes the need for companies to be “open for business” 24 hours a day, 7 days a week, and has invested heavily in developing technologies that provide high levels of performance and availability. You should carefully consider these features when designing a WMS deployment. Close attention should also be paid to a redundant infrastructure for LANs, WANs, and RF networks to minimize disruptions to the business.

Global Trade Item Numbers

This chapter contains information on Oracle Warehouse Management System support for Global Trade Items Numbers. It contains the following topics:

- [Overview](#) on page 23-2
- [Global Trade Item Number Data Structures](#) on page 23-3
- [Global Trade Item Number Configuration](#) on page 23-5
- [Frequently Asked Questions](#) on page 23-7

Overview

A Global Trade Item Number (GTIN) is a unique number assigned to a product within the EAN/UCC framework for standard product identification. The product can be a physical item or different packaging configurations for an item. You can retrieve pre-defined information for an item such as item description, manufacturer, etc. at any point in the supply chain using the GTIN.

A GTIN is a 14-digit number that accommodates different structures within the EAN/UCC system for standard product identification. GTIN accommodates the following EAN/UCC standard data structures:

- 12-digits (UPC)
- 14- digits (EAN/UCC-14)
- 13-digits (EAN-13)
- 8-digits (EAN-8)

These data structures provide unique identification when right justified and zero padded in the GTIN 14-digit reference field.

Advantages of Global Trade Item Numbers

The following paragraphs contain the advantages of using Global Trade Item Numbers.

Re-label Products with Internal SKU number

Most products and packaging configurations use one of the existing EAN/UCC standard data structures in bar code form. A data structure is usually applied to the item at the point of manufacture such as UPC Barcode on loose items sold through retail outlets or EAN/UCC-14 barcode on corrugated cartons.

GTIN support in Oracle Warehouse Management allows you to scan one of the constituent data structures of GTIN to process transactions. Therefore if the manufacturer or another entity in the supply chain assigns a UPC, EAN-8, EAN-13 or EAN/UCC-14 barcode, you do not need to re-label an item with a bar code for the internal SKU number. Scanning one of the above barcodes identifies the item for mobile transactions in Oracle Warehouse Management.

Internal Cross-References

Because GTIN is unique and widely accepted, the need for maintaining internal cross-references to vendor or customer item is substantially reduced. Data entry and maintenance is also simplified.

Global Uniqueness

Adherence to EAN/UCC standards ensures a globally unique 14-digit GTIN. The global uniqueness ensures you can identify a given item and trace it to the manufacturer. All members of the supply-chain can use the same number to reference the item. Because GTIN is based on widely adopted EAN/UCC standards, it is understood and accepted worldwide.

Data Accuracy

Oracle mobile application recognition of GTIN facilitates bar code scanning and use of auto-identification techniques such as application identifiers (AI). This results in substantially higher data accuracy during transactions.

Global Trade Item Number Data Structures

GTIN describes the family of EAN/UCC data structures for global product identification. The four data structures in the GTIN family are as follows:

- EAN-8 (Europe)
- UCC-12 (North America)
- EAN-13 (Pacific Rim and Europe)
- EAN/UCC (worldwide, includes packaging level)

You can use four numbering structures to construct a GTIN that depends on the exact application and the bar code symbology to be used. However, in a database all GTINs are unique and unambiguous when right justified in a 14-digit field padded by leading zeros. The 14th digit in all GTIN data structures is a check digit. This check digit is calculated by using modulo-10 check digit algorithm.

14 Digit Global Trade Item Number (GTIN)														
Numbering Structure	T ₁	T ₂	T ₃	T ₄	T ₅	T ₆	T ₇	T ₈	T ₉	T ₁₀	T ₁₁	T ₁₂	T ₁₃	T ₁₄
	EAN-8	0	0	0	0	0	N ₁	N ₂	N ₃	N ₄	N ₅	N ₆	N ₇	N ₈

14 Digit Global Trade Item Number (GTIN)													
Numbering Structure	T ₁	T ₂	T ₃	T ₄	T ₅	T ₆	T ₇	T ₈	T ₉	T ₁₀	T ₁₁	T ₁₂	T ₁₃ T ₁₄
UCC-12	0	0	N ₁	N ₂	N ₃	N ₄	N ₅	N ₆	N ₇	N ₈	N ₉	N ₁₀	N ₁₁ N ₁₂
EAN-13	0	N ₁	N ₂	N ₃	N ₄	N ₅	N ₆	N ₇	N ₈	N ₉	N ₁₀	N ₁₁	N ₁₂ N ₁₃
EAN/UCC-14	N ₁	N ₂	N ₃	N ₄	N ₅	N ₆	N ₇	N ₈	N ₉	N ₁₀	N ₁₁	N ₁₂	N ₁₃ N ₁₄

EAN-8

An EAN-8 barcode is a 2- or 3-digit number system code followed by a 4- or 5-digit product code. The numbering authority directly assigns EAN-8 product codes. Any company can request an EAN-8 code regardless of its EAN-13 manufacturer or product code. You must store EAN-8 codes in each database separately because you cannot translate an EAN-8 code to an EAN-13 equivalent.

UCC-12

UCC-12 is a 12-digit number that identifies trade items, commonly known as UPC. UCC-12 number consists of a one-digit UCC Prefix, a Company Number, an Item Reference, and a Check Digit. The UCC-12 number is represented using UPC-A (12 Digit) or UPC-E (8 digit) Bar Code Symbol. The UPC-A barcode shows all the 12 digits of the EAN/UCC-12 whereas the UPC-E bar code symbol carries only eight digits of a UCC-12 number and suppresses the zeros using a zero suppression technique.

EAN-13

EAN-13 is a superset of UPC-A. The only difference between EAN-13 and UPC-A is the number system code. UPC-A is a single digit from 0 through 9 whereas an EAN-13 number system code consists of two digits ranging from 00 through 99, which is essentially a country code. Each country has a numbering authority that assigns manufacturer codes to companies within its jurisdiction. The manufacturer code is five digits long, as is the product code, and the check digit is calculated in exactly the same way.

EAN/UCC-14

You use EAN/UCC-14 when packaging identical consumer units into standard quantities of intermediate packs or shipping containers. EAN/UCC-14 is the new term used by EAN/UCC for Shipping Container Code or SCC-14. EAN/UCC-14 is

commonly used in a non-retail environment, particularly in distribution centers dealing with packaged goods. The General EAN/UCC standards specify that you assign different packing configurations a new, 14 digit number. Thus cartons containing ten units would be assigned a different 14-digit number than cartons containing twenty units of the same product.

As per EAN/UCC specification, prefixing 2-digit of package level information to the base UPC number and recalculating the check digit generates EAN/UCC-14. This 14-digit code identifies intermediate packs and shipping containers holding standard configurations of consumer units.

Global Trade Item Number Configuration

You can use cross reference types to establish an item code-GTIN relationship. Use the following Oracle Inventory profile option to define the cross reference type: INV: GTIN cross-reference type. Set this profile option at the site level. You can use a new or existing cross-reference type in this profile option, and define a cross-reference code item relationship that is either specific to an organization or alternatively common to all organizations.

You can define item cross-reference relationships for: UCC-12, EAN-8, EAN-13 and EAN/UCC-14. As per the EAN/UCC guidelines the GTIN cross-reference must be 14 digits in length. It should also be right justified and padded by zeroes for UCC-12, EAN-8 and EAN-13 to make a 14-digit number. In addition, you must assign a unique EAN/UCC-14 for different packaging configurations of the item i.e. pallet, inner pack, master cases, etc. Therefore you need a separate entry in the cross-reference table for each packaging configuration. In this case you associate multiple cross-reference codes that correspond to the EAN/UCC-14 with the same item based on different packaging configurations for the item.

Transactions Involving Global Trade Item Numbers

GTIN allows you to scan constituent data structures in bar code format to process Oracle Mobile transactions. Whenever you scan a GTIN data structure (i.e. UCC-12, EAN-8, EAN-13 or EAN/UCC-14) in the item field, Oracle mobile applications converts it into GTIN by right justifying and zero padding into a 14-digit field. The system uses this 14-digit number to lookup the item in the GTIN cross-reference relationship table. If a match exists, the system substitutes the referenced item in the item field. Therefore if the item or the standard packaging already has a bar code, it is no longer necessary to print an additional label with bar code for internal item number.

Current functionality does not support translation of packaging indicators in EAN/UCC-14 into transaction unit of measure or transaction quantity. A scan of EAN/UCC-14 in the item field results in substitution of the reference item in the item field. The user should manually enter the transaction unit of measure or transaction quantity.

Example

The following table shows sample GTIN configuration for different EAN/UCC data structures. These data structures could be stored in different bar-code symbology.

Item	EAN/UCC Bar Code	GTIN as configured in Item Cross-Reference Type
EUR100AX	EAN-8 Bar Code	0000001234565
		
NA100AY	UPC-E Bar Code	00012000000508
		
		GTIN cross-reference code will correspond to the base EAN/UCC-12 number
NA100AX	UPC-A Bar Code	00012345678905
		

Item	EAN/UCC Bar Code	GTIN as configured in Item Cross-Reference Type
EUR100AY	EAN-13 Bar Code	00012345678905
		
NA100AX Master case of item NA100AX in corrugated containers with pre-printed ITF-14 label	UCC.EAN-14 in ITF-14 Symbology	00012345678905
		
NA100AX Standard Pallet of item NA100AX with UCC-128 Label	UCC.EAN-14 in UCC-128 Symbology	0012345678902
		
		Please note that Application Identifier for EAN/UCC-14 (01) is not part of the cross-reference code.

Frequently Asked Questions

1. Is it necessary to put an additional barcode for the internal item number?
An additional bar code for the internal item number is not required if the vendor or manufacturer of the product already has one of the GTIN data structures (i.e. UPC, EAN-8, EAN-13 or EAN/UCC-14) in bar code form on the product. You can process Oracle mobile application transactions by scanning the GTIN bar code.
2. Do GTINs replace the UPC?
Since UPC is one of the data structures included in GTIN, replacing UPC with GTIN is not required. GTIN does not replace the UPC. Companies that place a UCC-12 (UPC) on products now, should continue to do so.

3. Is GTIN functionality available only in Warehouse Management?

Yes. This functionality is available in Warehouse Management transactions and Inventory transactions in Mobile Supply Chain Applications. This functionality is not enabled for Manufacturing or Quality transactions in Mobile Supply Chain Applications.

4. Is a unique GTIN cross-reference required for every level of packaging?

Yes. There should be a unique number that identifies the single unit, an inner or multi-pack, a case, a pallet, etc.

5. What is 2005 Sunrise?

This is an initiative underway in USA and Canada with two objectives. First, retailers must upgrade Point of Sale (POS) systems to scan and store EAN-13 symbols in addition to UPC symbols. This must be completed by 1/1/2005. Second, all supply chain participants are encouraged to expand the GTIN field in their databases to 14-digits to enable all forms of the GTIN. GTIN framework within Oracle Warehouse Management stores the entire 14-digit number in a single cross-reference entity.

6. How do you generate a label with a bar code for GTIN data structures?

Currently this is not supported, as GTIN data structures are not included in the standards label fields for material or LPN label. You can store EAN-8, EAN-13 and UCC-12 as item attributes on flexfields and include the flexfields in the labels. A possible work-around for EAN/UCC-14, is defining base UPC as an item attribute and define a UoM that includes a packaging indicator. You can use the packaging indicator along with base UPC number to compute check digit in 3rd party label printing software and print GTIN.

7. Is it possible to default the transaction Unit of Measure based on EAN/UCC-14?

This is not currently supported, however if customization is an option, you can use customizable bar codes to default the transaction unit of measure when you scan a EAN/UCC-14 barcode. The system automatically recomputes the task quantity in terms of the transaction unit of measure.

8. Can scanners distinguish the GTIN from other symbols?

Yes. However you must configure to distinguish between different symbology. One of the strengths of the EAN/UCC standards is the use of a unique symbology for the number structure that identifies a product/service (e.g., a UPC or EAN symbol is *only* used to identify product).

9. Can I derive the supplier from the GTIN?

No. The EAN/UCC company prefix is not a company identifier. The company prefix in GTIN ensures globally unique product identification. The objective is not to determine the vendor or manufacturer identifier. Parsing of company prefix from GTIN to identify manufacturer is not recommended by EAN/UCC. The resulting vendor or manufacturer may be inaccurate as companies have multiple EAN/UCC company prefixes due to mergers and acquisitions. In addition, different divisions of a company may have distinct UCC company prefixes.

Warehouse Management-Project Manufacturing Integration

This chapter includes the following topics:

- [Overview](#)
- [Implementation Setup](#)
- [Project Definition](#)
- [Functional/Business Flow Description](#)
- [Shipping](#)
- [Manufacturing](#)
- [Transactions](#)
- [LPN transactions: Commingling](#)
- [Common Problems](#)
- [Frequently Asked Questions](#)
- [Debugging Tips](#)

Overview

Oracle Warehouse Management System provides integration with Oracle Project Manufacturing. This integration enables you to use the warehouse management functions such as, warehouse resource management, license plate numbers (LPN), warehouse configuration, task scheduling, advanced pick methodologies, value added services and the rules engine for put away, picking, task assignment and label printing. You can now receive, move, manufacture, pick and ship material owned by a project. When a Project Manufacturing Organization is warehouse management enabled – transactions performed in the organization ask for references to project and/or task. As a result, warehouse management transactions provide support for these project and/or task references related to them.

Project Locator

A Project Locator is a locator with a project or project and task reference. It is also a logical partition of a physical location. Project Inventory is stocked in a Project Locator and is transacted in and out of a Project Locator. Since you can create locators dynamically you do not need to predefine all Project Locators.

Common Locator

A Common Locator is a locator without a project or project and task reference. It is also a real, physical location. Project Locators, unlike common locators, contain values in the Project and Task segments in the flexfield definition of the Locator.

Example: BULK.1.1.PJM01.1.0 for project PJM01 and task 1.0. In Project Manufacturing Organizations, you can store material in common locators if it does not belong to a project.

Project Manufacturing

In a project manufacturing environment projects drive the production requirements. You can plan, schedule, process, and cost against a specific project or a group of projects. If Oracle Project Manufacturing is installed, Project References Enabled and Project Control Level parameters are set in the PJM Organization Parameters window, you can assign project and task references to sales orders, planned orders, jobs, requisitions, purchase orders, and other entities within Oracle Manufacturing. If you enable Project Cost Collection Enabled parameter on the Inventory Organization parameters window, you can collect and transfer manufacturing cost to Oracle Projects. Defining Costing Information.

See Also

Defining Costing Information, *Oracle Inventory User's Guide*

Defining Stock Locators, *Oracle Inventory User's Guide*.

Implementation Setup

Organization Setup

The following parameters govern the way transactions work and details the implications to a Project Manufacturing-Warehouse Management enabled Organization.

Project Reference Enabled

When an organization is Project Reference Enabled, you can associate projects and tasks, with jobs, stock locators, sales orders, demand and production schedule entries, supply items, requisitions and purchase order distributions.

Allow Cross Project Issues

Allow Cross Project Issues governs allocation in a Project Manufacturing Warehouse Management enabled organization. If you do not enable Allow Cross Project Issues, the system only allocates material from the same project and task as the sales order or WIP job/schedule with the exception of soft pegged items. If the sales order or WIP job is common, the system allocates only common material. This restriction is enforced regardless of picking rules. If you enable Allow Cross Project issues, you can source material from any project and task regardless of the project on the sales order or WIP job/schedule. However, this is subject to warehouse management picking rules.

Allow Cross Unit Issues

Use this parameter to allocate serial numbers for an item under unit effectivity control. If the box is unchecked, the system allocates only serials with the same end item unit number specified on the sales order or WIP job/schedule. This restriction is enforced regardless of the picking. If the box is checked, the system allocates any serial number for the order based on the rules provided.

Note: The allocation flexibility described above is unique to warehouse management enables organizations. For organizations that do not use WMS, allocations always behave as though the cross unit number and cross project issue boxes are unchecked.

Figure 24–1 *Project Manufacturing Parameters Window*

Project Manufacturing Parameters (P2)

General Invoice Transfer Borrow Payback

☒ Enable Project References
☒ Allow Cross Project Issues
☐ Allow Cross Unit Number Issues

Project Control Level Task

Common Project Common

Default Common Project Tasks

Material	2.0
Resource	3.0
WIP Material	

Project Control Level: Project or Task

If Project References is enabled, you can choose the Project Control Level, and associate projects and tasks with supply and demand entities. The following is a list of supply and demand entities:

Supply Entities

- Jobs
- Production schedule entries
- purchase requisitions

Demand Entities

- Sales Orders

- Demand Schedules

If you enable Project References and choose the Task Control Level, when you associate projects with supply and demand entities then you must also associate tasks.

Project Definition

See: Project Definition, *Oracle Project Manufacturing User's Guide*

Subinventories and Locators

Oracle Project Manufacturing reserves segment19 and segment20 of the Stock Locator key flexfield to store the project and task numbers. Do not modify these two segments.

If you install Oracle Project Manufacturing as part of an Oracle Applications installation, create an inventory organization, and check the Project Reference Enabled checkbox, the system automatically enables segment19 and segment20 of the Stock Locator key flexfield for project and task references.

If you install Oracle Project Manufacturing in an existing Oracle Applications installation and currently use segment19 and segment20 of the Stock Locator key flexfield, you must change the current flexfield schema and use other segments for the physical stock location layout. The system does not support automatic conversion.

Physical Locators vs. Logical Stock Locators

The same definition of stock locators used in Oracle Inventory is used in Oracle Warehouse Management, but it may not be feasible for you to affix multiple location labels to the same physical warehouse shelf for each project and task combination. If the material in the location is not labeled with the project and task, you may inadvertently scan the wrong location label and pick material from an incorrect project. Oracle warehouse management removes the project and task segments from the locator field in all mobile user interfaces. Whenever possible warehouse management derives the project and task from the context of the current transaction or the transacted document when this information is not available. You may enter or scan the project and task in separate fields on each mobile page. You must enter or scan the project and task in separate fields on each mobile page. The system converts the physical locator scanned to the logical project and task locator in the background. The transactions in Oracle Inventory are posted with the appropriate project and task locator.

Oracle Warehouse Management differentiates the actual locator in Oracle Inventory from the locator you scan by using logical locators. Logical locators indicate the stock locator, including project and task. Physical locators indicate the stock locator without the project and task. One physical locator may have multiple corresponding logical locators if you store material for more than one project and task combination in a location. When you create a logical locator the system also creates a corresponding physical locator if one does not already exist.

See Also

Setting Up the Oracle Warehouse Management System, *Oracle Warehouse Management User's Guide*

Defining Stock Locators with Project Manufacturing

You can define Physical Stock Locators to receive project material. When the system performs a receipt for a project into inventory, it generates a corresponding logical locator with project and task information in the background. You can view logical locators in the Stock Locators window.

All capacity (weight, volume and Units) and occupancy of the locators are calculated at the physical locator level. No Locator capacity is stored at the logical locator level except for the on hand quantity.

Example In a subinventory BULK, physical locator PB1.1.1 exists with defined Maximum Capacity: *Units*: 1000, *Volume*: 1000 Cubic Foot and *Weight*: 1000 Pounds.

Material (Quantity=100, Unit Weight =1 pound, Unit Volume = 1 Cubic foot) is received for Project: PANPJM01 and Task: 1.0 in Locator: PB1.1.1– At the time of receipt a Project Locator is created: PB1.1.1.PANPJM01.1.0 with on hand quantity for the item as 100.

After receipt the physical locator capacity is updated with Units: Current Units=100 Available= 900, Volume: Current =100 and Available = 900, and Current Weight as 100 pounds and available = 900 pounds.

See Also

Locators in Project Manufacturing, *Oracle Project Manufacturing User's Guide*

Defining Stock Locators, *Oracle Inventory User's Guide*

Inventory Attribute Group, *Oracle Inventory User's Guide*

Functional/Business Flow Description

Inbound Logistics

You can setup rules to suggest putaway locations for purchase order receipts. You can use the rules engine to optionally setup put away rules based on the source project and task. For example you can setup rules to put away items into the particular subinventories and / or locators based on the projects and tasks on the purchase order distribution lines. See, *WMS Rules Engine Setup, Oracle Warehouse Management User's Guide*.

You enter purchase orders and returns on the desktop. Projects setup on the project manufacturing parameters in the receiving organization can be entered on the PO distribution lines. Distribution lines for project and non-project (common) material can be entered on the same PO.

Figure 24–2 Distributions Window

Distributions (Vision Project Mfg) - [New]

Destination More Project

Expenditure

Num	Project	Task	Award	Type	Org	Da
1	Common	1.0		Books and Public	Vision Service	

Account Description

Charge Budget

Accrual Variance

Item And Shipment Details

Line Num 1 Shipment Num 1 Org P2 Ship-To P2- Los Angeles

Item test

Outside Services

Inbound Functional Overview

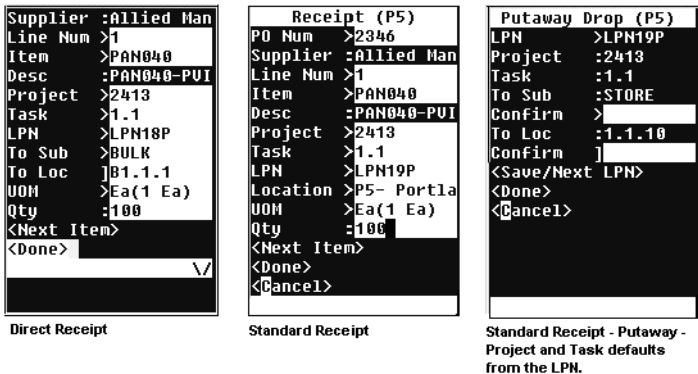
Purchase Order Transaction: Receiving When you receive a Purchase Order, RMA or Internal Requisition in a Project enabled organization, the project and task fields appear on the receipt page. Those fields have a list of values containing all projects on the PO distributions for that item. If a distribution exists without a project, one of the values in the list is "No Project".

You can receive more than one item into an LPN but the contents of any LPN must all belong to the same project and task or they must all be common.

If the receipt routing on the purchase order shipment is direct, the system prompts you for the destination sub inventory and locator in the receipt page. This is the common locator (there will be no project and task segments in the locator). The system creates the corresponding logical locator based on the project and task provided in order to post the receipt to Inventory.

In inspection or standard receipt routings, the LPN will carry the project and task of its contents. This information will be shown to the user in the inspection and put away pages and the user will not be required to enter it again.

Figure 24-3 Inspection and Put Away Pages



Receiving into Common Locators If the purchase order does not contain project references, during receiving there are no validations done and you receive the material into a common locator.

In the previous example if you receive against “No Project”, there are no appropriations of material against shipment that have distributions with project and/or task references. The Purchase Order shipment matching logic consumes the quantity to be received only against those shipments, which do not have any distributions with projects and /or tasks. If you enter the project/task, receiving occurs against the shipment/distribution with that specific project/task.

Purchase Order Return Transaction When you perform a Purchase Order Return/Correction transaction, the system defaults the project and task from the purchase order distribution line to the source locator. If the user updates the project and task segments of a source locator on a purchase order return, they must match the project and task exactly on the purchase order distribution line.

Put Away Rules The put away rules execution process in warehouse management determines an appropriate common locator based on the rules defined and the capacity carried at the physical locator level. It then creates a corresponding logical locator based on that common locator and the project and task of the LPN.

During receiving the system recognizes capacity utilization against the physical Locator. For Put away, you can use the rules engine to setup put away rules that contain the source project and source project task as objects to enforce business restrictions, for put away of material based on the project and/or task components.

Cross Docking

Warehouse management only suggests cross-docks within a project and task. This means that if an LPN is received from a purchase order or WIP job/schedule, only backordered sales order lines or WIP jobs & schedules with the same project and task are eligible for cross docking. You cannot using cross-docking to perform a project transfer.

Outbound Logistics

Setup

Sales Orders, RMAs, and Pick Release are entered on the Desktop. You can enable sales orders and RMAs for project and task by referencing the project and task information in the Sales Order Lines Others tabbed regions.

Figure 24–4 Sales Orders Window

Sales Orders (80000) - World of Business

Order Information Line Items

Order Total 0.00

Main Pricing Shipping Addresses Returns Services Others

Line	Ordered Item	Qty	Project Number	Task Number	Unit Number	Customer J
1.1						

Line Total Line Qty Service Total

Description

Actions Related Items Configurator Availability Book Order

Functional Overview

At pick release, depending on the cross project issue flag and the picking rules defined, the system may or may not allocate material from the project and task on the sales order line. Regardless of where the material comes from, the destination locator created by the put away rules executed at pick release to select a staging locator will always have the project and task of the sales order. Therefore an implicit project transfer takes place at sales order pick.

In a project manufacturing warehouse management enabled organization, there is a seeded pick strategy defined/enabled for picking. You can define pick rules or modify and use the changed seeded rules to suit your business needs. Enable this seeded strategy or setup their own business strategy in the Rules Workbench as part of the implementation. In the absence of a strategy, the system allocates any material for project and non-project sales orders. When the seeded project manufacturing pick strategy is used during pick release, the system tries to allocate from the project and task on the sales order or job, transferring from other projects or tasks if necessary. However, if cross project issues are not allowed, as defined on

the project manufacturing parameters form, then the Rules Engine will not transfer from other projects or tasks. The project and task allocated by the Rules Engine cannot be changed during task execution.

Seeded Pick Strategy for Project Manufacturing.

When you enable warehouse management in an existing Project Manufacturing organization, a seeded picking strategy is assigned to the organization. This strategy is most useful where cross project allocations are allowed in the Project Manufacturing organization parameters as it adds preferences to the material allocated for project sales orders and WIP jobs/schedules. This strategy uses five seeded picking rules to model common requirements of a project manufacturing-warehouse management enabled organization. The strategy is automatically assigned to the organization when an organization is enabled for both warehouse management and project manufacturing. The strategy attempts to allocate first the most specific material for a particular project and task, gradually loosening the restrictions, finally allocating any material if necessary. It behaves as follows:

1. Allocate material from the same project and task as that on the job/schedule or sales order
2. Allocate material from the same project without respect to task
3. Allocate material that is not stocked for any particular project (Pick from the "Common" stock)
4. Allocate material from the same planning group
5. Allocate any material.

Figure 24–5 Project Manufacturing Strategy

Strategy Project Manufacturing Allocation Preferences

Strategy Description Prefer same project, then task, then planning group, then common, then anything

Rule Name: Same Project Same Task (Always)

R		Source Locator	Project Identifier	=	Source Project	Project Identifier		
R	AN	Source Locator	Task Identifier	=	Source Project	Task Identifier		
	D							

Rule Name: Same Project (Always)

R		Source Locator	Project Identifier	=	Source Project	Project Identifier		

Rule Name: Pick Common Stock (Always)

R		Source Locator	Project Identifier	IS				
				NUL				
				L				

Rule Name: Same Planning Group (Always)

R		Source Project	Planning Group	=	Project Stock on-hand	Planning Group		

Rule Name: Seeded Default Pick Rules (Always)

The last rules may be too generic for some organizations, but a copy of the strategy can be made, and then that copy modified by removing or modifying the last rule. The rules are defined as follows. If you elect to change the seeded strategy, remember that you will have to disable the seeded strategy assignment and create a new assignment for the new strategy you are defining in the Rules Workbench.

You can build rules for Project Manufacturing-Warehouse Management organizations with project related rules engine objects. Some objects that may be useful in rules set up in a Project Manufacturing organization are as follows:

- Source Project-Project Information
- Source Project Task- Project Task Information
- Project Stock on-hand- Project Details of on-hand material.

Note: i.Only if you check the PJM Organization Parameter Allow Cross Project Issue do all the rules in the seeded strategy become relevant. If this flag is unchecked, the Rules Engine will not be able to allocate common material or allow cross project allocations

Listing of Relevant Business Object Parameters

The following table lists the relevant business object parameters.

Table 24–1 Business Object Parameters

Parameter	Object	Description
Project Names	Source Project	Project Description
Project Number	Source Projects	Project Number
Inventory Organization Identifier	Source Project	The organization ID
Cost Group Identifier	Source Project	The system generated number for the cost group
Planning Group	Source Project	The Planning Group-Groups one or more
Project Identifier	Source Project	The system generate Number which uniquely identifies the project.
Description	Source Project Task	Description of the task
Project Identifier	Source Project Task	The identifier of the Project for which the task is a unit of work
Task Number	Source Project Task	The user defined number which uniquely identifies the task within a project
Task Identifier	Source Project Task	The system generate number which uniquely identifies the task
Planning Group	Project Stock on-hand	The planning groups-Groups one or more projects

Note: Rules that reference the concatenated segments parameter of the locator object should be avoided in project manufacturing organizations as they interfere with the rules engine's ability to check capacity at the physical locator level and create the appropriate logical locator.

See Also

Describing the WMS Rules Window, *Oracle Warehouse Management User's Guide*
WMS Rules Engine, *Oracle Warehouses Management User's Guide*

Shipping

In standard picking and shipping flows, the picking process associates the LPN to the delivery lines and the appropriate project and task on that delivery line. Therefore you do not need to enter any project and task data in the LPN ship or dock door ship forms.

Direct Shipping

You can direct ship project and task material against a booked project and task sales order. During direct shipment the shipped LPN should contain material that belongs to the same project and task defined in the sales order. However, if the Organization parameter Allow Cross-Project issue is enabled – then any project and task material can be direct shipped against a project Sales Order. In case of serial numbers having unit numbers, the same check is performed depending upon the setting of the Organization parameter Allow Cross Unit numbers issue. If the project sales order contains unit numbers then the serial having that unit number can only be shipped. However if the Organization parameter Allow Cross-Unit numbers is enabled, then serial with any unit number can be shipped

Manufacturing

Discrete Jobs and Component Pick Release are entered on the Desktop. Projects that have been setup on the PJM Project Parameters window in the organization performing the job can be entered on the Work Order window. When a Discrete Job is created with Project and task references, the subsequent transactions like Work in Process Issues, Return and Work in process Assembly Completion and Return seek project and task references. However, the behavior of these transactions varies with the setting of the Organization parameter: Allow Cross Project Issues Enabled check box.

Project Discrete Job: Component Pick Release

The Component Pick Release for Project Discrete Job is similar to a Project Sales Order. You can use the default seeded Pick strategy, for WIP component allocation.

The transactions created for component picking differ slightly from sales order picking depending on the pegging attribute on the item definition

If the components are *hard pegged*, the system pulls material from any locator based on the rules defined and the destination locator (in the case of moves to a WIP supply locator) is a logical locator with the project and task of the job or schedules

If the components are *soft pegged*, the system pulls from any locator based on the rules setup but the destination locator is a common locator in the case of a move to a supply location. This is because WIP backflushes from common locators for soft pegged items.

Project Discrete Job Completion

When you create a project discrete job, the system defaults the project and task from the project discrete job to the project and task segments of the completion locator. If you assigned a completion locator to the routing, the system concatenates the common locator segments with the project and task to create a project locator.

Project Work Order-less Completion

When you perform a project work order-less completion, you must specify the assembly, quantity, project, or project and task, and other information. When the transaction is saved, the system defaults the project and task from the transaction to the completion locator. The dynamic creation of locator is allowed.

Work order-less completion automatically backflushes all operation pull, assembly pull, and push components.

Transactions

The following section contains information on transactions:

- [Subinventory Transfer](#)
- [Inter-Organization Transfers](#)
- [Miscellaneous Transactions](#)
- [Cycle Counting](#)
- [Physical Counting](#)
- [Lot Split and Merge Transactions](#)
- [Kanban Replenishment](#)

Subinventory Transfer

A subinventory transfer changes the physical location of inventory within an organization but does not change the project and/or task information. When you perform a mobile subinventory transfer of an LPN, the project and task are taken from the LPN's current logical locator. You must indicate the destination physical

locator and the system creates a logical locator so the transaction does not perform an implicit project transfer. If you perform a subinventory transfer of loose material, the system prompts you for the project and task. This project and task appends to both the source and the destination physical locator you enter.

Note: This document refers to user interface enhancements made to warehouse management and mobile supply chain application windows to support project manufacturing. No desktop user interfaces have been changed to support this functionality. All desktop locator fields still display and require entry by logical locators.

See Also

Performing Inventory Transfer with LPNs, *Oracle Warehouse Management User's Guide*.

Inter-Organization Transfers

You can perform a direct inter organization transfer to move project inventory to a different organization. You can perform the following types of transfers:

- Project to Common
- Common to Project
- One Project to another
- Common to Common

The direct inter-organization transfer verifies that the item, project, and task are valid in the destination organization. If the destination organization allows dynamic creation of locators, the inter-organization transfer creates a locator with the project and/or task references in the locator segment

Miscellaneous Transactions

In the Mobile Pages, you can optionally enter a project and task when doing a miscellaneous transaction. If you enter a project and task on a miscellaneous transaction, the material is received into the physical locator with the Project and task appended to the last two segments, forming the project locator.

If you do a miscellaneous receipt of an LPN into a project locator, the LPN resides within the project locator. If you do a miscellaneous issue from an LPN, the entire contents of the LPN belonging to the project and task are issued out.

There are no mobile user interfaces for project transfer or borrow payback transactions. You must perform those transactions on the desktop. These Transactions are available only for loose material. There also exists within inventory the ability to project enable a miscellaneous receipt or issue transaction. This can be done in non project manufacturing enabled transactions and it allows inventory users to reference a project and task on miscellaneous receipts and issues for project cost collection. There is no mobile user interface support for project enabled transactions

Cycle Counting

Counting in a Project Manufacturing-WMS enabled Organization are supported as follows:

Project and Task details serve as part of the unique identification of a Storable Unit of inventory, in a similar manner to Lot, Revision, Serial Number, or LPN. This unique identification is carried through the entire counting process. A separate Cycle Count request or Physical Inventory Tag is generated for each unique combination of Item, Lot, Revision, Serial Number, LPN, Locator, Project, and Task.

Figure 24–6 Cycle Count Mobile Window

The screenshot displays a mobile application window titled "Cycle Counting (P4)". It contains a list of fields for data entry, each with a label and a value or prompt. The fields are: Name (value: >PANCYC04), Project (value: >PANPJM014), Task (value: >2.0), Sub (value: >PANSUB02), Loc (value:]PS4.1.1), ParentLPN (value: >LPN69), Item (value: >PANWCOM03), Desc (value: :PANWCOM03), UOM (value: >Ea(1 Ea)), Avail Qty (value: :100.0), and Qty (value: : followed by a text input field). The background is black, and the text is white.

Field	Value
Name	>PANCYC04
Project	>PANPJM014
Task	>2.0
Sub	>PANSUB02
Loc	]PS4.1.1
ParentLPN	>LPN69
Item	>PANWCOM03
Desc	:PANWCOM03
UOM	>Ea(1 Ea)
Avail Qty	:100.0
Qty	: [Input Field]

You can identify the Locator by scanning the physical bar code, followed by the Project/Task label that was prepared when the inventory was introduced

Count reporting is performed for each Storable Unit, which carries a unique Project / Task.

For a project manufacturing-warehouse management enabled organization, on navigating through the regular cycle count page, the List of Values field for project and task is displayed.

For unscheduled count entries not allowed cycle count, project/task is restricted to only those locators that have been defined in the schedule request. (Example: Suppose a subinventory has Projects P1 P2 P3 defined. The material for which the counting is to be performed is in project P1 and P3 only. Then the Project LOV shows only Projects P1 and P3).

For unscheduled count entries Allowed cycle count, all projects/tasks defined in that Organization are available (Example: Suppose a Organization has Projects P1 P2 P3. the material for which the counting is to be performed is in project P1, then the Project LOV shows all the Projects i.e. P1, P2 and P3)

See Also

Performing Cycle and Physical Counting with warehouse management, *Oracle Warehouse Management User's Guide*

Physical Counting You perform physical inventory through mobile device, you must define physical inventory and generated tags using desktop windows.

Log into the mobile device and navigate to the Physical counting window.

Figure 24–7 Physical Counting Page

Physical Counting (P)	
Name	>PANPHY016
Project	>PANPJM020
Task	>2.0
Sub	>PANBULK
Loc	]PB1.1.1
ParentLPN	>
Item	>PAN010
Desc	:PAN010-PLA
UOM	>Ea(1 Ea)
Qty	:100
<Save/Next Item>	
<Done>	
<Cancel>	

When the Allow dynamic flag is unchecked in the Physical Inventory, project/task is restricted to only those locators that have been defined in the Physical Count header. (Example: Suppose a subinventory has Projects P1, P2, P3 defined. The material for which the counting is to be performed is in project P1 and P3 only. Then the Project LOV will show only Projects P1 and P3)

When the Allow Dynamic tags is checked, all projects/tasks defined for the organization are available for selection (Example: Suppose a Organization has Projects P1 P2 P3. the material for which the counting is to be performed is in project P1, then the Project LOV will show all the Projects i.e. P1, P2 and P3)

See Also

Performing Cycle and Physical Counting with warehouse management, *Oracle Warehouse Management User's Guide*

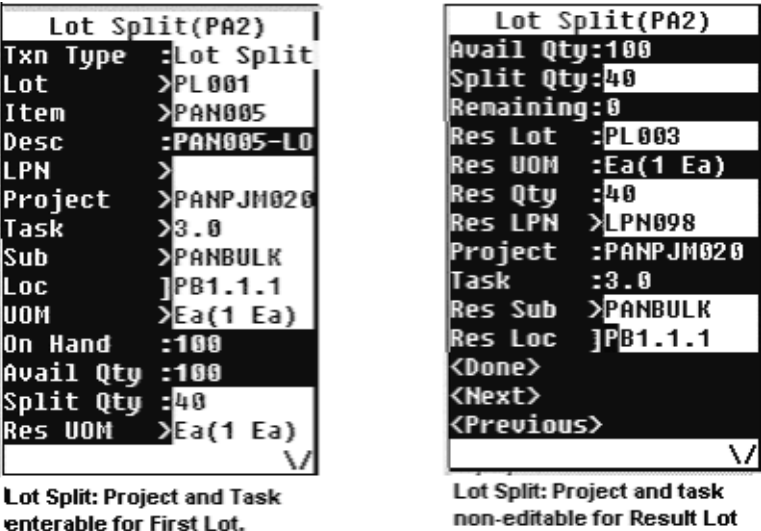
Lot Split and Merge Transactions

Lot Split functionality allows you to split a lot using a Mobile Device. For a project manufacturing organization, Project and Task fields are displayed on the start Lot

and resultant lot windows. The resultant lot from lot split have same project and task as original lot and are not editable. project and task are editable for the first start lot only.

- In the result page, the Project, Task, Sub-inventory and Locator fields are defaulted from the start lot page. The defaulted values can be changed for all except for the Project and Task fields.
- In the start lot page, if LPN is entered, the project, task, sub-inventory, locator, on hand and available quantity defaults from the LPN, but Project and Task fields are non-editable
- If Start Project and Task fields are not entered, Result Project and Result Task fields do not display.
- If there are any lot attributes for the item, Lot Attribute page is displayed after entering the Result Lot.

Figure 24–8 Lot Split Pages



Lot Merge functionality allows you to merge lots using a mobile device. The Resultant Lot from Lot Merge have same project and task as Merged Lots and are not editable. Project and task are editable for the first start Lot only. With the project

manufacturing integration, Project and Task field are displayed on the start and result windows. At least two or more lots can be merged into one resultant lot.

Figure 24–9 Lot Merge Page

```

Inventory Lot Merge(
Total Qty:14
Res UOM >Ea(1 Ea)
Rep Lot :
Res Lot >C1838
Res LPN >LPN68
Project :PANPJM10
Task :1.0
Res Sub >PANCASE
Res Loc ]PC3.1.1
<Done>
<Cancel>
  
```

**Lot Merge - Project and Task
non-editable for Result Lot**

- Lots can be merged only from the same project and/or task.
- If for Start lot, Project and Task fields are not entered, Result Project and Result Task fields will not be displayed (Non-Project Lot Material)
- If LPN is entered, the project, task, sub-inventory, locator, on hand and available quantity are defaulted from the LPN but, the result project and/or task are non-editable.
- Project and Task fields are only editable for the start lot. The following lots defaults the values of Project and Task fields, from the start lot and Project and/or Task are non-editable.
- If there are any lot attributes for the item, Lot Attribute page will be displayed after entering the Result Lot.

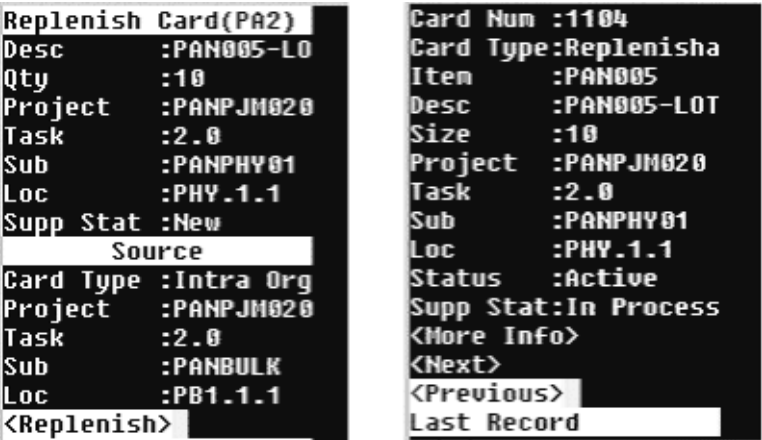
See Also

Describing Lot Split, Merge, and Genealogy, *Oracle Warehouse Management User's Guide*

Kanban Replenishment

The Kanban Replenish pages and Kanban Move Order show Project and Task information for project manufacturing organizations. Kanban Pull Sequence can be created for source and destination locators, which are associated with same Project and task. However, once the Project and task is defined, it is non-editable on the mobile page.

Figure 24–10 Kanban Pages



Note: If project inventory resides in an LPN, only material or LPNs with the same project and task can be packed to that LPN.

See Also

Explaining how to use warehouse management Kanban Features, *Oracle Warehouse Management User's Guide*

LPN transactions: Commingling

The Project co-mingling check differs from the Cost Group co-mingling check with regards to co-mingling in an LPN. For project Material -the logical locator is the only mechanism currently available to reflect the Project and Task of the inventory. Also for project material, the on hand balances are stored at the logical locator level and an LPN does reside at the logical locator level and it can reside in no more than one logical locator at a time.

Different projects and tasks have different logical locators. This logic ensures that no more than one Project/Task can be carried at any level of nesting within any LPN.

If Project inventory resides in an LPN, additional Storable Units belonging to the same Project/Task may be added. These Storable Units may be the same Item/Rev/Lot, or may differ in any identifying characteristic, except Project/Task. Other LPNs containing inventory of the same Project/Task may only nest within the LPN.

If any non-Project inventory resides anywhere within an LPN, the addition of any Project inventory is restricted/prevented.

Note: Iff Project inventory resides in an LPN, additional Storable Units belonging to the same Project/Task may only be added.

Cost Groups Overview

Within any Project Organization, each Cost Group is defined as either a Project or inventory Cost Group, and each Project is associated with a specific Cost Group. More than one Project may be associated with a single Cost Group.

Warehouse management Cost Group Rules excludes all Project Cost Groups. That is, only Inventory Cost Groups are available for assignment by a Cost Group Rule.

If warehouse management is enabled in a project manufacturing organization, any material received that has a project associated with it, is placed into the cost group of the project. Cost Group Assignment rules are not used or called.

The transaction Cost Group Update enables the costs associated with one item to be transferred to another, without physically moving the item. In organizations with both project manufacturing and warehouse management enabled, the Cost Group Update transaction prevents inventory belonging to a Project from being selected

for Cost Group Update. The Cost Group Update is used only to change ownership between one non-Project Cost Group and another non-Project Cost Group. A Project Transfer window is used to change ownership between two Projects, or in either direction between a Project and a non-Project Cost Group.

Note: Cost group transfers are not allowed for locators, LPNs or items that belong to a project.

LPN transactions: Commingling

The Project co-mingling check differs from the Cost Group co-mingling check with regards to co-mingling in an LPN. For project Material -the logical locator is the only mechanism currently available to reflect the Project and Task of the inventory. Also for project material, the on hand balances are stored at the logical locator level and an LPN does reside at the logical locator level and it can reside in no more than one logical locator at a time.

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If Project inventory resides in an LPN, additional Storable Units belonging to the same Project/Task may be added. These Storable Units may be the same Item/Rev/Lot, or may differ in any identifying characteristic, except Project/Task. Other LPNs containing inventory of the same Project/Task may only nest within the LPN.

If any non-Project inventory resides anywhere within an LPN, the addition of any Project inventory is restricted/prevented.

Note: Iff Project inventory resides in an LPN, additional Storable Units belonging to the same Project/Task may only be added.

Common Problems

Common problems and their causes and solutions, including debugging scripts are discussed below.

1. Can I do replenishment by Min.- Max planning using project Locators?

Replenishments can only pull from non-project controlled locators and put away to non-project controlled locators. If you received material into

non-project locators, and enabled non-project locators in the min.-max sub, the replenishments would work.

2. No Valid PO/Document available during receiving?

Check whether your mobile responsibility is tied to the correct operating unit.

3. In Mobile transactions Project, Task fields – sometimes when you enter the project details and press <ctrl-l> the system gives “No Result is found”. What happens?

If everything is correct including the correct operating unit, ask the system administrator to bounce the mobile server, log out & check to see if it works.

4. First time when you receive material into a Locator, when you press <CTRL-L> the system gives “No Result is found”?

Check to see whether the Locator is Dynamic entry and if yes, enter the physical locator details in the Locator field. System allows you to proceed further.

5. Though I have created a Project referenced purchase order with some Distribution lines without having any Project references – why do I get to see the value “No Project” in the Mobile Receipt page in the Project List of Values? What does this signify?

In a project referenced Purchase order, if there are some Purchase Order Distributions – created with no Project and/ or task referencing – then you can select “No Project” value in the Project Field to receive material explicitly in a common locator. In a Project referenced Purchase Order (even if one line Distributions line contain a project reference) – the user cannot skip the Project field without entering any value. The user is mandated to enter the project mentioned in the Purchase order distributions or select “No Project” for receiving against shipments with Purchase Order Distributions line in that Purchase order without any Project and/or Task reference.

6. Where do I check for Locator capacity in a Project Manufacturing-WMS enabled Organization?

Locator capacity is always maintained in the physical locator only.

Frequently Asked Questions

1. Which patch set onwards the Project Manufacturing and Warehouse Management System integration is available?

This Warehouse Management system integration with Project Manufacturing has been available from 11i 11.5.8.

2. Can you have the same Project Number for two different Organizations?

Project Numbers have to be unique in an Operating unit.

Debugging Tips

Use the Rules Execution trace to check how the rules engine behaves for transactions.

Verify in table MTL_ITEMS_LOCATIONS the records are updated with project and Task ID.

For more debugging, set the following profiles and generate trace output:

Do the following query to find out the valid log directories
`select * from v$parameter where name = 'utl_file_dir';`

Log on as your user in desktop

Select from the menu Edit->Profiles.

Enter Query 'INV%DEBUG%' .

The following profiles will be retrieved, enter User values for each

INV_DEBUG_TRACE = Yes

INV_DEBUG_FILE = <path and name of file where debug information will be written>

INV_DEBUG_LEVEL = 9.

If you upgrade to this patch / release on their current system, what is necessary to activate each of the new features delivered by this patch / release, in terms of set up, initialization, etc.

1. PJM organization should be warehouse management enabled to utilize warehouse management functionality.
2. In the PJM Organization Parameters window, Tab enable relevant warehouse management functionality like Cartonization, Cross-docking etc. required.
3. Project subinventory Locator Control should be Dynamic.
4. In Project Manufacturing Parameters (Organization level) – Field Project_Control_Level should be Task enabled if the Project, Task details need to be captured during mobile transactions. If this is set to Project, the Task field is not mandatory and does not appear in the mobile windows.

5. Allow Cross Project Issues Check Box should be enabled, if warehouse management must allocate material from same project or another project or from common locator for Project Sales orders. This feature available in Project Parameters form for Project manufacturing organizations.
6. Allow cross unit number issues check box should be enabled, if warehouse management must allocate serials with unit number listed on Project sales orders. This feature available in Project Parameters form for Project manufacturing organizations. Verify the warehouse management mobile responsibility points to the correct operating unit. If not, it prevents mobile users from visibility to source documents created in desktop.

System Task Management

This chapter contains information on task management. It contains the following topics:

- [Overview](#) on page 25-2
- [Functional Flow](#) on page 25-2
- [Implementation](#) on page 25-13
- [Operation](#) on page 25-18
- [Common Problems](#) on page 25-27
- [Frequently Asked Questions](#) on page 25-33
- [Debugging Tools](#) on page 25-36

Overview

This chapter contains a detailed discussion of the complete Task Management process, which consists of task creation, splitting, merging, assignment, dispatching, and execution. It provides the basic fundamentals of tasks as well as highlights decisions that may impact the implementation. It also discusses key setup areas, and helps to troubleshoot some basic problems that may be encountered during implementation or warehouse operation.

Functional Flow

Task management is used in many processes in Oracle Warehouse Management. It is used for material transfers required for sales order picking, replenishment, picking for manufacturing, and requisition move orders. It is also used for cycle count tasks.

The following table outlines which of the task management features are applicable for each of these different types of tasks, and how the features differ for different task types.

Task Type						
	Sales Order	Replenishment	Move Order Issue	Move Order Transfer	WIP Picking	Cycle Count
Task Creation Process	Pick Release Cycle Count Workflow	Move Order Pick Slip Report N Step putaway workflow	Move Order Pick Slip Report	Move Order Pick Slip Report	Component Pick Release	Cycle Count Schedules Cycle Count Workflow
System Task Type	Pick	Replenishment	Move Order Issue	Move Order Transfer	Pick	Cycle Count
Allocation	Yes	Yes	Yes	Yes	Yes	N / A
Pick Methodology	Yes	No	No	No	Yes	N / A
Paper Assisted Picking	Yes	Yes	Yes	Yes	Yes	No
Task Type Assignment	Yes	Yes	Yes	Yes	Yes	Yes
Task Split	Yes	Yes	Yes	Yes	Yes	Yes

Task Type						
	Sales Order	Replenishment	Move Order Issue	Move Order Transfer	WIP Picking	Cycle Count
Task Dispatch	Yes	Yes	Yes	Yes	Yes	Yes
Task Load	Yes	Yes	No	Yes	Yes	N/A
Task Drop	Yes	Yes	Yes	Yes	Yes	N/A
Label Printing	Yes	Yes	Yes	Yes	Yes	Yes
Operation Plan	Yes	No	No	No	No	No
Task Planning	Yes	Yes	Yes	Yes	Yes	Yes
Warehouse control board	Yes	Yes	Yes	Yes	Yes	Yes

Task Creation Process

Each of the different business flows has different processes to create tasks. For instance, sales order tasks are created by using the Pick Release program to select specific sales orders to include in release. It is only after these respective processes run that tasks are visible to Oracle Warehouse Management as Unreleased or pending work.

All these processes require you to set up data. For instance, prior to running Component Pick Release to create tasks for manufacturing components, you must define the job or schedule. Prior to creating Move Order Issue tasks, you must create and approve the Requisition Move Order.

Pick Release

The pick release process releases internal and external sales orders to the warehouse floor. The Pick Release window has many options to control which lines to select for pick release and how to restrict the material the system considers available for pick release, as well as several other options.

Selection criteria for the release lines to include are as follows:

- Order number
- Order type
- Order status

- Customer address
- Ship to address
- Dates of scheduled shipment
- Customer request dates.

You can also select lines based on delivery or trip, if these have been created in advance, or via ship method or order priority.

Pick release establishes the sales order allocation sequence in case of short supply, optionally specifies the staging lanes, and controls if deliveries are automatically created as part of the pick release process using the Delivery Grouping Rules defined on the Shipping Parameters window. Other options control if pick release is restricted to lines for which prior reservations were made, and can be further restricted to consider only material from a particular subinventory or locator.

A pick release option controls if the move orders are automatically allocated, or if allocation happens later by a manually triggered process. Set this option to automatically allocate the move order, except when you want to troubleshoot with the Rules Engine Simulator.

Another pick release option controls whether the allocated move orders are automatically transacted, which bypasses much of the rest of the task management process. In a warehouse management enabled organization, automatic confirmation is typically disabled except in certain situations. A serialized item cannot be transacted by auto pick confirmation if serial allocation is disabled. In the absence of customizations, if auto-pick confirmation is enabled, then the only mobile shipping method available for use is the Quick Ship method. Another pick release option controls if the system should create a task with an unreleased or pending status.

In addition, the cycle count workflow can create sales order tasks by automatically re-allocating new material when a sales order task is underpicked

Replenishment

The system creates replenishment tasks (and allocations) when the Move Order Pick Slip report runs. You must also run the Min-max planning report prior to running the Move Order Pick Slip report.

The Min-max Planning Report creates the move orders based on selection criteria, such as item category, and planner and buyer, and also controls which sources of demand and supply are included. This creates the move orders, but the Move Order Pick Slip report actually allocates these move orders and creates the tasks to

perform. Alternatively, you can choose Allocate in the Transact Move Order window to manually allocate the move orders the Min-max Planning Report creates.

In addition, the n-step putaway workflow can create replenishment tasks when an LPN is dropped to an intermediate staging location that differs from the initial putaway suggestion provided by the system. The replenishment task directs the operator to move the material from this intermediate location to its final destination.

Move Order Issue and Transfer

The system creates Move Order Issue & Transfer Requisition move order tasks (and allocations) when the Move Order Pick Slip report is run for approved move orders. Similar to replenishment, a two step process is used to create the move order, and then allocate the move order. Alternatively, you can choose Allocate in the Transact Move Order window to manually allocate the move orders the Min-max Planning Report creates.

Picking for Manufacturing

The system creates tasks to pick components required for manufacturing jobs when Component Pick Release is run. Component pick release allocates and creates the tasks. Different user-interfaces are used based on manufacturing mode: discrete jobs, repetitive jobs, lot-based jobs, and flow schedules each have separate component pick release processes with different selection criteria.

Cycle Counting

Tasks for cycle counting are automatically created when the counts are scheduled. This is triggered via the Cycle Count Scheduler, accessible from the cycle counts window. You must create the cycle count header prior to scheduling cycle counts.

In addition, the cycle count workflow can create cycle count tasks by automatically generating a task to count the material that the operator was unable to find when executing a picking task. In creating this cycle count task, the system also automatically places a reservation on the missing quantity so that it is not allocated for other tasks until the discrepancy is resolved

System Task Type

Each of the different business flows for which tasks are created has a System Task Type. The system defines System Task Types, and groups them by similar sets of

features. The System Task Type is automatically assigned to every task when it is created and cannot be edited. Tasks within the same System Task Type can be further classified by User Task Types, which are assigned at a later point by the Rules Engine.

Allocation

All material movement tasks require a source and a destination for the material. Only cycle count tasks do not require material movement, and are not allocated. All other tasks use the Rules Engine to allocate material and, if necessary, a destination locator. See: [System Rules Engine](#) on page 13-2.

Sales Order

Allocation is performed during pick release, if auto-allocate is enabled. If the move order is not automatically allocated during pick release, you can use the Allocate button on the Transact Move Order window to allocate it at later point.

The Rules Engine allocates material based on defined picking rules. If the sales order was reserved, the reservation is viewed as an additional constraint on the rule. If you entered a subinventory or locator in the Pick Release window, these also act as additional rule constraints. The system applies these constraints together to find available material to allocated for the sales order. If no material is found, the system backorders the delivery.

The Rules Engine is also used to select the staging lane if none was specified on the pick release window or selected by previously defined dock door appointments. Otherwise, the Rules Engine is used to validate the staging lane.

Replenishment

The Move Order Pick Slip report performs allocation. The Min-max Planning reports specifies the destination subinventory but may not specify the source subinventory. The system uses the Rules Engine picking rules to select the source subinventory, if not already specified, and the source locator. The Rules Engine putaway rules are used to select which locator of the destination subinventory the replenishment should be directed to.

Move Order Issue & Transfer

You can specify different levels of detail on the move order during creation. For instance, a subinventory transfer move order requires only the destination subinventory be specified, but you can optionally indicate the destination locator, source subinventory and locator, or lot or serial details. The Rules Engine fills in any

missing details when allocating, with the details already specified acting as additional constraints on the rules.

Move order issues do not have an inventory destination. The rules engine can specify the subinventory or locator, or optionally you can specify the subinventory or locator. Move order transfers require both a source and a destination.

Picking for Manufacturing

Manufacturing picking tasks are allocated at the same time the task is created. Unlike the other types of tasks, you cannot separate the move order creation and the allocation into two separate processes.

The move order is allocated using the Rules Engine to determine the source of the material. The destination of the material is controlled by attributes on the material requirement. If the supply type is push, (and the supply subinventory is null) then the destination of the move order is a job or schedule, and thus no destination subinventory or locator is determined by the system. If the supply type is pull, the destination of the move order is the supply subinventory / locator defined on the bill. The Rules Engine is used to validate the supply subinventory and locator.

If a supply subinventory is specified, the destination of the move order is the supply subinventory, even if the supply type is push. The supply subinventory must be non-LPN controlled and non-reservable. See: [Manufacturing Picking](#) on page 20-2.

Pick Methodology

Various picking methodologies are available to control the way tasks are dispatched. These methodologies are supported for sales order and manufacturing picking tasks.

Pick Slip Grouping Rules

Immediately after allocation, all lines released together are grouped according to a pick slip grouping rule. All lines with the same criteria defined in the pick slip grouping rule used for the release get the same pick slip number, while lines that have different attributes get different pick slip numbers. All lines with the same pick slip number are dispatched in a group, so a single operator is assigned to a group.

Some commonly used pick methodologies for sales orders are as follows:

- Wave picking: lines are not grouped by any criteria. Operators pick multiple orders at the same time.
- Order picking: all lines for a particular sales order, job, or schedule are grouped together, so an operator receives all the tasks required to pick a single sales order, job, or schedule. An operator must complete all the tasks in the group before any other tasks are dispatched.
- Zone picking: The system groups all lines for a particular sales order, job, or schedule, and within a particular subinventory together so an operator receives all the tasks required to pick a sales order, job or schedule from a single subinventory. Because one group per source document per subinventory exists, potentially multiple groupings for the sales order, job or schedule could exist. An operator must complete all the tasks in the group before the system dispatches any other tasks.
- Bulk picking: all lines that allocate the same item from the same locator are grouped together into a single larger task, so an operator can pick for multiple sales order or manufacturing requirements in a single operation. Note that these must then be de-consolidated after the picking process.

A manager can also create pick methodologies based on any number of grouping criteria. Pick slip grouping rule may include criteria that is not applicable to the task for which it is used. For instance, a grouping rule with the job, department, and operation criteria checked may be used during sales order pick release. In this case, the system ignores criteria that is not applicable.

Bulk Picking / Task Merging

Tasks for the same item and revision from the same subinventory and locator are merged together if the item is bulk picked. Bulk picking can be specified either by the pick slip grouping rule / pick methodology on pick release, or the Bulk Picked item attribute on the item definition.

The task merging process, as an extension of the pick slip grouping rules, is supported for manufacturing and sales order tasks. Items that are lot or serial controlled are not eligible to be merged.

Cartonization

The system suggests containers into which the items on the tasks are picked. This allows the picker to pick into the final shipping carton, and is also commonly used for conveyor-based picking where a picker picks a sales order into a tote that is scanned to trigger the next task. Cartonization is grouped by delivery, so lines that are shipped together are grouped together by the system. Only sales order and

manufacturing picking tasks are cartonized. See: [Warehouse Management Cartonization](#) on page 5-2.

Cluster Picking

Cluster picking allows a pre-specified number of “clusters” to be dispatched to an operator, to handle scenarios where the operator may be traveling through the picking area with a cart and be able to pick for several sales orders or jobs at once by consolidating the material into a tote specific to the source document.

Clusters are defined by the tasks within a single delivery for sales order picking, or all the tasks related to a single job or schedule for manufacturing. As soon as the operator accepts a task via the cluster picking option, all other tasks for that cluster as well as the tasks from a pre-specified number of additional clusters are assigned to the operator immediately. The system directs the operator to use new LPNs / totes when picking the first task for a new cluster, but to reuse the already existing / loaded totes when picking additional tasks for that cluster. Clusters for manufacturing and sales orders can be interleaved, based on operator qualifications and task type setup.

Paper Assisted Picking

In some scenarios paper-assisted picking, where the system produces a paper report, and the operator has the ability to decide which task to perform next, may be useful. Paper assisted picking could be helpful when the operator knows more efficient paths to go from locator to locator that cannot easily be modeled in the system, or if some pick methodology not easily mapped to the methodologies above is required.

Paper-assisted picking is available for all of the material movement tasks, which excludes only cycle counting tasks. You must enter a task number that is provided on the move order report. These reports can be automatically printed as part of the task creation process.

Task Type Assignment

As soon as the tasks are created, the system assigns a task type you define to the task. This task type controls which skill sets are required to perform the task. Equipment may also be required to perform the task, which is captured by the task type. Only operators with the valid skill sets and equipment are dispatched specific tasks.

For all tasks except cycle count tasks, the task type is assigned by the Rules Engine based on any number of criteria you define. See: [Task Type Assignment](#) on page 13-3. You can also define a default task type for each of the System Task Types if more specific rules-based logic is not necessary, or to serve as a fallback task type if the Rules Engine is unable to select a task type.

Cycle count tasks use the first task type you defined in the task types window. Currently, cycle count tasks do not use the Rules Engine to select the task type.

Task type assignment does not assign a task to an operator, but rather assigns a task to a skill set and optionally, equipment item, that is required to perform the task. One or more operators can be qualified to perform this type of task, and the task is not actually assigned to the operator until the operator asks the system to dispatch the next unit of work. Only at this point, or via a manual task assignment from the Warehouse Control Board, is a task associated to a particular operator.

Task Split

The task is split, if necessary, based on the capacity of the equipment required to perform the task. Tasks split in this way receive the same pick slip number, and are grouped together and dispatched to the operator. All material movement tasks are potentially split based on equipment capacity.

Task Dispatch

All tasks are dispatched when the operator logs into the system and requests a task. The operator receives the highest priority task sequenced by subinventory and locator picking order, based on where the operator is currently located. You can assign task priorities manually via the Warehouse Control Board.

All of the system task types can be interleaved. For example an operator could perform a sales order pick, followed by a move order issue task, followed by a pick for a manufacturing job, and then back to a sales order pick. Essentially, interleaving can be controlled by the task types. If qualified, the operator is dispatched the next task regardless of the task type. However, in cases where the system assigns a groups of tasks to an operator, such as via cluster picking or pick slip grouping rules, the system directs the operator to complete that group of tasks before it assigns additional tasks of potentially different system task types.

Sales Order

Sales orders have an additional feature to control how to interleave sales order tasks across the pick release waves. You can interleave Sales order picking tasks across

pick release waves so the highest priority task in any wave is dispatched first. You can also segregate tasks by waves, so an operator is not dispatched any task from a later wave if the operator is qualified to perform any task on an earlier wave, regardless of task priority or subinventory / locator picking sequence. This behavior is controlled by a profile option WMS: Sequence Picks Across Waves.

Task Load

An operator can load or drop a task. Loading a task indicates the material was loaded to equipment or a person. An operator can load additional tasks or drop the loaded tasks when ready.

Cycle count tasks are not material movements, and thus cannot be loaded. Move order issue tasks issue material directly to a destination account in a single operation, and thus loading these tasks is not supported. All other tasks can be optionally loaded.

Task Drop

Task drop confirms the material is moved to the final destination, which may be a staging lane, job or schedule, supply subinventory, account, or normal subinventory or locator. The material transaction is completed only after the task is dropped. All material movement tasks support task dropping.

Labeling

The entire picking process is integrated with label printing. Several business flows are integrated into the picking process and are triggered automatically by specific transactions. The business flows are as follows:

- Pick Load: The label request is created when an operator selects Load or Drop in the Pick Load page for sales order tasks.
- Pick Drop: The label request is created when an operator completes the drop transaction for sales order tasks.
- WIP Pick Load: The label request is created when an operator selects Load or Drop in the Pick Load page for all manufacturing picking tasks.
- WIP Pick Drop: The label request is created when an operator completes the drop transaction is for manufacturing picking tasks.
- Cartonization: The label request is created during pick release for tasks that are cartonized.

- Cycle count: The label request is created when a cycle count entry is posted.
- Replenishment Load: The label request is created when an operator selects Load or Drop in the Pick Load page for all replenishment tasks.
- Replenishment Drop: The label request is created when an operator completes the drop transaction for replenishment picking tasks

See Also

[Label Printing Integration Kit](#) on page 10-2

Operation Plans

Operation plans control the routing and behavior of individual tasks through the warehouse. Operation plans are automatically assigned to tasks when initially created, using the Rules Engine. Currently, the features of operation plans are only available for sales order tasks.

Sales Order

The system assigns one of three pre-defined operation plans during pick release to sales order or internal order tasks. You can use the operation plan selection rules via the rules engine, or accept the default from the Warehouse Parameters window to assign the operation plans. The plan controls if and how to default LPNs when the operator drops sales order tasks in the destination locator thereby aiding in delivery consolidation.

Task Planning

When the system creates tasks, they can be dispatched immediately, or at a later time. You can hold back tasks to manually prioritize, assign, and group tasks as required, and then release smaller groups of tasks to be performed by certain individuals or groups of operators. In this way, and using some of the summary features of the Warehouse Control Board, you can exert tighter control over the work performed in the warehouse.

Warehouse Control Board

The Warehouse Control Board provides visibility to the following information to all tasks performed in the warehouse.:

- Task Details

- Dispatch information,
- Load information
- Completion information
- Operator who performed the task
- Task exceptions

The Control Board also provides some management functionality, by allowing you to manually update the priority of a task or assign a task to a particular operator that can optionally override the qualifications of that operator.

Finally, the Control Board also provides summary statistics that allow you to monitor labor productivity and equipment utilization within the distribution center. Additional summary statistics can be reported on groups of tasks, so the total weight or volume required for the tasks, or the total expected time required to complete those tasks can be estimated.

Implementation

In order to use the task management features, you must define several different entities. Some of these steps are optional, while others are required for some of the system task types. However, you must define at least one task type must for each of the system task types (Pick, Replenishment, MO Issue, MO Transfer, Cycle Count) in order to automatically have those tasks dispatched. Some of these steps, such as defining employees and defining users, are performed as part of the common installation steps.

The following table lists the steps for setting up task types:

Step	Required
Define Employees	Yes
Associate Employees to Users	Yes
Define Equipment Items	No
Define Equipment Instances	No
Define Resources	Yes
Define Department	Yes
Define Task Type	Yes

Step	Required
Define Task Type Rules	No
Define Default Task Types	No

Though defining task type rules and defining default task types are optional, you must perform at least one of the steps.

Prior to defining entities, you must identify the task types to be used in the warehouse. See: [Appendix C - Task Management](#) on page C-1 for a complete example of developing the equipment types, resources, and task types. Use the following questions to help define task types:

- Beyond the five system-defined task types that differentiate the tasks by the type of document that originated the task, what criteria are used to differentiate who is qualified or what equipment is required to perform a task? This helps determine what task types should be defined.
- Do operators typically work with one or two pieces of material handling equipment all day, such as a dedicated fork truck driver? If so, then equipment resources should be defined. Or do they typically switch equipment frequently, grabbing whatever equipment they need to do the task? If so, then it may not even be necessary to define equipment resources because operators are already deciding which equipment to get based on the task attributes.
- Are there different classes of material handling equipment in the warehouse, such as a pallet jack, fork truck, or cart? Are these classes broken down even further, perhaps by weight capacity, or by material handling properties? Can only some equipment be used for refrigerated or hazardous items? Is some equipment required to reach certain areas, such as high racks, in the warehouse? This helps determine what equipment items should be defined and how they should be associated to task types.
- Are different operators trained to operate different pieces of equipment, or move different classes of items, or are all operators qualified to move all material? This helps determine what manual resources should be defined and how they should be associated to task types.

Though task types are set up to model skill sets and equipment required to perform tasks, they can also be used to selectively restrict tasks to operators. Operators can elect to perform tasks in the refrigerated cooler in the morning, and tasks in the freezer in the afternoon, as directed by you the manager, and controlled by the equipment the operator signs on to.

In addition to defining task types, you must define Transaction Reasons if exceptions to tasks, such as picking less than the allocated quantity or picking from a different locator than suggested, are allowed. See: [Transaction Reasons](#) on page 17-1 for implementation details on defining Transaction Reasons and the associated workflows.

Define Employees

In setting up skill sets, you assign a particular employee to resources, which effectively means the employee has the skill sets to perform specific tasks. You must define this employee to set up resources.

Employee information is maintained by Oracle Human Resources. If Oracle Human Resources is installed, an employee can be defined and maintained from the Enter and Maintain People window in HRMS Manager responsibility. If Oracle Human Resources is not installed, you can access the same window via the Warehouse Manager responsibility. See *Entering a New Person (Person Window)*, *Managing Your Workforce Using Oracle HRMS (US)*.

Associate Employees to Users

When signing on to the mobile devices, an operator indicates a username and password. The user name is associated to a specific employee, and in turn, to the skill sets the operator has, by means of this step.

You can define a mobile user in the Define User window. See: *User's Window*, *Oracle Applications System Administrator's Guide*. After creating a mobile user and providing it with the appropriate responsibilities, associate the employee defined in the previous step to this user.

There can be more than one employee with the same employee name and number, but belong to different Operating Units. Verify the employee selected belongs to the correct Operating Unit for the responsibilities.

Define Equipment Items

Equipment items are a specific type of equipment required to perform a task type. They are used to restrict the tasks dispatched to a particular operator based on the equipment with which the operator has logged on. Equipment capacity is also used to split tasks, if the weight or volume of the task exceeds the weight capacity or volume capacity of the equipment that is required to perform it. Typically, equipment items are the model numbers of the equipment used in the warehouse.

Examples of equipment items include Komatsu K4300 forklift 2-ton fork, Yale Y4000 2-ton lift, or Caterpillar C3600 high-reach fork truck.

Equipment items are optional resources on a task type. This step is only required if the operator should be required to sign on to particular equipment to get specific tasks.

Equipment items are defined from the Master Items window, as equipment items are simply serialized inventory items with several additional attributes. Ensure the Vehicle check box is enabled, and that the item is defined as serial at receipt, or serial predefined. You must assign the item to the organization in which it is used. Additional optional attributes include the equipment capacity, specified by entering a maximum load weight and internal volume. Ensure the units-of-measure that are specified for these two attributes are in the same unit-of-measure class that is used to specify the weight and volume of the items.

See Also

Defining Items, *Oracle Inventory User's Guide*

Defining Unit of Measure Classes, *Oracle Inventory User's Guide*

Define Equipment Instances

The specific pieces of equipment in each warehouse are modeled as serialized instances of equipment items. For instance, there may be 15 2-ton forklifts in a particular warehouse. Because these forklifts have the same make and model and are therefore interchangeable on the warehouse floor, they have been defined using just one equipment item. Serial numbers must then be generated for the 15 different instances. It is these serial numbers, associated with a particular equipment item, which the operator is logging on to. This step is only required if equipment items have been defined.

Serial numbers can be generated either via the desktop concurrent request to generate serial numbers, or via miscellaneous receipts of the equipment items. Equipment items can be on-hand, but that the task management processes do not require that it be on-hand, nor do they perform or require any material movements of the equipment item.

See Also

Serial Number Control, *Oracle Inventory User's Guide*

Define Resources

Resources are used to model the equipment and employee skill sets. Two different types of resources are used to model task types: manual and machine, or rather, operator and equipment. Resources group the employees or equipment items into sets where every instance on that set is considered equivalent.

To define manual resources create a resource name and indicate the type as Manual. You can assign the employees defined earlier to that resource. All the employees assigned to a resource are considered interchangeable, so any one of the employees on a resource can perform a particular task. Different manual resources might be a 2-ton forklift operator, forward picker, hazmat handler, or cycle counter.

To define equipment resources create a resource name and indicate the type as Machine. You can assign the equipment items defined earlier to that resource. Equipment items assigned to a resource are considered interchangeable, so any serial instance tied to an equipment item on a resource can perform a particular task. Different machine resources might be a 2-ton forklift, small cart, or hazmat forklift.

See Also

Defining a Resource, *Oracle Bills of Material User's Guide*

Define Departments

Departments break resources into logical groups. One department may be defined for hazardous material handling, while a second department may be defined for miscellaneous material. Or one department may be defined for picking, and another for replenishment. You can assign resources to one or many departments, and departments include both manual and machine resources.

See Also

Defining a Department, *Oracle Bills of Material User's Guide*

Define Task Types

User-defined tasks types set the skill sets and optionally, equipment, required to perform a task. Each task type you define is associated with exactly one manual resource and either one or zero machine resources. The task dispatching engine dispatches tasks to operators qualified to perform that particular task. You must associate the task type with a department and with a system-defined task type. You

must define at least one user task type for each system task type in order to use task dispatching for that system task type.

Define Task Type Rules

Task type assignment rules determine the user-defined task types to assign to each task. You use the Rules Definition window to create Task type assignment rules. However, unlike picking and put away rules, task type assignment rules do not have strategies, or strategy assignments.

Each task type assignment rule has both restrictions and a return value. The return value is the user-defined task type that should be returned when the restrictions are met. The restrictions indicate the requirements that must be met, such as the quantity of the task or the source location of the task. The rules also are given a weight, which determine the sequence in which the rules are evaluated; higher weighted rules are evaluated first. The task type on the rule with the highest weight for which all the restrictions are met is stamped on the task.

You do not have to define Task Type Assignment Rules if default task types are defined at the organization level. You can use rules and organization defaults to ensure a task type is always assigned.

Define Default Task Types

If no task type is assigned after evaluating all the task type assignment rules, or if no task type rules exist, the system checks for the default task types assigned to each system task type on the Organization Parameters window. You do not have to define default task types if task type rules exist. Both rules and organization defaults can be used to ensure that a task type is always assigned.

Operation

The following section provides details about how the system dispatches tasks operators and the different processes available to manage the tasks in the warehouse.

Picking Process

Mobile Sign On

In order to receive tasks, an operator must sign on to the mobile device, select the Whse Mgmt responsibility, and navigate to the Tasks menu. After entering the

current organization, an operator can optionally enter the equipment serial currently in use, or the subinventory from which tasks should be restricted.

If the operator does not enter any value for the equipment, the system assumes the operator has the necessary equipment to perform the next task. The operator can also enter a value of NONE, which restricts the system to dispatch only tasks that do not require any equipment. For any other value entered, the system dispatches tasks that require a resource equipment type the operator indicates. Although the operator scans or enters the specific equipment item serial number, the serial number is tied to an equipment item, which is in turn linked to a resource, and a task type.

If the operator enters a subinventory, only tasks originating in that subinventory are dispatched to the operator.

Task Menu

There are several ways you can dispatch tasks to operators. The following section describes all the options available in the Task menu.

Acc Next Task

The Acc Next Task option calls the task dispatching engine to retrieve the next optimal task among all the pending tasks that the operator is qualified for. If any tasks are already dispatched or queued to the operator, the next task based on priority and subinventory / locator picking order is then presented to the operator.

If no tasks are currently dispatched or queued to the operator, the following process gets the next task or group of tasks. Tasks are first filtered out based on the manual resources required for the task, the equipment the operator has signed on to, and the subinventory the operator signed in to. The tasks that pass these restrictions are then sequenced based first on the task priority, where lower priority numbers take precedence, and any priority number takes precedence over a null priority. The tasks of the highest priority are then sequenced based on subinventory and locator picking order, and the task closest to the operator's last known position based on ascending subinventory / locator picking sequence is dispatched to the operator and presented on the mobile device. Sales order tasks can also be optionally interleaved across pick release batches, or dispatched batch by batch, depending on the setting of the profile option WMS: Sequence Picks Across Waves.

All tasks with the same pick slip number are also assigned to the same operator at this time. Note that this pick slip grouping overrides any task type assignment. When performing tasks with the same pick slip number, the operator is automatically brought to the next task in that group as soon as the previous task is

dropped. When the operator completes the tasks in the group, the mobile device displays a message, and returns the operator to the task menu.

From the Acc Next Task option, the operator can completely perform the task, and elect to drop the material directly to the destination for material movement tasks, or if applicable, load the task.

Current Tasks

The Current Tasks option displays all loaded tasks. The tasks are linked to the loaded LPN, so the operator can scan an LPN directly from this menu option and proceed to drop it, or view all loaded LPNs. This includes LPNs loaded via LPN Putaway, which were not dispatched via tasks. LPNs may be listed multiple times if multiple tasks have been loaded to the same LPN, or if the operator traverses the task load page multiple times when loading material to the same LPN.

The most common flow from the Current Tasks page is to drop a task, which completes the transaction and moves the material. The operator can also unload the task, reversing the task load and placing the task back in the queue of pending tasks available for operators. Unload returns the material to the source locator in the same state (packed or loose) in which it was loaded. Finally, information about the task can be viewed.

Although the Current Tasks page shows LPNs the operator signed in to the device loaded, the operator can access other LPNs via this page if the LPN is scanned directly. This is typically used in a pick-and-pass environment, which may be used during conveyor-based picking. See: [Pick by Label](#) on page 25-21.

Putaway

The Putaway option allows an operator to put away to inventory LPNs that reside in receiving or manufacturing. LPNs may reside in receiving from an inspection or standard routing receipt, or they may reside in manufacturing after an LPN-based completion. Either the system-directed or user-directed options are supported for these LPNs. The user-directed mode uses the default setting of rules validation. See: [Putaway](#) on page 9-6.

Putaway can also be called for LPNs that already reside in Inventory, though only the non-consolidated system-directed putaway can be used for these LPNs.

LPN Putaway is not dispatched as a task; it is discussed because it resides in the Tasks menu on the mobile device.

Manual Pick

The Manual Pick option is primarily used in paper-assisted picking environments where the operator dispatches tasks manually, rather than relying on the task dispatching engine to select the next task to dispatch. The Pick ID triggers the Manual Pick option, available from the Pick List printed by sales order pick release, and also available on the Move Order Pick List report for other move orders.

Once a task has been dispatched to an operator manually via Manual Pick, the other task features behave exactly as if the task were dispatched via Acc Next Task, with the exception of pick slip grouping rules. Specifically, the Manual Pick option does not honor the pick slip grouping rules, so that an operator can perform tasks from multiple different groups if desired. However, because the pick slip report breaks pages with each new pick slip number, this can be avoided by process controls, if desired.

The Pick ID is simply the TRANSACTION_TEMP_ID, from MTL_MATERIAL_TRANSACTIONS_TEMP, and so in the absence of these reports during testing or demo situations, can be accessed either directly from the tables, or from the Transaction Number column on the Warehouse Control Board. In the case of bulk picked tasks, the individual child tasks that are merged to window the parent task are not eligible to be picked via Manual Pick.

Pick by Label

The Pick by Label option is primarily used in conveyor-based picking, where a tote passes down a conveyor belt and different operators load material to the tote. Rather than dispatching tasks based on priority, or by a Pick ID, tasks are dispatched by scanning the license plate. By way of cartonization, the tasks have already been associated to that particular LPN. The LPNs are initially placed on the conveyor based on the labels printed during cartonization at pick release.

When the operator scans an LPN, the next task (based on the picking sequence) is dispatched. The operator then loads the material to that license plate, and uses the same interface as if the task had been accepted via Acc Next Task. If additional loads into the same tote are required, the operator cannot drop the license plate until all loads are complete.

Once the last task load for a tote has been completed, the Pick by Label option automatically directs the operator to drop the LPN. Alternatively, the LPN can be accessed in the Current Tasks option from the LPN field by the last operator that loaded the task, or by any operator if the LPN is scanned directly.

Express Load

Tasks dispatched via Acc Next Task require the operator to confirm several details about the task, including the revision, item, source subinventory and locator, and quantity, as well as the lot and / or serial details, as applicable. If the material is packed and comes from an LPN that can be entirely consumed by the task, the confirmation process is simplified. The operator only has to scan the LPN.

The Express Load page bypasses all of the confirmation fields, allowing a task load to be confirmed with a single keystroke. The system automatically generates the pick-to LPN if the cartonization process did not generate it at pick release. Alternatively, if after accessing the Express Load page, the operator must override details of the task, the standard task page can be accessed directly via a button.

Express Load uses the same task dispatching algorithm as Acc Next Task to select the next task to load for an operator. However, because of the simplified user-interface, several additional restrictions are necessary. Serial-controlled items are excluded from Express Load, as are any tasks for lot-controlled items for which more than one lot was allocated. If a particular LPN was allocated, the task is not available for Express Load. Only tasks from non LPN-controlled subinventories are eligible for Express Load. You can use task types and /or equipment items to restrict dispatching tasks that should be performed via Express Load.

Express Pick

Express Pick is similar to Express Load, except both the pick load and the pick drop are performed in a single operation. The complete task is transacted in a single operation. Express Pick has the same restrictions on tasks as Express Load.

Cluster Pick

Cluster picking dispatches several “clusters” of tasks to an operator at once. You can specify the number of clusters on the Organization Parameters window or an operator can enter the number of clusters. If you enter a non-zero value on the parameters window, this value is used and cannot be changed by individual operators. However, if set to zero or left null, the operator has the ability to enter the number of clusters desired when entering the mobile page for the first time.

A cluster consists of all the tasks tied to a single delivery for sales orders, or a single job or schedule for manufacturing. In the case of sales orders, if deliveries are not created during pick release, the delivery grouping criteria specified on the Shipping Parameters window is used to build the clusters.

As soon as the operator receives the first task from the first cluster, all the remaining tasks of that cluster, and of the specified number of additional clusters, are

dispatched. The tasks within the clusters are sequenced by priority, and subinventory / locator picking order. The operator generates the first pick-to LPN for each cluster, unless cartonization generates the first pick-to LPN. However, as additional tasks for the same cluster are performed, the pick-to LPN is defaulted by the system as the same as that entered earlier for the same cluster. In this way, the page assists with consolidation as the picking tasks are performed.

Task Exceptions

Oftentimes, a locator may be unavailable or specific material may not be found as expected. Different types of task exceptions are supported, each of which can trigger a corrective workflow.

Transaction Reasons

You define transaction reasons during the setup process. Transaction reasons link an exception type, such as a Picking exception or a Putaway exception, with a text description and an optional user-defined workflow that can perform a corrective action.

Common types of corrective actions may be placing locators or subinventories on hold if they are damaged, cycle counting an item in a locator if it is short picked, or reallocating an order line if insufficient material was found. See: [Transaction Reason Setup](#) on page 17-2.

Allowed Exceptions

The Pick Load and Pick Drop pages allow the operator to record task exceptions in several different places. The following types of exceptions are supported for material movement tasks:

- Pick less quantity than allocated
- Pick from a different subinventory / locator than allocated
- Pick a different LPN than allocated
- Drop to a different destination subinventory / locator than suggested

All of these exceptions automatically validate the availability of the material and locators with which the task is being overridden, relieving the allocation on the material that was not picked and instead transferring the allocation (and, if appropriate, reservation) to the material that was picked.

Whenever any of these types of exceptions occurs, the operator enters an exception reason from the predefined list for that transaction type. These exceptions are recorded on the task and visible on the Warehouse Control Board on the Exceptions tab. In addition, any workflow associated with the Transaction Reason is triggered.

Reason Types

Transaction reasons are defined with a reason type, which restricts the types of tasks in which it can be used. The reason types relevant for tasks are Picking and Replenishment. For instance, only reasons with the reason type of Picking can be entered as the exception reason for a sales order picking task.

License Plate Matching

In the Pick Load page, an operator can pick packed material, as well as loose material. Packed material is picked by entering an LPN in the From LPN field; to pick loose material, the From LPN field is left blank.

Any LPN which contains the allocated item and revision, at least one allocated lot if the item is lot controlled, and at least one allocated serial if the item is serial controlled and specific serials were allocated at pick release, and is located at the allocated source locator, is displayed in the From LPN field.

When the operator scans the from LPN, the system calls a LPN matching routine. This compares the selected LPN against the requirements of the task in question. The system calls the routine even if a particular LPN has been allocated, in case additional material was packed into the LPN after the allocation occurred.

The matching routine verifies the selected LPN has the allocated item. If the item is revision controlled, the LPN must include the specific revision on the task. If the item is lot controlled, the LPN must include at least one of the allocated lots. If the item is serial controlled and serial allocation is enabled, the LPN must include at least one of the allocated serials. The material that matches the allocation must also be available. Note that this matching routine allows LPNs from different locators to be entered, even though they are not in the list of values for From LPN. But it performs the additional availability check, for which LPNs displayed in the From LPN list may then be invalidated.

The matching routine then checks to see if the LPN can be completely consumed by the task:

- If item lot controlled, all lots in the LPN have been completely allocated
- If item serial controlled, all serials have either been completely allocated, or specific serials have not been allocated

- No other items or revisions in the selected LPN

If the LPN can be entirely consumed by the task, the operator does not need to confirm any of the other task details such as subinventory, locator, item, revision, lot, or serial. However, if the LPN can be only partially consumed, then the operator must confirm all the additional details. Regardless of LPN matching, if the user picks a different LPN than allocated (if LPN allocation enabled), or picks from an LPN from a different locator than allocated (if LPN allocation disabled), the user will still be required to enter an exception reason.

If, after selecting the LPN, regardless of whether it was entirely consumed, the task still has remaining quantity to pick, the operator can either continue to pick more loose or packed material from the same or different locator, or can indicate that there is no more material to pick that thus the task is short picked.

Pick To LPN

All material movement tasks must be picked to an LPN. This LPN could be the final LPN that is shipped to the customer, an intermediate LPN that is consolidated into a larger shipping container or pallet, or an intermediate tote that is only used to identify the material while the operator is moving it.

The Express Load and Express Pick pages automatically generate the Pick To LPN, even if they had not already been generated by cartonization. In addition, cartonization, if enabled, automatically generates the Pick To LPN, as well as the container item that the task should be picked to. If cartonization is enabled, this suggestion is displayed in the Pick Load page. If the operator is picking an entire LPN, then the Pick To LPN defaults as the From LPN, meaning that the entire LPN is loaded as is. However, if the task is not cartonized and the operator picks a partial LPN or loose material, the operator enters or generates the Pick To LPN.

For sales order picking tasks, the only restrictions the system enforces are that different deliveries are not commingled in the same Pick To LPN, and that the Pick To LPN is in the correct context when it is used. The valid contexts are Packing Context, and Defined but not Used. This means the following can be used for the Pick To LPN:

- LPN which is currently loaded to the operators equipment for the same delivery
- LPN which has been pre-generated and not yet used
- LPN generated inline using the hot-key

Drop LPN

Sales order picking tasks allow the operator to consolidate individual picking tasks for larger deliveries as part of the Pick Drop process. If deliveries were automatically created as part of the pick release process, or if they were created manually prior to pick release, the Pick Drop page uses the deliveries to group LPNs that should be dropped together. If any operator has already dropped an LPN for the delivery, that LPN will be defaulted as the Drop LPN.

By leaving the Drop LPN as suggested, the Pick To LPN is automatically nested inside the Drop LPN. The operator can also clear the Drop LPN, so that the Pick To LPN is dropped as is, or a new Drop LPN can be generated. Like the restriction on the Pick To LPN, the only restrictions on the Drop LPN are that it does not result in delivery commingling, and that it is in a valid context of Picked or Defined but not Used.

If the LPNs are not consolidated into larger shipping containers, the Drop To LPN can be used to help identify other LPNs in the staging lane near which the current LPN should be dropped, thereby keeping deliveries near each other. This helps streamline the outbound shipping process because a shipper need not search the entire staging lane for missing LPNs.

LPN Contexts

LPN contexts indicate the current LPN state. For instance, an LPN may be in inventory, or it may be in-transit between two organizations. Other contexts include Resides in WIP and Resides in Receiving. Resides in receiving is used for LPNs that have been created and packed, but not yet put away to inventory. Several contexts are used for LPNs as they proceed through the picking process. Specifically, the contexts Packing Context and Picked come up only in reference to tasks.

The Picked context is used to identify LPNs that have been staged for sales orders. These LPNs can only be issued as part of a shipping transaction. They can also be split into smaller LPNs, or merged so long as only LPNs on the same delivery are combined.

The material movement is not processed until the task is dropped; no transaction is recorded for tasks which have only been loaded, though details about the task such as the time at which it was loaded and the operator who loaded the task are recorded.

When a new LPN is generated for a task that is subsequently loaded, the LPN is not packed and does not yet reside in a particular subinventory and locator. These LPNs are given the context Packing Context. This also applies to Pick To LPNs that

previously had the context Defined but not Used. When a task is dropped, the LPN is given one of several contexts as follows:

- If the task is dropped for a sales order staging transfer, the LPN is given the Picked context.
- If the task is dropped for any other task to an LPN controlled subinventory, the LPN is given the context Resides in Inventory.
- If the task is dropped to a non-LPN controlled subinventory, or the task drop issues the material to WIP, the LPN is given the context Defined but not Used so that it can be reused as a tote.
- If the task is issued on a Move Order Issue, the LPN is given the context of Issued Out of Stores.

Warehouse Control Board

The Warehouse Control Board is a desktop-based management tool that enables you to view the tasks pending progress, currently in progress, or already completed, for a particular operator, task type, job, sales order, date, task status, or any number of additional criteria. Task exceptions are recorded and displayed in the Control Board.

Common Problems

1. User gets No Tasks Available message

This could happen for one of many reasons. There could be no tasks pending, or the task could be pending but no task type assigned, or the task type could be assigned, but the operator is ineligible to perform the task. The following helps determine which those three scenarios is the root cause of the problem, and how to resolve the problem.

First, query the Warehouse Control Board for tasks created by the particular document (job, sales order, move order, etc.) for which tasks were expected. Clear the date fields, and select all statuses. If no tasks are found for that particular document, then the task creation process failed. For material transfer tasks, the most common cause is that the Rules Engine was unable to allocate any material. Please refer to the Rules Engine chapter of this guide for steps on how to debug this problem. Other possibilities are that no replenishments were required, the Restock option on the Min-max Planning Report was set to No, Cycle Counts have already been scheduled for the period, or the release criteria set during pick release were too restrictive and did not pick up the desired lines.

If tasks have been created, check the task status. The task status should be Unreleased or Pending for any task that has not yet been begun or assigned to a particular operator. If the task status is Unreleased, either task planning was enabled when the tasks were initially created, or a user manually changed the task status to Unreleased. Unreleased tasks are not eligible to be dispatched.

If the task status is Completed, check the name of the employee that the system believes completed the task; perhaps someone else is also testing concurrently. If the task status is Completed for a sales order task, verify that Auto Pick Confirm was disabled during the pick release batch. Verify that the item is reservable, as non-reservable items are automatically pick confirmed during sales order pick release regardless of the setting of the Auto Pick Confirm flag.

If the task status is Queued, that means the task has been manually assigned to a particular operator via the Control Board. Either log on as that operator to complete the task, change the assignment to another operator via the Control Board, or set the task status back to Pending, which automatically clears out the operator assignment and make the task available for any operator. However, tasks in status of Queued should still be available via Acc Next Task to the correct operator.

If the task status is Dispatched, that means the task has been assigned to a particular operator by the system based on either pick slip grouping rules or cluster picking. Tasks in status of Dispatched should still be available via Acc Next Task to the correct operator.

If the task is in status Loaded, an operator has loaded the task to his equipment, but has not yet completed the task. The task should be available to be completed from the Current Tasks option of the user who loaded the task. Or any other operator can complete the task by manually entering or scanning the LPN in their Current Tasks page.

If the task is in status Pending, the task should be available to any qualified operator based on the task type that is assigned to the task. Verify the Task Type for the task; if the task type is null, then the Rules Engine was unable to assign a task type and there were no default task types defined in the Organization Parameters window. Verify that the task type assignment rules are enabled. Also, if patches have been recently applied to the instance and task type rules worked prior to the patches, run the concurrent request Generate All Rules. Define default task types ensure that a task type is always assigned to tasks. To continue with this task, manually assign the task to a particular operator in the Warehouse Controlboard.

If the task is in status Pending and has a task type, but is still unavailable via Acc Next Task, then likely the employee associated with the mobile user is not qualified to perform the task. Check the Resources required for the Task Type; there should be exactly one manual resource, and either zero or one machine resources assigned. Verify the employee name that is associated to the user, and then verify that employee is on the list of valid employees to perform the manual resource. Also, when signing on to the mobile device, leave the Equipment and From Sub fields blank, so that these do not act to further restrict the tasks available to the operator.

If the task status is Active, the task page is currently open in an operators session and thus the system thinks an operator is currently working on that task. The operator that has that task open will also be displayed in the Warehouse Controlboard.

2. Some sales order picking tasks are never dispatched

So long as some operator is qualified to perform the task, the qualified operator should always be dispatched tasks before being given the “No Tasks Available” message, as long as that operator did not sign on to a specific subinventory or sign on with specific equipment. However, in an active warehouse, there may always be pending picking tasks as pick release is performed daily for new batches and yet it may seem that some of the picking tasks for waves released in previous days do not get dispatched.

Tasks are dispatched in sequence of priority and subinventory / locator picking sequence, and restricted by the operators skill set. Assuming that an operator is qualified to perform all tasks, priorities are never manually assigned, and the operator does not sign on to a particular piece of equipment or a particular subinventory, tasks are sequenced solely on subinventory / locator picking sequence.

If an operator is in one end of the warehouse, based on that picking sequence, additional picking waves are released before the operator completes the previous wave. It is possible the operator may never get to the opposite end of the warehouse because additional were created for locations within the operator’s current area. While this ensures an efficient picking path, this also means tasks may be left pending indefinitely as new batches are released. Instead, you may wish that an operator cannot work on any tasks released in a later pick release wave as long as there are tasks still pending in a previous wave for which the operator is qualified.

This is controlled by a profile option, WMS: Sequence Picks Across Waves. This profile option determines whether sales order picking tasks should be

sequenced only on priority and subinventory / locator picking order regardless of pick wave, or whether they should be sequenced by wave number, priority, and then subinventory / locator picking order.

This profile option only affects how sales order picking tasks are interleaved with other sales order picking tasks; if an operator is qualified to perform, say, replenishment or WIP picking tasks, these may be continually dispatched before other sales order tasks if they are continually being created. Therefore, if this continues to be a problem for sales order picking tasks, the operator qualifications or task types should be modified so that sales order picking tasks are not interleaved with other task types.

3. User dispatched a task not qualified to perform

There are two possible causes that a task for which an operator is not qualified to perform has nonetheless been dispatched to the operator.

The task may have been manually assigned to a particular operator via the Warehouse Control Board. Manual assignments take precedence over the user task type assigned to the task. However when manually assigning specific operators to tasks, you have the option to indicate the assignment should only be made if the user is qualified to perform the task type, or the assignment should be made regardless of qualifications or skill sets.

4. User task type populated incorrectly

The most common cause for an incorrect task type is that the task type assignment rules are incorrectly defined. Task type rules are evaluated in sequence of descending weight; the task type on the highest weighted rule for which all the rule restrictions apply (and which has a return value associated with the same System Task Type required for the task) are assigned to the task.

Verify that the rules are weighted correctly, and that different task type assignment rules do not have the same weight. Also verify that the rules that should be selected are enabled, and run the Generate All Rules concurrent request if patches have been recently applied to the system. Double-check the rule restrictions to ensure that they are encoding the correct rule logic. Finally, verify that the task type that is expected has the correct System Task Type; for instance, a Replenishment task type will never be assigned to a Picking task, regardless of the rule setup.

5. Tasks not consolidated for bulk picking

When tasks for the same item created by sales order pick release or manufacturing component pick release are not grouped together, as expected for bulk picking, there are several attributes to verify.

First if the item is bulk picked, verify that the bulk pick flag is enabled on the organization item, as depending on the implementation, this flag may be controlled at the organization level rather than the master level. Or, if the batch was released with a bulk picking pick methodology, verify that Bulk Picking is, in fact, indicated as the pick methodology on the rule.

Verify that all other attributes of the task are identical. Specifically, only tasks of the same item and revision, from the same subinventory and locator, and assigned the same task type, can be consolidated for bulk picking.

If the task type assigned to the task requires an equipment item with constrained capacity, verify that the consolidated tasks would not exceed the equipment capacity. Tasks are not consolidated if their combined weight or volume would exceed the equipment capacity.

Tasks for which particular license plates have been allocated are not merged with any other task.

6. Tasks not split as expected

When a task exceeds the equipment capacity by weight or volume, it will be automatically split. If it is split unexpectedly, there are several attributes to verify.

Verify the equipment capacity and item attributes are defined at the organization item, as depending on the implementation, this flag may be controlled at the organization level rather than the master level. Also, verify that the units-of-measure for both the equipment item weight and volume, and the picked item weight and volume, have been defined, and that they are in the same unit-of-measure class.

The system splits tasks based on the smallest capacity equipment item of the required machine resource. For instance, if a resource "Small forklift" is required for a particular task type, and three equipment items are assigned to the machine resource defined on the task type have weight capacities of 2000 pounds, 2200 pounds, and 2500 pounds, the original task is split into smaller tasks of 2000 pounds per task.

7. Exiting from a task makes task unavailable to others

When you enter a task, the task status is updated from Pending to Active. This prevents other operators from accessing the same task. When you exit from a task using the key assigned to the Menu function (defaulted to F2 with the default key mappings), the task is set back to a Pending status, and available for any operator.

However, in certain situations, the system is unable to rollback the task. Currently, if the mobile device loses the connection but you elect to start a new session, rather than continuing the old session, when you log in to the system, the task remains Active.

8. From LPN list does not include an expected LPN

The From LPN list of values in the Pick Load page displays any LPN that contains some of the allocated material in the allocated locator. That is, any LPN that includes at least one of the allocated item, revision, and lot, and if serial allocation is enabled, serial, and resides in the locator selected by the Rules Engine, will be in the LPN list of values. Verify the allocation details of the task and the contents of the license plate.

You can pick LPNs that reside in different locators than allocated may, as long as they also match the allocation details. However, these other LPNs are not displayed in the From LPN list.

9. Invalid LPN message when a particular From LPN is picked

After selecting a particular LPN, several additional validations are made as follows.

- The system checks LPN to verify at least some of its contents are allocated, including verifying the revision, lots, and if serial allocation is enabled, serial numbers contained.
- Material statuses of the contents are verified to ensure that at least some of the contents may be picked.
- Availability of the contents are verified to ensure that the contents are available and not allocated or reserved to another requirement.

10. Invalid LPN message when a particular Pick To LPN is specified

The Pick To LPN must meet several restrictions. It must either be loaded by the operator for the same delivery, or have a context of Defined but not Used. You can generate a new LPN via a hot-key, or the desktop concurrent request. If you do not generate a new LPN the From LPN defaults as a valid Pick To LPN if the LPN entered as the From LPN was entirely consumed by the task. No other LPNs can be used as the Pick To LPN.

11. Invalid LPN message when a particular Drop LPN is specified

You can specify the Drop LPN for sales order picking tasks. LPNs cannot commingle deliveries at any level of nesting. Only LPNs picked for the same

delivery, new LPNs generated via a hot-key or LPNs that reside in the context Defined but not Used, can be used as a Drop LPN.

12. Task type assignment rule cannot be compiled

See: [System Rules Engine](#) on page 13-2

Frequently Asked Questions

1. What do the different task statuses mean and how are they dispatched?

There are seven task statuses, as follows:

- *Unreleased*: The task was created but is not yet eligible to be dispatched. Tasks are generally created in this status because you wish to exert additional control over exactly when tasks are released. Tasks in this status can be updated to status Pending, to make them eligible for dispatching, or can be updated directly to status Queued.
- *Pending*: The task was created and can be sent to any available operator. Pending tasks are dispatched to operators in sequence of priority, subinventory picking order and locator picking order in relation to the operators last known position. Task are then filtered by task type, current operator equipment, and subinventory. The system dispatches a task in Pending status only when there are no more Queued and Dispatched tasks assigned to the operator.
- *Queued*: You manually assign a task to a particular operator in the Warehouse Control Board. The sequence in which tasks in Queued and Dispatched status that are assigned to a particular operator are dispatched to that operator is controlled by task priority. The system sequences the based on subinventory picking order and locator picking order in relation to the operators last known position.
- *Dispatched*: The system assigns the task to an operator as part of a group of tasks because of pick slip grouping rules or cluster picking. The sequence in which tasks in Queued and Dispatched status that are assigned to a particular operator are dispatched to that operator is controlled by task priority. The system sequences the tasks based on subinventory picking order, and then subinventory picking order and locator picking order in relation to the operators last known position. You cannot update the Dispatched on the Warehouse Control board. When an operator cancels from an Active task in the same cluster, the rest of the tasks revert to status pending.

- *Active*: The task is currently being worked on by a user. The task has been rendered to the user's mobile device, but neither the <Load> nor <Drop> buttons have yet been pressed. As soon as either the task has been loaded or dropped, the status changes correspondingly.
- *Loaded*: A particular operator has loaded the task. No material transaction has yet been posted. To complete the task, the operator must drop the task from the Current Tasks menu.
- *Completed*: The task has been completely transacted. The material transaction has been posted.

2. Is task interleaving supported?

Task interleaving is when tasks of different types are dispatched to an operator to minimize deadheading and take advantage of the current operator location. For instance, if, after loading a picking task, a cycle count needs to be performed in an adjacent locator, the operator should perform the cycle count first before leaving the area.

Oracle Warehouse Management has full support for task interleaving. Tasks are dispatched to an operator based on skills and equipment required for the task, operator capabilities, and grouping rules. Beyond these restrictions, tasks of any type are dispatched to operators based on priority and subinventory and locator picking order. Cycle count, picking, replenishment, and requisition move order tasks can be interleaved.

3. How is wave planning supported?

Wave planning refers to the process by which sets of outbound sales order tasks are grouped, released, and executed. For example, if an organization performs primarily parcel shipments, there may be one daily UPS departure in the afternoon, and one daily FedEx departure in the morning. Sales orders that must be shipped via UPS may be released several times throughout the day, while FedEx orders may be released just once, early in the morning.

You can schedule the pick release process, which creates tasks for the outbound shipments, with certain parameters. You can set several release rules the system automatically performs every day at predefined times. See: [Wave Planning](#) on page 1-6.

4. Are tasks assigned to specific operators?

When tasks are created, they are not assigned to specific operators. Rather, a task type is assigned to operators, which represents the skill set the task requires. The task type has an associated set of operators and optionally, a set of

equipment, any instance of which are equally qualified to perform the task. The system dispatches tasks when the operator indicates they are ready for the next task.

At the point of accepting a task, it is possible for several tasks to be assigned to a single operator, based on the current pick slip grouping rules. All tasks with the same pick slip number are dispatched together as a group. In addition, it is always possible to assign a task directly to an operator via the Warehouse Control Board.

5. Can tasks be automatically pick confirmed?

Auto pick confirm, an option that can be specified on the pick release batch or controlled for the organization on the shipping parameters window, automatically confirms the move order as allocated without any manual intervention. Auto pick confirmation is supported in a Warehouse management organization.

However, only loose material is picked, and moved to the staging lane loose, unassociated with any license plates. Both cartonization suggestions and LPN allocations are not honored if the task is automatically pick confirmed. Only loose material is selected even if LPN allocation has been used. If auto pick confirmation is enabled, the subinventories from which material is allocated should not be LPN controlled. Otherwise, when attempting to confirm the move order, the system may drive loose on-hand quantities negative or the transaction may error, depending on the organization parameter for negative balances.

You can complete the ship confirmation process on the desktop Shipping Transactions window or on the mobile Quick Ship page. Note that neither LPN Ship nor Dock Ship will be available for auto pick confirmed lines, because both of these shipping processes are driven by the LPN.

The Warehouse management Controlboard does not include auto pick confirmed move orders. Also, note that as is also the case for inventory organizations, serialized items can only be automatically pick confirmed if serial allocation is enabled; otherwise the system does not know which serials to transact.

6. Can nested license plates be picked?

Warehouse management supports nesting license plates to any number of levels. However, only innermost license plates, that contain only loose items and not other license plates, can be picked. This means an item is stored in cases and pallets, where a case is modeled as an LPN and a pallet is a nested LPN

that contains many case LPNs. You can confirm a task for that item by scanning one or several case LPNs, which would automatically unpack the case from the pallet before moving it to the staging lane. But a larger task could not be confirmed by scanning the pallet LPN label, as that license plate is not the innermost level.

7. What attributes must tasks share in order for them to be merged?

Tasks can be merged for bulk picking if the item is marked as bulk picked, or pick release is performed with a bulk picking pick slip grouping rule. However, several other criteria of the items must also be shared. The tasks must be for the same item and revision, and be allocated from the same subinventory and locator. Also, specific LPNs may not be allocated for the particular task. Tasks with LPN level allocations are not merged. However, tasks for different lots or serials may potentially be merged.

Debugging Tools

The following table shows the warehouse management task type value for each of the system defined task types:

System Task Type	Warehouse Management Task Type Value
Pick	1
Putaway	2
Cycle Count	3
Replenish	4
Move Order Transfer	5
Move Order Issue	6

Task Type Rules

This script identifies the applicable task type assignment rules called for a particular task. The following query displays all enabled task type rules for the selected organization or made common to all organizations. You must enter the numeric value for the system task type and the three-character organization code.

```
select wrb.rule_weight as weight,
       wrt.name as name,
       wrt.description as description,
       operation_code as user_task_type,
```

```
ml.meaning as system_task_type
from wms_rules_tl wrt, wms_rules_b wrb, mtl_parameters mp,
    bom_standard_operations bso, mfg_lookups ml
where wrt.language = 'US'
and wrt.rule_id = wrb.rule_id
and wrb.type_code = 3
and wrb.organization_id in (mp.organization_id,-1)
and mp.organization_code = &org_code
and wrb.enabled_flag = 'Y'
and bso.standard_operation_id = wrb.type_hdr_id
and bso.wms_task_type = &wms_task_type
and bso.wms_task_type = ml.lookup_code
and ml.lookup_type like 'WMS_TASK_TYPES'
order by wrb.rule_weight
```

Appendix A - Label Type Fields

This appendix includes the following topics:

- [Label Type Fields](#) on page A-2

Label Type Fields

The most current complete list of label fields that are available for printing on each of the label types can be seen by executing the following query on your database:

```
select ml.meaning "Label Type",  
       wlf.field_name "Field Name",  
       wlf.field_description "Field Description"  
from apps.wms_label_fields wlf, apps.mfg_lookups ml  
where ml.lookup_type = 'WMS_LABEL_TYPE'  
and wlf.document_id=ml.lookup_code  
order by wlf.document_id, wlf.field_name
```

This list is ordered first by label type identifier, and then by label field name. Additional fields are added by seeding new data, and so with new releases or label printing patches, you can run this query again to get the most up-to-date list for your instance.

Appendix B - Rules Engine

This appendix contains the following topics:

- [Date Types](#) on page B-2
- [Objects](#) on page B-2
- [Selected Parameters](#) on page B-7
- [Seeded Rules](#) on page B-12
- [Seeded Strategies](#) on page B-14

Date Types

Table B–1 Oracle Warehouse Management Rules Engine - Date Types

Date Type	Example	Additional Notes
Accounting Period	3 rd period to 4 th period	Accounting defined on the general ledger
Always	No additional data needed	none
Calendar Period	1 st period to 6 th period	Calendar periods defined on BOM calendar
Day	Monday to Thursday	none
Day of month	1 st to 5 th every month	none
Full date	Jan. 1, 2001 to Jan. 5, 2001	none
Month	January to March	none
Quarter	1 st quarter to 3 rd quarter	none
Shift	2 nd shift only	Work shifts defined as BOM shifts
Week	10 th to 25 th week of the year	none
Year	2001 to 2002	none

Objects

Table B–2 Oracle Warehouse Management Rules Engine - Objects

Object	Usage	Rule Type
Account Alias	Attributes of the account alias. Used for finding cost group for account alias receipt.	Cost Group
Actual Transaction	Information from the move order line.	Pick, Put away, Cost Group
BOM Bill of Materials	Details about the job and schedule bill of materials header. This object is applicable for discrete, lot based (OSFM), repetitive, and flow manufacturing.	Pick

Table B–2 Oracle Warehouse Management Rules Engine - Objects

Object	Usage	Rule Type
BOM Components	Details about the job and schedule material requirements defined on the BOM bill of materials. At work order creation, discrete, lot based, and repetitive jobs create a copy of this data. The copy can be referenced with the object WIP Requirements. This object is therefore applicable mostly for flow manufacturing, but can also be used by discrete, lot based (OSFM), and repetitive manufacturing.	Pick
BOM Operations	Details about the job and schedule operations defined on the BOM routing. At work order creation, discrete, lot based, and repetitive jobs create a copy of this data. The copy can be referenced with the object WIP Operations. This object is therefore applicable mostly for flow manufacturing, but can also be used by discrete, lot based (OSFM), and repetitive manufacturing. This is only applicable when the job has a routing, which is optional for discrete manufacturing.	Pick
BOM Routing	Details about the job and schedule routing header. This object is applicable for discrete, lot based (OSFM), repetitive, and flow manufacturing. This is only applicable when the job has a routing, which is optional for discrete manufacturing.	Pick
Category	Information on the item category.	All
Category Set	Attributes of the item category set.	Cost Group, Label
Cost Group	Information on the cost group on the move order line.	Pick
Cost Group Transaction	This object represents the input record passed to the cost group engine. It is based on the view WMS_COST_GROUPS_INPUT_V.	Cost Group
Container	Attributes of the inventory item used as the container for this task.	Task Type
Customer Contact	Contact person at the customer.	Label

Table B-2 Oracle Warehouse Management Rules Engine - Objects

Object	Usage	Rule Type
Customer Item Cross Reference	The attributes of the customer item which corresponds to the current inventory item	Label
Customers	Customer information. For picking rules, this object is useful only for pick wave move orders.	Pick, Cost Group, Label
Date	Current date.	Pick, Put away, Task Type
Destination Locator	For picking rules, this is the destination locator on the move order line. On pick wave move orders, this would be the staging locator specified during pick release. For put away rules, this is the destination locator found through the rules.	Pick, Put away, Cost Group, Task Type
Destination Organization	For picking and put away rules, the source organization and destination organization are the same - the organization on the move order line.	Pick, Put away, Cost Group
Destination Project	The destination project for the transaction or task.	Cost Group, Task Type
Destination Subinventory	For picking rules, this is the destination subinventory on the move order line. On pick wave move orders, this would be the staging subinventory specified during pick release. For put away rules, this is the destination subinventory found through the rules.	Pick, Put Away, Cost Group, Task Type
Freight Carrier	Freight carrier information. For picking and put away rules, this object is useful only for pick wave move orders.	Pick, Put away, Label
Hazard Class	The hazard class of the inventory item	Label
Item	Attributes of the item on the move order line	All
Item Locator	Attributes of relationship between item and source locator (for picking) or destination locator (for put away).	Pick, Put away

Table B–2 Oracle Warehouse Management Rules Engine - Objects

Object	Usage	Rule Type
Item Subinventory	Information on any Item-Subinventory relationship between the item and the current source subinventory (for picking) or destination subinventory (for put away), such as min-max quantities.	Pick, Put away
License Plate	Attributes of the LPN on the move order line.	Pick, Put away, Cost Group, Label
License Plate Contents	Attributes of the contents of the LPN on the move order line.	Pick, Put away, Label
Lot	Attributes of the Lot being allocated for the current move order line. Useful only for lot controlled items.	All
Order Type	Attributes of the Order Type on the sales order line. Useful only for pick wave move orders.	Pick, Put away
Primary UOM	Information on the Items Primary Unit of Measure.	Pick, Put away
Purchase Order Header	Attributes of the purchase order. Used mostly for put away move orders created during a PO receipt.	Pick, Put away, Label
Purchase Order Lines	Attributes of the purchase order lines.	Put, Cost Group
Purchase Order Lines type	Attributes of line type on the purchase order line.	Put, Cost Group
Revision	Attributes of the revision being allocated.	Pick, Put away
Sales Order Header	Attributes of the sales order header. For pick and put away rules, this object is useful only for pick wave move orders.	Pick, Put away, Cost Group, Label
Sales Order Lines	Attributes of the sales order line for this move order line. For pick and put away rules, this object is useful only for pick wave move orders.	Pick, Put away, Cost Group, Label
Serial Number	Attributes of the current serial number being allocated.	All
Ship To Customer Sites	The customers ship-to location.	Label

Table B-2 Oracle Warehouse Management Rules Engine - Objects

Object	Usage	Rule Type
Source Locator	The locator from where the engine is allocating.	All
Source Organization	For picking and put away rules, the source organization and destination organization are the same - the organization on the move order line.	Pick, Put away, Cost Group
Source Project	Attributes of the project specified on the move order line.	Pick, Put away, Cost Group, Task
Source Project Task	Attributes of the task specified on the move order line.	Pick, Put away
Source Subinventory	The subinventory from where the engine is allocating during picking.	Pick, Put away, Cost Group, Task
Stock on-hand	Information about the storable unit (combination of revision, lot, subinventory, locator, and cost group) being allocated, including receipt date and quantity.	Pick, Put away
Subinventory / Locator	For picking, information about the material in the locator being picked from, such as quantity in the current locator.	Pick, Put away
Supplier	Attributes of the supplier of the material.	Put, Cost Group, Label
Supplier Site	Attributes of the site for the supplier of the material.	Put, Cost Group
Transaction Action	Information about the move orders transaction action.	Pick, Put away
Transaction Reason	Information about the transaction reason on the move order line.	Pick, Put away
Transaction Source Type	Attributes of the transaction source type for the move order line.	Pick, Put away, Cost Group
Transaction Type	Attributes of the Transaction Type of the move order line.	Pick, Put away, Cost Group
UOM	Attributes of the unit of measure specified on the move order line.	Pick, Put away
UOM Class	Attributes of the class which contains the UOM specified on the move order line.	Pick, Put away

Table B–2 Oracle Warehouse Management Rules Engine - Objects

Object	Usage	Rule Type
User	Information on the user who created the move order line.	Pick, Put away
Warehouse Task	Attributes of the task the task type is being assigned to.	Task
WIP Entity	The job name and reference to the manufacturing mode. This is applicable to discrete, lot based (OSFM), repetitive, and flow manufacturing.	Pick, Put away, Cost Group, Task
WIP Job	Details about the particular job. This is applicable to discrete and lot based (OSFM) manufacturing only.	Pick, Put away, Cost Group, Task
WIP Operations	Details about the job and repetitive schedule operations. This is applicable to discrete, lot based (OSFM), and repetitive manufacturing only. This is only applicable when the job has a routing, that is optional for discrete manufacturing.	Pick
WIP Repetitive Schedule	Details about the repetitive schedule. This is applicable to repetitive manufacturing only.	Pick, Put Away, Cost Group, Task
WIP Requirements	Details about the job and repetitive schedule material requirements. This is applicable to discrete, lot based (OSFM), and repetitive manufacturing.	Pick
WIP Schedules	Details about the flow schedule. This is applicable to flow manufacturing only.	Pick, Put away, Cost Group, Task

Selected Parameters

Table B–3 Oracle Warehouse Management Rules Engine - Parameters

Parameter	Object	Usage
Transaction Quantity	Actual Transaction	The quantity to be allocated, as entered on the move order line, in the transaction UOM.
Current Date	Date	The current date according to the database.

Table B-3 Oracle Warehouse Management Rules Engine - Parameters

Parameter	Object	Usage
Number of Other Items in the Location	Destination Locator	For put away rules, this value is the number of items other than the item on the move order line currently residing in the destination locator. Useful for put away rules preventing item commingling.
Number of Other Lots in the Location	Destination Locator	For put away rules, this is the number of lots for this item that currently reside in the destination locator, other than the lot being put away. Useful for put away rules preventing lot commingling.
Number of Other Revisions in the Location	Destination Locator	For put away rules, this is the number of revisions for this item that currently reside in the destination locator, other than the revision being put away. Useful for put away rules preventing revision commingling.
Proximity To Locator With Item By Coordinates	Destination Locator	For put away rules, this is the distance between the destination locator and the nearest locator that contains the item. If the item resides in the locator, this value = 0. The calculation only works if locators have defined x, y, and z coordinates. Useful for put away rules limiting the scattering of material in the warehouse.
Proximity To Locator With Item By Picking Order	Destination Locator	For put away rules, this is the distance between the destination locator and the nearest locator that contains the item, as determined by locator picking order. This calculation assumes that locators that have picking orders that are close in value are physically close in the warehouse. If the item resides in the locator, this value is 0. The calculation only works if locators have defined picking order. Useful for put away rules limiting the scattering of material in the warehouse.
Direct ATT/ATR Quantity	Stock On-Hand	The quantity of the storable unit currently being examined by the rules engine. A storable unit is a collection of material that has the same revision, lot number, and cost group that sits in a single subinventory and locator. In the database, a storable unit is a single row in MTL_ONHAND_QUANTITIES. When allocating serial numbers, this value is always equal to 1. Useful for rules for picking all of the material from a single locator.

Table B–3 Oracle Warehouse Management Rules Engine - Parameters

Parameter	Object	Usage
Actual item on-hand quantity / txn UOM	Subinventory/Locator	The picking locator's on hand quantity. Useful for picking to deplete locators.
Actual on-hand quantity / txn UOM	Subinventory/Locator	The onhand quantity for all items being allocated in the locator being picked from or being put away to. Useful for picking to deplete locators.
Available Capacity by Customer-Specific Algorithm	Subinventory/Locator	The capacity of the destination locator as defined through a custom API. See Customization section. Available for put away rules.
Available Capacity by Units	Subinventory/Locator	Available capacity in destination locator for put aways, based on the defined Unit capacity on the locator.
Available Capacity by Volume	Subinventory/Locator	Available capacity in destination locator for put aways, based on volume. Returned value is in transaction UOM.
Available Capacity by Weight	Subinventory/Locator	Available capacity in destination locator for put aways, based on weight. Returned value is in transaction UOM.
Empty Flag	Object Destination Locator	Use this parameter to find empty locators. The value is equal to Y for empty locators, if there value is N the locator is not empty. Using this parameter is the most efficient way to find an empty locator.
Item Resides in Locator	Object Destination Locator	To find locators that already contain this item, use this parameter. The value is equal to 'Y' for locators that contain the selected item, and 'N' for locators that do not contain the item. This parameter is best used to find locators that contain mixed items including the item under consideration. The best performance will occur if rules that use this parameter also set the Mixed Items flag equal to 'Y'. To find locators where the item does not mix with other items, use the Only Item in Locator parameter.
Maximum Occupied Capacity by Units, Volume and Weight	Subinventory/Locator	The highest value from among occupied capacity of the locator determined by weight, occupied capacity of the locator determined by volume, and occupied capacity of the locator by units. Available for put away move orders.

Table B-3 Oracle Warehouse Management Rules Engine - Parameters

Parameter	Object	Usage
Maximum Occupied Capacity by Volume and Weight	Subinventory/Locator	The populated locator's highest value, determined by weight and population governed by volume. Available for put away move orders. Value is in transaction UOM.
Minimum Available Capacity by Units, Volume and Weight	Subinventory/Locator	The lowest value from among available capacity of locator measured by weight, available capacity of locator measured by volume, and available capacity of locator by units. Available for put away move orders.
Minimum Available Capacity by Volume and Weight	Subinventory/Locator	The lower value from among available capacity of locator measured by weight and available capacity of locator measured by volume. Available for put away move orders. Value returned in transaction UOM.
Minimum Remaining Available Capacity by Units, Volume and Weight	Subinventory/Locator	The lowest value from among remaining available capacity of locator measured by weight, remaining available capacity of locator measured by volume, and remaining available capacity of locator by units. Remaining available capacity is the capacity that will be available in the locator after the current transaction. Available for put away move orders.
Minimum Remaining Available Capacity by Volume and Weight	Subinventory/Locator	The lower value from among remaining available capacity of locator measured by weight and remaining available capacity of locator measured by volume. Remaining available capacity is the capacity that will be available in the locator after the current transaction. Available for put away move orders. Value is in Transaction UOM.
Minimum Total Capacity by Units, Volume and Weight	Subinventory/Locator	The lowest value from among total capacity of locator measured by weight, total capacity of locator measured by volume, and total capacity of locator by units. Available for put away move orders.
Minimum Total Capacity by Volume and Weight	Subinventory/Locator	The lower value from among total capacity of locator measured by weight and total capacity of locator measured by. Available for put away move orders. Value is in transaction UOM.

Table B–3 Oracle Warehouse Management Rules Engine - Parameters

Parameter	Object	Usage
Mixed Items Flag	Object Destination Locator	This parameter returns 'Y' if the locator contains more than one item, and 'N' if the locator contains 0 or 1 item. Please refer to the Update Locator Capacity concurrent request to understand how this flag is maintained.
Occupied Capacity by Customer-Specific Algorithm	Subinventory/Locator	Currently occupied capacity in the destination locator as defined by a custom API. See the Customization section.
Occupied Capacity by Units	Subinventory/Locator	Currently occupied capacity in the destination locator as measured by unit.
Occupied Capacity by Volume	Subinventory/Locator	Currently occupied capacity in the destination locator as measured by volume. Value in Transaction UOM.
Occupied Capacity by Weight	Subinventory/Locator	Currently occupied capacity in the destination locator as measured by weight. Value in Transaction UOM.
Only Item in Locator	Object Destination Locator	This parameter returns the item identifier of the only item in the locator. This parameter is null if the locator is empty, or if the locator contains more than one item. To putaway to locators that contain only the current item, set the Only Item in Locator parameter equal to the Inventory Item Identifier parameter on the Item object.
Remaining Available Capacity by Customer-Specific Algorithm	Subinventory/Locator	The capacity that will be available in the destination locator after this transaction, as determined by a custom API. See the section on customization
Remaining Available Capacity by Units	Subinventory/Locator	The capacity that will be available in the destination locator after this transaction, as measures in units.
Remaining Available Capacity by Volume	Subinventory/Locator	The capacity that will be available in the destination locator after this transaction, as measures by volume. Value in Transaction UOM.

Table B–3 Oracle Warehouse Management Rules Engine - Parameters

Parameter	Object	Usage
Remaining Available Capacity by Weight	Subinventory/Locator	The capacity that will be available in the destination locator after this transaction, as measures by weight. Value in Transaction UOM.
Total Capacity by Customer-Specific Algorithm	Subinventory/Locator	Total capacity of the destination locator, as given by custom API. See Customization section.
Total Capacity by Units	Subinventory/Locator	Total capacity of the destination locator in units.
Total Capacity by Volume	Subinventory/Locator	Total capacity of the destination locator in volume. Value in the Transaction UOM.
Total Capacity by Weight	Subinventory/Locator	Total capacity of the destination locator in weight. Value in the Transaction UOM.

Seeded Rules

Table B–4 Oracle Warehouse Management Rules Engine - Seeded Rules

No.	Type	Rule Name	Description
1.	Pick	Rotate stock	Pick stock based on FEFO for expiration date controlled material and FIFO for non-expiration date controlled material
2.	Pick	Absolute LIFO	Pick stock based on LIFO of receipt date
3.	Pick	30-day range FEFO min pick task	Pick any lot that expires in the next 30 days, splitting the pick across storage units-of-measure intelligently, and ordering to deplete locators closest to empty first (restricted to items that are lot controlled)
4.	Pick	Serial order	Pick stock in alphabetical order of the serial number (restricted to items that are serial controlled)
5.	Pick	Single lot, pick UOM	Pick a single lot, splitting the pick across storage units-of-measure intelligently, and ordering by FEFO or FIFO (restricted to items that are lot controlled)
6.	Pick	Rotate stock pick UOM	Pick stock based on FEFO for expiration date controlled material and FIFO for non-expiration date controlled material, splitting the pick across storage units-of-measure intelligently

Table B–4 Oracle Warehouse Management Rules Engine - Seeded Rules

No.	Type	Rule Name	Description
7.	Put away	Empty locator	Put away to any empty locator
8.	Put away	Prevent lot or item commingling	Put away to any locator, when the item commingling (different items) or lot commingling (different lots of same item) are prevented, ordering the locator to minimize fragmentation
9.	Put away	Single location	Put away to any locator that has enough capacity for the entire put away, while trying to minimize item fragmentation
10.	Put away	Minimize fragmentation	Put away to minimize fragmentation of the item
11.	Put away	Like material status code for lots	Put away a lot controlled item to a locator or subinventory that has the same material status (restricted to items that are lot status controlled)
12.	Put away	Like material status code for serials	Put away a serial controlled item to a locator or subinventory that has the same material status (restricted to items that are serial status controlled)
13.	Pick	Pick Common Stock	This rule is applicable for project manufacturing organizations only. It will ensure that only material that is not stored in a project locator, or common stock, is allocated.
14.	Pick	Same Planning Group	@ This rule is applicable for project manufacturing organizations only. It ensures that only material that is in a project locator of the same planning group as the planning group on the move order request is allocated
15.	Pick	Same Project	This rule is applicable for project manufacturing organizations only. It ensures that only material that is for the same project as that on the move order line is allocated.
16.	Pick	Same Project Same Task	This rule is applicable for project manufacturing organizations only. It ensures that only material that is for the same project and task as that on the move order line is allocated.
17.	Pick	Seeded Default Pick Rule	This rule has no restrictions and no sort criteria and is automatically assigned as the default organization picking rule when the organization is first enabled for warehouse management.

Table B–4 Oracle Warehouse Management Rules Engine - Seeded Rules

No.	Type	Rule Name	Description
18.	Put away	Seeded Default Put away rule	This rule has no restrictions and no sort criteria and is automatically assigned as the default organization putaway rule when the organization is first enabled for warehouse management.

Seeded Strategies

Table B–5 Oracle Warehouse Management Rules Engine - Seeded Strategies

No.	Type	Strategy Name	Description
1.	Pick	Prefer single lot	Attempt to pick single lot, but pick multiple lots if necessary, splitting the pick across storage units-of-measure intelligently (rule 5, then rule 6)
2.	Pick	30-day range FEFO	Pick any lot that expires in the next 30 days, splitting the pick across storage units-of-measure, and deplete the almost empty locators first (rule 3)
3.	Pick	Rotate stock	Pick stock based on FEFO for expiration date controlled material and FIFO for non-expiration date controlled material (rule 1)
4.	Pick	Rotate stock, pick UOM	Pick stock based on FEFO for expiration date controlled material and FIFO for non-expiration date controlled material, splitting the pick across storage units-of-measure (rule 6)
5.	Put away	Empty locator	Put away to any empty locator (rule 7)
6.	Put away	Minimize fragmentation	Put away to minimize fragmentation of the item (rule 10)
7.	Put away	Same material status code	Put away lot or serial status controlled material to a locator or subinventory with the same status (rule 11, then rule 12)

Table B–5 Oracle Warehouse Management Rules Engine - Seeded Strategies

No.	Type	Strategy Name	Description
8.	Pick	Project Manufacturing Allocation Preferences	This strategy uses five seeded picking rules to model common requirements of a project manufacturing organization. The strategy is automatically assigned to the organization when an organization is enabled for both warehouse management and project manufacturing. This means that a picking strategy search order, with the source organization as the only object, is also defined when an organization is both warehouse management and project manufacturing enabled. The strategy attempts to allocate first the most specific material for a particular project and task, gradually loosening the restrictions, finally allocating any material if necessary. It behaves as follows: 1. Allocate material from the same project and task 2. Allocate material from the same project 3. Allocate material that is not stocked for any particular project (Common stock) 4. Allocate material from the same planning group 5. Allocate any material The last rules may be too generic for some organizations, but a copy of the strategy can be made, and then that copy modified by removing or modifying the last rule.

Appendix C - Task Management

This appendix contains the following topics:

- [Overview](#) on page C-2
- [Business example](#) on page C-2
- [Worksheet](#) on page C-2

Overview

The attached sample worksheet serves as a functionality implementation guideline. The business example and worksheet are based on the example to present a clear overview of the implementation process.

Business example

There are six tasks that are performed on a regular basis in this warehouse (Atlas Distribution Center) that is being considered in this example - hazardous picks, cycle counts, replenishments (HZPK) (HZCC) (HZRP), pallet picks and replenishments (PLPK)(PLRP), case picks (CSPK), and each picks (EAPK).

There are three operators (Rob, Charlie, and Michael) employed by a warehouse and three types of equipment (Fork Lift, Pallet Jack, and Trolley) available to perform all the tasks.

Worksheet

1. What are the different operations that are carried out on a daily basis?

There are three main functions that are performed on a regular basis. They are picking, cycle counts, and replenishments. Each system task has a separate set of rules that are associated with their type.

2. What are the different types of jobs within each type of operation?

Based on the example above, there are seven main tasks that are carried out on a day-to-day basis.

They are hazardous picks, cycle counts, and replenishments (HZPK)(HZCC)(HZRP), pallet picks and replenishments (PLPK)(PLRP), case picks (CSPK), and each picks (EAPK). For brevity, we will only discuss setting up the rules for jobs of type picking.

3. How do we identify a job?

The next step is to create rules to distinguish the jobs based on some criteria. The user has to be careful in setting up the rules so that the same set of conditions are not applicable for a different type of job. Setting up a flow chart during such scenarios would be advisable. Moreover, the order in which these rules are to be evaluated is also important so that two different task types do not satisfy the same rule set.

The priority of jobs

- a. Hazardous
- b. Cold Storage
- c. Rest of the jobs

The rules have to be identified separately to evaluate each of the above types.

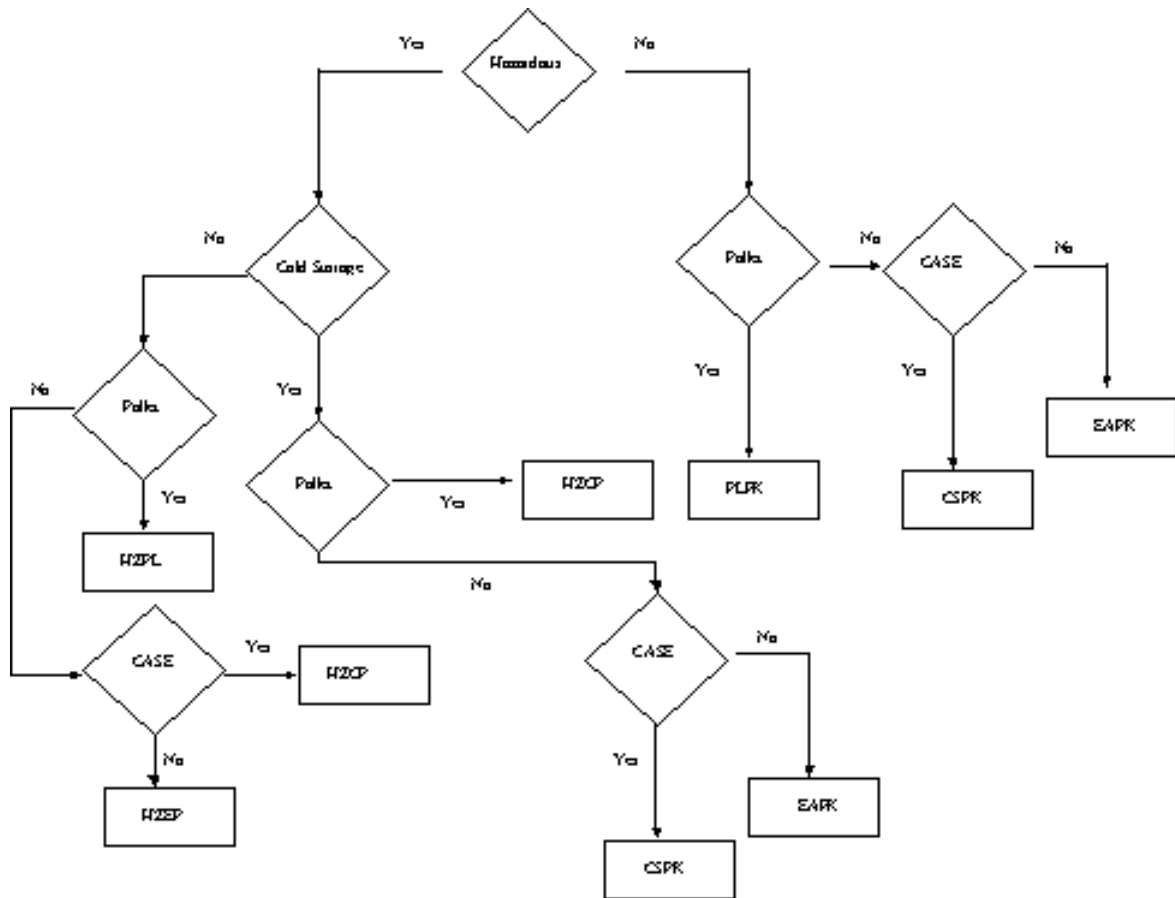
4. How do we identify a specific task type?

In the next step, list out all the criteria that would identify a specific task type.

How will a hazardous task be identified? The item HAZMAT code should be 'yes'.

Secondly, how would a cold storage task be identified? The subinventory where the material is being picked from would suggest the second type.

The following flowchart helps the user to prioritize and set up rules based on the task types.

Figure C-1 Oracle Warehouse Management - Task Type Flow

Based on the flowchart, there are nine different task types that are identified. The user should then create rules to return every scenario identified in the step above.

5. What jobs are to be identified as special?

All hazardous and cold storage jobs and pallet picking jobs are to be considered special since they either use a trained resource or a specific type of equipment.

6. What are the available resources and who are qualified to do special jobs?

Rob, Charlie, and Michael are the available resources. Rob is qualified to perform hazardous jobs and can drive a fork lift. Charlie can drive a forklift while Michael cannot drive a fork lift and is qualified to perform hazardous jobs.

7. What jobs require special equipment?

All pallet jobs require a fork lift and all jobs involving cases requires a pallet jack or a trolley.

8. How do we group resources into departments?

All task types identified in step three should be associated with the employee and equipment that can be qualified to do the tasks.

HZPL - Rob, Fork Lift

CDPL - Rob, Charlie, Fork Lift

EAPK, DFPK - Rob, Charlie, and Michael, no equipment needed, and so on

Each group of employees within a specific task are classified as human resources and all the equipment is classified as an equipment resource.

Now group both to a department, which is the associated to the task type itself.

Appendix D - LPN Contexts

This appendix includes the following topics:

- [LPN Contexts](#) on page D-2
- [Definitions of Context Values](#) on page D-2

LPN CONTEXTS

Oracle Warehouse Management system (WMS) defines a context for each LPN to denote the current state of the LPN. Some of these contexts can be used in the WMS Rules Engine to define specialized picking and put away rules. The table below summarizes the LPN context codes currently defined in Oracle WMS.

Table D–1 Oracle Warehouse Management - LPN Context Codes

LPN Context Value	Description
1	Resides in Inventory
2	Resides in WIP
3	Resides in Receiving
4	Resides in Stores
5	Pre-generated
6	Resides in Intransit
7	Resides in Vendor Site
8	Packing context, used as a temporary context value
9	Loaded for shipment
10	Prepack of WIP
11	Picked

Definitions of Context Values

Resides in Inventory

An LPN with a context of 1 indicates that material associated with this LPN has been costed and accounted for in inventory. A LPN with this context may not be used when receiving material against a standard or inspection routed receipt, but may be used during a direct delivery routed receipt. Outbound transactions can be performed on LPNs with a context of 1.

Resides in WIP

An LPN with a context of 2 indicates that material associated with this LPN is currently being transacted in WIP (Work in Process). Therefore, the associated material is not yet in inventory and has not been costed to inventory.

Resides in Receiving

An LPN with a context of 3 indicates that material associated with this LPN have been received using a standard routing or inspection routing receipt and have not been put away yet. Therefore, the associated material is not yet in inventory and has not been costed to inventory.

Issued out of Stores

LPNs with a context of 4 are no longer tracked by the system, and hence, no longer associated with a locator within the warehouse. The system does however retain history information pertaining to transactions this LPN was involved in and material it was associated with prior to leaving the warehouse. LPNs shipped out of inventory receive this context and may not be re-received.

Pre-generated

When LPNs are pre-generated by Oracle WMS and have not been used yet, they are not associated with any physical material. They can be printed and used to identify material during any stage of the material management process such as inbound, replenishment, outbound, and so on. Essentially, this context refers to LPNs that are ready to be used.

Resides in Intransit

A LPN with this context is an indication that it is currently moving from one location to another. Possible uses for this are when a LPN is moved from one organization to the next, for example while the LPN is on a truck. The LPN is in an intermediary state, but resides within the entire system. This context is used only for inter-org transit or internal sales orders where an indirect shipping network is defined between the organizations.

Resides in Vendor Site

When a vendor sends an Advanced Shipment Notice (ASN) to Oracle WMS, the system internally generates LPNs and associates them with material information on the ASN. These LPNs receive a context of 7. Material associated with LPNs of this context are not on-hand or costed until it is actually received.

Packing Context, Used as a Temporary Context Value

This context is temporary and used internally by the software as an intermediary. It should not be used or referenced anywhere including the setup of picking or put away rules.

Loaded for shipment

An LPN loaded for shipment has just been loaded onto a carrier ready to leave the warehouse. Once the entire carrier leaves the dock, the LPN obtains a context of 6 Resides in Intransit or 4 Issued out of Stores.

Prepack of WIP

LPNs that reside in WIP and are associated with material that is pre-packed by WIP receive this context. This context adds an extra level of granularity to an LPN's usage within WIP. This is used when the system has associated the LPN with material and printed the labels, but the material has not yet been physically packed.

Picked

LPNs picked during the picking process receive this context. They are intransit within the warehouse.

Appendix E - Migrating to Oracle Warehouse Management

This appendix contains the following topics:

- [Overview](#) on page E-2
- [Migrating to LPNs](#) on page E-2
- [Migrating to Material Statuses](#) on page E-2
- [Migrating to Cost Groups](#) on page E-3
- [Migrating to Locator Control](#) on page E-3
- [Migrating to Setting Up Item Dimension and Locator Capacities](#) on page E-4
- [Migrating to Lot & Serial Attributes](#) on page E-5
- [Migrating to Rules Engine](#) on page E-6

Overview

Oracle offers enhanced functionality with the release of Oracle Warehouse Management system (WMS). Many features of Oracle WMS are new, for example the use of License plate Numbers (LPNs), cartonization, and so on. However, other features are an extension of existing Oracle Inventory features, for example Advanced Lot and Serial Attributes, Mobile Cycle and Physical counting, and so on. This chapter details how to migrate to these new features of WMS from the existing Oracle Inventory features. This chapter also discusses the business considerations and system considerations for this upgrade/migration process. Detailed functionality will not be discussed, however a brief introduction will be given. The details of implementing these new and enhanced existing features are discussed in the other chapters of this guide.

Migrating to LPNs

Physically, the License Plate (LP) is equivalent to a label and the License Plate Number (LPN) is a unique number that is printed on the label. A barcode representing the unique number is also printed on the label to facilitate scanning of the LPN when performing transactions as opposed to performing keypunch data entry. Details about LPN functionality can be found in the *Oracle Warehouse Management User's Guide*.

When migrating to LPN functionality, perform the following steps:

- Loose items should be packed into LPNs by a pack transaction. This will pack the loose materials into an LPN. An LPN can be a pallet, box, cart, and so on.
- LPN labels (barcodes) should be printed and posted on respective pallet, box, cart, and so on.

There are no mass pack scripts available for this purpose. The user has to perform pack transactions so that the material can be associated with LPNs. For example consider a warehouse scenario where the warehouse is migrating from existing Oracle Inventory to Oracle WMS. The user goes into the warehouse and decides what on-hand inventory needs to be in LPNs. After this is determined, a pack transaction is performed and labels are printed and posted on the pallets or boxes. The inventory that needs to remain loose is left as it is.

Migrating to Material Statuses

Material Status Control makes it possible to control the movement and usage for portions of on-hand inventory that may have distinct differences due to grade,

quality, or maturity level. It provides the user flexibility in specifying allowable transactions. Users can indicate with a high degree of granularity the actions to be allowed or disallowed, the statuses that are applicable to their warehouse or facility, and the entities that are assigned to various statuses. For further details on Material status functionality please refer the *Oracle Warehouse Management User's Guide* or the Material Status Control chapter of this guide.

To start using this feature following steps should be taken:

There are SQL scripts available in a driver file that are run during installation of Oracle WMS. After running these SQL scripts the item becomes Lot and Serial status enabled. By default they are given a status of Active, which means that all transactions can be performed on the lots and serials for that item. This script also assigns a status of Active to all the lots and serials of that item in all the organizations to where that item is assigned.

Similarly there is a SQL script in the driver file that updates the status of all the subinventories and locators in the organization to Active. The status of Active here has the same meaning as that of lot and serial Active status.

These statuses can be changed according to the needs of the user.

Migrating to Cost Groups

A Cost Group is the set of accounts that hold on hand inventory. Cost Groups were introduced in Oracle WMS to separate tracking of Physical and Accounting attributes. With the introduction of Cost Groups, it is now possible to have a 1:1 mapping of the zones in the warehouse to the subinventories in the system resulting in more accurate representation of capacity.

Cost Groups have been a part of Oracle Inventory since before the introduction of Oracle WMS. There is a data migration script that can be used to migrate to Cost Groups. For more information, refer to the Oracle Inventory Implementation Guide.

Migrating to Locator Control

Unlike Oracle Inventory, in Oracle WMS all the subinventories must be locator controlled. Every subinventory must have at least one locator. Locator control can be decided at the organization parameter level or at the subinventory level. For a WMS organization, Locator Control cannot be None, it can either be predefined or dynamic.

When migrating from Oracle Inventory to Oracle WMS all subinventories have to be made locator controlled. When converting an organization with an on hand inventory to a WMS enabled organization, the do the following:

Use the Locator Control API to create locators in the existing subinventories. After this is done perform a mass move to move the existing on hand inventory to the newly created locator for a given subinventory. Details about this API are in the following section.

Migrating to Setting Up Item Dimension and Locator Capacities

In Oracle WMS, available weight capacity, available volume capacity, and available units capacity of a locator is maintained in real time. This is essential for an efficient put away process. During any material transaction, the available weight capacity, available volume capacity, and available units capacity of the transacted locator are updated based on the total weight and total weight of the transacted item and maximum weight, maximum volume and maximum units allowed of the locator. It is therefore imperative that all locators used in WMS have weight unit of measure, maximum weight, volume unit of measure, maximum volume, and maximum units defined.

For existing Oracle Applications users, who are upgrading to Oracle WMS, it is recommended that a set of check scripts, that are provided with the product, be run and any corrective action be taken before using Oracle WMS. These scripts identify pre-WMS data that may have to be enhanced to better utilize the capabilities of Oracle WMS. One of the check scripts is the Locator check script. It lists locators with either one of the following not defined:

- Weight unit of measure
- Maximum weight
- Volume unit of measure
- Maximum volume
- Maximum units
- X coordinate
- Y coordinate
- Z coordinate
- Dimension unit of measure
- Length

- Width
- Height

The existing Locators Maintenance form can be used for adding the missing attributes to the definition of the listed locators. However, data entry would be time consuming and cumbersome if the locators list is large. A faster approach would be to write a script in an appropriate language that would repeatedly call APIs that perform Locator Maintenance passing the required data.

Currently, in Oracle Inventory, items can be restricted to certain locators, but with Oracle WMS the same functionality is used to assign items to locators to create a "soft" assignment that can be used by the WMS Rules Engine. In Oracle Inventory, locators cannot be deleted. There may be a need to delete locators that are obsolete. This may reduce the volume of data and also improve performance. But then it's essential that before deleting, you confirm that the locator to be deleted doesn't exist in any core Oracle Inventory table.

Locator Maintenance APIs handle the above said requirements. They constitute the following:

- Create Locator API to create a new locator (CREATE_LOCATOR)
- Update Locator API to update an existing locator (UPDATE_LOCATOR)
- Locator Item Tie API to assign an item to a locator (CREATE_LOC_ITEM_TIE)
- Delete Locator API to delete an existing locator (DELETE_LOCATOR)

The APIs are part of PL/SQL package INV_LOC_WMS_PUB. This is defined in \$INV_TOP/patch/115/sql/INVLOCPS.pls.

Migrating to Lot & Serial Attributes

Advanced Lot and Serial Control provides two new areas of functionality for tracking lots and serials. Lot and Serial attributes enable you to store a range of information for material based upon the lot and or serial number. Sublot functionality enables you to split and merge lots to differentiate between quantities of material that are no longer similar enough to be considered a single lot. Lot Genealogy stores the parent/child relationship between lots and sublots and provides lot traceability resulting from inventory transactions, including all lot splits and merges. The analogous functionality for Serial Genealogy has been available with Discrete Manufacturing.

Upgrading to the Advanced Lot & Serial attributes, when there is existing on hand inventory, is done from the Maintain Lot Numbers / Maintain Serial Numbers

form. There are no API or concurrent requests to update all the existing on hand lots so that they receive the default and or mandatory attributes. Perform the following steps to update the existing on hand lot:

- Assign lot context to item or item category
- Query up the lot number in the Maintain Lot Numbers form
- Enter the mandatory values for the different segments in the context

These steps must be performed for all the existing on hand lots. Same procedure is followed for assigning serial attributes to the existing on-hand serial numbers. There is a different form, Maintain Serial Number that is used for updating the serial number attributes.

A future proposal states that there should be a fully developed functionality for mass update of lot and serial attributes.

Migrating to Rules Engine

Oracle WMS provides tools that enable a warehouse to effectively dispatch tasks and manage inventory. Currently, many decisions within a warehouse are left to the operator, demanding a high degree of operator training, but still yielding suboptimal results and occasionally, serious mistakes. Material handling rules, customer requirements, and storage constraints place complex demands on the warehouse. The Rules Engine provides a flexible repository for the many different types of rules and restrictions to effectively manage a warehouse. This section illustrates how the Rules Engine can automate this decision making process, removing it from operators and thereby reducing mistakes and increasing efficiency. The Rules Engine enables directed picking and put away, assigns transactions to a cost group, ensures customer compliant labeling, and assigns tasks to a resource with the appropriate training and equipment. Rules can be based on nearly any attribute in the database, including user defined flexfields. Strategies, or a collection of rules, can be organization specific, customer specific, item specific, or specific to one of many additional business objects.

While migrating to Oracle WMS, the simplest possible setup is as follows:

- One picking rule with no restrictions or sort criteria
- One put away rule with no restrictions or sort criteria

However, a warehouse would likely not want to utilize only this setup because of specific business requirements that would restrict what should be picked or where material should be put away.

Reasonable picking rules would utilize First In First Out (FIFO) and First Ended First Out (FEFO) picking standards, which have been seeded within Oracle WMS. These are basic standards for picking material, however put away is also a consideration for a warehouse. The following put away decisions may need to be made:

- Should material be put away to any empty locator?
- Should lots and items be commingled?

If this basic approach is not sufficient to model the warehouse, you need to go through the entire setup process including:

- Strategy search orders
- Defining rules
- Defining strategies
- Defining strategy assignments

For detailed information on defining strategy search orders, defining rules, defining strategies, and strategy assignments, refer to the *Oracle Warehouse Management System User's Guide*.

Appendix F - Warehouse Management Case Study

This appendix contains an Oracle Warehouse Management case study. It contains the following sections:

- [Overview](#) on page F-2
- [Inbound Process](#) on page F-4
- [Outbound Process](#) on page F-4
- [Replenishment](#) on page F-6
- [Accuracy and Counting](#) on page F-6
- [Major Challenges](#) on page F-7
- [Facility Map](#) on page F-7
- [Sample As-Is Process Maps](#) on page F-9
- [Using Warehouse Management in Conjunction with Business Process Re-engineering to Address Current Challenges](#) on page F-14
- [Sample Warehouse to be Process Maps](#) on page F-17

Overview

Beanz n' Leavz (B&L) is the world leader in the specialty coffee industry. B&L sources whole beans from the best coffee plantations in the world and roasts them using patented roasting technology. The company sells whole bean and ground coffee along with freshly brewed espresso style beverages, cookies, pastries, candy and allied accessories and equipment via its numerous retail stores throughout the world. B&L also sells tea products and their flagship bottled coffee drink Beanzo by exclusively partnering with niche suppliers. In addition to sales through its company-operated retail stores, B&L sells whole bean coffee and specialty items online through B&L.com and to special customers such as supermarkets and hotels. B&L's vision is to establish itself as the most recognized and respected brand in the world. The company plans to achieve its vision by rapidly expanding its retail operations, growing its specialty business and introducing new products.

B&L has approximately \$2.5 Billion in annual revenue and has two distribution centers, one located in Memphis, Tennessee and the other in Irvine, California. The business is rapidly growing at the rate of approximately 1000 new retail stores a year. Revenues are growing at 20% a year and operating income by 30% a year. Recently, B&L has decided to replace its paper-based Warehouse Management System (WMS) and implement the Oracle Warehouse Management System in its Memphis facility. The company has brought in a team of consultants to analyze the operations, propose an implementation plan and recommend how the new warehouse management can increase throughput.

The following information pertains to the Memphis facility only.

Application Landscape

B&L uses the following applications for their various operations:

- Retail, International, Interplant – DistributeX
- Online – Amadeus OM, DistributeX and X-Ship
- Super markets, Hotels – Picasso OM, DistributeX and X-Ship

Product Profile

B&L has the following product profile:

- 15000 SKUs
- 9000 Active SKUs, some lot/expiration controlled
- General product mix:

- Ground Coffee (3 pack sizes),
- Whole Beans (3 pack sizes),
- Tea (2 pack sizes),
- Beanzo bottled drinks,
- Confections and Candy,
- Coffee makers,
- Espresso machines,
- Cups,
- Syrups,
- A large variety of specialty items such as mugs, CDs, T-Shirts,
- Store setup items such as tables, chairs, product tags etc.

Customer Profile

Retail

B&L Outlets 4000 worldwide, growing at the rate of 1000 a year. B&L Memphis services 2000 outlets and 600 new stores a year.

Online customers:

- 5000 to 8000 Orders per day (90% single, 100% piece picks)

Super Markets, Hotels:

- 200 – 300 orders per day, 3000 to 4000 pieces per day
- B&L Pennsylvania caters to customers in the Midwest, North East and South of the US and all International Orders

Vendor Profile

B&L receives material from the following:

- Roasted Ground and Whole Bean coffee from the adjacent production plant
- Most specialty items from China
- Paper Cups, CDs, Tables, and Chairs etc. from US vendors

- Tea from partners

Shipments comprising any of the above from the other facility in Irvine

Inbound Process

General Merchandise and Non-Green Coffee receiving is performed via the 6 inbound dock doors. A unload, stage, and check in process is utilized. Purchase order is used for merchandise check in. Inbound shipments are scheduled by appointments over two shifts. A color coded pallet ticket is applied to loads. Receipt quantity is shown on receiver. Expiration code date is entered when available. Inbound staging lane space is highly utilized on first shift.

Receipts are put away on a first come basis. Material is always received and putaway in full pallets. Pallets are put away one pallet at a time. An attempt is made to put away product in the primary pick location but high space utilization causes product to be put away in a random manner.

Production coffee is staged in the Production Staging Area. Production inventory is updated in the DistributeX system 3-4 times per shift. Production inventory is not reconciled between production and the warehouse.

Only visibly damaged material or non-compliant pallets are sent to the rework area. In the re-work area 3-4 people correct vendor errors and prepare product for putaway. Vendors are charged back for non-compliance. This information is kept track in a spreadsheet and sent to vendors twice a month.

Outbound Process

The Outbound process can be divided into the following:

Retail Picking:

- Ten to twelve waves are handled over two shifts.
- Twenty to Forty thousand units are picked over two shifts.
- Orders are processed on the DistributeX system.
- Pick zones consist of Candy, Overstock, Primary and Case Flow (Promotion)
- Pick to single orders. Pick Tickets are printed and sorted by zone for each order.
- One person picks entire order from all zones except Case Flow

- Candy, Overstock and Primary picks are brought directly to staging lanes and consolidated on pallets.
- Picks from Case Flow are consolidated in the Intermediate Consolidation area and finally consolidated with others in the staging lane.
- Consolidated pallets are stretch wrapped. Pallets are 7 ft. high.
- Each store receives one shipment of 1-2 pallets per week with two shipments during Christmas. The second shipment is generally a small shipment.
- There are 8 major promotions per year.
- Space utilization is low on Case Flow.

New Store Orders:

- On an average has 1500 lines.
- Orders are processed on the DistributeX system.
- Pick to single orders. Pick Tickets are printed and sorted by zone for each order.
- One person picks entire order from all zones.
- It takes 2-3 days to pick a complete order
- Staged in the New Store staging area.
- Two store orders can occupy a Truck Load.

International Orders:

- Same as Retail and New Store Orders
- There are 100 International Stores.
- There is one New store order per month.

Online Customers:

- Picked to Order
- Orders are processed on the Amadeus OM, DistributeX and X-Ship systems
- Printers sort orders into pick zones; however, orders still have some manual sorting
- During peak season 5000-8000 orders are processed per day

- Gift orders create a flow problem during the busy season
- Space utilization is low on pick belt
- The packaging operation is very labor intensive
- Shipment verification is a manual scan
- Product is transferred from Retail to Online as needed
- There are 8 packing stations
- Products are shipped using FedEx or UPS

Super Markets and Hotels:

- 200 - 300 Orders per day
- 3000 - 4000 pieces picked per day
- Orders are processed using Picasso OM, DistributeX and X-Ship
- Picks from Case Flow only
- It takes 4.5 hours to prepare order shipping paperwork
- There are three order waves per day
- 75% case pick
- A shipment tracking bar code is applied to all cases via Pfast Ship

Replenishment

The DistributeX System generates a list of replenishments in advance of requirements for all of the above. Replenishment is performed from Overstock to Primary. Not all replenishments arrive at the primary locations before the pick is attempted.

Accuracy and Counting

- Cycle counting is performed on an as needed basis
- Inventory accuracy is 85%
- Average inventory level is \$16M
- Coffee turns are approximately 13.0 turns per year

- Obsolete inventory is \$1 M.
- Duplicate SKUs between Retail, Online are being eliminated
- No ABC stratification

Major Challenges

B&L is facing substantial challenges in the following areas:

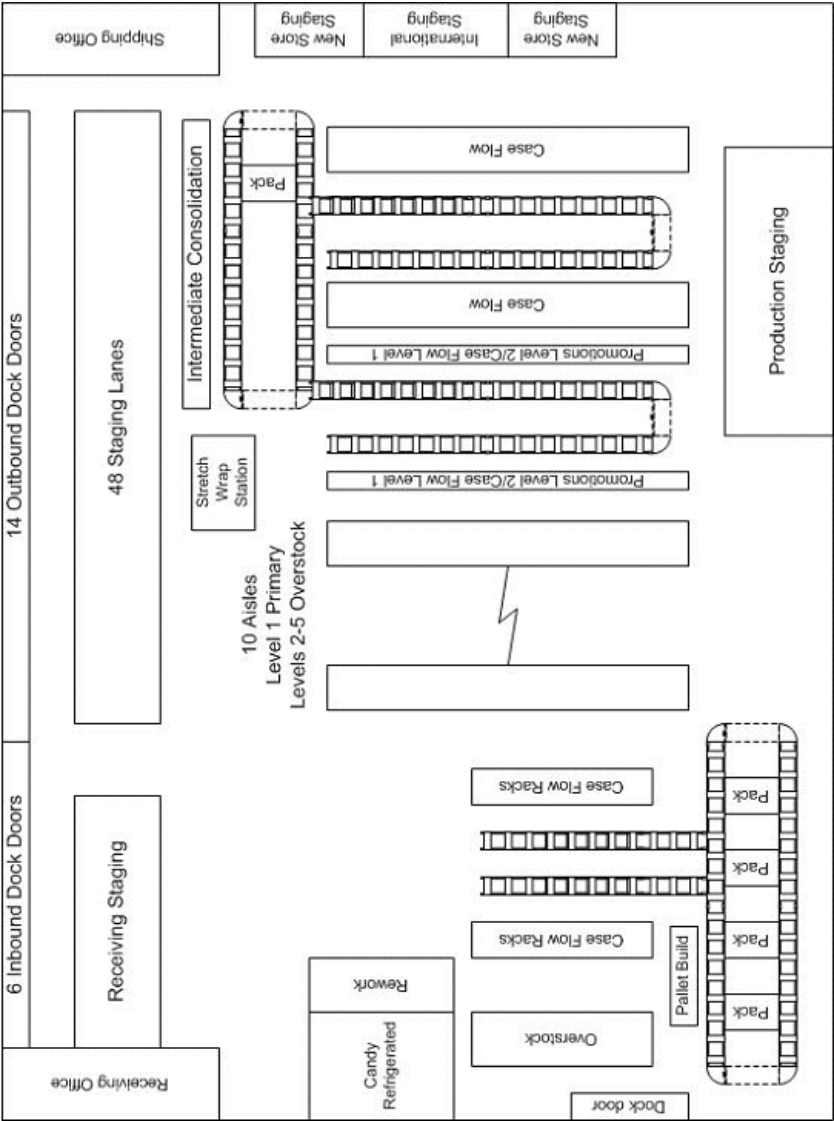
- Maintaining information in three systems
- Inventory accuracy is 85%
- Annual Inventory obsolescence is \$2 M
- High Space Utilization of 90%
- Overtime and Temps
- Mis-shipments are \$500,000 per year
- Attempted implementing a Best-of Breed warehouse management and pulled the plug in a week due to a severe backlog (5% of pre go-live volume shipped per day)

B&L is currently not interested in replacing its existing production system.

Facility Map

The facility map is shown in the attached layout below. The warehouse is 300,000 sq. ft. and is attached to a production facility. It has 6 Inbound Dock Doors for general receiving and 14 Outbound Dock Doors for general shipping on one side of the building. It has one dock door on one side of the building separate from all other dock doors, catering to FedEx and UPS shipments. All Locators are labeled but not barcoded because operations are paper based.

Figure F-1 Beanz n’ Leavz



Sample As-Is Process Maps

The following diagrams contain the sample as is processes for Beanz nLeavz.

Figure F–2 Merchandise Receiving Process Map

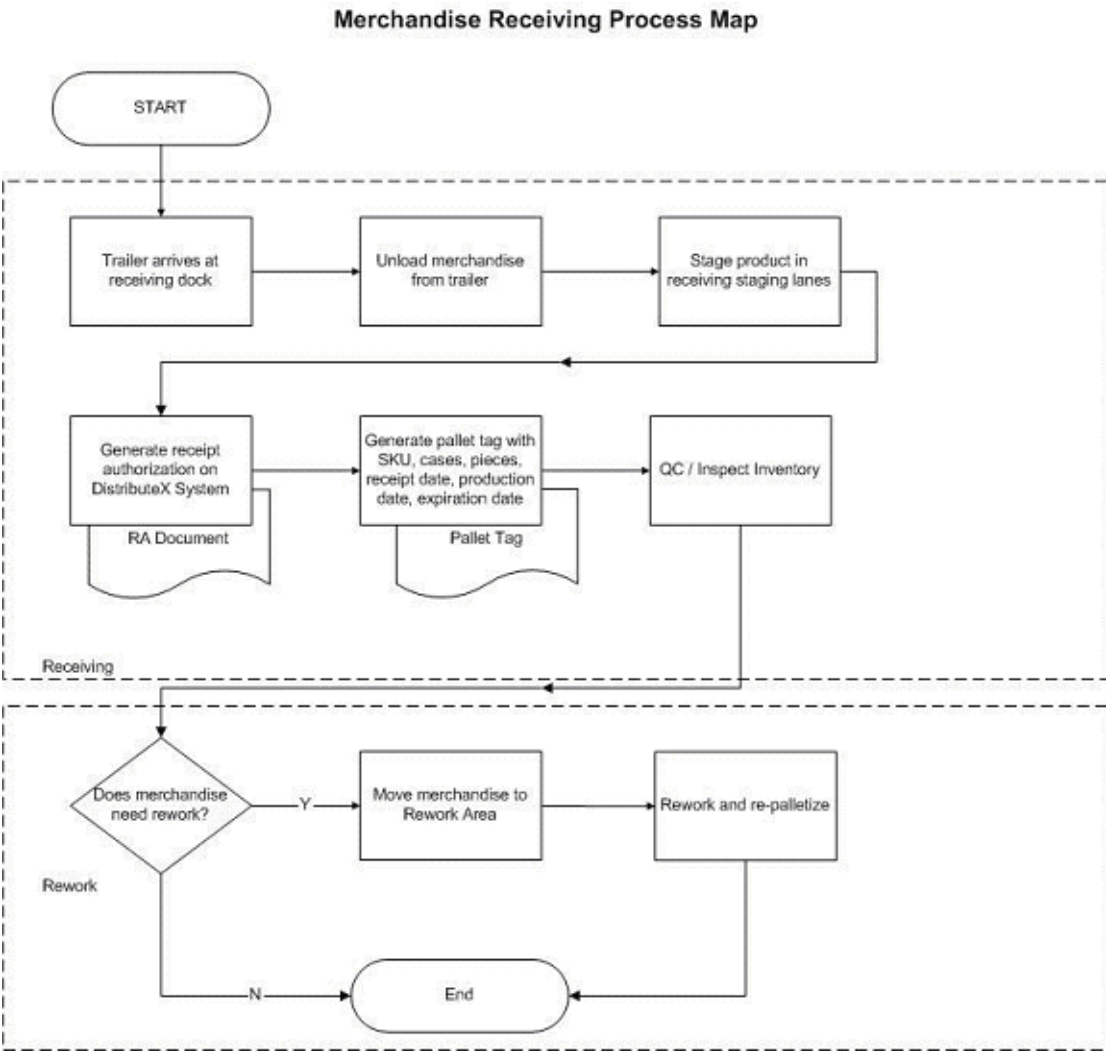


Figure F-3 Merchandise Putaway Process Map

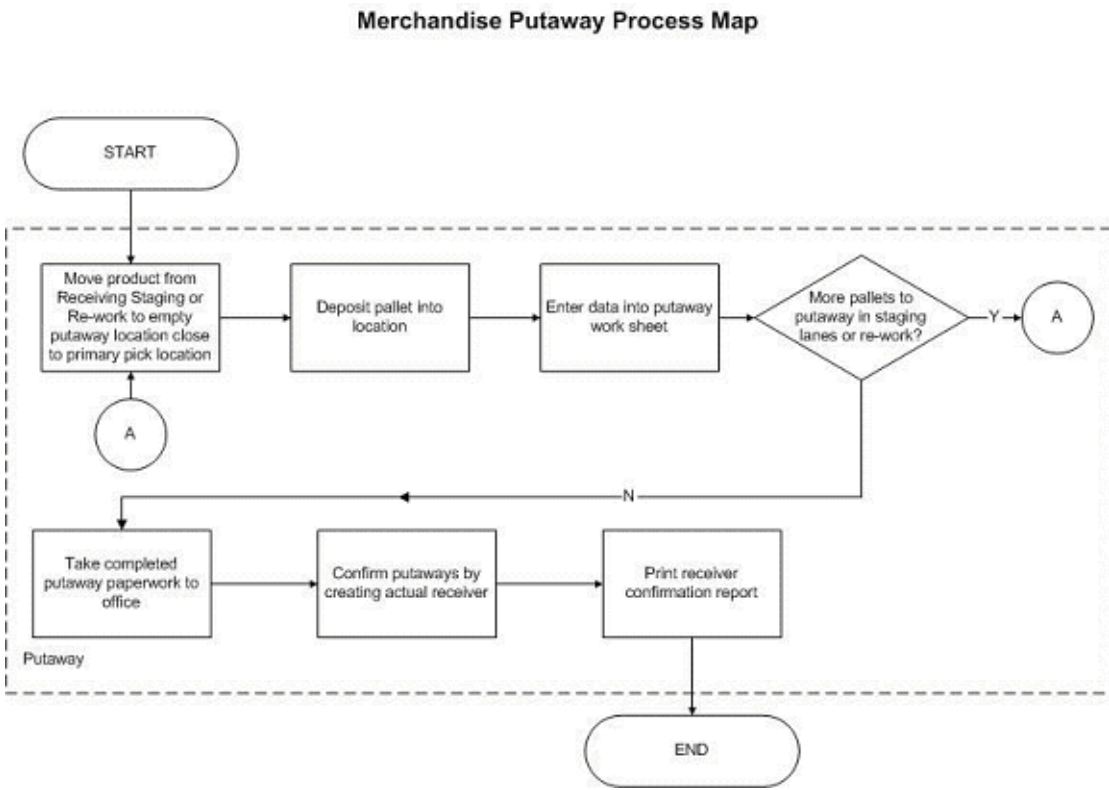


Figure F-4 Retail Picking Process Map

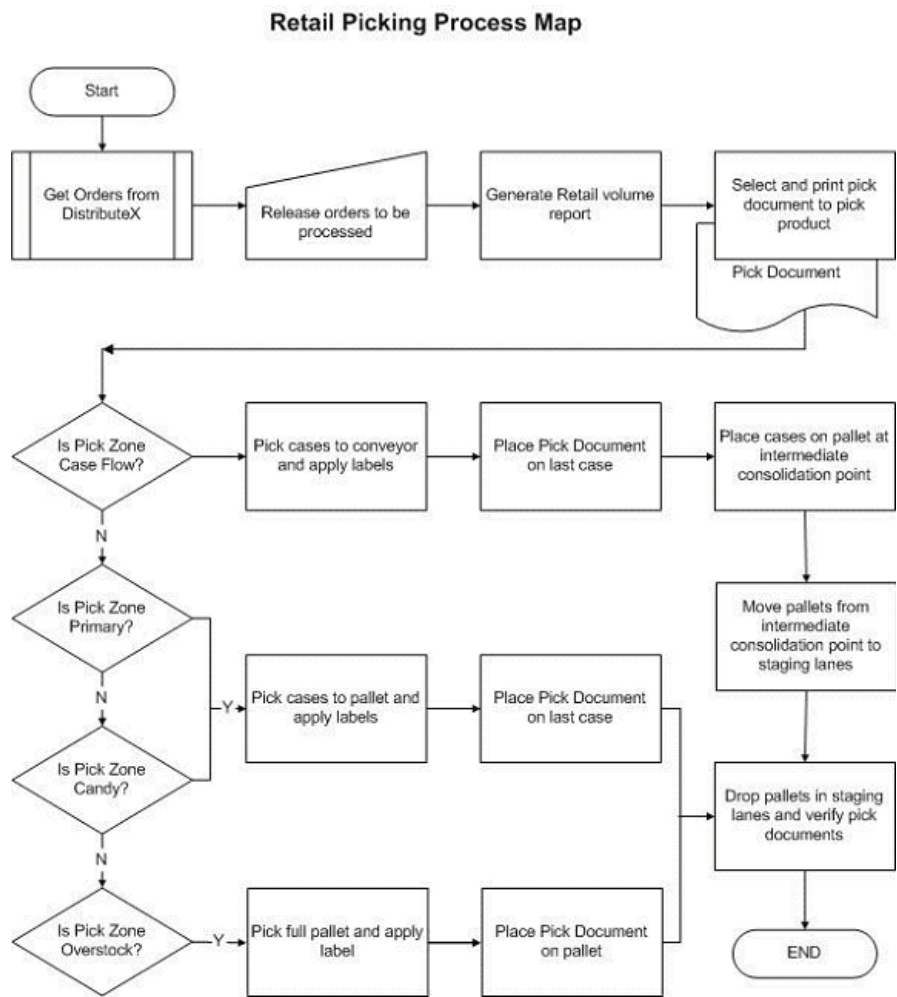


Figure F-5 Super Market and Hotel Picking Process Map from Case Flow Zone

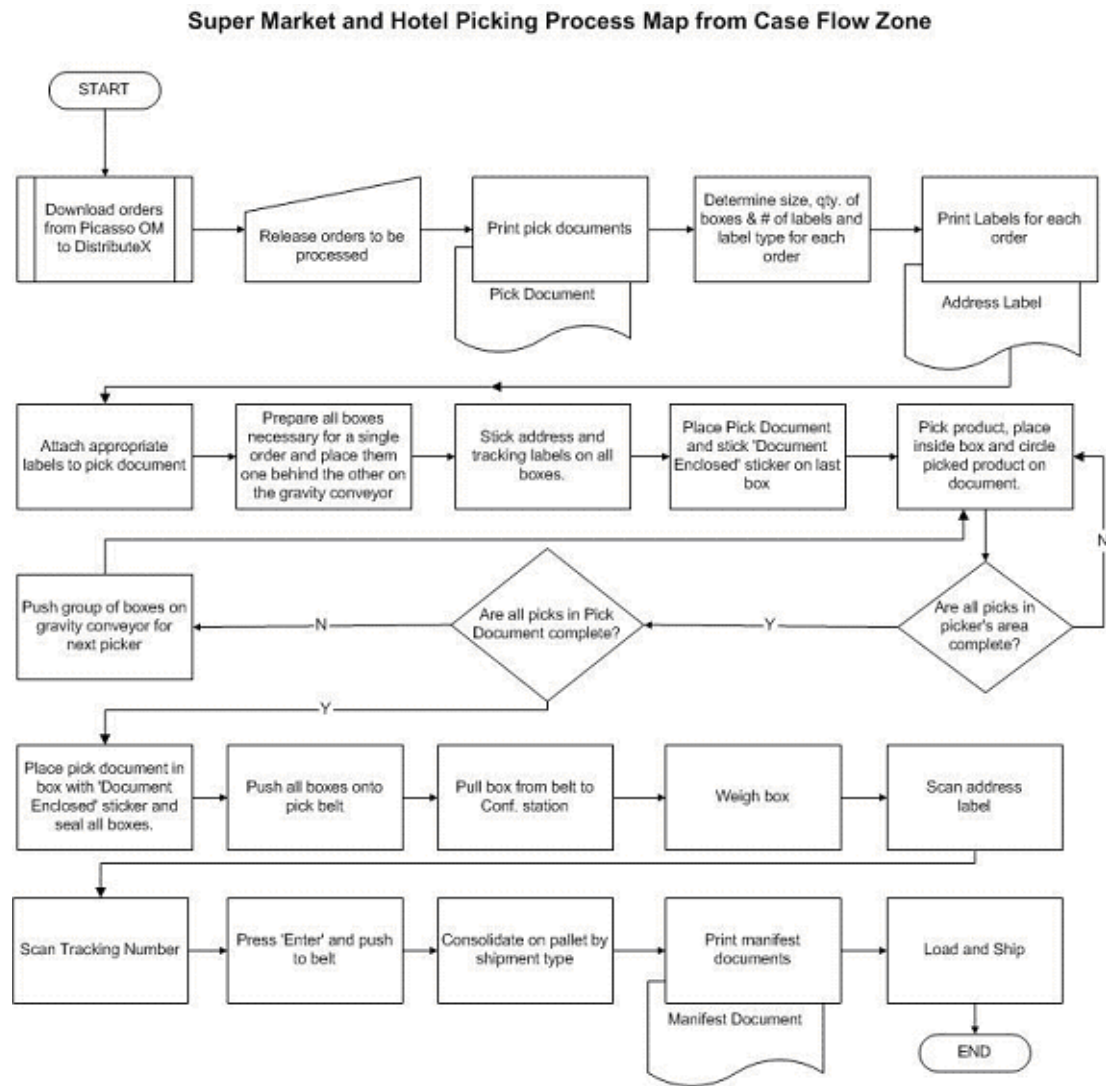
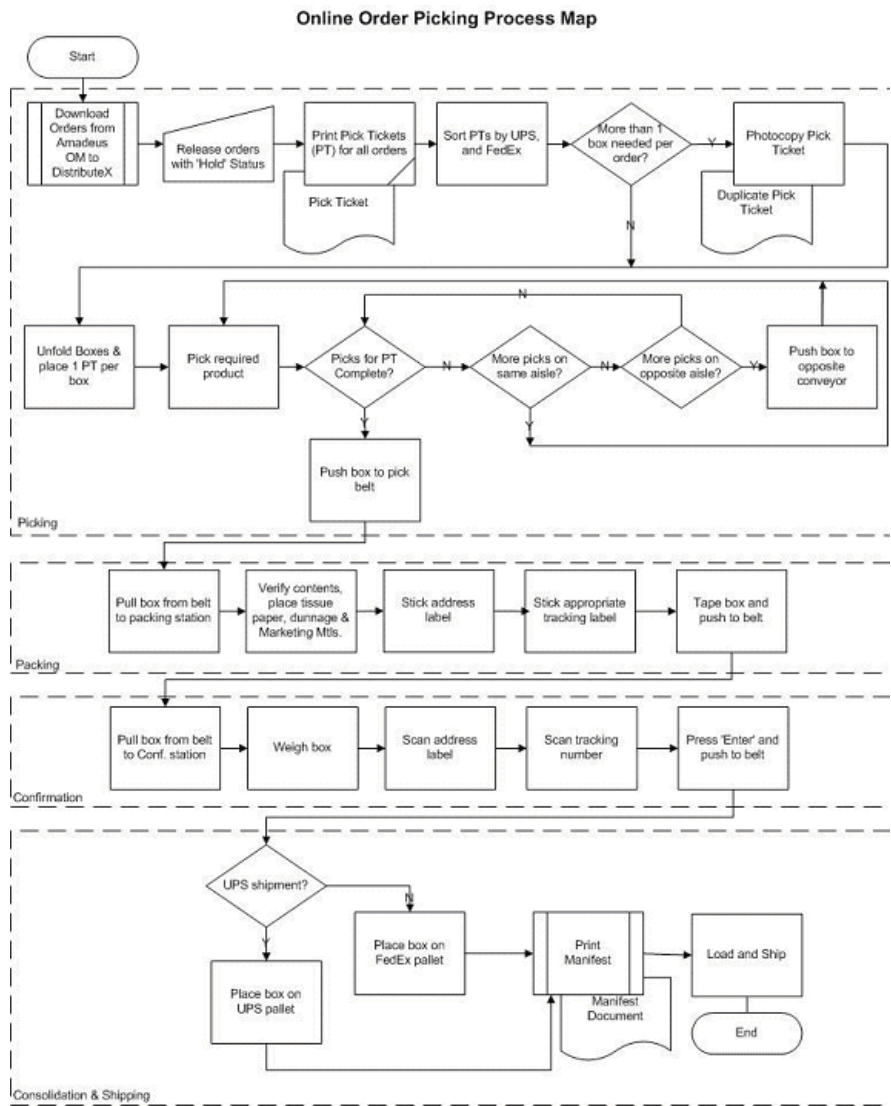


Figure F-6 Online Order Picking Process Map



Using Warehouse Management in Conjunction with Business Process Re-engineering to Address Current Challenges

The following section discusses the challenges and the solutions for Beanz n' leaves.

Maintaining Information

Challenge

Beanz n' Leavz currently maintains in three separate systems.

Solution

The Oracle e-business suite is a fully integrated system that allows order entry and capture via multiple channels such as back-office call center order entry, web orders and order import. This multi-faceted solution should eliminate the current necessity to use multiple systems to capture orders. In addition, warehouse management negates the necessity to hold inventory information in multiple systems. Also, warehouse management is a real-time application in that the database is updated as and when a transaction is performed thereby maintaining currency of inventory information.

Inventory Accuracy

Challenge

Beanz n' Leavz inventory accuracy is currently 85%

Solution

As stated above, warehouse management is a real-time application in that the database is updated as and when a transaction is performed thereby maintaining currency of inventory which in turn will aid in using accurate data for material allocation. This will ensure that the pickers will indeed find material in the right locators when they perform picks. Currently, B&L uses a paper based system with minimal barcodes to perform transactions. Warehouse management thrives on using barcodes for a majority of its execution transactions. Barcodes eliminate errors, improve efficiency and augment the real-time nature of doing business.

Inventory Obsolescence

Challenge

Annual Inventory obsolescence is \$2 Million

Solution

When inventory accuracy is increased, the inventory availability picture is current and accurate. This in conjunction with sophisticated material allocation rules via the warehouse management rules engine can ensure elimination of inventory obsolescence by allocating material long before expiry. In addition, system directed tasks in warehouse management will pin-point locators and material and direct users to retrieve and/or deposit material with tremendous accuracy and efficiency.

Space Utilization

Challenge

Beanz n' Leavz has a space utilization of 90%

Solution

This challenge can be addressed via a combination of business process re-engineering, layout changes and warehouse management.

Space utilization is currently low in the case flow area. The online picking process is similar to the case flow picking process but requires tremendous amount of space and labor. In addition, shortages in either the case flow or online picking areas are addressed by transferring merchandise from one to the other as appropriate. The key reasons behind having a separate online picking area are that the volume is high and the order entry/management systems employed is different.

By implementing the Oracle e-business suite, a single Order management system can be used to capture all kinds of orders. By implementing warehouse management and utilizing cartonization and pick and pass methodology, high volumes can be addressed.

By business process re engineering, the online order picking area can be eliminated and consolidated with the case flow area. This in turn will free up all the space used for online picking thereby reducing the space utilization and creating room to expand throughput.

The intermediate consolidation step can be totally eliminated by re engineering the business process via better pick release planning and consolidation.

Personnel

Challenge

Use of temps and overtime for employees

Solution

The re-engineering and elimination of the current online order picking process will allow for reassignment of labor thereby eliminating the necessity to hire temps. The operational efficiency introduced by warehouse management will eliminate the necessity for overtime.

Mis-Shipments

Challenge

Mis-shipments is \$500,00per year.

Solution

The current system is entirely paper based with minimal barcoding at the time of shipment. By the time picks are performed and are ready to be shipped, it becomes impossible to accurately determine if the shipments contain the required merchandise.

Warehouse management can increase picking accuracy up to 99.9% via barcodes and system directed picking. If picks are accurate, shipments will be accurate. Quality at the source will ensure quality of the end result. It will also eliminate packing and shipment verification thereby enhancing the overall efficiency of order fulfillment.

Best-of-Breed Attempted Implementation

Challenge

Attempted implementing a Best-of-Breed WMS and pulled the plug in a week due to severe backlog (5% of pre go-live volume shipped per day)

Solution

The Best-of-Breed warehouse management system would have provided operational efficiencies but would not have been able to address order entry/import into a single system. Consequently, it would not have been able to aid in re engineering the business process to consolidate the online order picking process with the case flow picking process. In addition, it is extremely vital that the implementation team understands the current business process and recommends the optimal business process that should be adopted when using the new system without sacrificing operational efficiency and/or accuracy.

The above warrants a strong implementation team that has a sound understanding of analyzing warehousing processes, recommending best practices and most importantly implementing warehouse management.

Sample Warehouse to be Process Maps

The following section contains the sample warehouse to-be process maps using warehouse management.

Figure F–7 Inbound Receiving, Rework and Putaway Process Map

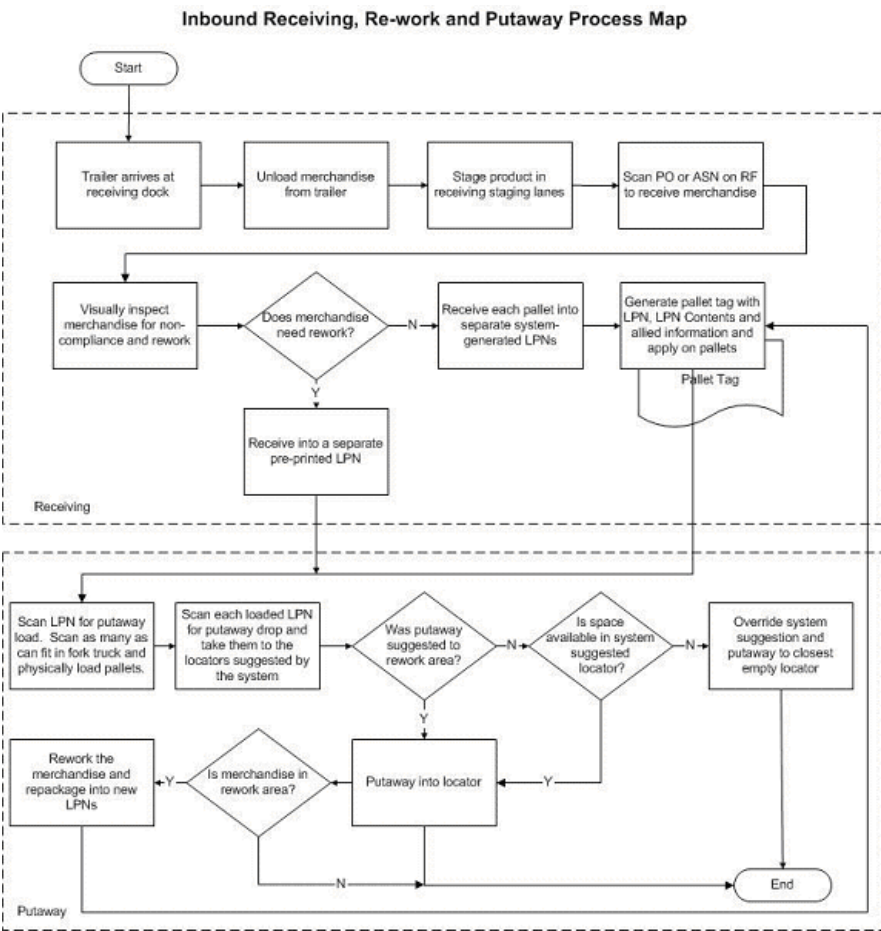


Figure F–8 Retail Picking Process Map Non-Cartonized Zone Cluster Picking from Primary and Candy Pick Zones

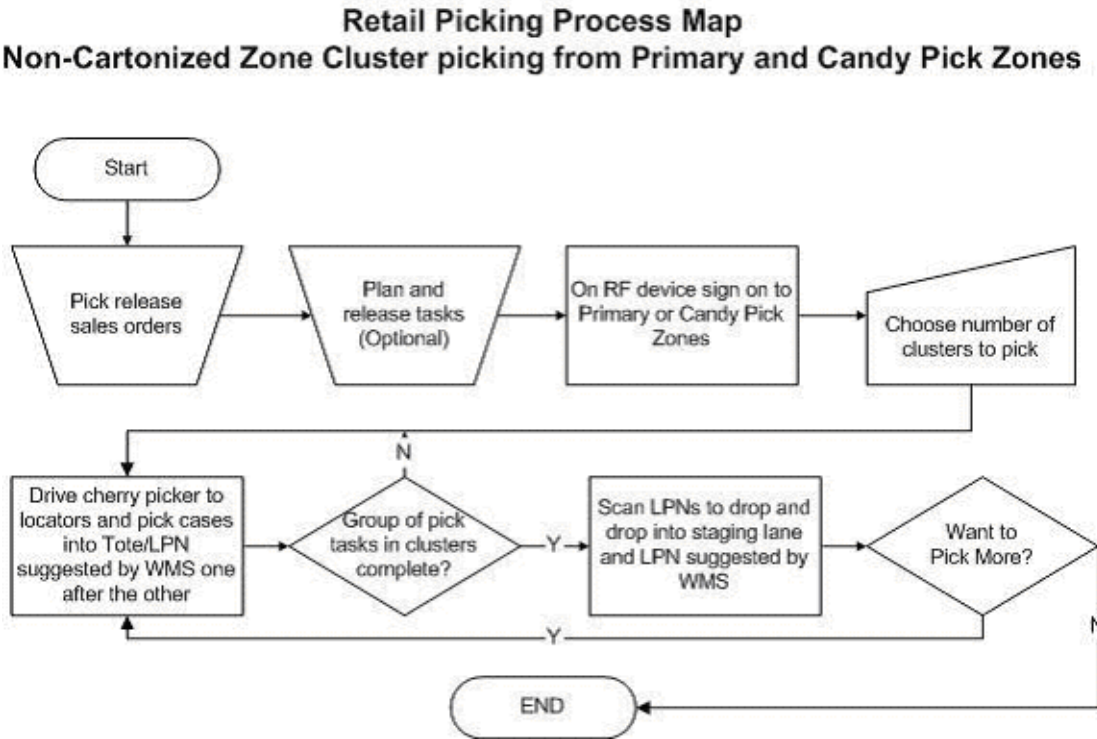
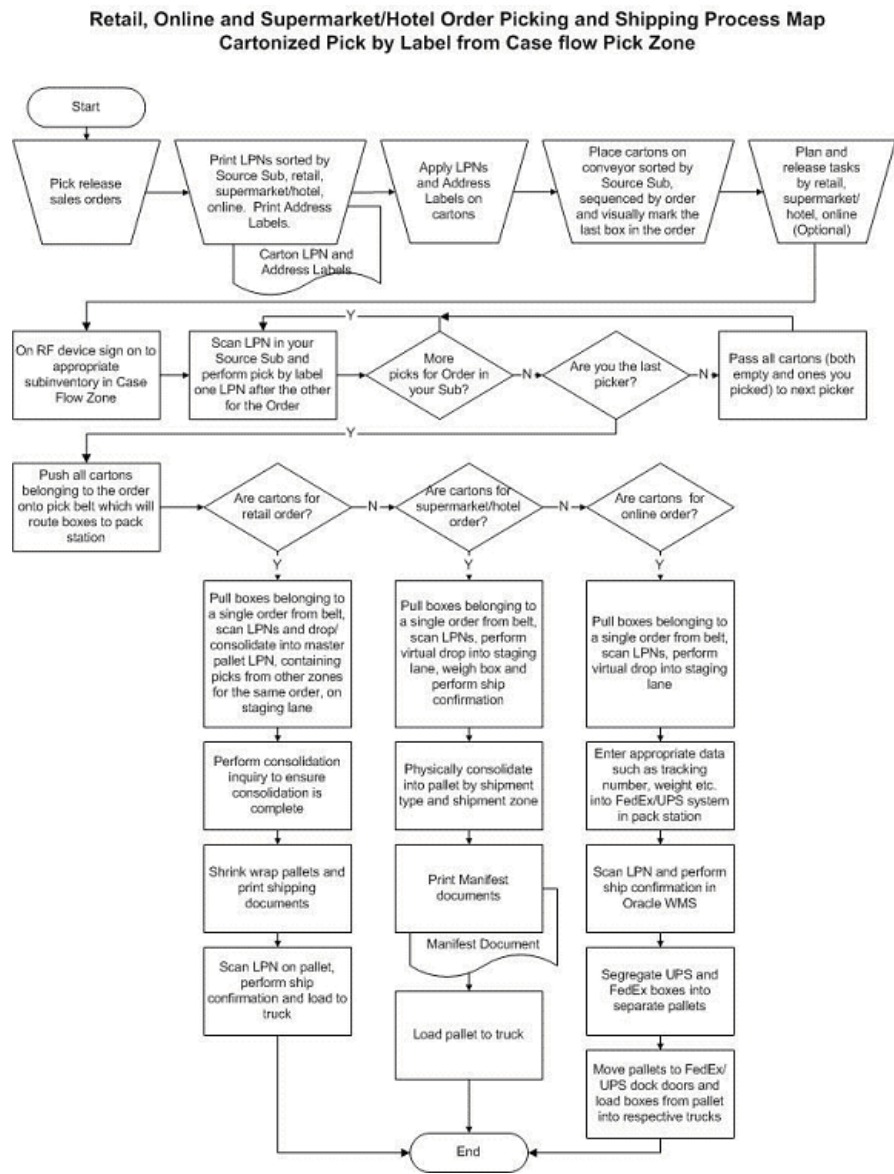


**Figure F–9 Retail, Online and Supermarket / Hotel Order Picking and Shipping
Process Map Cartonized Pick by Label from Case flow Pick Zone**



Glossary

A

address validation

The type of validation you want the system to use for your address, if you are not using a flexible address format for validation. Address validation can be implemented at three levels- Error, No Validation, or Warning. 'Error' ensures that all locations exist for your address before it can be saved. 'Warning' displays a warning message if a tax rate does not exist for this address (allows you to save the record). No Validation does not validate the address.

advanced ship notice (ASN)

An electronic document that notifies the customer of a supplier shipment and its contents. This document can include a list of shipment contents, order information, product description, physical characteristics, type of packaging, marking carrier information and configuration of the goods within the transportation equipment.

The ASC X12 transaction name for this EDI document is the 856. The EDIFACT message name for this EDI document is DESADV. Also referred to as Ship Notice/Manifest.

allocated ATP

This term is used to describe the ability to allocate scarce supply, whether it's finished goods, or a key components or resources, to various demand channels. Whether you are performing ATP or CTP, the allocation is being considered for order promising. See Feature Highlight: *Allocation*.

areas

Areas represent either a section of the plant floor or an entire plant facility. You can use inventory organizations to define areas.

ASN

Advanced Shipping Notice

assembly

An item that has a bill of material. You can purchase or manufacture an assembly item. *see* **assemble-to-order, bill of material**.

assembly completion transaction

A material transaction where you receive assemblies into inventory from a job or schedule upon completion of the manufacture of the assembly.

asset subinventory

Subdivision of an organization, representing either a physical area or a logical grouping of items, such as a storeroom where quantity balances are maintained for all items and values are maintained for asset items.

attribute

A basic data element used by Oracle Pricing to control pricing activity. For example, Pricing uses attributes to define the eligibility of a customer order to receive a particular price or modifier. In Oracle Pricing, individual attributes are obtained from data sources that are called contexts. Pricing attributes may also be used as elements of a pricing formula.

availability

Availability means how much of the item is in stock (and not reserved) in the default location. Calculation is 'on-hand minus reserved.'

available to promise quantity

See **available to promise (ATP)**.

available to reserve (ATR)

The quantity of on-hand stock available for reservation. It is the current on-hand stock less any reserved stock.

available to transact (ATT)

Quantity on hand less all reservations for the item which may be transferred within or out of inventory.

B**backordered lines**

Unfulfilled order line details which have failed to be released at least once by Pick Release or have been backordered by Ship Confirm.

business object

An independent item of significance in the business world, such as an order.

C**carrier**

See **freight carrier**.

cartonization

A system generated suggestion of the use of a specific carton in which to pack material.

category

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

category set

A feature in Inventory where users may define their own group of categories. Typical category sets include purchasing, materials, costing, and planning.

common locator

A locator without a project or project and task segment values. A common locator represents a physical location. *see* **project locator**.

common subinventory

Subinventory that does not have a project reference into which items can be delivered and out of which items can be issued and transferred.

completion locator

An inventory location within a completion subinventory where you receive completed assemblies from work in process.

completion subinventory

An inventory location at the end of your production line where you receive completed assemblies from work in process. Often this is the supply subinventory for subassemblies or finished goods inventories for final assemblies.

container

The receptacle (box, tank, etc.) in which items to be shipped are placed.

cost group

An attribute of a project which allows the system to hold item unit costs at a level below the inventory organization. Within an organization, an item may have more than one cost if it belongs to multiple cost groups. Item costing can be specific to a single project if each project has a distinct cost group, or specific to a group of projects if all projects in that group are assigned to the same cost group.

cost group rule

A user defined rule, based on business practices, that assigns a specific cost group to material based on criteria defined in the rules engine.

cross docking

Cross docking refers to when you have a shortage for a given item, and when you receive that item, you send it straight to the source of demand instead of putting it away in its usual storage location.

cumulative received quantity

The total quantity of goods (e.g. shipped or received) during a defined period of time, e.g. Model Year. This can be used by suppliers to represent year-to-date shipped and by trading partners as year-to-date received.

current date

The present system date.

current on-hand quantity

Total quantity of the item on-hand before a transaction is processed.

customer

As a party to a contract, the customer is responsible for oversight of the contract, payments and any agreed-to obligations with the contractor. The organization which is in the process of placing an order with the company.

customer item

Allows you to define specific attributes for items per customer class, customer and ship-to/bill-to location. Demand Tolerance is an example for such an attribute.

customer item number

Item Number used only by a particular customer, and it represents the item's name used in the customer's organization.

cycle counting

An inventory accuracy analysis technique where inventory is counted on a cyclic schedule rather than once a year.

D**delivery**

A set of order lines to be shipped to a customer's ship-to location on a given date in a given vehicle. Multiple deliveries can be grouped into a single departure. A single delivery may include items from different sales orders and may include backorders as well as regular orders.

department

An area within your organization that consists of one or more people, machines, or suppliers. You can also assign and update resources to a department.

department class

A group of departments.

descriptive flexfield

A feature used to collect information unique to your business. You determine the additional information you need and descriptive flexfield lets you customize your application to your needs without additional programming.

direct receipt

The receipt of an item directly to its final destination (either directly to the person who requested the item or directly to the final inventory location). It differs from a standard receipt in that it is received into a receiving location and delivered in one transaction, rather than received and delivered in two separate transactions.

discrete manufacturing

A manufacturing environment where you build assemblies in discrete jobs or batches. Different from a repetitive production environment where you build assemblies on production or assembly lines at a daily rate.

document

Any document that furnishes information to support a business object or an action on the business object. Examples include: a purchase order document, an invoice document, a word processing file listing receiving instructions, CAD files citing an item's specifications, or video instructions of an assembly operation.

due date

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

E**effective date**

Date when an Oracle Manufacturing function is available for use. For example, this could be the date a bill of material component or routing operation becomes effective, or the date you anticipate revised item changes become part of a bill of material and can no longer be controlled by an ECO.

effective dates

Start date and end date that a price, discount, surcharge, deal, promotion, or change is active.

exception

An occurrence of the specified condition found during an alert check. For example, an alert testing for invoices on hold may find five invoices on hold, or none. Each invoice on hold is an exception.

express delivery

An option that lets you deliver the entire quantity of a receipt without entering quantities for each shipment or distribution.

express receipt

A site option that lets you receive an entire purchase order or blanket purchase agreement release with one keystroke.

F**flexfield**

A field made up of segments. Each segment has a name you assign and a set of valid values. *see* **descriptive flexfield** and **key flexfield**.

flexfield segment

One of the parts of your key flexfield, separated from the other parts by a symbol you choose (such as -, /, or \). Each segment typically represents a cost center, company, item family, or color code.

flow manufacturing

Manufacturing philosophy utilizing production lines and schedules instead of work orders to drive production. Mixed models are grouped into families and produced on lines balanced to the takt time.

freight carrier

A commercial company used to send item shipments from one address to another.

fulfillment

Fulfilled sales order lines have successfully completed all Workflow processing activities up to the point of becoming eligible for invoicing.

H**hard reservation**

Sales order demand that you *firm* by reserving selected inventory for the purposes of material planning, available to promise calculations, and customer service issues.

I

inter-organization transfer

Transfer of items from one inventory organization to another. You can have freight charges and transfer credits associated with inter-organization transfer. You can choose to ship items directly or have them go through intransit inventory.

internal item number

The internal representation of Item's Name within your organization.

internal order

A sales order in the Order Management system that is generated from an internal requisition in the Purchasing system and loaded into OM through Order Import.

internal requisition

A requisition in the Purchasing system that will directly result in the generation of a sales order in the Order Management system through the Order Import process in OM.

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 Management. Also known as *internal requisition* or **purchase requisition**.

intransit inventory

Items being shipped from one inventory organization to another. While items are intransit you can view and update arrival date, freight charges, and so on.

inventory allocation

The act of assigning on hand inventory to specific orders.

inventory controls

Parameter settings that control how Inventory functions.

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.

inventory organization

An organization that tracks inventory transactions and balances, and/or that manufactures or distributes products.

inventory parameters

The set of controls, default options, and default account numbers that determine how Inventory functions.

inventory transaction

A record of material movement. The basic information for a transaction includes the item number, the quantity moved, the transaction amount, the accounting flexfields, and the date. *See* **material transaction**.

issue transaction

A material transaction to issue component items from inventory to work in process.

item

Anything you make, purchase, or sell, including components, subassemblies, finished products, or supplies. Oracle Manufacturing also uses items to represent planning items that you can forecast, standard lines that you can include on invoices, and option classes you can use to group options in model and option class bills.

item attribute control level

To maintain item attributes at the item master attribute level or the organization specific level by defining item attribute control consistent with your company policies. For example, if your company determines serial number control at headquarters regardless of where items are used, you define and maintain serial number attribute control at the item master level. If each organization maintains serial number control locally, they maintain those attributes at the organization specific level.

item attributes

Specific characteristics of an item, such as order cost, item status, revision control, COGS account, etc.

item category

See **category**.

item groups

A group of related products that can be added to one or more price lists.

item master level attribute

An item attribute you control at the item master level as opposed to controlling at the organization level.

item status

Code used to control the transaction activity of an item.

J**job**

A category of personnel in your organization. Examples of a typical job include Vice President, Buyer, and Manager. *see position*.

K**kanban**

A method of Just-in-Time production that uses standard containers or lot sizes with a single card attached to each. It is a pull system in which work centers signal with a card that they wish to withdraw parts from feeding operations or suppliers. The Japanese word *kanban*, loosely translated, means *card*, *billboard*, or *sign*. The term is often used synonymously for the specific scheduling system developed and used by the Toyota Corporation in Japan.

kanban card

The visual replenishment signal. It corresponds to a kanban bin. Replenishable kanban cards are based on pull sequences; non-replenishable cards can be created manually.

kanban items

An item that is pulled through the Kanban system, rather than pushed by the planner, is called a Kanban-released item, or simply Kanban item. Your planning system can have Kanban items and items released by the planner.

kanban pull sequence

A body of information that defines the kanban location, source information, and planning parameters required to calculate the kanban size for a given kanban bin. Replenishment chains are created by multiple pull sequences.

L**labeling rule**

A user defined rule, based on business practices, that directs the labeling of material based on criteria defined in the rules engine. A labeling rule may be defined to use a Hazmat label for all items that are hazardous.

license plate number (LPN)

License Plate Numbers uniquely identify each container in the supply chain. Contents of each container are tracked by this identifier. LPNs are used to store and transact inventory throughout the supply chain and may be individually transacted through its packed/unpacked, reservation and shipment sealing processing. A license plate number is a unique identifier for a collection of items in a single location. LPNs store their contents, including item, revision, lot and serial numbers, and the quantities. LPNs also store their current location including organization, subinventory and locator.

locator

Physical area within a subinventory where you store material, such as a row, aisle, bin, or shelf.

lot control

An Oracle Manufacturing technique for enforcing use of lot numbers during material transactions thus enabling the tracking of batches of items throughout their movement in and out of inventory.

lot genealogy

In Oracle Shop Floor Management you can view the historical production information of a lot including the sectors lot has moved, stocking locations, and transactions.

lot merging

In Oracle Shop Floor Management you can combine multiple lots into one resulting lot. The starting lots must be the same revision level for the item, attributes values, intraoperation step, department, and resources.

lot splitting

The splitting of a parent lot into multiple child lots.

M**material status**

Makes it possible to control the movement and usage of portions of on hand inventory that might have distinct differences because of grade, quality, or maturity level.

material workbench

A tool used to query item information, location information, cost group information, status information, LPN information, and lot and serial information. It is also used to perform some transactions including move order subtransfers, move order issues, material status updates, cost group changes and cycle count requests.

min-max planning

An inventory planning method used to determine when and how much to order based on a fixed user-entered minimum and maximum inventory levels.

mobile devices

Oracle Mobile Supply Chain Applications uses equipment with the ability to communicate to an application server by the Internet or local area networks. Also called mobile devices, this equipment includes hand-held Radio Frequency (RF) devices, wearable computing and ring scanner systems, lift truck mounted RF computers, and personal digital assistants. (PDA).

move transaction

A transaction to move assemblies from operation to operation or within an operation on a discrete job or repetitive schedule.

N**nested**

The placing of one, or many, LPNs into another LPN.

new on-hand quantity

The quantity on-hand immediately after the transaction is performed and saved. Equal to current on-hand quantity plus total quantity. *See* **current on-hand quantity, total quantity**.

O**operating unit**

An organization that partitions data for subledger products (AP, AR, PO, OE). It is roughly equivalent to a single pre-Multi-Org installation.

organization

A business unit such as a plant, warehouse, division, department, and so on. Order Management refers to organizations as warehouses on all Order Management windows and reports.

Internal organizations are divisions, groups, cost centers or other organizational units in a company. Organizations can be used to demonstrate ownership or management of functions.

P**pack slip**

An external shipping document that accompanies a shipment itemizing in detail the contents of that shipment.

parameter

A variable used to restrict information in a report, or determine the form of a report. For example, you may want to limit your report to the current month, or display information by supplier number instead of supplier name.

pending

A status where a process or transaction is waiting to be completed.

pick list

A report that lists all component requirements sorted by supply type for a particular discrete job, repetitive schedule or production line.

pick release

An order cycle action to notify warehouse personnel that orders are ready for picking.

pick slip

Internal shipping document pickers use to locate items to ship for an order. If you use standard pick slips, each order will have its own pick slip within each picking batch. If you use the consolidated pick slip, the pick slip contains all orders released in that picking batch.

picking

The process of withdrawing items from inventory to be shipped to a customer.

picking line

An instruction to pick a specific quantity of a specific item for a specific order. Each pick slip contains one or more picking lines, depending on the number of distinct items released on the pick slip.

picking rule

A user defined rule, based on business practices, that directs the picking of material from a specified location in the warehouse.

PO

See **purchase order**.

predefined serial number

To define an alphanumeric prefix and a beginning number for your serial numbers before you assign them to items. Predefined serial numbers are validated during receiving and shipping transactions.

profile option

A set of changeable options that affect the way your applications run. In general, profile options can be set at one or more of the following levels: site, application, responsibility, and user.

purchase order

A type of purchase order you issue when you request delivery of goods or services for specific dates and locations. You can order multiple items for each planned or standard purchase order. Each purchase order line can have multiple shipments and

you can distribute each shipment across multiple accounts. *See* **standard purchase order and planned purchase order**.

purchase order receipt

See **receipt**.

put away rule

A user defined rule, based on business practices, that directs the put away of material to a specified location in the warehouse.

Q

quantity remaining

The quantity of an assembly remaining to be completed at an operation in a discrete job or repetitive schedule. This is the sum of the quantities in all intraoperation steps at all operations before the current operation, plus the quantities in the Queue and Run intraoperation steps at the current operation.

quantity required

The total quantity of a component item required to produce all the assemblies in a discrete job or repetitive schedule as determined by the usage quantity on the bill of materials, the production quantity, and the component yield.

R

receipt

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

receiving and inspection

A condition of a returned inventory item signifying it has been received but is being inspected for damage. If in acceptable condition, the items are transferred to stock and a credit can be issued. If unacceptable, the items can be returned to the customer or scrapped.

reject

An intraoperation step in an operation where you can record assemblies that require rework or need to be scrapped.

report

An organized display of Oracle Applications information. A report can be viewed on-line or sent to a printer. The content of information in a report can range from a summary to a complete listing of values.

responsibility

Determines the data, windows, menus, reports, and concurrent programs you can access in Oracle Applications. It is linked directly to a data group. Several users can share the same responsibility, and a single user can have multiple responsibilities.

return material authorization (RMA)

Permission for a customer to return items. Receivables allows you to authorize the return of your sales orders as well as sales made by other dealers or suppliers, as long as the items are part of your item master and price list.

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.

revised item

Any item you change on an engineering change order. Revised items may be purchased items, subassemblies, finished goods.

revision

A particular version of an item, bill of material, or routing.

rule simulator

Performs simulations, based on user defined information, of picking and put away rules for debugging purposes. The rules simulator also simulates strategies, or the entire process of the rules engine.

rules

WMS rules include put away rules, picking rules, cost group rules, task type rules, and labeling rules. Rules are used to enforce business policies and procedures for warehouse tasks.

rules engine

Provides a repository for restrictions and business policies related to your warehouse.

S

serial number

A number assigned to each unit of an item and used to track the item.

serial number control

A manufacturing technique for enforcing use of serial numbers during a material transaction. An Oracle Manufacturing technique for enforcing use of serial numbers during a material transaction thus enabling the tracking of serialized items throughout their movement in and out of inventory.

ship confirm

A process in Shipping Execution which allows you to identify shipped quantities, assign inventory control information for released lines, assign freight charges, and specify whether or not to backorder unfulfilled quantities of released line items.

ship confirmation

To enter shipped quantity and inventory controls for specific shippable lines. You can ship confirm the same delivery / departure repeatedly until you close the delivery / departure. Once it is closed, no more changes can be made into a delivery / departure.

ship date

The date upon which a shippable item is shipped.

shipment

An individual package sent to a customer. Thus, a shipment might contain an entire order, if all items in that order are pick released and packed together. A shipment might contain just part of an order that is pick released and packed. A shipment might also contain only part of a released order line, where some of the items on the picking slip are not in stock.

shipping

The function that performs tasks for the outgoing shipment of parts, components, and products. It includes packaging, marking, weighing and loading for shipment.

shipping documents

Shipping related reports, such as the Bill of Lading, Commercial Invoice, Mailing Label, Pack Slip, Vehicle Load Sheet Summary, and Waybill.

shipping instructions

Notes that print on the pick slip. These instructions are intended for internal use.

sort criteria

For picking and put away rules, the sort criteria determines in which order the system uses a rule to suggest an allocation

standard item

Any item that can have a bill or be a component on a bill except planning items, option classes, or models. Standard items include purchased items, subassemblies, and finished products.

standard purchase order

A type of purchase order you issue when you order delivery of goods or services for specific dates and locations for your company. Each standard purchase order line can have multiple shipments and you can distribute the quantity of each shipment across multiple accounts. *See* **purchase order**.

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.

strategies

An ordered sequence of rules that WMS uses to fulfill complex business demands.

strategy assignment

A strategy that is assigned to an instance of a particular business object.

strategy search order

The sequence in which various objects will be evaluated for associated strategies and rules.

subinventory

Subdivision of an organization, representing either a physical area or a logical grouping of items, such as a storeroom or receiving dock.

sublot

A subdivision of a lot which may be used when an entire lot is more than would be used or produced at any one time, but grouping of the material into a single lot is still desired. This maintains the integrity of the overall lot, but allows it to be consumed in manageable pieces.

supplier

Provider of goods or services.

supply

A quantity of materials available for use. Supply is replenished in response to demand or anticipated demand.

supply locator

The specific location, such as shelves or containers, within a supply subinventory that you use as the default locator in a material transaction.

supply subinventory

The subinventory you use as a primary source of supply to meet a specific material requirement in a discrete job or repetitive schedule.

T**task type rule**

A user defined rule, based on business practices, that assigns specific tasks to specific human resources and machine resources, if defined. Task type rules can be utilized to ensure that a specific employee picks specific material from a specific location.

transaction quantity

The quantity of a transaction.

U**unit of measure**

The unit that the quantity of an item is expressed.

unpack

An LPN can be unpacked. This can be used effectively in an "Each" subinventory where LPNs are not utilized.

UOM

See **unit of measure**.

V**vendor**

See **supplier**.

W**warehouse**

See **organization**.

warehouse control board (WCB)

A tool used by warehouse management to monitor, control, and execute various warehouse operations.

warehouse management system (WMS)

The Warehouse Management System provides advanced distribution processes such as value-added services, cross docking, order assembly postponement, and resource and task management to optimize the order fulfillment process. Oracle Warehouse Management System provides an easy to use automated interface for mobile Internet devices.

WIP

See **work in process**.

work in process

An item in various phases of production in a manufacturing plant. This includes raw material awaiting processing up to final assemblies ready to be received into inventory.

Z

zone

The area within an encompassing set of locations. A zone is used as a charging mechanism for deliveries and freight rating for the order quote. A collection of locations. The area within a concentric ring from a warehouse.

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