

Oracle[®] Supplier Scheduling

User's Guide, Release 11i

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Oracle[®] Supplier Scheduling User's Guide, Release 11i

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Primary Author: John Gilbert Chan

Contributing Authors: Catherine Hopkins

Contributors: Rachel Haas, Raghav Keshav, Vijay Pawar, Carol Borison

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Contents

| | |
|---|-------|
| Audience for This Guide | xi |
| How To Use This Guide | xi |
| Finding Out What's New | xii |
| Other Information Sources | xii |
| Online Documentation..... | xii |
| Related User Guides..... | xiii |
| User Guides Related to All Products..... | xiii |
| Reference Manuals | xix |
| Installation and System Administration Guides..... | xxi |
| Training and Support..... | xxii |
| Do Not Use Database Tools to Modify Oracle Applications Data | xxiii |

1 Overview of Supplier Scheduling

| | |
|--|-----|
| Overview of Supplier Scheduling | 1-2 |
| Overview Flowchart of Supplier Scheduling | 1-3 |
| Inputs from Oracle Planning and Purchasing | 1-4 |
| Inputs from Oracle Purchasing | 1-5 |
| Inputs from Oracle Planning | 1-5 |
| Major Features..... | 1-5 |
| How to Navigate through Supplier Scheduling | 1-7 |
| Schedule Types and Subtypes | 1-8 |
| Planning Schedule | 1-8 |
| Structure..... | 1-8 |

| | |
|-------------------------------------|------|
| Shipping Schedule | 1-9 |
| Simulation Schedules | 1-9 |
| Comparison: Schedule Types | 1-10 |
| Comparison: Schedule Subtypes | 1-11 |

2 Setting Up

| | |
|--|------|
| Overview of Setting Up | 2-2 |
| Related Product Setup Steps | 2-2 |
| Setup Flowchart | 2-3 |
| Setup Checklist | 2-4 |
| Setup Steps..... | 2-4 |
| Functional Security | 2-6 |
| Defining Approved Supplier Statuses..... | 2-6 |
| Bucket Patterns | 2-8 |
| Defining Bucket Patterns | 2-9 |
| Defining Supplier Scheduling Options..... | 2-11 |
| Resource Authorizations | 2-13 |
| Enabling Resource Authorizations in the Approved Supplier List | 2-16 |

3 Scheduler's Workbench

| | |
|--|------|
| Overview of Scheduler's Workbench | 3-2 |
| Building New Schedules Manually | 3-3 |
| Locating/Reviewing Existing Schedules | 3-7 |
| Reviewing Item Schedules | 3-9 |
| View Authorizations | 3-13 |
| Authorization | 3-13 |
| UOM | 3-13 |
| Quantity | 3-13 |
| Days | 3-13 |
| Date..... | 3-13 |
| Schedule Orders | 3-15 |
| PO UOM..... | 3-15 |
| Order Quantity..... | 3-15 |
| Due Date..... | 3-15 |
| Document Type..... | 3-15 |

| | |
|--|-------------|
| Document Number..... | 3-16 |
| Document Revision..... | 3-16 |
| Document Status..... | 3-16 |
| Document Line..... | 3-16 |
| Building Revision Schedules | 3-18 |
| Building Simulation Schedules..... | 3-20 |
| Planned Orders for MRP/MPS/DRP | 3-24 |
| MRP Plan Name..... | 3-24 |
| MPS Plan Name | 3-25 |
| DRP Plan Name | 3-25 |
| Reviewing Schedule Headers and Items..... | 3-27 |
| Rebuilding Schedules..... | 3-28 |
| Confirming Schedules..... | 3-29 |
| Confirming Schedule Headers at the Header Level..... | 3-30 |
| Confirming Schedule Line Items at the Item Level..... | 3-30 |
| Printing Schedules..... | 3-32 |
| | |
| 4 AutoScheduling | |
| Overview of AutoScheduling..... | 4-2 |
| Enabling AutoSchedule in the Approved Supplier List..... | 4-3 |
| Building a Schedule Using AutoSchedule | 4-5 |
| Setting the AutoSchedule Process to Run Reports Automatically..... | 4-6 |
| | |
| 5 CUM Management | |
| Overview of CUM Management..... | 5-2 |
| Reviewing and Adjusting CUM Quantities..... | 5-2 |
| CUM Accounting Transactions | 5-3 |
| Enabling CUM Management | 5-3 |
| Defining CUM Periods | 5-4 |
| Viewing and Adjusting CUM Quantities..... | 5-5 |
| CUM Quantity Tracking..... | 5-6 |
| | |
| 6 Supply Base Management | |
| Overview of the Approved Supplier List | 6-2 |

| | |
|--|------------|
| Major Features..... | 6-3 |
| Defining the Approved Supplier List | 6-4 |
| Defining the Supplier/Item Attributes..... | 6-6 |
| ASL Header Attributes | 6-6 |
| Viewing the Approved Suppliers List Summary..... | 6-10 |
| | |
| 7 Reports and Processes | |
| CUM History Reports | 7-2 |
| Report Submission..... | 7-2 |
| Report Parameters | 7-2 |
| Planning and Shipping AutoSchedule Processes..... | 7-3 |
| Report Submission..... | 7-3 |
| Process Parameters | 7-3 |
| Printed Planning Schedule Reports | 7-6 |
| Report Submission..... | 7-6 |
| Report Parameters | 7-6 |
| Printed Shipping Schedule Reports..... | 7-8 |
| Report Submission..... | 7-8 |
| Report Parameters | 7-8 |
| | |
| 8 EDI Transactions | |
| EDI Transactions | 8-2 |
| Planning Schedule (830)..... | 8-2 |
| Forecast (830) | 8-2 |
| Material Release (830) | 8-2 |
| Shipping Schedule (862) | 8-3 |
| | |
| 9 Troubleshooting | |
| Troubleshooting | 9-2 |
| | |
| A Windows and Navigation Paths | |
| Windows and Navigator Paths | A-2 |

Send Us Your Comments

Oracle Supplier Scheduling User's Guide, Release 11i

Part No. A75100-01

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

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most about this manual?

If you find any errors or have any other suggestions for improvement, please indicate the chapter, section, and page number (if available). You can send comments to us in the following ways:

- E-mail - your_product@us.oracle.com
- FAX - telephone number. Attn: Oracle Supplier Scheduling
- Postal service:
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Oracle Supplier Scheduling Documentation
500 Oracle Parkway, 30p6
Redwood Shores, CA 94065
USA

If you would like a reply, please give your name, address, and telephone number below.

If you have problems with the software, please contact your local Oracle Support Services.

Audience for This Guide

Welcome to Release 11*i* of the Oracle Supplier Scheduling user guide.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Supplier Scheduling

If you have never used Oracle Supplier Scheduling, we suggest you attend one or more of the Oracle Supplier Scheduling training classes available through Oracle University.

- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This guide contains the information you need to understand and use Oracle Supplier Scheduling.

This preface explains how this user guide is organized and introduces other sources of information that can help you. This guide contains the following chapters:

- Chapter 1 Provides an overview of Supplier Scheduling.
- Chapter 2 Describes how to set up Supplier Scheduling.
- Chapter 3 Describes how to build, view, edit, print, and confirm planning, shipping, and simulation schedules.
- Chapter 4 Provides an overview of the Autoschedule process.
- Chapter 5 Provides an overview of CUM Management.
- Chapter 6 Provides an overview of Supply Base Management.
- Chapter 7 Describes the Planning and Shipping Reports and Processes.

- Chapter 8 Describes EDI Transactions.
- Chapter 9 Describes possible solutions to problems that you might encounter.

Finding Out What's New

From the HTML help window for Oracle Supplier Scheduling, choose the section that describes new features or what's new from the expandable menu. This section describes:

- New features in 11*i*. This information is updated for each new release of Oracle Supplier Scheduling.
- Information about any features that were not yet available when this user guide was printed. For example, if your system administrator has installed software from a mini pack as an upgrade, this document describes the new features.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Supplier Scheduling.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides unless we specify otherwise.

Online Documentation

All Oracle Applications documentation is available online (HTML and PDF). The technical reference guides are available in paper format only. Note that the HTML documentation is translated into over twenty languages.

The HTML version of this guide is optimized for onscreen reading, and you can use it to follow hypertext links for easy access to other HTML guides in the library. When you have an HTML window open, you can use the features on the left side of the window to navigate freely throughout all Oracle Applications documentation.

- You can use the Search feature to search by words or phrases.
- You can use the expandable menu to search for topics in the menu structure we provide. The Library option on the menu expands to show all Oracle Applications HTML documentation.

You can view HTML help in the following ways:

- From an application window, use the help icon or the help menu to open a new Web browser and display help about that window.
- Use the documentation CD.
- Use a URL provided by your system administrator.

Your HTML help may contain information that was not available when this guide was printed.

Related User Guides

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

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle store at <http://oraclestore.oracle.com>.

User Guides Related to All Products

Oracle Applications User Guide

This guide explains how to navigate the system, enter data, and query information, and introduces other basic features of the GUI available with this release of Oracle Supplier Scheduling (and any other Oracle Applications product).

You can also access this user guide online by choosing *Getting Started and Using Oracle Applications* from the Oracle Applications help system.

Oracle Alert User Guide

Use this guide to define periodic and event alerts that monitor the status of your Oracle Applications data.

Oracle Applications Implementation Wizard User Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Oracle Applications Demonstration User's Guide

This guide documents the functional storyline and product flows for Vision Enterprises, a fictional manufacturer of personal computers products and services. As well as including product overviews, the book contains detailed discussions and examples across each of the major product flows. Tables, illustrations, and charts summarize key flows and data elements.

Oracle Assets User's Guide

If you install Oracle Assets, you can use this manual to add assets and cost adjustments directly into Oracle Assets from invoice information in Payables.

Oracle Bills of Material User's Guide

This guide describes how to create various bills of materials to maximize efficiency, improve quality and lower cost for the most sophisticated manufacturing environments. By detailing integrated product structures and processes, flexible product and process definition, and configuration management, this guide enables you to manage product details within and across multiple manufacturing sites.

Oracle Business Intelligence System Implementation Guide

This guide provides information about implementing Oracle Business Intelligence (BIS) in your environment.

BIS 11/ User Guide Online Help

This guide is provided as online help only from the BIS application and includes information about intelligence reports, Discoverer workbooks, and the Performance Management Framework.

Oracle Capacity User's Guide

This guide describes how to validate a material plan by verifying that there are resources sufficient to perform the planned work for repetitive and discrete jobs. Using finite capacity planning techniques, you learn how to use rough-cut capacity planning to validate a master schedule and capacity planning to validate the material plan.

Oracle Cash Management User's Guide

This manual explains how you can reconcile your payments with your bank statements.

Oracle Cost Management User's Guide

This guide describes how to use Oracle Cost Management in either a standard costing or average costing organization. Cost Management can be used to cost inventory, receiving, order entry, and work in process transactions. It can also be used to collect transaction costs for transfer to Oracle Projects. Cost Management supports multiple cost elements and multiple subelements. It also provides comprehensive valuation and variance reporting.

Oracle e-Commerce Gateway User's Guide

This guide describes how Oracle e-Commerce Gateway provides a means to conduct business with trading partners via Electronic Data Interchange (EDI). Data files are exchanged in a standard format to minimize manual effort, speed data processing and ensure accuracy.

Oracle Engineering User's Guide

This guide enables your engineers to utilize the features of Oracle Engineering to quickly introduce and manage new designs into production. Specifically, this guide details how to quickly and accurately define the resources, materials and processes necessary to implement changes in product design.

Oracle General Ledger User's Guide

This guide explains how to plan and define your chart of accounts, accounting period types and accounting calendar, functional currency, and set of books. It also describes how to define journal entry sources and categories so you can create journal entries for your general ledger. If you use multiple currencies, use this manual when you define additional rate types, and enter daily rates. This manual also includes complete information on implementing Budgetary Control.

Oracle HRMS Documentation Set

- *Using Oracle HRMS - The Fundamentals* explains how to set up organizations and site locations.
- *Managing People Using Oracle HRMS* explains how to enter and track employee data.
- *Running Your Payroll Using Oracle HRMS* explains how to set up payroll, do withholding, run statutory reports, and pay employees.
- *Managing Compensation and Benefits Using Oracle HRMS* explains how to set up Total Compensation, including 401(k), health, and insurance plans.
- *Customizing, Reporting, and System Administration in Oracle HRMS* explains how to customize to the system and design reports.

Oracle Inventory User's Guide

This guide describes how to define items and item information, perform receiving and inventory transactions, maintain cost control, plan items, perform cycle counting and physical inventories, and set up Oracle Inventory.

Oracle Manufacturing Scheduling User's Guide

This guide describes how to use Oracle Manufacturing Scheduling to view and reschedule single discrete jobs or the entire shop floor. Specifically, this guide details how to easily use the drag and drop functionality to view and reschedule jobs, operations, and resources.

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

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

Oracle Order Entry/Shipping User's Guide

This guide describes how to enter sales orders and returns, copy existing sales orders, schedule orders, release orders, plan departures and deliveries, confirm shipments, create price lists and discounts for orders, and create reports.

Oracle Payables User's Guide

This guide describes how accounts payable transactions are created and entered in Oracle Payables. This guide also contains detailed setup information for Oracle Payables.

Oracle Configurator User's Guide

This guide describes how to improve order taking and fulfillment productivity by eliminating errors in new sales orders and bills of materials. You can use Oracle Configurator to verify product configurations, automatically select configuration options, and generate manufacturing bills of materials according to configuration constraints.

Oracle Project Manufacturing User's Guide

This guide describes the unique set of features Oracle Project Manufacturing provides for a project-based manufacturing environment. Oracle Project Manufacturing can be tightly integrated with Oracle Projects. However, in addition to Oracle Projects functionality, Oracle Project Manufacturing provides a comprehensive set of new features to support project sales management, project manufacturing costing, project manufacturing planning, project manufacturing execution and project quality management.

Oracle Projects User's Guide

This guide explains how to set up projects for use in project manufacturing and project accounting.

Oracle Purchasing User's Guide

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

Oracle Quality User's Guide

This guide describes how Oracle Quality can be used to meet your quality data collection and analysis needs. This guide also explains how Oracle Quality interfaces with other Oracle Manufacturing applications to provide a closed loop quality control system.

Oracle Receivables User's Guide

Use this manual to learn how to implement flexible address formats for different countries. You can use flexible address formats in the suppliers, banks, invoices, and payments windows.

Oracle Sales and Marketing Connected Client User's Guide

This guide describes how to set up your connected client, manage your account information, manage your database of contacts, and how to record, review and add information about an account, contact, or opportunity. This guide also describes how to view pending, current, and past customer orders, to create and track responses to promotional campaigns, track the effectiveness of a promotional program, and how to project your progress towards sales goals.

Oracle Sales Compensation User's Guide

This guide describes how to categorize your sales revenue, how to define the data you need to Oracle Sales Compensation, and where to collect the data from. Each sales organization has different ways of paying compensation; thus each organization needs different types of data to calculate a compensation payment. This guide also explains how to setup and calculate compensation for a salesperson, adjust for sales credits, and view a salesperson's performance against their quota. In addition, this guide also explains how to run a variety of reports for individuals or groups of salespeople.

Oracle Self Service Web Applications User's Guide

This guide describes how Oracle Self Service Web Applications enable companies to provide a self-service and secure web interface for its employees, customers and suppliers. Employees can change their personal status, submit expense reports or request supplies; customers can check on their orders; and suppliers can share production schedules with their trading partners. This guide is available in HTML only.

Oracle Release Management User's Guide

This manual describes how to manage high volume electronic demand by continually incorporating your customers demand into your order and planning processes. By explaining how to validate, archive, manage and reconcile incoming planning, shipping and production sequence schedules with updates to sales orders and forecasts, it enables you to electronically collaborate with your customers to more accurately manage demand. It also describes how to plan, create and manage trading partner layers for trading partner specific customizations.

Oracle Supplier Scheduling User's Guide

This guide describes how you can use Oracle Supplier Scheduling to calculate and maintain planning and shipping schedules and communicate them to your suppliers.

Oracle Work in Process User's Guide

This guide describes how Oracle Work in Process provides a complete production management system. Specifically this guide describes how discrete, repetitive, assemble-to-order, project, flow, and mixed manufacturing environments are supported.

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Reference Manuals

Oracle Technical Reference Manuals

Each technical reference manual contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products.

You can order a technical reference manual for any Oracle Applications product you have licensed.

Oracle Automotive Implementation Manual

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

Oracle Manufacturing and Distribution Open Interfaces Manual

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

Oracle Applications Message Reference Manual

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

Oracle Project Manufacturing Implementation Manual

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

Oracle Receivables Tax Manual

This manual provides everything you need to know about calculating tax within Oracle Receivables, Oracle Order Management, Oracle sales, and Oracle Web Customers. It includes information about implementation procedures, setup forms and windows, the Oracle Receivables Tax calculation process, tax reports and listings, and open interfaces.

Oracle Self-Service Expenses Implementation Guide

This guide explains in detail how to configure Oracle Self-Service Expenses and describes its integration with Oracle Payable and Oracle Projects.

Oracle Self-Service Web Applications Implementation Manual

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

Oracle Applications Flexfields Guide

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

Installation and System Administration Guides

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind, and major issues, for Applications-wide features such as Business Intelligence (BIS), languages and character sets, and self-service applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle One-Hour Install, which minimizes the time it takes to install Oracle Applications and the Oracle 8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle One-Hour Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process in general and lists database upgrade and product-specific upgrade tasks. You must be at either Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0 to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Using the AD Utilities

Use this guide to help you run the various AD utilities, such as AutoInstall, AutoPatch, AD Administration, AD Controller, Relink, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities.

Oracle Applications Product Update Notes

Use this guide as a reference if you are responsible for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new

features and enhancements and changes made to database objects, profile options, and seed data for this interval.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage processing.

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Training and Support

Training

We offer a complete set of training courses to help you and your staff master Oracle Applications. We can help you develop a training plan that provides thorough training for both your project team and your end users. We will work with you to organize courses appropriate to your job or area of responsibility.

Training professionals can show you how to plan your training throughout the implementation process so that the right amount of information is delivered to key people when they need it the most. You can attend courses at any one of our many Educational Centers, or you can arrange for our trainers to teach at your facility. We also offer Net classes, where training is delivered over the Internet, and many multimedia-based courses on CD. In addition, we can tailor standard courses or develop custom courses to meet your needs.

Support

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

Do Not Use Database Tools to Modify Oracle Applications Data

We STRONGLY RECOMMEND that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications tables, unless we tell you to do so in our guides.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

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

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

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support and office automation, as well as Oracle Applications. Oracle Applications provides the E-business Suite, a fully integrated suite of more than 70 software modules for financial management, Internet procurement, business intelligence, supply chain management, manufacturing, project systems, human resources and sales and service management.

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

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools,

and application products, along with related consulting, education and support services, in over 145 countries around the world.

Your Feedback

Thank you for using Oracle Supplier Scheduling and this user guide.

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

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

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

Overview of Supplier Scheduling

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

- Overview of Supplier Scheduling on page 1-1
- Overview Flowchart of Supplier Scheduling on page 1-3
- Inputs from Oracle Purchasing on page 1-5
- Inputs from Oracle Planning on page 1-5
- Major Features on page 1-5
- How to Navigate through Supplier Scheduling on page 1-7
- Schedule Types and Subtypes on page 1-8
- Comparison: Schedule Types on page 1-10

Overview of Supplier Scheduling

Supplier Scheduling lets you create planning and shipping schedules that communicate forecast and shipping information to suppliers. You can use sourcing rules and approved supplier lists, create and maintain planning and shipping schedules, and communicate the schedules to suppliers.

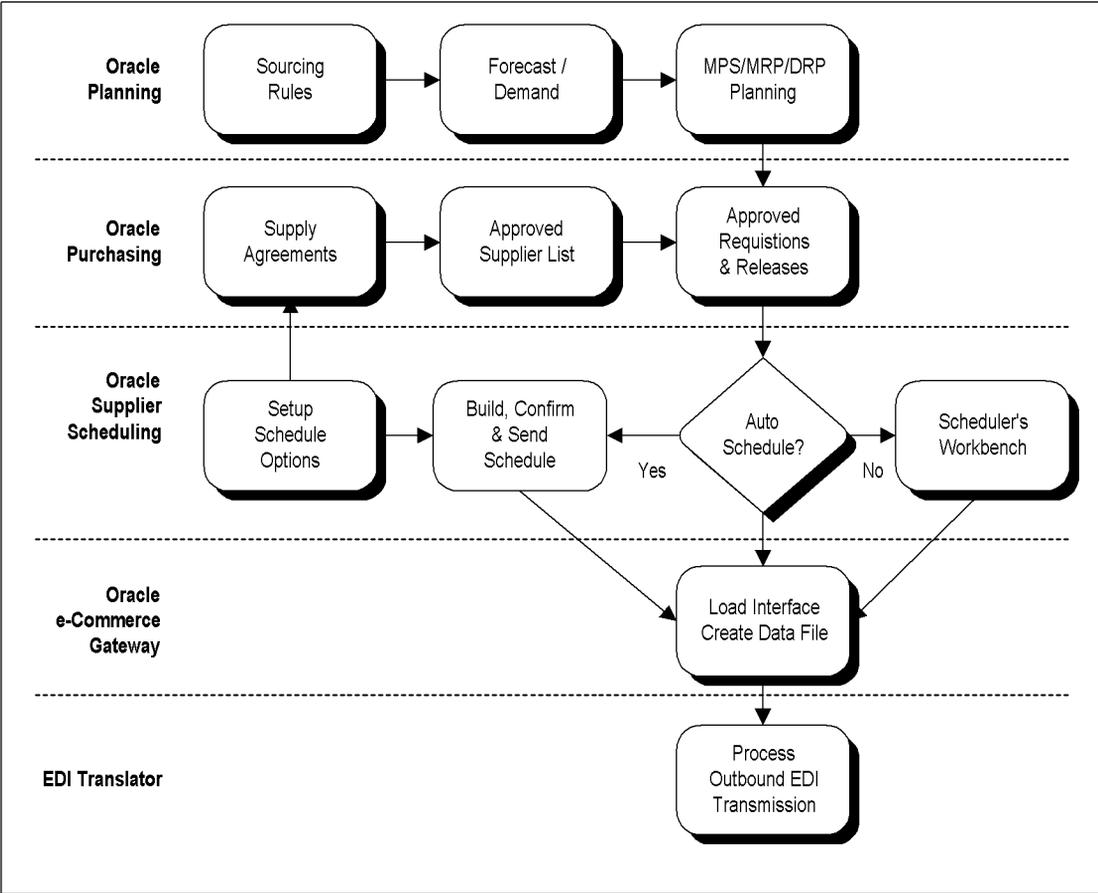
You can use planning schedules to convey long-range requirement forecasts, and include order releases and material authorizations that are commitments to fund investment in raw materials and processing for projected requirements.

You can use shipping schedules to communicate firm requirements, such as order releases. You can also use shipping schedules with planning schedules to provide a detailed view of expected delivery. The schedules are comprised of unimplemented MRP/MPS/DRP planned orders, approved requisitions, and approved supply agreement releases for specific suppliers, supplier/site combinations, items, and ship-to organizations.

You can include orders in the schedule only if their due dates fall within the schedule horizon and their document types are relevant for the schedule type. For example, you cannot include planned orders in a shipping schedule with a subtype of release only. You can build a schedule in a bucket pattern of days, weeks, months, and quarters that will best communicate your orders and you can distribute your schedules to your supplier by EDI or printed report.

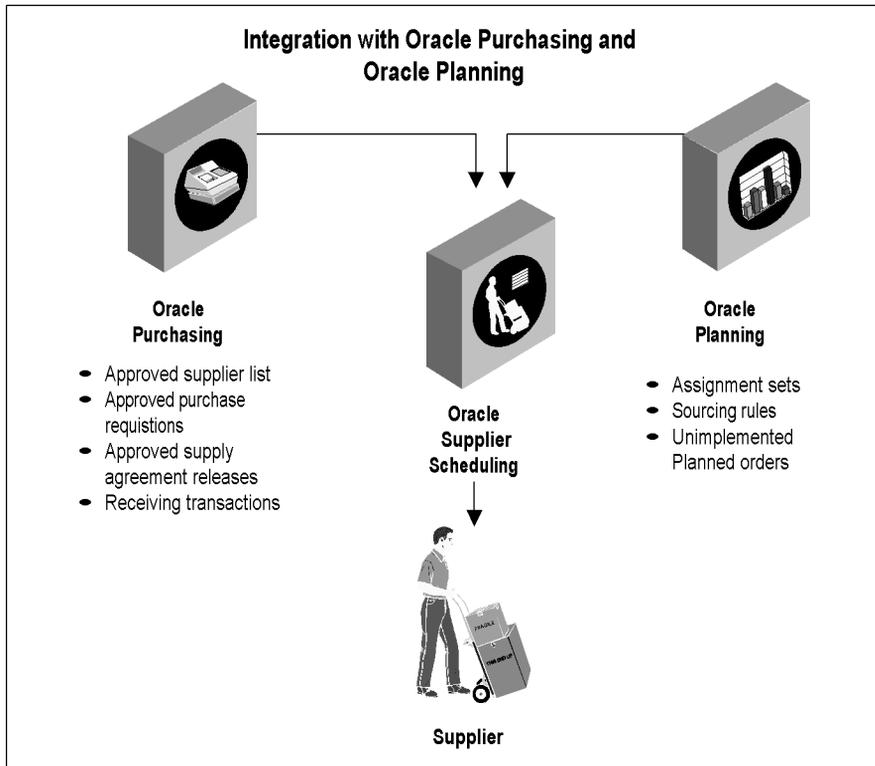
You can specify the capacity of individual suppliers to supply specific items. You can allocate planned orders taking capacity constraints of the suppliers into account. Planning uses the ranking information you specify and first attempts to source the planned orders with the primary sources. If the primary source does not have the capacity to fulfill the demand, planning suggests sourcing with the alternative sources you have specified, in the priority you have specified.

Overview Flowchart of Supplier Scheduling



Inputs from Oracle Planning and Purchasing

To take full advantage of Supplier Scheduling, inputs from Oracle Planning and Purchasing are essential.



Note : Setting up Oracle Purchasing is a prerequisite setup step in Supplier Scheduling, however, setting up Oracle Planning is not. If you use Supplier Scheduling without one of the Oracle planning products, unimplemented planned orders will not be available.

Inputs from Oracle Purchasing

- Approved supplier list: A repository of information that associates items with suppliers sites and allows you to define attributes specific to the item/supplier site combination.
- Approved purchase requisitions: Requests for the purchase of goods from a supplier that has been approved.
- Approved supply agreements releases.
- Receiving transactions: Receipts of goods from a supplier, returns to a supplier, and corrections associated with these transactions.

Inputs from Oracle Planning

- Sourcing rules: Predefined rules for determining the sources that replenish an item.
- Assigned sets: A collection of sourcing rules that is assigned to a material plan to allocate unimplemented planned orders to suppliers.
- Unimplemented planned orders: Suggestions generated by the planning process to procure a specific item for specific quantity on a specific date. (Once a planned order for purchased part is implemented, it becomes a purchase requisition.)

Major Features

With Supplier Scheduling, you can do the following:

- Automatically or manually build planning schedules to communicate long-range forecast information to suppliers.
- Automatically or manually build shipping schedules to communicate near-term release shipment information to suppliers.
- Build revision schedules.
- Build simulation schedules for personal use.
- Use number/name saved simulation schedules manually to allow for easy retrieval.
- Build schedules that include discrete requirements for multiple ship-to organizations.
- Use a wide variety of criteria for building and reviewing schedules.

- Use number planning and shipping schedules to automatically employ a combination of date stamp and unique sequence.
- Communicate schedules to suppliers by EDI, printed report, or online with Oracle Supply Management Portal.
- Automatically maintain the cumulative quantity received (CUM) by supplier/item/ship-to organization for user-defined CUM periods.
- Adjust CUM quantities manually.
- Review high authorization and CUM details for all CUM periods.
- Define and calculate quantities for up to four different resource authorization types by supplier site/item/ship-to organization.
- Define variable bucket patterns that allow flexible schedule presentation.
- Control access by responsibility for specific features, using function security.
- Include Supplier Scheduling and the ASL in Supplier Merge.

How to Navigate through Supplier Scheduling

This guide assumes that you know how to navigate through Oracle Supplier Scheduling. As such, the navigation path for each task is abbreviated. Refer to the Windows and Navigator Paths on page A-2 when you do not already know the complete navigation path.

Schedule Types and Subtypes

Planning Schedule

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

Structure

The planning schedule is typically structured as follows:

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

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

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

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

You can control the bucket quantities with dates for each item on the planning schedule by defining the pattern of days offset from the forecast horizon start date.

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

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

- Days

- Weeks
- Months
- Quarters

Before you confirm a schedule, you can delete items, and edit and change item schedules, if you have function security. After you confirm a schedule at the header level, you can print it and electronically transmit it as an 830 transaction, if your supplier sites support EDI transactions.

Note : You cannot modify a schedule after you confirm it.

Shipping Schedule

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

Before you confirm a schedule, you can delete items, and edit and change item schedules, if you have function security. After you confirm a schedule at the header level, you can print it and electronically transmit it as an 862 transaction, if your supplier sites support EDI transactions.

Note : You cannot modify a schedule after you confirm it.

Simulation Schedules

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

Comparison: Schedule Types

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

Comparison: Schedule Subtypes

| Schedule Type | Subtype (Type) | Description |
|---------------|------------------|--|
| Planning | Forecast All | <p>Conveys all quantities as forecast information</p> <p>Includes quantities taken from approved releases, approved requisitions, and unimplemented MRP/MPS/DRP planned orders.</p> <p>Can include supply agreement releases.</p> <p>Shows past due requirements.</p> <p>Conveys firm requirements when used with the shipping schedule.</p> |
| Planning | Forecast Only | <p>Conveys forecast information only.</p> <p>Includes quantities taken from approved requisitions and unimplemented MRP/MPS/DRP planned orders.</p> <p>Does not include supply agreement releases.</p> <p>Does not show past due requirements.</p> <p>Conveys firm requirements when used with the shipping schedule; however, do not use forecast only for organizations that have CUM-based forecasts.</p> |
| Planning | Material Release | <p>Conveys firm requirements taken from approved releases of blanket purchase agreements that are identified as supply agreements.</p> <p>Conveys forecast quantities.</p> <p>Includes authorizations for each supplier item, if specified.</p> <p>Shows past due requirements.</p> <p>May not require a business requirement for the shipping schedule.</p> |
| Planning | Material Release | <p>Conveys firm requirements taken from approved releases of blanket purchase agreements that are identified as supply agreements.</p> |
| Shipping | Release Only | <p>Conveys firm quantities only.</p> <p>Derives requirements from approved supply agreement releases.</p> <p>Shows past due requirements.</p> |

See Also

Building New Schedules Manually on page 3-3.

Building Revision Schedules on page 3-18.

Building Revision Schedules on page 3-20.

Confirming Schedules on page 3-29.

EDI Transactions on page 8-2.

Planned Orders for MRP/MPS/DRP on page 3-24

Locating/Reviewing Existing Schedules on page 3-7.

Planned Orders for MRP/MPS/DRP on page 3-24.

Resource Authorizations on page 2-13.

Reviewing Schedule Headers and Items on page 3-27.

Schedule Orders on page 3-15.

View Authorizations on page 3-13.

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

- Overview of Setting Up on page 2-2.
- Related Product Setup Steps on page 2-2.
- Setup Flowchart on page 2-3.
- Setup Checklist on page 2-4.
- Setup Steps on page 2-4.
- Functional Security on page 2-6.
- Defining Approved Supplier Statuses on page 2-6.
- Bucket Patterns on page 2-8.
- Defining Bucket Patterns on page 2-9.
- Defining Supplier Scheduling Options on page 2-11.
- Resource Authorizations on page 2-13.
- Enabling Resource Authorizations in the Approved Supplier List on page 2-16.

Overview of Setting Up

This section contains an overview of each step you need to complete to set up Oracle Supplier Scheduling. For instructions on how to complete each task, see the setup sections indicated in each step.

See Also

Implementation Wizard, Oracle Applications Implementation Wizard User's Guide

Related Product Setup Steps

You must complete the prerequisite listed below before setting up Supplier Scheduling.

Set up Oracle Purchasing. See Oracle Purchasing User's Guide.

Attention: Make sure you define the following periods in Oracle Purchasing.

- Open and Close
 - Control Purchasing
-
-

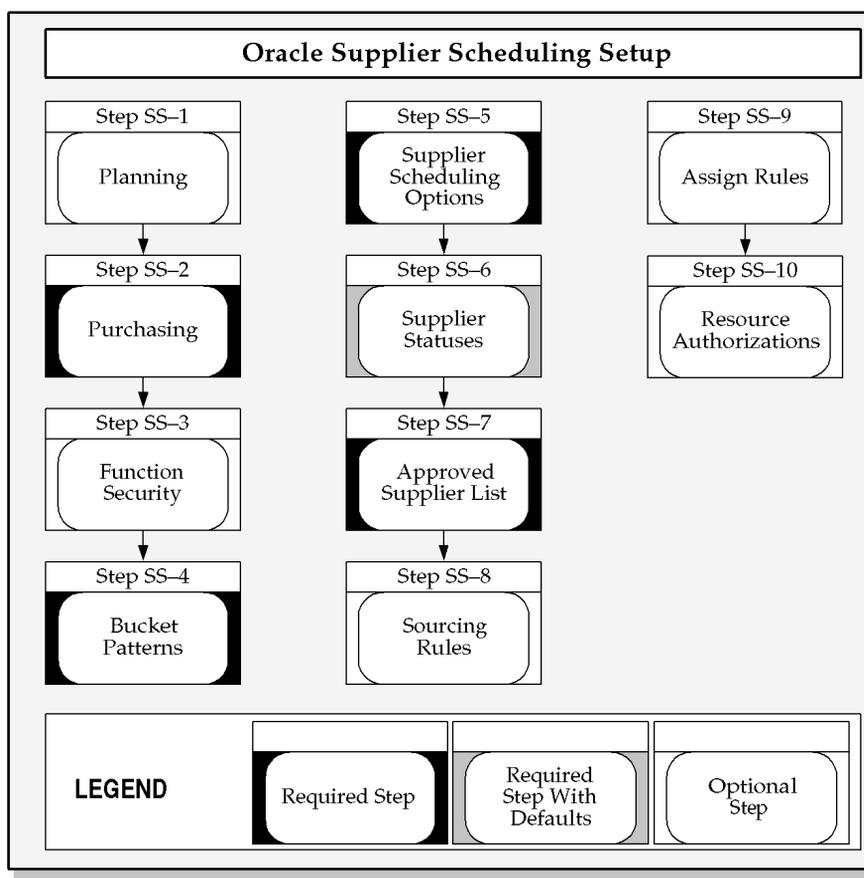
See Also

Oracle Applications System Administrator's Guide

Oracle Workflow Guide

Setup Flowchart

The following flowchart contains setup steps for Oracle Supplier Scheduling. Some of the steps outlined in this flowchart and setup checklist are Required and some are Optional. Required Step With Defaults refers to setup functionality that comes with pre-seeded, default values in the database; however, you should review those defaults and decide whether to change them to suit your business needs. If you want or need to change them, you should perform that setup step. You need to perform Optional steps only if you plan to use the related feature or complete certain business functions.



Setup Checklist

The following table lists setup steps for Supplier Scheduling. Each of these steps are described in more detail in the Setup Steps.

| Step No. | Required | Step |
|----------|------------------------|--|
| Step 1 | Optional | Set Up Oracle Master Scheduling/MRP and Oracle Supply Chain Planning |
| Step 2 | Required | Set Up Oracle Purchasing |
| Step 3 | Optional | Functional Security |
| Step 4 | Required | Define Bucket Patterns |
| Step 5 | Required | Define Supplier Scheduling Options |
| Step 6 | Required with Defaults | Define Approved Supplier Statuses |
| Step 7 | Required | Set Up Your Approved Supplier List in Oracle Purchasing |
| Step 8 | Optional | Define Sourcing Rules |
| Step 9 | Optional | Assign Sourcing Rules |
| Step 10 | Optional | Resource Authorizations |

Setup Steps

Step 1. Set up Oracle Master Scheduling/MRP and Oracle Supply Chain Planning (Optional)

This step involves the following tasks:

- Set up one of the following:
 - Master Resource Planning
 - Supply Chain Planning
- Run your MRP/MPS/DRP plans.

See Oracle Master Scheduling/MRP and Oracle Supply Chain Planning.

Step 2. Set up Oracle Purchasing (Required)

See Oracle Purchasing.

Attention: Make sure you define the following periods in Oracle Purchasing.

- Open and Close
 - Control Purchasing
 - Inventory Accounting
-
-

Step 3. Function Security (Optional)

For information on Function Security, Oracle Purchasing User's Guide.

Step 4. Define Bucket Patterns (Required)

See Bucket Patterns on page 2-8.

See Defining Bucket Patterns on page 2-9.

Step 5. Define Supplier Scheduling Options (Required)

See Defining Supplier Scheduling Options on page 2-11.

Step 6. Define Approved Supplier Statuses (Required with Defaults)

See Functional Security on page 2-6.

Step 7. Set Up Your Approved Supplier List in Oracle Purchasing (Required)

- Set up your Approved Supplier List.
- Set up your Supplier Scheduling attributes.

For more information on the approved supplier list, see Approved Supplier List, Oracle Purchasing User's Guide.

Step 8. Define Sourcing Rules (Optional)

See MRP.

Step 9. Assign Sourcing Rules (Optional)

See MRP.

Step 10. Resource Authorizations (Optional)

See Resource Authorizations on page 2-13.

Functional Security

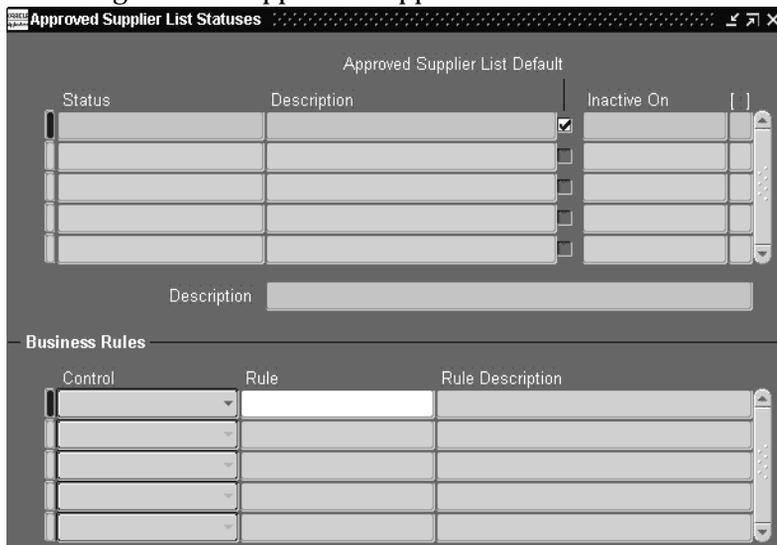
See Function Security, Oracle Purchasing.

Defining Approved Supplier Statuses

You can create any number of approved supplier statuses to describe the condition of the approved supplier. Each approved supplier status can have business rules applied to manage the characteristics of the status. For example, the default status of Approved allows all the default business rules: PO Approval, Sourcing, Schedule Confirmation, and Manufacturer Linking. You can also create your own status with your own combination of business rules.

►► To define approved supplier statuses:

1. Navigate to the Approved Supplier List Statuses window.



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

5. This is the status that appears as the default for suppliers you add to the Approved Supplier List window. (You can change a supplier's status from within the Approved Supplier List window.)

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

6. Optionally, choose a date for Inactive On to set the time when the status will no longer be active.

If you choose to apply Business rules to the Approved Supplier Status, choose a Control. By choosing a Control, you either Allow or Prevent the Business Rule.

7. Select a Business Rule.
 - PO Approval - Enables you to allow or prevent purchase order approvals sourced to this supplier.
 - Sourcing - Enables you to allow or prevent sourcing to this supplier.
 - Schedule Confirmation - Enables you to allow or prevent schedule information for this supplier in Supplier Scheduling.
 - Manufacturer Link - In the Approved Supplier List window, you choose a Business from one of the following: Direct (Supplier)
8. Save your work.

See Also

Defining Approved Supplier Statuses, Oracle Purchasing User's Guide.

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

Bucket Patterns

You can define variable bucket patterns to use when building planning and shipping schedules and generating the Supplier Scheduling Requirements report. Bucket patterns are comprised of up to 56 buckets of the following intervals:

- Days
- Weeks
- Months
- Quarters

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

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

Note: Buffer buckets do not count towards the maximum number of bucket patterns.

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

When you build a schedule, using the Scheduler's Workbench and include future releases, the schedule will have an additional bucket labeled Future. The Future bucket includes approved releases dated after the schedule horizon end. This bucket does not appear on the printed schedule or the electronic transaction; however, the contents of the bucket can be reviewed and rescheduled to fit within the horizon. See: Defining Bucket Patterns on page 2-9.

- In **Begin Weeks On**, select the day of the week you want your weekly schedule to begin on.
If you entered a nonzero bucket count in **Weeks**, you must specify the day of the week on which all weekly intervals will begin.
 - In **Inactive On**, enter a disable date to prevent future use of this bucket pattern for schedule generation and reporting.
6. Save your work.

See Also

Bucket Patterns on page 2-8

Defining Supplier Scheduling Options

For each ship-to organization, you must define CUM management parameters. You also select defaults for schedule types, bucket patterns, and the MRP/MPS/DRP plan. These defaults are used in the AutoSchedule process. You can change these defaults when you build schedules manually.

To define supplier scheduling options:

1. Navigate to the Supplier Scheduling Options window.

2. Select the Ship-To Organization code.

You can select Enable CUM Management, if you want to enable CUM tracking for all approved supplier list items in the ship-to organization you specified.

You can select RTV Updates CUM, if you want Return to Supplier (RTV) transactions and their associated RTV corrections automatically included in the CUM calculation.

3. Select a default planning schedule type.
4. Select a default shipping schedule type.
5. *Release Only*: includes approved supply agreement releases
6. *Release With Forecast*: includes release and forecast quantities
7. Select a default planning bucket pattern.
8. Select a default shipping bucket pattern.

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

See Also

Bucket Patterns on page 2-8.

CUM Management on page 5-1.

Defining Bucket Patterns on page 2-9.

Resource Authorizations

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

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

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

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

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

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

You can enable authorizations in the approved supplier list by selecting Enable Authorizations, and then associating up to four authorization lookup codes with individual time fences to the supplier site/item combination.

Example

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

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

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

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

The following data applies to this supplier site/item:

| Current CUM Received | 2500 | |
|-----------------------------|-----------------|-----------------|
| Blanket Releases: | Due Date | Quantity |
| BO 100 - rel 09 | 3/10/96 | 100 |
| | 3/17/96 | 100 |
| | 3/20/96 | 100 |
| | 3/23/96 | 100 |
| | 3/27/96 | 100 |
| | 3/29/96 | 100 |
| | 4/03/96 | 100 |
| | 4/08/96 | 200 |
| BO 100 - rel 10 | 4/13/96 | 100 |
| | 4/17/96 | 100 |
| | 4/20/96 | 100 |
| Requisition A | 5/01/96 | 100 |
| | 5/03/96 | 200 |
| Requisition B | 5/10/96 | 100 |
| | 5/12/96 | 100 |
| MRP Order | 5/15/96 | 100 |
| | | |

If you are tracking CUMs, the result is the following:

| | |
|-------------------------|-------------|
| Authorization 1: | 2900 |
| Authorization 2: | 3400 |

If you are not tracking CUMs, the result is:

| | |
|-------------------------|------------|
| Authorization 1: | 400 |
| Authorization 2: | 900 |

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

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

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

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

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

See Also

Function Security, Oracle Purchasing User's Guide.

Enabling Resource Authorizations in the Approved Supplier List

Use the Supplier Scheduling tab to enable resource authorizations in the approved supplier list.

►► To enable resource authorizations in the approved supplier list:

1. Navigate to the Approved Supplier List window.

The screenshot shows the 'Approved Supplier List' window. At the top, there is a table with columns: Type (dropdown menu), Commodity, Item, and Description. Below this table is a section titled 'Suppliers' with three tabs: 'Key Attributes', 'Record Details', and 'Comments'. The 'Key Attributes' tab is selected, displaying a table with columns: Business, Supplier, Site, Status, Disabled (checkbox), Supplier Item, and Manufacturer. At the bottom right of the window, there is an 'Attributes' button.

2. Query your item or select an item.
For the item, select the supplier/site combination that you need to enable AutoSchedule. Then place your cursor anywhere in the record, so that you can select the Attributes button.
3. Click the Attributes button.
4. The Supplier-Items Attribute window appears.
5. Select the Supplier Scheduling tab.
6. Select Enable Authorizations.
7. Select a Sequence, Authorization, and Cutoff Days.
8. Click Save.

Scheduler's Workbench

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

- Overview of Scheduler's Workbench on page 3-2
- Building New Schedules Manually on page 3-3
- Locating/Reviewing Existing Schedules on page 3-7
- View Authorizations on page 3-13
- Schedule Orders on page 3-15
- Building Revision Schedules on page 3-18
- Building Simulation Schedules on page 3-20
- Planned Orders for MRP/MPS/DRP on page 3-24
- Reviewing Schedule Headers and Items on page 3-27
- Rebuilding Schedules on page 3-28
- Confirming Schedules on page 3-29
- Printing Schedules on page 3-32

Overview of Scheduler's Workbench

You can use the Scheduler's Workbench to build, view, edit, print, and confirm planning, shipping, and simulation schedules, using a wide variety of find or build criteria.

With the Scheduler's Workbench, you can perform the following tasks:

- Build New Schedules Manually
- Locate/Review Existing Schedules
- Schedule Orders
- View Authorizations
- Build Revision Schedules
- Build Simulation Schedules
- MRP/MPS/DRP Plan Name Fields
- Review Schedule Headers and Items
- Rebuild Schedules
- Confirm Schedules
- Print Schedules

Note: You will not see items on the Scheduler's Workbench, if they are a discrete subassembly or a buy item.

Building New Schedules Manually

Unstable items that are procured from a new supplier that need more control over inputs (require review or modification before submitting to a supplier) are good candidates for building schedules manually.

By contrast, stable items with consistent demand to a reliable supplier are good candidates for AutoSchedule because they often don't require review or modification before submitting to the supplier. For more information on AutoSchedule, see Overview of AutoScheduling on page 4-2.

►► To build a new schedule manually:

1. Navigate to the Find Supplier Schedules window.

2. Select the Build option button to display the Build Supplier Schedules window.
3. Select the New option button.
4. To enable multi-org schedules, check Multi-Org.

Attention: This feature is only available for planning:

5. In Schedule, select one of the following types:

Planning - Multi-Org is available only for planning schedules.

Shipping

6. In Type, select a schedule subtype.
7. Select a Bucket Pattern.

You can check "Include Future Releases", if you want to include releases beyond the schedule horizon.

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

8. Select a horizon start date.

The bucket pattern applicable for the supplier site will be used to calculate bucket dates and the schedule horizon date. Requirements that are dated earlier will be indicated as past due if they are from a blanket release, or ignored if they are from MRP planned orders or purchase requisitions.

If you are building a planning schedule or a shipping schedule that includes forecast, select at least one of the following plans:

- MRP Plan
- MPS Plan
- DRP Plan

Note: You must select a MRP, MPS, or DRP plan name.

9. Select a Ship-To organization.

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

You can select the following building criteria:

- Supplier name

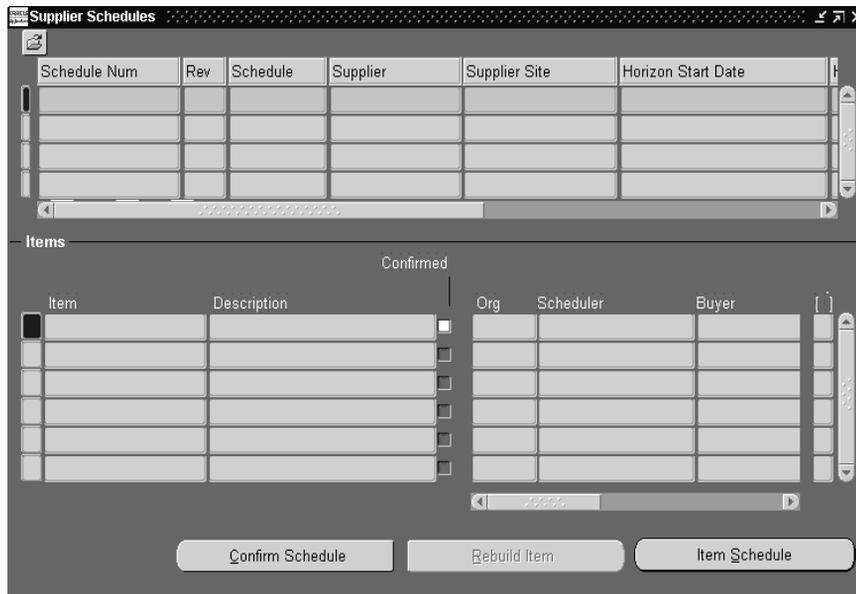
- Supplier Site code
- Category Set, which includes category sets from the PO item master organization.
- Category, which includes all categories for the selected category set and all items associated with the specified category.
- Item name
- Description of the item
- Scheduler's name. You must enter a scheduler's name to build a schedule manually.

Attention: If the enabling planning schedules, enable shipping schedules, and enable AutoSchedule are selected, you will not be able to build schedules manually. Uncheck these schedules to build a schedule manually.

Attention: To run a planning AutoSchedule, you must enter the scheduler's name. The scheduler's name must match the scheduler's name in the ASL Supplier Schedule option because the AutoSchedule name is tied to the ASL's scheduler's name in Purchasing.

- Buyer name
 - Planner name
10. Choose Build.

The Supplier Schedules window is displayed.



Use this window to view, edit, and confirm your schedule.

11. Choose Clear to clear all current build criteria.

See Also

- Building New Schedules Manually on page 3-3.
- Confirming Schedules on page 3-29.
- EDI Transactions on page 8-2.
- Locating/Reviewing Existing Schedules on page 3-7.
- Rebuilding Schedules on page 3-28.
- Reviewing Schedule Headers and Items on page 3-27.
- Resource Authorizations on page 2-13.
- View Authorizations on page 3-13.

Locating/Reviewing Existing Schedules

Use the Find Suppliers window to locate and review existing schedules.

►► To locate and review existing schedules:

1. Navigate to the Find Supplier Schedules window.

2. Select the Find option button.

You can select any of the following search criteria:

- Schedule Number, Revision, and Name
- Select one of the following schedule statuses:
 - In Process*
 - Confirmed*
- Select one of the following schedule types:
 - Planning*
 - Shipping*
- Schedule subtype

- Schedule owner name
 - Ship-To Organization
 - Simulation Schedule
 - Supplier name
 - Supplier Site code
 - Category Set
 - Category
 - Item category for the category set you selected
 - Item Description
 - Scheduler name
 - Buyer name
 - Planner name
 - Select from the following line item statuses:
 - In Process*
 - Confirmed*
 - Select a Creation from and Creation to Date
Schedules are retrieved from those created within the specified create date range.
 - Select a horizon date
Schedules are retrieved from those that have a horizon start date, which falls within the specified horizon start date range.
 - Select a MRP, MPS, or DRP Plan
3. Choose Find to query existing schedules.
If the query displays schedules that are not yet confirmed, they will be available for editing and confirmation only if you have functional security to perform these tasks.
 4. Choose Clear to clear all current search criteria.

Reviewing Item Schedules

Use the Item Schedule window to view the bucketed requirements and calculated authorization quantities for the current item within the schedule horizon start and end dates. This window reflects the bucket pattern applied at the time the schedule was built.

►► To review item schedules:

1. Navigate to the Item Schedule window.

The screenshot shows the 'Item Schedule' window. The top section contains reference information for the current item, including:

- PO UOM
- Last Receipt Qty
- Last Receipt Date
- Last Receipt Num
- Last Shipment Num
- CUM Received
- Primary UOM
- Lead Time
- Minimum Order Qty
- Maximum Order Qty
- Fixed Lot Multiple

Below this is a section titled 'Schedule Quantities' which contains a table with 5 columns and 5 rows. The rows are labeled 'Release', 'Forecast', 'Bucket Total', and 'CUM'. The 'Release' row has a small vertical bar on the left side. At the bottom of the window, there are two buttons: 'Authorizations' and 'Orders'.

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

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

- Minimum Order Qty
- Maximum Order Qty
- Fixed Lot Multiple

In Schedule Quantities the following information is included:

- Release
- Forecast
- Bucket Total
- CUM

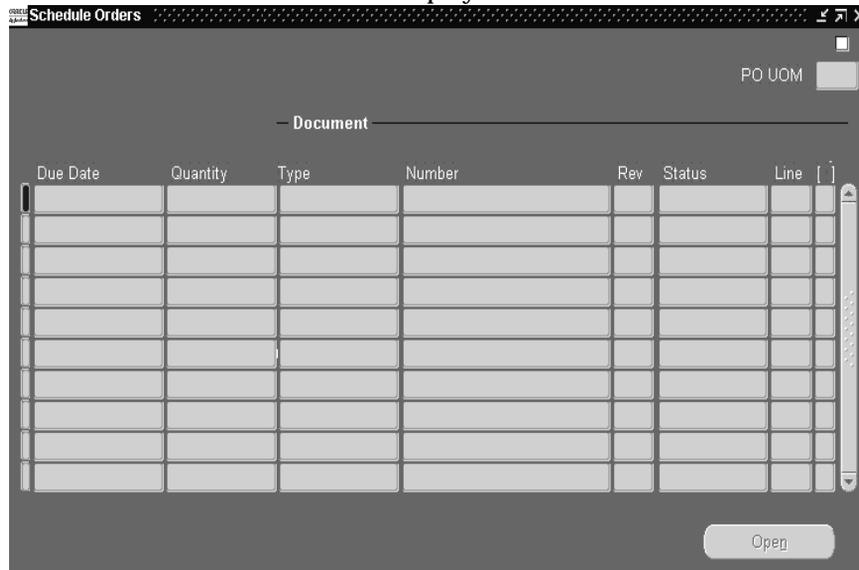
▶▶To view orders for a quantity bucket:

1. Choose the Orders button or double-click a quantity bucket.

Note: You must select a MRP, MPS, or DRP plan name. Past due quantity never includes forecast quantity. Any forecast shipment quantity that is dated before the schedule horizon start date is ignored during the schedule build and is not visible in the Schedule Orders window.

Note: If you selected the Include Future Release, an additional bucket is included at the end of the horizontal plan, which shows approved releases that are dated after the schedule horizon end date (forecasts are not shown). These releases will be included in the Orders window.

The Schedule Orders window is displayed.



You can use this window to perform the following tasks:

- View the complete list of individual source documents containing requirements for the current item's bucketed schedule.
- View only the current bucket's individual source documents containing requirements for the item when you drill-down from a specific bucket.
- Make changes to the approved blanket release by opening the Releases window in Oracle Purchasing by choosing the Open button. After you have reappraised the release, you can return to the Supplier Schedules window and rebuild the schedule, which will then consider the changes.

Attention: You cannot change requisitions, MRP/MPS planned orders, or unapproved releases. This option is subject to function security, schedule type, and schedule status.

▶▶To view Authorizations:

1. Choose the Authorizations button.

The Authorizations window is displayed.

See Also

Building New Schedules Manually on page 3-3.

Building Revision Schedules on page 3-18.

Building Simulation Schedules on page 3-20.

Confirming Schedules on page 3-29.

EDI Transactions on page 8-2.

Locating/Reviewing Existing Schedules on page 3-7.

Planned Orders for MRP/MPS/DRP on page 3-24.

Rebuilding Schedules on page 3-28.

Reviewing Schedule Headers and Items on page 3-27.

Resource Authorizations on page 2-13.

Schedule Orders on page 3-15.

View Authorizations on page 3-13.

View Authorizations

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

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

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

Authorization

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

UOM

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

Quantity

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

Days

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

Date

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

- Authorization cutoff date cannot exceed the schedule horizon end date

- Authorization cutoff date cannot exceed the current CUM period if the ship-to organization maintains CUMs.

See Also

Building New Schedules Manually on page 3-3.

Building Revision Schedules on page 3-18.

Building Simulation Schedules on page 3-20.

Confirming Schedules on page 3-29.

EDI Transactions on page 8-2.

Locating/Reviewing Existing Schedules on page 3-7.

Planned Orders for MRP/MPS/DRP on page 3-24.

Rebuilding Schedules on page 3-28.

Reviewing Schedule Headers and Items on page 3-27.

Resource Authorizations on page 2-13.

Schedule Orders on page 3-15.

View Authorizations on page 3-13.

Schedule Orders

Use the Schedule Orders window to complete the following tasks:

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

PO UOM

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

Order Quantity

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

Due Date

Displays the source document due date.

Document Type

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

Planned Order - unimplemented planned order resulting from the most recent MRP or MPS plan which has been assigned to this schedule because this supplier site is the primary supplier to the ship-to organization on the current schedule.

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

Release - approved release of a supply agreement blanket order specified in the approved supplier list documents sourced to this supplier site. Approved releases are applied to the release quantity

Document Number

Displays the document number if the source document type is requisition or release. Planned orders do not have a source document number.

Document Revision

Displays the document revision if the source document type is release. This field is not relevant for requisitions or planned orders.

Document Status

Displays the document status if the source document type is requisition or release. This field is not relevant for planned orders.

Document Line

Displays the document line number if the source document type is release or requisition. This field is not relevant for planned orders.

Recalculate/redisplay authorizations

See Also

Building New Schedules Manually on page 3-3.

Building Revision Schedules on page 3-18.

Building Simulation Schedules on page 3-20.

Confirming Schedules on page 3-29.

EDI Transactions on page 8-2.

Locating/Reviewing Existing Schedules on page 3-7.

Planned Orders for MRP/MPS/DRP on page 3-24.

Rebuilding Schedules on page 3-28.

Reviewing Schedule Headers and Items on page 3-27.

Resource Authorizations on page 2-13.

Schedule Orders on page 3-15.

View Authorizations on page 3-13.

Attention: The status of the selected DRP Plan is very important. You must complete all planning tasks of the selected DRP Plan before you build a schedule. The forecast requirements may be inaccurate if several days have passed since the DRP Plan was launched

Building Revision Schedules

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

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

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

▶▶ To build a revision schedule:

1. Navigate to the Find Supplier Schedules window.

2. Select the Build option button.
3. Select the Revision option button.
4. Select a Schedule Number and Revision.

Attention: You must enter the Schedule Number of the schedule you want to revise.

5. Choose Build.

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

6. Choose Clear to clear all current build criteria.

See Also

Building New Schedules Manually on page 3-3.

Building Revision Schedules on page 3-18.

Building Simulation Schedules on page 3-20.

Confirming Schedules on page 3-29.

EDI Transactions on page 8-2.

Locating/Reviewing Existing Schedules on page 3-7.

Planned Orders for MRP/MPS/DRP on page 3-24

Rebuilding Schedules on page 3-28.

Reviewing Schedule Headers and Items on page 3-27.

Resource Authorizations on page 2-13.

Schedule Orders on page 3-15.

View Authorizations on page 3-13.

Building Simulation Schedules

You can use simulation schedules to review selected scheduling data that reflect the most current receipt and past due quantities by supplier site without actually building a planning or shipping schedule. You have the option to assign a schedule number to the simulation schedule. You can also save these schedules and retrieve them later.

►► To build a simulation schedule:

1. Navigate to the Find Supplier Schedule window.

2. Select the Build option button.
The Build Supplier Schedules window appears.
3. Select the Simulation option button.
Check Multi-Org, if you want the schedule to include multiple organizations.
4. In Schedule, select one of the following types:
 - Planning*
 - Shipping*
5. In Type, select a schedule subtype.
6. Select a Bucket Pattern.

You can check **Include Future Releases**, if you want to include releases beyond the schedule horizon.

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

7. Select a Horizon Start Date.

The bucket pattern applicable for the supplier site will be used to calculate bucket dates and the schedule horizon date. Requirements that are dated earlier will be indicated as past due if they are from a blanket release, or ignored, if they are from MRP planned orders or purchase requisitions.

If you are building a planning schedule, or a shipping schedule that includes forecast, select at least one of the following:

- MRP Plan
- MPS Plan
- DRP Plan

8. Select a Ship-To organization.

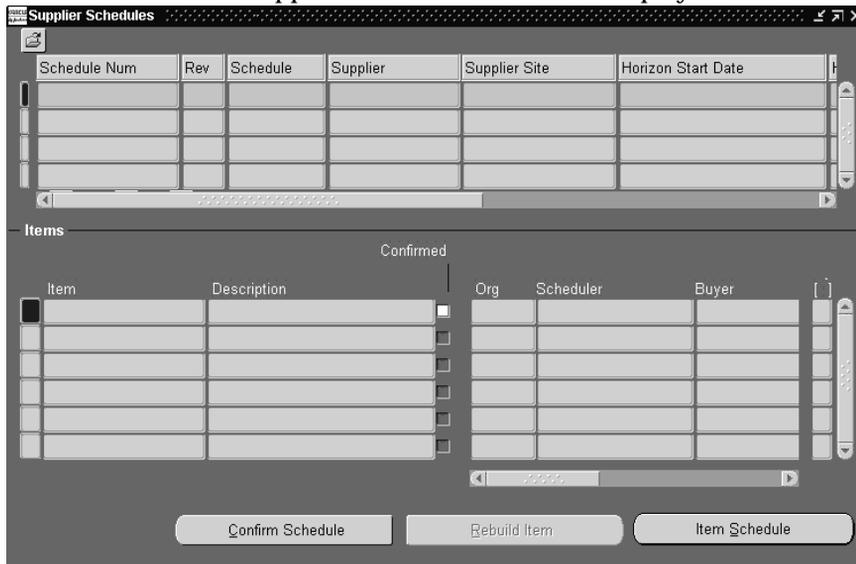
If you check the **Multi-Org** option, when you choose the build button, the **Ship-To Organizations** window opens, and you can check **Include** for any of the displayed organizations. These are organizations for which MRP/MPS/DRP plans have been defined.

9. Optionally, select the following:

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

- Buyer name
- Planner name

10. Choose Build. The Supplier Schedules window is displayed



Use this window to view, edit, and confirm your schedule.

11. Choose Clear to clear all current build criteria.

See Also

- Building New Schedules Manually on page 3-3.
- Building Revision Schedules on page 3-18.
- Building Simulation Schedules on page 3-20.
- Confirming Schedules on page 3-29.
- EDI Transactions on page 8-2
- Locating/Reviewing Existing Schedules on page 3-7.
- Planned Orders for MRP/MPS/DRP on page 3-24
- Rebuilding Schedules on page 3-28.
- Reviewing Schedule Headers and Items on page 3-27.
- Resource Authorizations on page 2-13.

Schedule Orders on page 3-15.

View Authorizations on page 3-13.

Planned Orders for MRP/MPS/DRP

You can extract unimplemented planned orders for MRP, MPS, or DRP plan name from their planned items that will be include in the schedules you will be building.

MRP Plan Name

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

This field is relevant only if you are building a planning schedule or shipping schedule with a subtype of release and forecast. The planned orders recommended by this MRP plan will be used when building the schedule for MRP Planned items only.

If you are building a shipping schedule with the subtype release only, this field is irrelevant because unimplemented MRP planned orders are not used.

If you are building a shipping schedule with the subtype release and forecast, the same MRP plan should be used to generate both the planning and the shipping schedule.

You can master schedule raw material with long lead times. You should begin Supplier Scheduling processing after you complete the MRP launch so that all master scheduled item requirements are included in the MRP recommendations.

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

Attention: If you are planning for a single organization in the Supplier Scheduling Options window and you do not select an MRP plan in the Scheduler's Workbench, Supplier Scheduling defaults to the plan specified for your organization. If the plan is no longer valid, Supplier Scheduling defaults to NULL.

MPS Plan Name

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

This field is relevant only if you are building any planning or shipping schedule with a subtype of "Release and Forecast". The planned orders recommended by this MPS plan will be used when you are building a schedule for MPS planned items only.

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

If you are building a shipping schedule with the subtype "Release and Forecast", you should use the same MPS Plan to generate both the planning and shipping schedules to ensure consistent reporting of requirements to the supplier.

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

Attention: If you are planning for a single organization in the Supplier Scheduling Options window and you do not select an MPS plan in the Scheduler's Workbench, Supplier Scheduling defaults to the plan specified for your organization. If the plan is no longer valid, Supplier Scheduling defaults to NULL.

DRP Plan Name

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

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

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

If you select a shipping schedule with the a subtype "Release and Forecast", the DRP Plan should be used to generate both the planning and shipping schedules.

Attention: You can master schedule raw material with long lead times. You must complete Supplier Scheduling processing after the DRP launch is completed so that all master scheduled item requirements are included in the DRP recommendations.

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

See Also

Building New Schedules Manually on page 3-3.

Building Revision Schedules on page 3-18.

Building Simulation Schedules on page 3-20.

Confirming Schedules on page 3-29.

EDI Transactions on page 8-2.

Locating/Reviewing Existing Schedules on page 3-7.

Planned Orders for MRP/MPS/DRP on page 3-24

Rebuilding Schedules on page 3-28.

Reviewing Schedule Headers and Items on page 3-27.

Resource Authorizations on page 2-13.

Schedule Orders on page 3-15.

View Authorizations on page 3-13.

Reviewing Schedule Headers and Items

►► To review schedule headers and items:

1. Navigate to the Find Supplier Schedules window.

2. Enter your search criteria.
3. Select the Find option button.

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

4. Navigate to the Items block to view the items associated with the schedule. Items must match the search criteria for the Find.
5. Click the drill down indicator in the Items block or choose the Schedule button to view the horizontal, bucketed item schedule.

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

Rebuilding Schedules

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

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

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

►► To rebuild a schedule:

1. Navigate to the Workbench window.

The screenshot shows the 'Find Supplier Schedules' window with the following fields and options:

- Buttons: Find (selected), Build
- Radio buttons: New, Revision (selected), Simulation
- Checkbox: Multi-Org
- Dropdown: Schedule
- Text fields: Type, Number, Rev
- Text fields: Bucket Pattern, Horizon Start
- Checkbox: Include Future Releases
- Text fields: MRP Plan, Ship-To Org, MPS Plan, DRP Plan
- Text fields: Supplier, Site
- Text fields: Category Set, Category
- Text fields: Scheduler, Planner, Buyer
- Buttons: Clear, Find

2. Retrieve the schedule for the item requirement that you want rebuild, using the Find option in the Build Supplier Schedule's window.
3. In the items region, select the item that you want to rebuild by putting your cursor anywhere in the record.
4. Click Rebuild Item.

See Also

Building New Schedules Manually on page 3-3.

Building Revision Schedules on page 3-18.

Building Simulation Schedules on page 3-20.

Confirming Schedules on page 3-29.

EDI Transactions on page 8-2.

Locating/Reviewing Existing Schedules on page 3-7.

Planned Orders for MRP/MPS/DRP on page 3-24

Rebuilding Schedules on page 3-28.

Reviewing Schedule Headers and Items on page 3-27.

Resource Authorizations on page 2-13.

Schedule Orders on page 3-15.

View Authorizations on page 3-13.

Confirming Schedules

You can review and confirm new and revision schedules. You cannot confirm simulation schedules.

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

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

You cannot edit or delete a confirmed schedule.

The confirmed status is similar to a purchase order approval, and implies that the schedule is accurate and approved for distribution to the supplier.

All new planning and shipping schedules are created with a header and line item status of "In Process". As you complete the confirmation process, the status is changed to "Confirmed".

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

If authorizations are enabled for any item and CUM Management is enabled for the ship-to organization, the highest authorization within the current CUM period is evaluated when the schedule, not the item, is confirmed.

Confirming Schedule Headers at the Header Level

►► To confirm a schedule at the header level:

1. Place your cursor in the Supplier Schedules header listing.
2. Choose the Confirm Schedule button.

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

Confirming Schedule Line Items at the Item Level

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

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

1. Navigate to the Items block of the Supplier Schedules window or to the Item Schedule window.

The screenshot shows the 'Item Schedule' window with the following fields and table:

| | | | |
|-------------------|----------------------|--------------------|----------------------|
| PO UOM | <input type="text"/> | Primary UOM | <input type="text"/> |
| Last Receipt Qty | <input type="text"/> | Lead Time | <input type="text"/> |
| Last Receipt Date | <input type="text"/> | Minimum Order Qty | <input type="text"/> |
| Last Receipt Num | <input type="text"/> | Maximum Order Qty | <input type="text"/> |
| Last Shipment Num | <input type="text"/> | Fixed Lot Multiple | <input type="text"/> |
| CUM Received | <input type="text"/> | | |

| Schedule Quantities | | | | | |
|---------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| Release | <input type="text"/> |
| Forecast | <input type="text"/> |
| Bucket Total | <input type="text"/> |
| CUM | <input type="text"/> |

At the bottom of the window, there are two buttons: 'Authorizations' and 'Orders'.

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

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

2. Choose the Confirm Items button in the Supplier Schedules window, and respond to the action verification.

You cannot print at the same time that you confirm individual items; you can print and confirm at the same time only when you are confirming the header.

See Also

Building New Schedules Manually on page 3-3.

Building Revision Schedules on page 3-18.

Building Simulation Schedules on page 3-20.

Confirming Schedules on page 3-29.

EDI Transactions on page 8-2

Locating/Reviewing Existing Schedules on page 3-7.

Planned Orders for MRP/MPS/DRP on page 3-24.

Rebuilding Schedules on page 3-28.

Reviewing Schedule Headers and Items on page 3-27.

Resource Authorizations on page 2-13.

Schedule Orders on page 3-15.

View Authorizations on page 3-13.

Printing Schedules

You can print a schedule at the same time that you confirm it.

►► To print a schedule at the same time that you confirm it .

1. Navigate to the Build Suppliers Schedule window.

2. Select Find to search for the schedule to print.

The Supplier Schedules window opens.

3. Click Confirm Schedule

The Confirm Schedule window is displayed.

If you have already confirmed the schedule in a previous step and want only to print the schedule, select Print Schedule from the Tools menu.

4. Select Print Schedule.
5. Click Ok.

See Also

Reports and Processes on page 7-1.

AutoScheduling

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

- Overview of AutoScheduling on page 4-2
- Enabling AutoSchedule in the Approved Supplier List on page 4-3
- Building a Schedule Using AutoSchedule on page 4-5
- Setting the AutoSchedule Process to Run Reports Automatically on page 4-6

Overview of AutoScheduling

AutoSchedule lets you generate planning and shipping schedules automatically at predefined intervals. You can also run the AutoSchedule concurrent program on demand. Items that you want to schedule, using Autoschedule, must be associated with a supplier site in the ASL and have AutoSchedule enabled. When the AutoSchedule program is run, it generates schedules by supplier site for those items that

- are assigned to the supplier site and have Autoschedule enabled
- meet the build parameters defined when the Autoschedule program runs

AutoSchedule uses the bucket pattern and schedule type assigned in the ASL to build schedules. AutoSchedule can confirm and print the schedule when defining the parameters of the program.

Attention: If you have set up an item for AutoSchedule, you will not be able to build a schedule manually for it with the Scheduler's Workbench, unless you disable it from AutoSchedule.

Attention: If an item is flagged as an AutoSchedule item in the ASL, you can only build its schedule as new (not revised). This restriction prevents double counting of requirements. AutoSchedule items will not be included on new schedules built through the Scheduler's Workbench.

Stable items with consistent demand to a reliable supplier are good candidates for AutoSchedule because they often don't require review or modification before submitting to the supplier.

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

When the planning and shipping AutoSchedule concurrent processes run, either at predefined intervals or on demand, new schedules are generated for those supplier

site/item combinations that have AutoScheduling enabled and that match the AutoSchedule build parameters.

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

Enabling AutoSchedule in the Approved Supplier List

You can manually build schedules through the Scheduler's Workbench or you can build schedules automatically. Enable the AutoSchedule in the Approved Supplier List window to build schedule automatically.

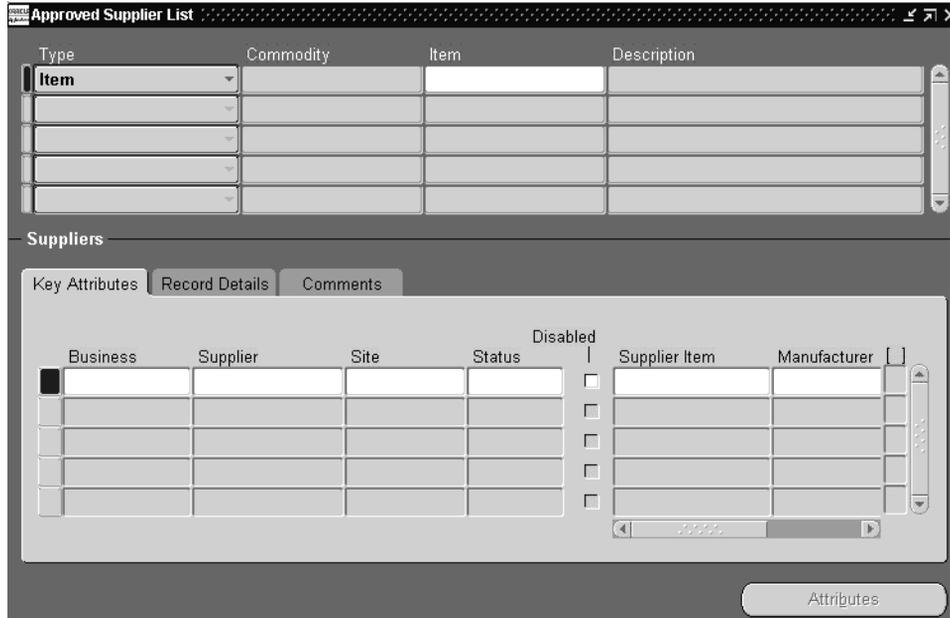
Once you have enabled planning schedules, shipping schedules, and AutoSchedule, you must enter the following information:

- Bucket patterns for planning and shipping (days, weeks, months, or quarters)
- Schedule types (forecast all documents, forecast only, or material planning)

Attention: If you have set up an item for AutoSchedule, you cannot build a schedule manually for it with the Scheduler's Workbench, unless you disable it from AutoSchedule.

▶▶ To enable AutoSchedule in the Approved Supplier List:

1. Navigate to the Approved Supplier List window.



2. Query your item or select an item.
For the item, select the supplier/site combination that you need to enable AutoSchedule. Then place your cursor anywhere in the record, so that you can select the Attributes button.
3. Click the Attributes button.
The Supplier-Items Attribute window appears.
4. Select the Supplier Scheduling tab.
5. Select Enable Planning Schedules or Enable Shipping Schedules.
6. Select Enable AutoSchedule.
7. Enter Plan Bucket Pattern.
8. Enter Ship Bucket Pattern.
9. Enter Plan Schedule Type.
10. Enter Ship Schedule Type.
11. Click Save.

See Also

Bucket Patterns on page 2-8.

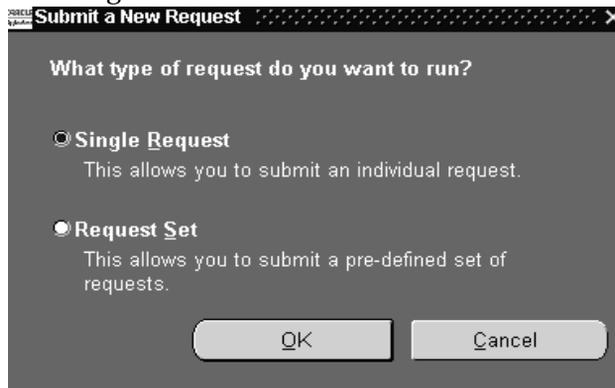
Defining Bucket Patterns on page 2-9.

Building a Schedule Using AutoSchedule

You can create schedules automatically using AutoSchedule.

►► To build a new schedule automatically:

1. Navigate to the Run window.



The Submit a New Request window appears.

2. Select Request from the Type pop-list and click OK.

The Submit Request window appears.

3. From the list of values in the Name field, select Planning AutoSchedule or Shipping AutoSchedule.

4. Enter the schedule criteria in the Parameters window.

The following fields must be completed:

- Ship-to Organization
- MRP Name
- Scheduler

- Owner

Attention: To run a planning AutoSchedule, you must enter the scheduler's name. The Scheduler's name must match the scheduler's name in the ASL Supplier Scheduler option because the AutoScheduler name is tied to the ASL's scheduler's name in Purchasing.

5. Click OK.

Setting the AutoSchedule Process to Run Reports Automatically

You can submit a request to run reports periodically, using AutoSchedule. For more information on running reports periodically, see *Submitting a Request*, Oracle Applications User Guide.

See Also

Overview of AutoScheduling on page 4-2.

Overview of the Approved Supplier List on page 6-2.

Viewing Requests, Oracle Applications User's Guide

CUM Management

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

- Overview of CUM Management on page 5-2
- Reviewing and Adjusting CUM Quantities on page 5-2
- CUM Accounting Transactions on page 5-3
- Enabling CUM Management on page 5-3
- Defining CUM Periods on page 5-4
- Viewing and Adjusting CUM Quantities on page 5-5
- CUM Quantity Tracking on page 5-6

Overview of CUM Management

CUM (cumulative) management lets you track the cumulative quantity received over a given time period for each supplier site/item in a ship-to organization. This time period is called the CUM period and generally relates to a meaningful business time frame like a quarter or model year in the automotive industry.

CUM management is enabled at the organizational level. You can determine, which transactions affect the CUM calculation as well as manually adjust the CUM quantities.

CUM management is enabled in the Supplier Scheduling Options window, where you can also select whether Return to Supplier (RTV) transactions and their associated corrections are included in the CUM calculation.

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

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

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

CUM Periods are defined in the CUM Periods window. See Defining CUM Periods on page 5-4.

Reviewing and Adjusting CUM Quantities

You can review all transactions affecting the CUM for a selected CUM period, supplier site, ship-to organization, and item, and manually change the calculated quantities if necessary.

If an item is received in one CUM period and then returned to the supplier in another CUM period, the return transaction updates the CUM quantity in the period the original receipt took place.

You can view and adjust CUM period quantities in the CUM Period Items window.

An item's transaction history can be reviewed in the CUM History Report. See: CUM History Report.

CUM Accounting Transactions

The CUM calculated is affected by the following transactions:

- receipt and match
- receipt quantity correction
- return to vendor
- return to vendor quantity correction

CUM quantities are automatically increased when a receipt of an item is received into the ship-to organization and matched correctly against the supply agreement blanket release (receipt and match). If a correction to a receipt has been made, this correction also automatically adjusts the CUM Quantity up or down, depending on the type of correction (Receipt Quantity Correction).

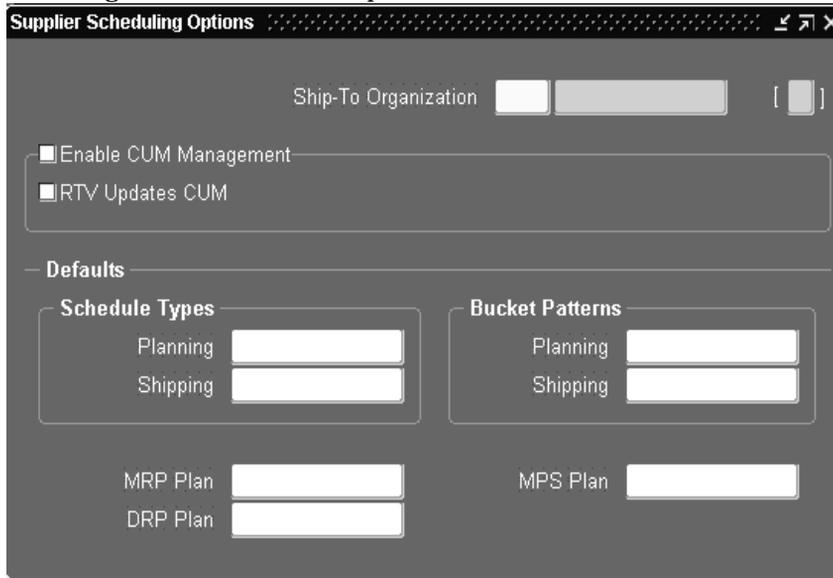
When you set up CUM management, you can determine whether you want Return to Vendor (RTV) transactions to affect the CUM Calculations.

Enabling CUM Management

CUM management is enabled in the Supplier Scheduling Options window, where you can also select whether Return to Supplier (RTV) transactions and their associated corrections are included in the CUM calculation.

►► To enable CUM management .

1. Navigate to the Schedule Options window.



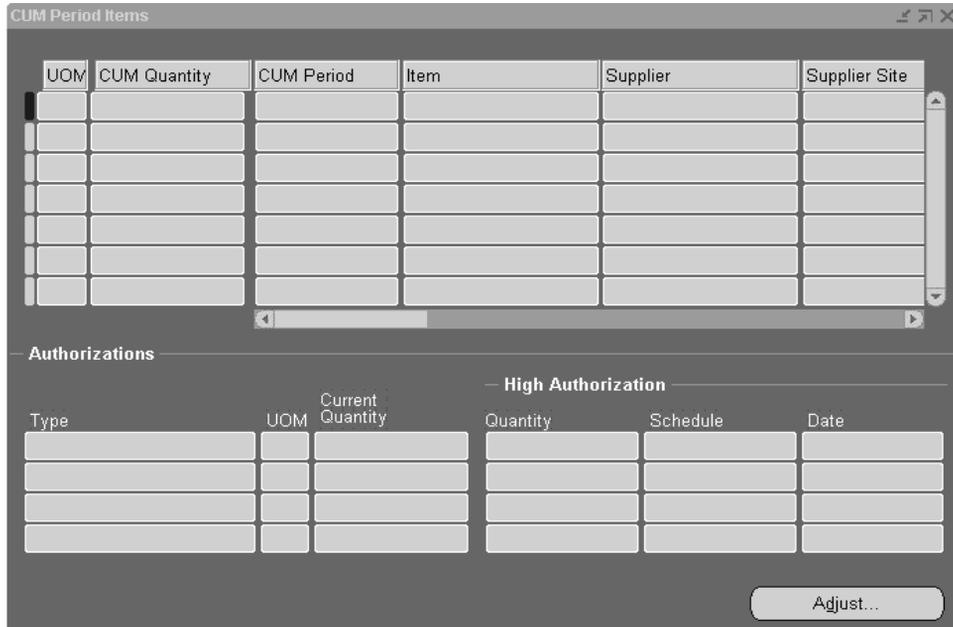
2. Navigate to the code of the ship-to organization.
 - You can select Enable, if you want to enable CUM tracking for all Approved Supplier List items in the ship-to organization you specified.
 - You can select RTV Updates CUM, if you want Return to Supplier (RTV) transactions and their associated RTV corrections automatically included in the CUM calculation.

Defining CUM Periods

Use the CUM Periods window to define your CUM period.

►► To define CUM periods:

1. Navigate to the CUM Periods window by selecting CUM Periods from the menu to open the Find CUM Periods window. Then choose CUM Periods in the Find Results Window region and choose the New button to open the CUM Periods window.



▶▶ To adjust CUM quantities:

To open the Adjust CUM window, choose Adjust in the CUM Period Items window.

CUM Quantity Tracking

If you are tracking CUMs and an authorization cutoff date is later than the end of a CUM Period date, the authorization cutoff date is automatically moved into the CUM period end date. Therefore, the amount of material and labor an organization is liable for to a supplier when tracking CUMs is the past due and future quantities up to the end of the CUM period, or cutoff date, whichever is sooner.

Based on the planning schedule above, the amount of material and labor this ship-to organization is liable for is as follows:

| Authorization Type | Authorization Cutoff Date | Quantity Liable For |
|---------------------------|----------------------------------|----------------------------|
| Finished Goods | November 5 | 42 |
| Labor Materials | November 10 | 46 |
| Labor | November 15 | 52 |
| Raw Materials | November 17 | 52* |

*Assumes there are no receipts November 16-17.

In the example above, the authorization cutoff date for raw materials is November 20 if CUMs were not tracked, but because the CUM end date is November 17, the cutoff date is moved in.

Supply Base Management

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

- Overview of the Approved Supplier List on page 6-2
- Major Features on page 6-3
- Defining the Supplier/Item Attributes on page 6-6
- Viewing the Approved Suppliers List Summary on page 6-10

Overview of the Approved Supplier List

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

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

Only ASL items can be scheduled in Supplier Scheduling.

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

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

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

For each ASL entry, you can specify Supplier Scheduling defaults and controls, the release generation method, purchasing unit of measure, and assigned scheduler. You can also specify source blanket agreements and catalog quotations for automatic reference during document creation.

By maintaining the ASL, you can perform the following tasks:

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

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

Major Features

With the Approved Supplier List (ASL), you can perform the following tasks:

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

See Also

Overview of AutoScheduling on page 4-2.

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

Overview of CUM Management on page 5-2.

Defining the Supplier/Item Attributes on page 6-6.

Overview of Scheduler's Workbench on page 3-2.

Profile Options in Purchasing, Oracle Purchasing User's

Resource Authorizations on page 2-13.

Defining the Approved Supplier List

The Approve Supplier List (ASL) defines the items that will be scheduled and their sources. You must define an item/supplier relationship in the approve supplier list for every item that you schedule.

►► To define the approved supplier list:

1. Navigate to the Approved Supplier List window.

2. Select the ship-to organization for which you want to define ASL entries.
3. Select the Item option.

Attention: Commodities are not applicable to Supplier Scheduling.

4. For an existing row in the Items block, select the item, then navigate to the Suppliers block. You will need to query the list of suppliers associated with the item.
5. Select a business type from the following:

- **Direct (Supplier):** Company sells their products directly to you
If you select Direct, select the supplier name and optionally, the supplier site.
- **Distributor:** Company sells products made by manufacturers
If you select Distributor, select the name and optionally, the site.

Attention: You must also associate a Manufacturer with the Distributor.

- **Manufacturer:** Company manufactures and sells through distributors
If you select Manufacturer, select the Manufacturer Name.
6. Select the supplier's approval status.
Optionally, select the supplier item number.
For Suppliers and Distributors, this supplier item number defaults to your purchase order and requisition lines, and is used to validate the source documents.
 7. Optionally, select a Review By date.
You can use this date to determine when a proactive business review will be performed for the supplier.
 8. Select Record Details from the region control poplist.
 9. Select one of the following in Global:
 - Yes - This ASL entry is valid for all inventory organizations in your operating unit.
 - No - This ASL entry is local--that is, valid only for the organization you chose in the Organizations window when you first navigated to the Approved Supplier List window.
 10. Save your work.

See Also

AutoScheduling

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

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

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

Defining the Supplier/Item Attributes on page 6-6

Overview of the Approved Supplier List on page 6-2.

Resource Authorizations on page 2-13.

Defining the Supplier/Item Attributes

For each item/supplier site relationship, you can define a set of attributes that control the Purchasing and Supplier Scheduling process. This set of attributes can be global (available to all organizations) or local (available to one organization). Local attributes override global attributes.

ASL Header Attributes

The following attributes are set at the ASL Header level:

- Business Type
- Manufacturer or supplier item type
- Global or local
- Status
- Disabled

Each item/supplier site combination can have a different set of attributes defined for enabling planning and shipping schedules. You can enable either schedule, or both, and designate whether you want to create them automatically.

For example, two suppliers supply the same item to an organization. You can enable just the planning schedule for one supplier and enable both the planning and shipping schedule for the other supplier.

You can also define authorizations against planning schedules when you define the Supplier Scheduling attributes.

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

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

1. Navigate to the Supplier-Item Attributes window.

2. Choose the Purchasing UOM.

3. Choose the Release Generation Method from the following options:

- Automatic Release/Review: automatically generate releases and approve in separate step.
- Automatic Release: automatically generates approved releases with a status of 'Incomplete'.
- Release Using AutoCreate: use the AutoCreate form to create releases.

Attention: Automatic Release is not available when Encumbrance or budgeting control is used.

▶▶ If you choose Source Documents:

1. Enter a unique Seq (Sequence) Number.
2. Select a Document Type from the following:
 - Blanket
 - Quotation
3. Choose a Document Number.
4. Choose a Line number.
The Status and effective dates are displayed.
5. Save your work.

▶▶ If you choose Supplier Scheduling:

Attention: This feature is only available when you select a site at the Suppliers Region.

1. Check the Enable Planning Schedules or Enable Shipping Schedules option, if you want to build Planning and/or Shipping Schedules.
If you check Enable Planning Schedules or Enable Shipping Schedules, you can select an assigned Scheduler.

Attention: You must select a scheduler, if you are using AutoSchedule.

2. Check Enable AutoSchedule, if you want your schedule automatically built.
3. If you check Enable Planning Schedules and Enable AutoSchedule, you must select the following:
 - Plan Bucket Pattern
 - Plan Schedule Type
4. If you check Enable Shipping Schedules and Enable AutoSchedule, you must select the following:

- Ship Bucket Pattern
 - Ship Schedule Type
5. If you check Enable Planning Schedules and Enable Authorizations, you can optionally select up to four Resource Authorizations with their associated time fences.
 6. Save your work.

See Also

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

Overview of AutoScheduling on page 4-2.

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

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

Defining the Approved Supplier List on page 6-4.

Resource Authorizations on page 2-13.

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

Viewing the Approved Suppliers List Summary

You can view the Approved Supplier List, using search criteria to narrow your search.

▶▶ To view the approved supplier list summary:

1. Navigate to the Approved Supplier List Summary window from the menu. The Search Approved Supplier List window opens.

Search Approved Supplier List

Review ASL Status By [] - []

Ship-To Org [] Include Global Entries

Item/Commodity

Commodity []

Category Set []

Category []

Item []

Description []

Supplier

Business []

Supplier []

Site []

ASL Status []

Supplier Item []

Manufacturer []

Buyer []

Scheduler []

Clear New Find

2. Enter the criteria for searching the list.
3. Click Find.

Note: To create a new ASL entry from this window click New.

The results of your search are displayed in the Approved Supplier List Summary folder.

- Folder technology enables you to tailor the presentation of the data to fit your needs.
- To view the entire selected record, click Open.

Reports and Processes

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

- CUM History Reports on page 7-2
- Planning and Shipping AutoSchedule Processes on page 7-3
- Printed Planning Schedule Reports on page 7-6
- Printed Shipping Schedule Reports on page 7-8

CUM History Reports

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

Report Submission

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

Report Parameters

Organization

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

CUM Period

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

Supplier

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

Supplier Site

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

Items From/To

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

Dynamic Precision Option

Enter the decimal precision for quantities on the report.

See Also

Submitting a Request, Oracle Applications System Administrator's Guide

Planning and Shipping AutoSchedule Processes

Use the Planning and Shipping AutoSchedule process to automatically build supplier schedules. This process builds schedules for those supplier site/item combinations that have AutoScheduling enabled and that match the AutoSchedule build parameters. You can manually build schedules with the Scheduler's Workbench. Exceptions encountered during the AutoSchedule process can be viewed by choosing the View Log button in the Requests window.

Report Submission

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

Process Parameters

Horizon Start Date

Enter the horizon start date.

Ship-To Organization

Select the ship-to organization.

MRP Name

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

Attention: A planning name is required. Select one the following:
MRP, MPS, or DRP plan name

MPS Name

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

DRP Name

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

Include Future Releases

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

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

Autoconfirm

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

Communication Method

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

Supplier

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

Supplier Site

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

Category Set

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

Category

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

Item

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

Scheduler

Select a scheduler to restrict the schedule to that scheduler.

Buyer

Select a buyer to restrict the schedule to that buyer.

Owner

Select the plan owner.

See Also

MRP/MPS/DRP Plan Name Fields MRP/MPS/DRP Plan Name Fields
Submitting a Request, Oracle Applications System Administrator's Guide

Printed Planning Schedule Reports

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

Note: You must confirm a schedule to print it.

Report Submission

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

Report Parameters

Schedule Number

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

Schedule Revision

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

Schedule Subtype

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

Horizon Start/End

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

Supplier From/To

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

Supplier Site

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

Test Print

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

Dynamic Precision Option

Enter the decimal precision for quantities on the report.

See Also

Submitting a Request, Oracle Applications System Administrator's Guide

Viewing Requests, Oracle Applications User's Guide

Printed Shipping Schedule Reports

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

Note: You must confirm a schedule to print it

Report Submission

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

Report Parameters

Schedule Number

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

Schedule Revision

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

Schedule Subtype

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

Horizon Start/End

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

Supplier From/To

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

Supplier Site

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

Test Print

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

Dynamic Precision Option

Enter the decimal precision for quantities on the report.

See Also

Submitting a Request, Oracle Applications System Administrator's Guide

EDI Transactions

This chapter tells you what you need to know about EDI transactions, including:

- EDI Transactions on page 8-2
- Planning Schedule (830) on page 8-2
- Forecast (830) on page 8-2
- Material Release (830) on page 8-2
- Shipping Schedule (862) on page 8-3

EDI Transactions

Supplier Scheduling lets you exchange business documents electronically with trading partners through EDI (Electronic Data Interchange). EDI subscribes to standard formats for conducting these electronic transactions to minimize manual effort, speed data processing and ensure accuracy.

The following EDI transactions facilitate the Supplier Scheduling process:

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

Planning Schedule (830)

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

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

Forecast (830)

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

Material Release (830)

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

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

You must archive material releases for the entire CUM period so that they remain available for inquiry and reporting purposes.

Shipping Schedule (862)

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

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

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

See Also

Building New Schedules Manually on page 3-3.

Building Revision Schedules on page 3-18.

Building Simulation Schedules on page 3-20.

Confirming Schedules on page 3-29.

Locating/Reviewing Existing Schedules on page 3-7.

Planned Orders for MRP/MPS/DRP on page 3-24.

Rebuilding Schedules on page 3-28.

Reviewing Schedule Headers and Items on page 3-27.

Resource Authorizations on page 2-13.

Schedule Orders on page 3-15.

Troubleshooting

This chapter tells you what you need to know about Troubleshooting, including:

- Troubleshooting on page 9-2

Troubleshooting

This table describes possible solutions to problems that you might encounter when you are not receiving schedules or release quantities, cannot build schedules manually or print shipping and planning reports.

Table 9–1

| Problem | Possible Solution (s) |
|--|--|
| Not Receiving Schedules | <p>Assign a scheduler in Supplier Scheduling Approved Supplier List.</p> <p>To run a planning AutoSchedule, you must enter the scheduler's name. The scheduler's name must match the scheduler's name in the ASL Supplier Schedule option because the AutoScheduler's name is tied to the ASL's scheduler's name in Purchasing.</p> <p>If you do not include a scheduler's name in the ASL, you will not receive schedules.</p> <p>Make sure your lead times are not compressed. If they are, that is if any of those items are inside its lead time, you will not receive a schedule for <i>ANY</i> item on the BOM</p> |
| Not Receiving Release Quantities | <p>If a blanket purchase order is to be used for a source document, you must navigate to the purchase order screen, press the "Terms" button, and check the supply agreement box.</p> |
| Cannot Build Schedules Manually | <p>If the enabling planning schedules, enable shipping schedules, and enable AutoSchedule are selected, you will not be able to build schedules manually. Uncheck these schedules to build a schedule manually.</p> |
| Cannot print Shipping or Planning Schedule Reports | <p>Make sure you've confirm your schedule before you print it.</p> |

A

Windows and Navigation Paths

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

Windows and Navigator Paths

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

| See... | Refer to this manual for a complete window description |
|--------------------|---|
| | |
| <i>MRP</i> | <i>Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide</i> |
| <i>PO</i> | <i>Oracle Purchasing User's Guide</i> |
| <i>User</i> | <i>Oracle Applications User's Guide</i> |

| Window Name | Navigation Path |
|---|--|
| Viewing and Adjusting CUM Quantities View and Adjusting CUM Quantites | CUM Periods > [CUM Period Items] (option) > [Find] > [Adjust] CUM Periods > [CUM Periods] (option) > [Find] > [CUM Period Items] > [Adjust] |
| Approved Supplier List on page 6-4. | Supply Base > Approved Supplier List- Supply Base > Summary Approved Supplier List > [Find] > [Open] |
| Approved Supplier List Statuses on page 2-5. | Supply Base > Supplier Statuses |
| Approved Supplier List Summary on page 6-10. | Supply Base > Summary Approved Supplier List > [Find] |
| View Authorizations on page 3-13. | Scheduler's Workbench > [Find] (option) > [Find] > [Item Schedule] > [Authorizations] |
| Bucket Patterns on page 2-8 | Setup > Bucket Pattern |
| Build Supplier Schedules on page 3-3. Change Organization Change Organization | Scheduler's Workbench > [Build] (option) Change Organization |
| Change Organization (See MRP) Confirm Schedule on page 3-29. | Change Organization Scheduler's Workbench > [Find] (option) > [Find] > [Confirm Schedule] |
| CUM Period on page 5-4 CUM Period Items CUM Period Items | CUM Periods > [CUM Periods] (option) > [Find] CUM Periods > [CUM Period Items] (option) > [Find] |
| Item Schedule | CUM Periods > [CUM Periods] (option) > [Find] > [CUM Period Items] Scheduler's Workbench > [Find] (option) > [Find] > [Item Schedule] |
| Personal Profile Values Personal Profile Values (See User) | Personal Profiles Personal Profiles |
| Releases | Releases Scheduler's Workbench > [Find] (option) > [Find] > [Item Schedule] > [Orders] > [Open] |
| Releases (See PO) | Releases |

| Window Name | Navigation Path |
|--|--|
| | Scheduler's Workbench > [Find] (option) > [Find] > [Item Schedule] > [Orders] > [Open] |
| Schedule Orders on page 3-15. | Scheduler's Workbench > [Find] (option) > [Find] > [Item Schedule] > [Orders] |
| Sourcing Rule | Sourcing Rules |
| Sourcing Rule (See MRP) | Sourcing Rules |
| Sourcing Rule / Bill of Distribution Assignments | Assign Sourcing Rules |
| Sourcing Rule / Bill of Distribution Assignments (See MRP) | Assign Sourcing Rules |
| Supplier-Item Attributes on page 6-6. | Supply Base>Approved Supplier List>[Attributes]>Supplier-Item Attributes |
| Supplier Schedules Supplier Schedules | Scheduler's Workbench > [Find] (option) > [Find] |
| Supplier Scheduling Options on page 2-11. | Setup > Schedule Options |
| Submit Request | Requests > [Submit a New Request...] > [OK] Help menu > View My Requests > [Submit a New Request...] > [OK] |
| Submit Request (See User) | Reports > Run > [OK] Requests > [Submit a New Request...] > [OK] |
| | Help menu > View My Requests > [Submit a New Request...] > [OK] Reports > Run > [OK] |

Glossary

A

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

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

ASC X12

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

ASCII

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

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

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

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

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

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

B

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

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

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

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

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

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

C

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

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

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

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

D

Distribution resource planning (DRP), Application of replenishment inventory calculations to assist in planning of key resources contained in a distribution system, such as sourcing and transport. DRP is an extension of distribution requirements planning, which applies MRP logic to inventory replenishment at branch warehouses.

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

DRP *See* **distribution resource planning**

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

E

EDI

See **Electronic Data Interchange (EDI)**

Electronic Data Interchange (EDI)

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

EDIFACT

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

electronic commerce

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

Electronic Data Interchange (EDI)

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

F

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

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

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

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

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

I

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

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

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

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

item category *See category.*

J

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

M

Make or Buy An item attribute the Planner Workbench uses to default an appropriate value for implementation type when implementing planned orders for the item. A value **Make** means the item is usually manufactured. The Planner Workbench defaults the implementation type for planned orders for the item to **Discrete job**. The planning process passes demand down from manufactured items to lower level components. A value of **Buy** means the item is usually purchased. The Planner Workbench defaults the implementation type for planned orders for the item to **Purchase requisition**. The planning process does not pass demand down from purchased items to lower level components.

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

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

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

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

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

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

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

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

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

MRP See **material requirements planning**.

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

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

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

O

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

P

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

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

planner The third of the three processes that comprise the planning process under the standard planning engine. The planner uses the low level codes calculated by the exploder, together with the supply and demand information gathered by the

snapshot, and calculates net material requirements for every planned item associated with the master schedule used to drive the planning process. Under the standard planning engine, the planner runs after the exploder and the snapshot. Under the memory-based planning engine, the memory-based planner performs planner functions.

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

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

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

purchased item An item that you buy and receive. If an item is also an inventory item, you may also be able to stock it. *See also **inventory item**.*

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

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

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

R

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

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

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

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

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

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

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

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

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

S

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

shipment release An actual order of goods and services against a planned purchase order. The planned purchase order determines the characteristics of the items on the order. The planned purchase order also has the expected quantities, prices, and ship-to locations, and delivery dates for the items on the order. You identify a shipment release by the combination of the planned purchase order number and the release number. Each planned purchase order line can have

multiple shipments and you can distribute the quantity of each shipment across multiple accounts.

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

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

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

sourcing rule assignment *See assignment hierarchy*

standard component A mandatory component used to assemble an ATO (assemble-to-order) item or configuration.

standard comments Standard text you can assign to discrete jobs or repetitive schedules. Special instructions or details specific to a particular job or circumstance.

standard costing A costing method where a predetermined standard cost is used for charging material, resource, overhead, period close, job close, and cost update transactions and valuing inventory. Any deviation in actual costs from the predetermined standard is recorded as a variance.

standard discrete job A type of discrete job that controls material and resources for standard production assemblies.

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 note A routine message you can predefine and automatically or manually attach to orders, returns, order lines, and return lines to convey important information. *See also one-time note, automatic note.*

standard note A long note you define for Oracle Manufacturing and can later reference on as many documents as you want.

standard operation A commonly used operation you can define as a template for use in defining future routing operations.

standard planning engine A planning engine that drives the planning process. This planning engine consists of three phases, each of which follows a strict

sequence: the exploder, the snapshot, and the planner. These phases are followed by two optional phases: CRP planner, and maintain repetitive planning periods. *See* **memory-based planning engine, planning process**

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 rate The frozen standard unit cost for a resource.

standard receipt A receipt routing in which shipments are received into a receiving location and then delivered in a separate transaction. Standard receipts can be inspected or transferred before delivery.

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

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

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

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

suggested aggregate repetitive schedule The optimal repetitive schedule suggested by MRP to satisfy a given master schedule. The optimal schedule represents aggregated production for all lines and considers the constraints of planning periods, item lead time, firm schedules, time fence control, acceptable rate changes and overrun amounts.

suggested repetitive schedule The schedule for an individual production line for a specific item that is derived from the Suggested aggregate schedule. MRP divides the suggested aggregate schedule for a specific line and item based on the production line attributes: priority, minimum and maximum rates.

supplier Provider of goods or services.

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

supplier product number The number your supplier assigns to an item. You and your supplier can have different item naming conventions. You can identify the item with one number (Item) while your supplier identifies this item using another

number (Supplier Product Number). Using and referencing supplier product numbers helps you speed up your purchasing cycle. By referencing a number your supplier knows, you can help your suppliers understand your purchase orders and RFQs better.

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

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

supply release agreements Release shipments against a Blanket Supply Agreement.T

trading partner

Any company that sends and receives documents via EDI.

U

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

unit of measure class A group of units of measure and their corresponding base unit of measure. The standard unit classes are Length, Weight, Volume, Area, Time, and Pack.

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

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

UOM See **unit of measure**.

V

vendor See **supplier**.

W

WP4

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

X

X12

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

A

- Approved Supplier List
 - default 2-6
 - defining 6-4
 - find window 6-10
 - Overview 6-2
 - scheduling organizations 6-2
- Approved Supplier List Statuses window 2-6
 - Defining Approved Supplier Statuses 2-6
- Approved Supplier List Summary window 6-10
- Approved Supplier List window
 - Defining the Approved Supplier List 6-4
- Approved Supplier Statuses
 - defining 2-6
- ASL 3-13, 6-2
- Authorization 3-13
- Authorization Cutoff Date 3-13
- Authorizations 3-12
 - recalculate/redisplay 3-16
 - window 3-13
- AutoSchedule 2-8
- AutoScheduling 4-2

B

- Begin Weeks On 2-10
- Blanket Agreements 6-2
- Bucket Count 2-9
- Bucket Patterns 1-2, 2-8
 - buffer 2-8
 - combinations 1-8
 - defining 2-9
 - start dates 2-8
 - variable bucket patterns 2-9
 - window 2-9
- Build
 - option button 3-20
- Building a New Schedule 3-3
- Building a Revision Schedule 3-18
- Building a Simulation Schedule 3-20
- Business Rules 2-6
- Buyersauthorizations' 1-8

C

- calculated authorization quantities 3-9
- Catalog Quotations 6-2
- Category Set 3-5
- Clear 3-6
- Confirmed 3-7
- Confirming Schedule Headers 3-30
- Confirming Schedules 3-29
 - authorizations 3-30
 - confirm button 3-30
 - confirmed 3-29
 - header level 3-29
 - high-water mark 3-30
 - in process 3-29
 - line items 3-30
 - unconfirmed schedule headers 3-29
- Control 2-7
- CUM
 - management 3-13
- CUM History Report 7-2
- CUM Period Items window
 - Viewing CUM Quantities 5-5
- CUM periods
 - defining 5-4
- CUM Periods window
 - Defining CUM Periods 5-4
- CUM Quantities
 - adjusting 5-5
 - viewing 5-5

D

- Daily Buckets 8-3
- Dates
 - creation from and to 3-8
- Direct Supplier 6-5
- Distributor 6-5
- DRP
 - plan 3-25
 - plan name 3-25
 - planned item 3-25

E

- EDI 1-9

EDI Transactions 8-2
Enable Authorizations 6-9
Enable AutoSchedule 6-8
Enable CUM Management option 2-11
Enable Planning Schedules 6-8
Enable Shipping Schedules 6-8

F

Find Supplier Schedules
 window 3-3
Forecast 1-8
 830 8-2
Future Bucket 2-8, 3-4, 7-4
Future Release 2-8, 3-10

H

Header 1-8
Horizon Start Date 3-4

I

In Process 3-7
Inactive On 2-7, 2-10
Include Future Releases 3-4
Intervals 2-9
ISO
 9001/9002 6-2
Item Detail 1-8
Item Detail Schedule 1-8
Item Schedules
 window 3-9

J

JIT 1-9, 8-3
Just-In-Time 1-9

L

Line Item Status Options
 confirmed 3-8
 in process 3-8
Locating/Reviewing Existing Schedules 3-7

M

Manufacturer 6-5
Master Resource Planning 2-4
Master Schedule 3-24
Material Release 8-2
 830 8-2
 archive 8-3
Menu paths A-2
MPS
 plan 3-25
 plan name 3-25
 planned item 3-25
MRP
 plan 3-24
 plan name 3-24
 planned items 3-24
 recommendations 3-24
 status 3-24
MRP/MPS/DRP 3-24
Multi-Org Option 3-4, 3-21

N

Navigator paths A-2
Near-Term Release 1-9
New Build Schedule 3-18
New Schedule
 Build 3-3
 New 3-3
 supplier site 3-4, 7-4
Nonzero Bucket 2-10

O

Orders 3-10
Overview 2-2

P

Past Due 1-8
Past Due Quantity 3-10
Pattern Description 2-9
Planned Order 3-15
Planning 3-7
Planning AutoSchedule

- concurrent process 4-2
- Planning AutoSchedule Process 7-3
- Planning bucket pattern
 - default 2-11
- Planning Schedule 1-8, 8-2
 - 830 8-2
 - material release 8-2
 - release and forecast 3-24
- Planning Schedule Report 7-6
- Planning schedule types
 - default 2-11
- Planning Schedules 1-2
- preface
 - PT PrefaceTitle ix
- Processes
 - Planning AutoSchedule Process 7-3
 - Shipping AutoSchedule Process 7-3
- PT PrefaceTitle ix

Q

- Quantity 3-13
- Quantity Bucket 3-10

R

- Raw Material 3-26
- Rebuilding Schedules 3-28
 - select all 3-28
- Release 1-8, 3-16
- Release Generation Method 6-7
 - AutoCreate 6-7
 - automatic 6-7
- Release Only 1-2, 3-25
- Reports
 - CUM History Report 5-2, 7-2
 - Planning Schedule Report 7-6
 - Shipping Schedule Report 7-8
- Requisition 3-16
- Resource Authorizations 2-13
 - enable authorizations option 2-13
 - example 2-13
- Reviewing Item Schedules 3-9
- Revision Schedule 3-18
- RTV Updates CUM option 2-11

S

- Schedule Headers
 - block 3-27
- Schedule Headers and Items
 - reviewing 3-27
- Schedule horizon end date 3-10
- Schedule Number 3-18
- Schedule Orders window
 - Scheduling Orders 3-15
- Schedule Owner Name 3-8
- Schedule Type
 - planning schedule 1-10
 - shipping schedule 1-10
 - simulation schedule 1-10
- Schedule Types
 - comparison 1-10
- Schedule Types and Subtypes 1-8
- SchedulersWorkbench
 - Overview' 3-2
- SchedulersWorkbench' 3-2
- Scheduling Options
 - window 3-24, 3-25
- Scheduling Orders
 - Document Line 3-16
 - Document Number 3-16
 - Document Revision 3-16
 - Document Status 3-16
 - Document Type 3-15
 - Due Date 3-15
 - Order Quantity 3-15
 - PO UOM 3-15
- Setting Up
 - Functional Security 2-6
 - Overview of Setting Up 2-2
 - Related Product Setup Steps 2-2
 - Setup Checklist 2-4
 - Setup Flowchart 2-3
 - Setup Steps 2-4
- Setup
 - Overview of Setting Up 2-2
- Shipping 3-7
- Shipping AutoSchedule
 - concurrent process 4-2
- Shipping AutoSchedule Process 7-3

- Shipping bucket pattern
 - default 2-11
- Shipping Schedule 1-9
 - 862 8-2, 8-3
 - archive 8-3
 - release and forecast 3-24
 - Requirements report 2-8
- Shipping Schedule Report 7-8
- Shipping schedule types
 - default 2-11
- Shipping Schedules 1-2
- Ship-To Organization 2-11
- Simulation Schedule
 - include future releases 3-21
- Simulation Schedule 3-20
 - bucket pattern 3-20
 - category set 3-21
 - current receipt 3-20
 - find window 3-20
 - horizon start date 3-21
 - include future releases 3-21
 - option button 3-20
- Simulation Schedules 1-9
 - personal 1-9
 - saved 1-9
- Status Options 3-8
- Structure 1-8
- Supplier Item Attributes
 - defining 6-6
- Supplier Name 3-4
- Supplier Schedules
 - find window 3-7
 - window 3-30
- Supplier Scheduling Options
 - single organization 3-24, 3-25
- Supplier scheduling options
 - defining 2-11
- Supplier Scheduling Options window
 - Defining Supplier Scheduling Options 2-11
- Supplier Site Code 3-5, 3-8
- Suppliers and Distributors
 - item number 6-5
- Supply Agreement 6-2
 - release 1-2
- Supply Chain Planning 2-4

Support Supplier Certification 6-2

T

Transaction
830 1-9

U

UOM 3-13

V

View Approved Suppliers 6-10
Viewing Authorizations 3-13

W

Windows
navigator paths A-2

