JD Edwards World

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Preface

Welcome to the JD Edwards World Advanced Warehouse Management Guide.

Audience

This document is intended for implementers and end users of JD Edwards World Advanced Warehouse Management system.

Documentation Accessibility

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Related Documents

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Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Overview to Advanced Warehouse Management

This chapter contains these topics:

1.1 System Integration

The Advanced Warehouse Management system is an integral part of your manufacturing and distribution processes. It works in conjunction with the Inventory Management and Shop Floor Control systems to manage your inventory and the products that you produce and ship. The Advanced Warehouse Management system does not create any accounting records of its own. Instead, the system uses records that are created by other JD Edwards World systems to help you keep accurate financial records of your warehouse transactions. This minimizes the number of duplicate records and mismatched data, reduces the hardware requirements for your system, and increases your system's performance.

The Advanced Warehouse Management system can exchange data with the following JD Edwards World systems:

- Sales Order Management

- Inventory Management

- Procurement

- Shop Floor Control

- Configuration Management

- Requirements Planning

- Enterprise Facility Planning

1.2 Features

The Advanced Warehouse Management system controls many aspects of warehouse operations, from receiving and storing items to retrieving and shipping them. You can design your warehouse to make the most of your available space, your employees' time, and the unique storage requirements of the goods that you stock. You can

structure your warehouse in almost limitless detail, so you can know exactly where everything is and the exact quantity you have on hand. This allows you to maintain a continuous flow of goods and gives you the competitive edge in delivering goods to your customers quickly and efficiently.

Some of the most important features of the Advanced Warehouse Management system are:

- User-defined rules for stock movement
- User-defined parameters for items and locations to control stock movement
- Fixed and random locations for more efficient stock movement
- Automatic shipping carton selection during picking
- Ability to review warehouse contents using up to nine levels of detail
- Manual or automatic storage, picking, and replenishment of stock
- Audit trail reporting of inventory movement

With the Advanced Warehouse Management system, you can:

- Create a logical model of your warehouse in as much detail as you need by specifying such characteristics as location dimensions, temperature, humidity, and lighting
- Create a logical model of each item in your warehouse to allow the system to match items to storage locations based on the characteristics of the items and locations
- Control how stock is stored, picked, and replenished by setting up rules for the system to follow
- Move stock to and from specific locations using manual input or automatic system-generated suggestions
- Use random locations for storage by allowing the system to track inventory for you
- Generate an audit trail of reports for each stock movement
- Sequence your employees' trips through the warehouse to maximize their productivity
- Confirm stock movement with minimal data-entry keystrokes
- Share stock movement data with other JD Edwards World systems to answer inquiries and improve customer service

The Advanced Warehouse Management system is extremely flexible because it can use more than fifty different parameters of locations, items, and rules to move your inventory. Some of Advanced Warehouse Management's features follow.

Feature	Description
Profiles of locations and items	For each item and location in your warehouse, you define a profile. For items, you can define many parameters and characteristics that control how the system moves the item. For locations, you can define parameters and characteristics that control the location's suitability for storing, picking, or replenishing items.

Feature	Description
Rule-based storage, picking, and replenishment	The Advanced Warehouse Management system is rule-driven. You can set up movement rules that are based on a variety of factors, including: ■ The sequence numbers that you can assign to locations ■ Each location's purpose and the quantity of items already present in the location ■ Location characteristics that are matched to item characteristics You can define as many rules as you need for different business purposes.
Automatic replenishment of locations	The system monitors every location in your warehouse and can trigger stock movements to replenish your picking locations automatically when you deplete stock quantities to a point that you define.
Movement path sequencing	You can design traffic patterns in your warehouse to reduce congestion and structure your stock movements to use each employee's trip through the warehouse most efficiently.
Units of measure	You can choose locations according to the item's unit of measure to ensure the best fit and maximization of your available warehouse space. You can also allow the system to combine or break down units of measure to speed up inventory movement or maximize utilization of locations.
First In First Out picking	You can move your oldest inventory first using date-of-receipt tags and expiration date codes.

1.3 Detailed Information

The Advanced Warehouse Management system stores its information in the following tables. You can update these as needed.

Table	Description
Branch/Plant Constants (F41001)	Contains information for day-to-day transactions, including: ■ Location number definition ■ Warehouse control data ■ Default units of measure ■ Inclusion rule, which lists the document types and status codes to process through the system
Location Master (F4100)	Contains basic information about each warehouse location.
Location Dimensions (F46022)	Contains the dimensions and maximum weight capacity of location dimension groups.
Item Master (F4101)	Contains basic information about each item, including: ■ Item number ■ Description ■ Search keys ■ Category codes ■ Default units of measure ■ Process groups ■ Item dimension group

Table	Description
Item Specific Unit of Measure Conversion (F41002)	Contains the unit of measure conversion equations that are unique to the warehouse item and its unit of measure structure information.
Location Characteristics (F46021)	Contains a list of characteristics that you use in random movement instructions.
Location Capacity (F46024)	Contains the quantity of an item (or an item group) that will fit into each location.
Allowed Containers by Location (F46026)	Contains a list of the containers that you allow to exist in each location.
Standard Unit Of Measure Conversion (F41003)	Contains the unit of measure conversion equations that are common to all warehouse items.
Item Branch (F4102)	Contains default item information, including each item's process and dimension groups, and other parameters that are common to every unit of that item in your warehouse.
Item Location (F41021)	Contains each item's quantity, general ledger class, and lot status in each location.
Item Profile (F46010)	Contains a profile of every item in the warehouse.
Item Unit Of Measure Profile (F46011)	Contains every unit of measure for each item in the warehouse.
Warehouse Requests (F4600)	Contains putaway, pick, and replenishment requests for inventory movement.
Task Header (F4601)	Contains inventory movement requests and the corresponding trips that warehouse employees make to fulfill the requests.
Warehouse Putaway Reservations (F460130)	Contains locations that you reserved for storage of a particular item.
Warehouse Suggestions (F4611)	Contains putaway, pick, and replenishment suggestions for inventory movement.
Location Detail Information (F4602)	Contains the items, quantities, and units of measure that exist in each location.
Item Ledger (F4111)	Contains a history of all inventory movements.
Inclusion Rules (F34004)	Contains the order types (sales, purchase, and so on) and the order statuses that the system processes.
Process Selection Rules (F46093)	Contains information about warehouse process and order groups and the movement instructions that you match to each set of groups.
Movement Instructions (F46095)	Contains information, such as zones and tiebreakers, about how the system chooses locations for putaway, picking, or replenishment.
Order Groups (F46092)	Contains order types that you assign to a group to use in the Process Selection Rules table.
Unit Of Measure Groups (F46096)	Contains units of measure that you assign to a group to use in the Movement Instructions table.
Fixed Locations (F46012)	Contains locations that you use only for putaway, only for picking, or only for replenishment.
Random Tables (F46822)	Contains characteristics that you match to location characteristics to create a table of valid random locations.
Random Locations (F46821)	Contains a list of valid random locations that match the characteristics you defined in a random rule.

Table	Description
Container and Carton Codes (F46091)	Contains a list of containers and cartons and their dimensions and weights.
Carton Recommendation Rules (F46013)	Contains information about the quantity of each item that will fit in each carton, so the system can recommend cartons for shipping.
Maximum Putaway Quantity By Zone (F46025)	Contains the maximum quantity of each item that you allow in each zone.
Fixed Replenishment Zones (F46051)	Contains a list of zones from which you allow the system to replenish fixed picking locations.
Default Location/Printers (F40095)	Contains the default warehouse code (branch/plant) and the default printer output queue for transactions that you process through the subsystem.
Distribution/ Manufacturing Constants (F4009)	Contains information that specifies whether the item unit of measure conversions are unique for each item or applicable to each item in the warehouse.

1.4 Menu Overview

These are the most commonly used menus for the JD Edwards World Advanced Warehouse Management system.

Figure 1–1   Commonly Used Menus

Advanced Warehouse
Management
G46

Daily Operations

Inbound Warehousing
Operations
G4611

Outbound Warehousing
Operations
G4612

Replenishment
Operations
G4613

Warehousing Inquiries
& Reports
G4614

Setup Operations

Warehouse System
Setup
G4641

Warehouse User
Defined Codes
G46411

Advanced and Technical
Operations

Warehouse Advanced
& Technical Operations
G4631

Warehousing
Movement Rules
G46311

Part I

Warehouse Setup

This part contains these chapters:

2

Overview to Warehouse Setup

This chapter contains these topics:

- Section 2.1, "Objectives,"
- Section 2.2, "About Warehouse Setup."

2.1 Objectives

- To define the physical warehouse for the system
- To define warehouse-specific information about each item
- To define which orders to process based on the order status

2.2 About Warehouse Setup

To set up your warehouse, you must consider the following information:

- The physical layout and characteristics of your warehouse
- The dimensions and capacities of all storage areas or racks
- The characteristics of all items that you stock, such as dimensions, weight, units of measure, special environmental requirements, and so on

You must also determine:

- Whether to group items based on similarities, dimensions, or units of measure
- Whether to have the system choose containers for certain items during putaway or cartons during picking
- Which factor is more important in managing the warehouse (you can change these at any time to suit your business needs):
  - Maximizing storage capacity
  - Maximizing productivity by reducing the number of trips that employees make during putaway, picking, or replenishment of stock
  - Using other criteria that you define

When you define the warehouse and its contents to the Advanced Warehouse Management system, you construct a model of the warehouse and all of the items it contains.

Defining the warehouse includes the following tasks:

- Setting up locations

- Setting up fixed locations and zones

- Setting up item warehouse information

- Setting up inclusion rules

- Setting up order groups

- Setting up unit of measure groups (optional)

- Setting up storage containers (optional)

- Setting up shipping cartons and recommendation (optional)

3

Set Up Locations

This chapter contains these topics:

3.1 Setting Up Locations

A location is a place that you use to put away (store), pick (retrieve), or replenish (refill) items that you stock in your warehouse. Your warehouse may consist of many locations, each with its own characteristics, such as:

- Length

- Width

- Height

- Weight capacity

- Proximity to other locations

- Temperature

- Humidity

- Lighting

Setting up locations is a major step in defining your warehouse. By setting up locations, you can match stock items to your locations based on the items' size, weight, and special needs like temperature or lighting.

3.1.1 Before You Begin

- Verify that you have identified each location's characteristics, dimensions, and physical position in the warehouse

3.2 Creating the Warehouse

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose Branch/Plant Constants

To create your warehouse, you use branch/plant constants. You specify whether you want the system to track locations and their contents.

To create the warehouse

On Branch/Plant Constants - Page 1

Figure 3–1   Branch/Plants Constants - Page 1 screen
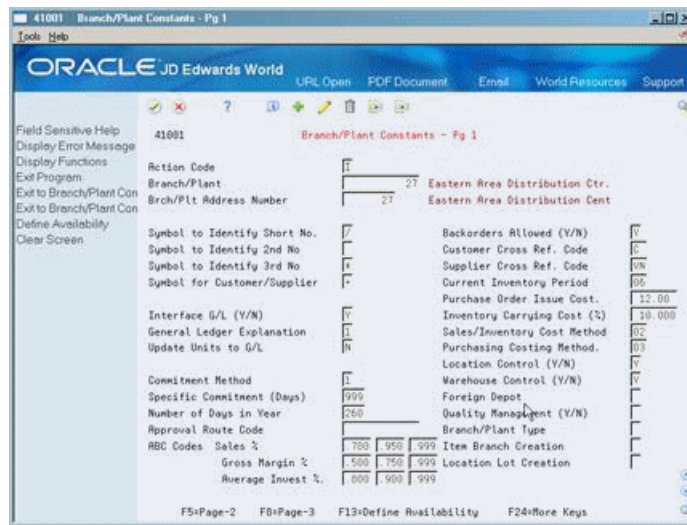
Complete the following fields (populate both with 'Y'):

- Location Control
- Warehouse Control

Field	Explanation
Location Control (Y/N)	A code that indicates what type of location control the system requires. You should use location control if you want to use only locations that are in the Location Master table.
	Valid codes are:
	Y – Yes, use only locations in Location Master (F4100).
	N – No, do not restrict locations to those in Location Master. Use all locations, as long as they conform to the location format defined on Branch/Plant Constants - Page 2.
	If Warehouse Control is set to Yes, Location Control also must be set to Yes.
Warehouse Control (Y/N)	A code that determines whether the system creates warehouse transactions for the branch/plant.

See Also:

■ Set Up Constants in the *JD Edwards World Inventory Management Guide* for more information on branch/plant constants.

3.3 Defining Warehouse Specifications

You define warehouse specifications to:

■ Define the format in which the system displays a location, such as 1.A.1 or C/3/5

■ Specify the inclusion rule that defines the orders and statuses that you want the Advanced Warehouse Management system to process

■ Define the default units of measure for dimensions, weight, and volume

■ Define the default locations for receiving and shipping

You use an inclusion rule (also known as the request inclusion version) to define which orders to process based on the next status code that is assigned to the order.

To define warehouse specifications

On Branch/Plant Constants - Pg 1

1. Access Branch/Plant Constants - Pg 2.

Figure 3–2 Branch/Plants Constants - Page 2 screen

2. On Branch/Plant Constants - Pg 2, complete the following fields:

■ Separator Character

■ Length of Aisle

■ L/R

■ Length of Bin

■ L/R

■ Length of Code 3

■ L/R

■ Length of Code 4

- L/R

- Length of Code 5

- L/R

- Length of Code 6

- L/R

- Length of Code 7

- L/R

- Length of Code 8

- L/R

- Length of Code 9

- L/R

- Length of Code 10

- L/R

3. Complete the following fields:

- Request Inclusion Version

- Dimension Display Unit of Measure

- Volume Display Unit of Measure

- Weight Display Unit of Measure

- Default Receiving Location

- Default Shipping Location

Field	Explanation
Separator Character	A character that divides the elements of the location when you display them on forms or reports. For example, you might use a slash (/) as a separator character to divide elements such as aisle, bin, and shelf in a location code.
	Separators are not stored in the tables, but are used to edit a location on a form or report. If you do not want to use separators, leave this field blank. However, you must enter characters and spaces to equal the correct length of each element in the location code. The system then displays the location as one string of characters.
	Form-specific information
	The system uses the character you enter in this field to separate the combination of tank/owner and aisle/bin as it appears on forms or reports. Companies commonly use a period (.) as the separator character.
Length of Aisle	Identifies the number of characters to represent the tank (or aisle for packaged stock). Valid values are numbers 1 through 8.
L/R - Aisle	A character (L or R) that specifies left or right justification for the Aisle element in the location format.
Number - Characters (Bin)	Identifies the number of characters to represent the owner for commingled bulk stock (or aisle for packaged stock). Valid values are numbers 1 through 8.

Field	Explanation
L/R - Bin	Left or Right justification for Bin in the location format specification.
Number - Characters (Code 3)	The number of characters to represent Code 3 in the location format specification.
L/R - Code 3	Left or Right justification for Code 3 in the location format specification.
Number - Characters (Code 4)	The number of characters to represent Code 4 in the location format specification.
L/R - Code 4	Left or Right justification for Code 4 in the location format specification.
Number - Characters (Code 5)	The number of characters to represent Code 5 in the location format specification.
L/R - Code 5	Left or Right justification for Code 5 in the location format specification.
Number - Characters (Code 6)	The number of characters to represent Code 6 in the location format specification.
L/R - Code 6	Left or Right justification for Code 6 in the location format specification.
Number - Characters (Code 7)	The number of characters to represent Code 7 in the location format specification.
L/R - Code 7	Left or Right justification for Code 7 in the location format specification.
Number - Characters (Code 8)	The number of characters to represent Code 8 in the location format specification.
L/R - Code 8	Left or Right justification for Code 8 in the location format specification.
Number - Characters (Code 9)	The number of characters to represent Code 9 in the location format specification.
L/R - Code 9	Left or Right justification for Code 09 in the location format specification.
Number - Characters (Code 10)	The number of characters to represent Code 10 in the location format specification.
L/R - Code 10	Left or Right justification for Code 10 in the location format specification.
Request Inclusion Vers	A user defined code (system 40/type RV) that identifies an inclusion rule that you want the system to use for this branch/plant. The Manufacturing and Advanced Warehouse Management systems use inclusion rules as follows:
	For Manufacturing
	■ Allows multiple versions of resource rules for running MPS, MRP, or DRP.
	For Advanced Warehouse Management
	■ Allows multiple versions of inclusion rules for running putaway and picking. The system processes only those order lines that match the inclusion rule for a specified branch/plant.

Field	Explanation
Dimen. Display U/M	A user defined code (system 00/type UM) that identifies the unit of measure that the system uses to display dimensions for the warehouse. The system provides the ability to establish inches, centimeters, meters, and so forth, as a measuring standard.
Volume Display U/M	A user defined code (system 00/type UM) that identifies the unit of measure that the system uses to display volume for this branch/plant. The system inputs a value in this field from Branch/Plant Constants - Page 2 (P410012). You can override this default value.
Weight Display U/M	A user defined code (system 00/type UM) that identifies the unit of measure that the system uses to display weight for this item. You can specify ounces, grams, kilograms, and so on, as weight standards. The system uses this unit of measure for the item or overrides it for an individual item or container.
Default Receiving Locn	A code that identifies the location that the system uses for receiving goods into the warehouse. This location defaults into purchase order detail lines for the item. You can define this location as a staging location (a location that has unlimited space) through Location Profile (P46020).
Default Shipping Locn	A code that identifies the location that the system uses for packing and shipping goods out of the warehouse. You can define this location as a staging location (a location that has unlimited space) through Location Profile (P46020).

3.4 Entering Locations

Your warehouse consists of locations, such as bins, spaces on a rack, pallet spaces on the floor, and so on. You must enter these locations into the system to use them for putaway, picking, or replenishment. Use the format that you specified on Branch/Plant Constants to enter each location where you store inventory in your warehouse.

Complete the following tasks:

- Enter locations interactively

- Enter locations by batch

- Enter locations using existing location data

- Define zones

- Define the level of detail for locations

    See Also:

    - Working with Speed Location Maintenance in the *JD Edwards World Inventory Management Guide*for information on entering locations.

3.4.1 Entering Locations Interactively

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose Location Master

You can enter locations interactively to create locations one at a time. You choose the naming convention (a combination of numbers, letters, or both, such as A/3/4, 6/B/2/A, and so on), and use the format that you specified on Branch/Plant Constants (a separator character, such as / or . , to name locations A/3/4 or 3.C.9). You enter locations interactively if you have only a few locations to create, or if you do not want to use the batch process.

To enter locations interactively

On Location Master

Figure 3–3   Location Master screen
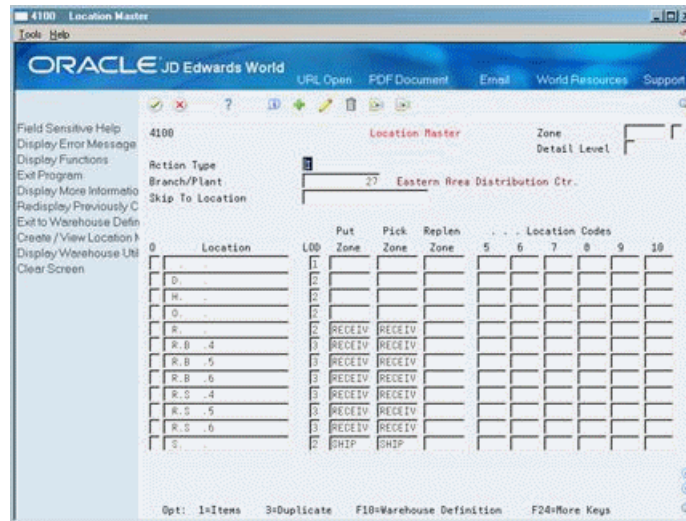
1. Access the detail area (F4).

Figure 3–4   Location Master (Details) screen
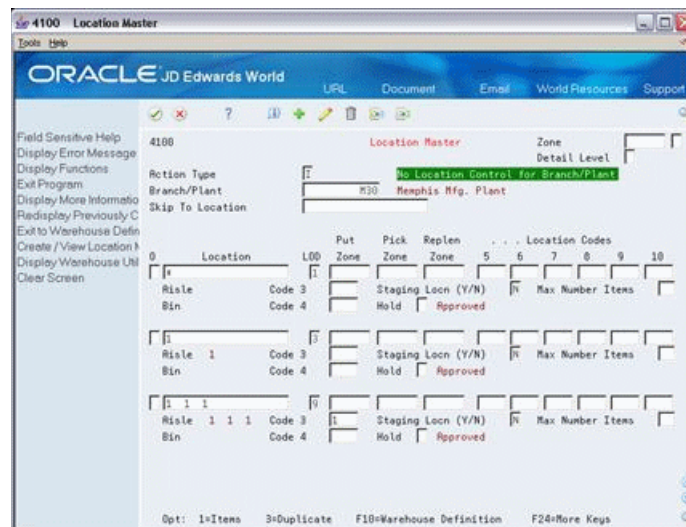
2. Complete the following field:

    ■   Location

    ■   Hold (Optional, to place the location on hold)

Field	Explanation
Location	A code that identifies inventory locations in a branch/plant. You define the format of the location identifier by branch/plant.
	Form-specific information
	A location format is composed of elements and, optionally, a separator character. Elements represent more specific locations in a branch/plant. If the tank contains commingled stock, include the separator character defined on Branch/Plant Constants - Page 2 and identify the owner.
	The total length of all elements in this field, including separators, cannot exceed 20 characters. The location for a single tank can contain up to the number of characters identified in the Length of Tank/Aisle field on Branch/Plant Constants - Page 2.
	The owner ID can contain up to the number of characters identified in the Length of Owner/Bin field on Branch/Plant Constants - Page 2.
	If you leave this field blank and do not use a separator character, the system displays the location as an asterisk. If you use a separator character, the system displays the location with the correct number of spaces for each element, followed by the separator character.
Hold	The Hold field is located in the detail area of the Location Master. You can enter a hold status code in this field to place the location on hold, regardless of the item status.

3.4.2 Entering Locations by Batch

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose Speed Location Maintenance

You can enter locations in batches instead of individually. This allows you to set up your warehouse quickly by copying an existing location to create new locations. You specify the range of locations to create (starting and ending at locations that you define) and the incremental value that separates each location. This method is much faster than entering locations interactively (one at a time). However, if any errors exist in the original location, you will duplicate them in each new location.

To enter locations by batch

On Speed Location Maintenance

Figure 3–5   Speed Location Maintenance screen

1. To identify the location to use as a model for new locations, complete the following fields:

   ■   Branch/Plant

   ■   Copy From Location

2. To enter new locations, complete the following fields:

   ■   From Aisle

   ■   To Aisle

   ■   Step By

   ■   Limit Method

   ■   From Bin

   ■   To Bin

   ■   Step By

   ■   Limit Method

3. To specify levels of detail for each location, complete the following fields:

   ■   From Location Code

   ■   To Location Code

   ■   Step By Location Code

   ■   Limit Method

4. To specify the sequence and proximity information for each location, complete the following fields:

   ■   Start Putaway Sequence

   ■   Step By Putaway Sequence

   ■   Start Pick Sequence

   ■   Step By Pick Sequence

   ■   Start Replenishment Sequence

- Step By Replenishment Sequence
- Start Latitude
- Step By Latitude
- Start Longitude
- Step By Longitude
- Start Height
- Step By Height

5. Access User Defined Code Revisions.

Figure 3–6   User Defined Code Revisions screen
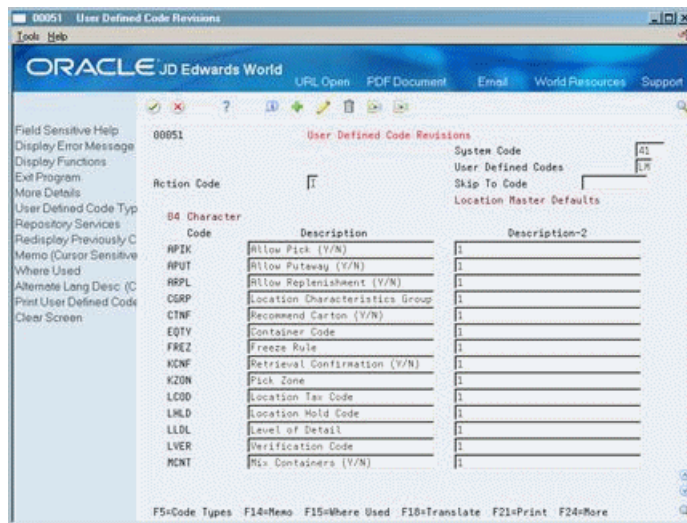
6. On User Defined Code Revisions, complete the following field for each value you want to copy from the model location:

   - Description - 2

   If you leave the field blank, the system inputs the default value. If a default value does not exist, the system leaves the field blank for an alphabetic value or inputs a zero for a numeric value.

7. Access Speed Location Maintenance.

8. On Speed Location Maintenance, choose Add/Change Locations to create the new locations.

Field	Explanation
Copy From Location	A code that identifies inventory locations in a branch/plant. You define the format of the location identifier by branch/plant.
Aisle	A code that identifies a location in a warehouse. This code is used in conjunction with a bin and lot identifier, to indicate a specific, tangible storage area within a warehouse or yard.

Field	Explanation
Step by	A number (alphabetic or numeric) that the system uses to create locations within a range of locations that you specify in Speed Location Maintenance. When the system creates each new location, it increments the next new location by the step number that you entered separates locations within a specified range of locations.
	For example:
	To create new locations:
	From Location: 1
	To Location: 7
	Step by: 2
	The new locations are: 1, 3, 5, and 7.
Step Limit Method	A code that indicates what limits are used in the stepping process:
	blank – Upper & Lower Limit. You create location codes beginning with the From value, ending with the To value, then starting again at the From value.
	1 – Upper Limit. You create location codes beginning with the From value, ending with the To value, then starting again at the lowest value for that location code.
	2 – Lower Limit. You create location codes beginning with the From value, ending with the highest value for that location code, then starting again at the From value.
	3 – No Limit. You create location codes beginning with the From value, ending with the highest value for that location code, and then starting again at the lowest value for that location code.
Bin	A specific storage location within a warehouse or store. The system uses the bin with an aisle location to identify a storage area whose width, depth, and height can be readily measured.
Location Code 03	A code that the system uses for one of two purposes:
	■ To identify a specific location within a Branch/Plant as part of the location identifier.
	■ To use as a general reporting code for location information.
Putaway Sequence	A number that you assign to a location to determine its place in the putaway sequence. Putaway is the movement of inventory to storage after receipt. A sequence of locations describes the path that warehouse employees follow through the warehouse during movement tasks. You can specify in the Movement Instructions (P46095) whether the system uses the putaway sequence as a tiebreaker when there is more than one location selected for putaway. For example, you can establish sequencing for the most efficient putaway routing.
Pick Sequence	A number that you assign to a location to determine its place in the picking sequence. Picking is the movement of inventory from storage to satisfy an order. A sequence of locations describes the path that warehouse employees follow through the warehouse during movement tasks. You can specify in the Movement Instructions (P46095) whether the system uses the picking sequence as a tiebreaker when there is more than one location selected to pick from. For example, you can establish sequencing for the most efficient pick routing.

Field	Explanation
Replen Sequence	A number that you assign to a location to determine its place in the replenishment sequence. Replenishment is the movement of inventory from storage locations to picking locations. A sequence of locations describes the path that warehouse employees follow through the warehouse during movement tasks. You can specify in the Movement Instructions (P46095) whether the system uses the replenishment sequence as a tiebreaker when there is more than one location selected to replenish from. For example, you can establish sequencing for the most efficient replenishment routing.
Latitude	The X or latitude coordinate of a location in the warehouse. The system can use latitude, longitude, and height as a tiebreaker when suggesting locations for putaway and picking.
Longitude	The Y or longitude coordinate of a location in the warehouse. The system can use latitude, longitude, and height as a tiebreaker when suggesting locations for putaway and picking.
Height	The Z or height coordinate of a location in the warehouse. The system can use latitude, longitude, and height as a tiebreaker when suggesting locations for putaway and picking.

3.4.3 What You Should Know About

Topic	Description
Entering steps	A step is a number that the system uses to separate locations within the range of locations you are creating. When the system creates each new location, it increments the name of each location by the step number that you enter. You can enter many locations simultaneously by entering a range of locations along with a step increment.
Entering limits	A limit is a code that tells the system the location names at which you want to start and stop entering locations, such as 1/A/1 to 1/A/9, according to the minimum and maximum values for location elements.
Deleting incorrect locations	If you make a mistake in setting up your locations with Speed Location Maintenance, you can:
	■ Delete your mistakes on a location-by-location basis, assuming only a few errors exist.
	■ Delete an entire range of locations and create them again, if many errors exist.
	You cannot delete locations using Speed Location Maintenance. You must use Location Master.

See Also:

■ Work With Speed Location Maintenance in the *JD Edwards World Inventory Management Guide* for more information on entering locations by batch.

3.4.4 Entering Locations Using Existing Location Data

Navigation

From Advanced Warehouse Management (G46), enter 27

From Warehouse Advanced and Technical Operations (G4631), choose Build Location Master

Use the Build Location Master program to update the Location Master table (F4100) with information from existing records in the Item Location table (F41021). This saves time in creating or changing locations, because Item Location contains all of the valid locations for your warehouse. The system prints a report that lists the updated locations and detailed information.

> **Caution:** You should run this batch program only once, during initial system setup. Do not run the program again after setup.

Build Location Master is a DREAM Writer program.

3.4.5 Processing Options

See Section 24.4, "Build Location Master - Warehouse Management (P41820)."

3.4.6 Defining Zones

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose Location Master

You use zones to group similar locations. After you define a zone, you can use it to make inquiries, without having to access each location contained in the zone. The most common zones you use in a warehouse are for putaway, picking, and replenishment. You can also use zones to set up special areas for items that require explosion safeguards, refrigeration, low humidity, low light, and so on.

Defining zones is optional. However, defining zones can save processing time and help you to structure your employees' movement patterns through the warehouse.

You choose a zone name from User Defined Code Revisions. If the predefined zones do not meet your needs, you enter a new zone on User Defined Code Revisions and then reference that zone name on Location Master.

To define zones

On Location Master

Complete the following fields:

- Putaway Zone
- Pick Zone
- Replenishment Zone

Field	Explanation
Put Zone	A code (system 46/type ZN) that identifies areas in the warehouse where goods are put away or stored.
	Form-specific information
	■ Use the Zone field to indicate a specific zone for which you want to display information.
	■ Use the Putaway Zone field to set up or review the putaway zone associated with the location.
Pick Zone	A code (system 46/type ZN) that identifies an area from which items are picked for shipment.
Replen Zone	A code (system 46/type ZN) that identifies the areas in the warehouse from which items are retrieved to replenish or refill picking locations.

3.4.7 Defining the Level of Detail for Locations

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose Location Master

You use levels of detail to control how the system displays storage areas and their capacities and available space. You define what each level of detail represents (aisles, racks, bins, and so on). For example, if you use Location Utilization to view the contents of your warehouse using a level of detail of 1 (warehouse level), the system displays one location (the warehouse). If you use a level of detail of 4 (rack level), for example, the system displays zones, aisles, and racks, and specifies capacities and available space for each rack.

Figure 3–7   Levels of Detail
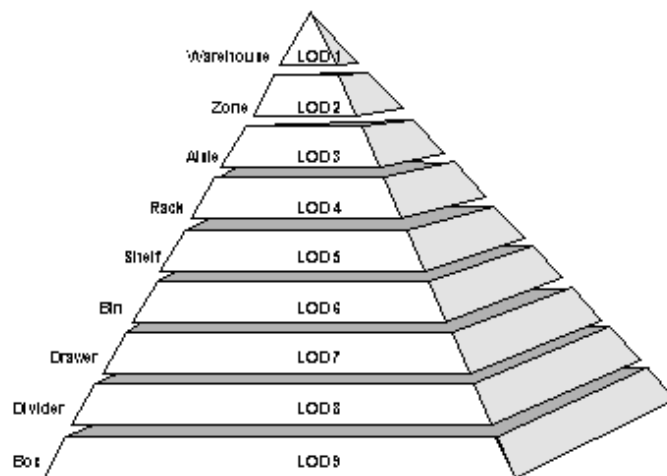
To define the level of detail for locations

On Location Master

For each location, complete the following field:

■ Level Of Detail

Field	Explanation
Level of Detail - Location	A code that summarizes or classifies locations and provides a hierarchy of locations for review purposes. For instance, you can assign aisles to level 3, and individual racks within the aisle as level 4.
	Form-specific information
	Use the Detail Level field to specify the beginning level of detail that you want the system to display.
	Use the Level of Detail field in the lower portion of the form to identify the level of detail for the location.

3.4.8 What You Should Know About

Topic	Description
Using blank locations	You should create a blank location, such as / / , and assign it a level of detail of 1. You use Level 1 to review the contents of the entire warehouse for reporting purposes.

3.5 Defining Location Dimensions

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose Location Dimensions

You define each location's dimensions to maximize the system's use of your warehouse's space. After you define a location's dimensions, the system can determine which items fit best into the location with a minimum of wasted space. You can define:

- Gross and usable dimensions (width, depth, and height)

- Gross and usable volume, which the system calculates from the dimensions

- Maximum weight that a location can hold

3.5.1 Before You Begin

- Verify that you have set up warehouse controls for default dimension information on Branch/Plant Constants - Pg 2.

To define location dimensions

On Location Dimensions

Figure 3–8 Location Dimensions screen
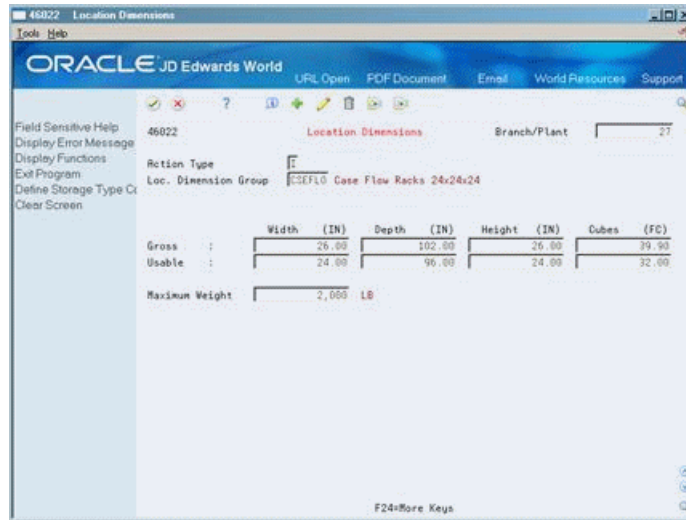
1. Complete the following fields:

   - Branch/Plant

   - Location Dimension Group

   - Gross Width

   - Gross Depth

   - Gross Height

   - Usable Width

   - Usable Depth

   - Usable Height

2. Complete the following optional field:

   - Maximum Weight

Field	Explanation
Group - Location Dimension	A code (system 46/type LD) that identifies a group of locations that share the same dimensions. A location dimension group defines the dimensions for all locations that belong to the group. After you set up a location dimension group, you can assign locations to the group through Location Profile Detail (P460201).
	You must define location dimensions if you plan to use volume-based putaway.
Gross : Width ( )	The gross width of the location(s) defined within the location dimension group, the gross width of an item as defined in the Unit Of Measure Definition (by item or group), or the gross width of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants - Page 2 (P410012).
Gross : Depth ( )	The gross depth of the location(s) defined within the location dimension group, the gross depth of an item as defined in the Unit Of Measure Definition (by item or group), or the gross depth of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants - Page 2 (P410012).

Field	Explanation
Gross : Height ( )	The gross height of the location(s) defined within the location dimension group, the gross height of an item as defined in the Unit Of Measure Definition (by item or group), or the gross height of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants - Page 2 (P410012).
Cubic Dimensions - Gross	The gross cubic dimensions of the locations defined within the location dimension group, the gross cubic dimensions of an item as defined in the Unit Of Measure Definition (by item or group), or the gross cubic dimensions of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants - Page 2 (P410012). *Form-specific information* If you leave this field blank, the system calculates cubic dimensions based on the numbers you entered for the width, depth, and height.
Usable - Width	The available storage width of the location(s) defined within the location dimension group. The system uses this width only if you use one of two capacity methods to select a putaway location for an item: ■ Volume checking (where the system compares the volume of the item to the usable volume of a putaway location) ■ Layering (where the system compares the length, width, and depth of an item to the usable length, width, and depth of a putaway location) *Form-specific information* If you leave this field blank, the system uses the number you entered in the Gross Width field.
Usable - Depth	The available storage depth of the location(s) defined within the location dimension group. The system uses this depth only if you use one of two capacity methods to select a putaway location for an item: ■ Volume checking (where the system compares the volume of the item to the usable volume of a putaway location) ■ Layering (where the system compares the length, width, and depth of an item to the usable length, width, and depth of a putaway location) *Form-specific information* If you leave this field blank, the system uses the number you entered in the Gross Depth field.
Usable - Height	The available storage height of the location(s) defined within the location dimension group. The system uses this height only if you use one of two capacity methods to select a putaway location for an item: ■ Volume checking (where the system compares the volume of the item to the usable volume of a putaway location) ■ Layering (where the system compares the length, width, and depth of an item to the usable length, width, and depth of a putaway location) *Form-specific information* If you leave this field blank, the system uses the number you entered in the Gross Height field.

Field	Explanation
Cubic Dimensions - Usable	The actual cubic volume that you can use for storage in a location. You define usable location space through Location Dimensions (P46022), and assign it to individual locations using Location Profile Detail (P460201). The unit of measure is defined in Branch/Plant Constants - Page 2 (P410012).
	Form-specific information
	If you leave this field blank, the system calculates cubic dimensions using the numbers you entered for the width, depth, and height.
Maximum Weight	The maximum weight a location can hold. During putaway location selection, the system accumulates item and/or container weights, which it adds to the weight currently available in the location, and compares the total to this maximum allowed weight.

3.5.2 What You Should Know About

Topic	Description
Building the tie-breaker table	If you use random locations for putaway, you must rebuild the Tie-breaker table whenever you define or change the dimensions of a random location.
	See Section 3.9, "Building the Tie-Breaker Table."
Maximum storage weight	If you do not specify a maximum storage weight, the system assumes the location has an unlimited capacity for weight.
Capacity checking	The system uses location dimensions to verify that the location has enough space for the item to fit. You can use volume checking (capacity method 1) or layering (capacity method 2) for an item's unit of measure definition, as follows:
	■ In volume checking, the system compares the item's volume to the available volume of space in the location. This might not work well if the item or the available space is not cubical in shape.
	■ In layering, the system compares the item's length, width, and height to the length, width, and height of the available space in the location. This method provides the best match of an item to a location.
	You define the capacity method on Unit of Measure Definition.

See Also:

- Section 3.3, "Defining Warehouse Specifications" for more information about processing methods.

3.6 Defining Location Characteristics

**Navigation**

From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose Location Characteristics

A characteristic is anything that makes a location (or a location group) unique. For example, you might stock items that must be kept cold to prevent spoilage, so you can

identify locations, such as a refrigerator, whose characteristics include cold. You can assign an unlimited number of characteristics to each location in your warehouse.

If you want the system to randomly choose locations for putaway, picking, or replenishment (instead of using fixed locations), you must define location characteristics.

You can choose a predefined characteristic from User Defined Code Revisions. If the predefined characteristics do not meet your needs, you can define the new characteristic on User Defined Code Revisions and then reference that characteristic on Location Characteristics.

You can:

- Define characteristics for a single location
- Define characteristics for a location group

Use location characteristic groups to reduce the number of locations for which you need to define characteristics, by grouping them all together.

Figure 3–9   Location Characteristics screen

3.6.1 What You Should Know About

Topic	Description
Regenerating the Random Locations table	If you use random locations for putaway, picking, or replenishment, and you change characteristics for any of those random locations, you must regenerate the Random Locations table (F46821). This ensures that the system uses a current table when it searches for random locations.
Building the tie-breaker table	If you use random locations for putaway, you must rebuild the tie-breaker table whenever you change the characteristics of a random location. See Section 3.9, "Building the Tie-Breaker Table."

To define characteristics for a single location

On Location Characteristics

Complete the following fields:

- Branch/Plant
- Location
- Characteristic

Field	Explanation
Location	A code that identifies inventory locations in a branch/plant. You define the format of the location identifier by branch/plant.
Characteristic	A code (system 46/type DF) defines a characteristic for a location or location group. You can define unlimited characteristics (such as Cold, Dark, Dry, Heavy, and Secure) for any location or location group.

To define characteristics for a location group

On Location Characteristics

Complete the following fields:

- Branch/Plant
- Characteristics Group
- Characteristic

Field	Explanation
Characteristics Grp	A code (system 46/type LC) that identifies a group of locations that share the same characteristics. A location characteristics group defines the characteristics for all locations that belong to the group. After you set up a location characteristics group, you can assign locations to the group through Location Characteristics (P46021).

3.7 Defining Location Profile Information

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose Location Profile

You define location profile information to attach specific attributes to each location. These attributes define the location's purpose, and its physical position in the warehouse. The system can use these attributes during inventory movement to choose locations for putaway, picking, or replenishment, as well as to determine what location is the best fit for the item, based on the attributes. You define:

- Location sequences, which can form the routes that warehouse employees follow for putaway, picking, and replenishment
- Relative coordinates for each location in the warehouse, which the system uses to calculate the distance between two locations
- The maximum number of items you can have in the location
- A location dimension group for the location
- A characteristic group for the location (optional)
- Whether you can mix container types or old and new items in the location

■ Whether the location is used for putaway, picking, replenishment, or for staging inventory during movement

To define location profile information

On Location Profile

Figure 3–10　Location Profile screen
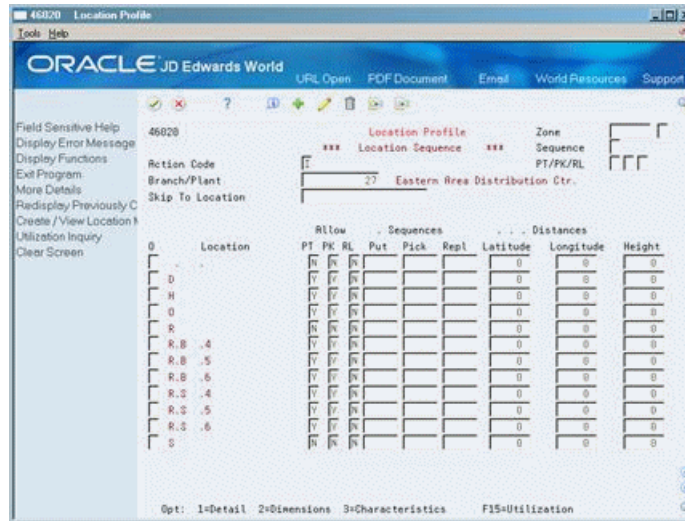
1. For each location in your warehouse, complete the following fields:

   ■ Allow Putaway

   ■ Allow Pick

   ■ Allow Replenishment

   ■ Putaway Sequence

   ■ Pick Sequence

   ■ Replenishment Sequence

   ■ Latitude

   ■ Longitude

   ■ Height

2. Access Location Profile Detail.

Figure 3–11   Location Profile Detail screen
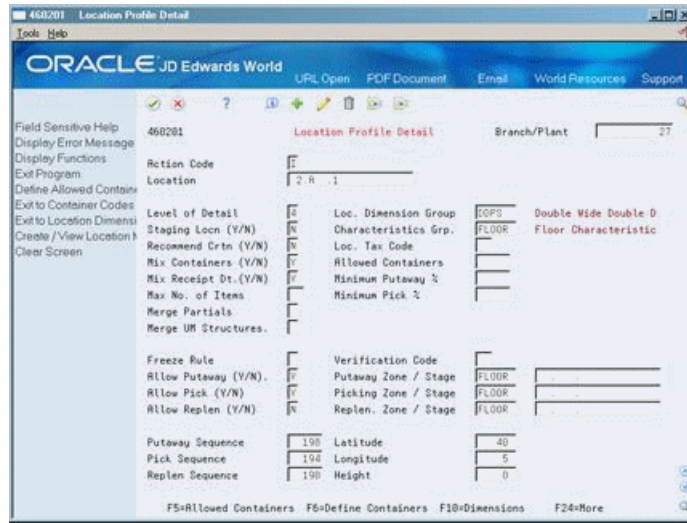
3. On Location Profile Detail, complete the following fields:

- Location Dimension Group

- Characteristics Group

- Staging Location

- Mix Containers

- Mix Receipt Dates

- Maximum Number of Items

- Merge Partial Structures

- Merge UM Structures

Field	Explanation
Allow Putaway (Y/N)	A code that indicates whether the location is valid for putaway selection.
	Valid codes are:
	Y – Yes, use this location for putaway
	N – No, do not use this location for putaway
Allow Pick (Y/N)	A code that indicates whether this location is valid for picking.
	Valid codes are:
	Y – Yes, use this location for picking
	N – No, do not use this location for picking

Field	Explanation
Allow Replen (Y/N)	A code that indicates whether you allow replenishment from a location (Location Profile (P46020) and Location Profile Detail (P460201)) or whether a picking instruction triggers replenishment (Picking Instructions (P46095)).
	Form-specific information
	A code that indicates whether you allow replenishment from a location. The system issues a replenishment while reviewing locations for picking suggestions if it did not find any locations to satisfy the pick request. In this case, the system uses the replenishment to satisfy the pick request.
	Valid codes are:
	Y – Yes, use this location for replenishment
	N – No, do not use this location for replenishment
	The system also issues replenishments to a location that has reached its minimum letdown point if this field is set to Y and if the processing option allowing replenishment during the selection process (P46171) is active. You define minimum letdown points on Fixed Picking Locations (P46012).
	Note: You must have quantity on hand in a location to automatically replenish to that location.
Putaway Sequence	A number that you assign to a location to determine its place in the putaway sequence. Putaway is the movement of inventory to storage after receipt. A sequence of locations describes the path that warehouse employees follow through the warehouse during movement tasks. You can specify in the Movement Instructions (P46095) whether the system uses the putaway sequence as a tiebreaker when there is more than one location selected for putaway. For example, you can establish sequencing for the most efficient putaway routing.
Pick Sequence	A number that you assign to a location to determine its place in the picking sequence. Picking is the movement of inventory from storage to satisfy an order. A sequence of locations describes the path that warehouse employees follow through the warehouse during movement tasks. You can specify in the Movement Instructions (P46095) whether the system uses the picking sequence as a tiebreaker when there is more than one location selected to pick from. For example, you can establish sequencing for the most efficient pick routing.
Replen Sequence	A number that you assign to a location to determine its place in the replenishment sequence. Replenishment is the movement of inventory from storage locations to picking locations. A sequence of locations describes the path that warehouse employees follow through the warehouse during movement tasks. You can specify in the Movement Instructions (P46095) whether the system uses the replenishment sequence as a tiebreaker when there is more than one location selected to replenish from. For example, you can establish sequencing for the most efficient replenishment routing.
Latitude	The X or latitude coordinate of a location in the warehouse. The system can use latitude, longitude, and height as a tiebreaker when suggesting locations for putaway and picking.
Longitude	The Y or longitude coordinate of a location in the warehouse. The system can use latitude, longitude, and height as a tiebreaker when suggesting locations for putaway and picking.

Field	Explanation
Height	The Z or height coordinate of a location in the warehouse. The system can use latitude, longitude, and height as a tiebreaker when suggesting locations for putaway and picking.
Characteristics Grp	A code (system 46/type LC) that identifies a group of locations that share the same characteristics. A location characteristics group defines the characteristics for all locations that belong to the group. After you set up a location characteristics group, you can assign locations to the group through Location Characteristics (P46021).
Mix Containers (Y/N)	A code that indicates whether you want to allow more than one type of storage container for an item to be stored in the location. Valid codes are:
	Y – Allow more than one type of container in this location
	N – Do not allow more than one type of container in this location
	You use Allowed Containers (P46026) to define which containers are allowed in the location.
	You must also set up the item profile to allow mixing of containers.
Mix Receipt Dt.(Y/N)	A code that indicates how you want the system to assign items to a location.
Max No. of Items	A number that specifies the maximum number of different items that can be stored in this location at one time.
	Enter a number from 1 to 99. If you leave the field blank (or zero), the system does not limit the number of different items in the location.
Merge Partials	A code that indicates whether a partial unit of measure can be added to another partial unit of measure in the Location Detail File (F4602). A partial quantity is a quantity in any UM in a structure that is less than one. For example, an item with a case-each structure, where case = 10 each, would have a partial quantity if there were 5 each of the item.
	Valid Codes are:
	blank – Do not merge two partial units of measure.
	1 – Merge two partial units of measure.
	Form-specific information
	To merge partials, you must also set this field to one on the Item Profile form.
Merge UM Structures	A code that indicates whether two unit of measure structures can be merged. Valid Codes are:
	blank – Do not merge unit of measure structures.
	1 – Merge unit of measure structures.
	Form-specific information
	To merge UM structures, you must also set this field to one on the Item Profile form.

3.7.1 What You Should Know About

Topic	Description
Building the tie-breaker table	If you use random locations for putaway, you must rebuild the tiebreaker table whenever you change the putaway sequence or proximity (latitude, longitude, or height) of a random location. See Section 3.9, "Building the Tie-Breaker Table."
Merging partial quantities or unit of measure structures	You can merge partial quantities or UM structures in location detail records to minimize the number of records created by the system. To do this, you must set Merge Partials or Merge UM Structures to 1 in both the Item Profile and Location Profile Detail form. Merging partials or UM structures can cause the system to over or understate the available space in a location. See Section A.13, "Merging Location Detail Records."

3.7.2 Processing Options

See Section 24.1, "Location Profile (P46020)."

3.8 Defining Location Capacity

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose an option

Each location has a finite capacity to hold items (except for staging locations). You can categorize your locations by location dimension group, such as bin, flow rack, pallet, or bulk, according to the size of the locations. Or, you can define each location's capacity individually. You then define how many items will fit in each location or location dimension group.

You can modify location capacity by setting up items to use one of the following capacity checking methods:

- Volume, where the system compares the item's cubic dimensions with the available cubic dimensions in the location.

- Layering, where the system compares the item's length, width, and height to the length, width, and height of the available space in the location. You must also specify whether the item's unit of measure definition allows the system to rotate the item during putaway.

- Quantity, where the system compares the quantity of the item to store to the quantity that you can still fit into the location.

A location dimension group only defines the volume of each location in the group. If you define an item's unit of measure to use quantity when you verify a location's capacity, you must use Capacity Definition by Item or Group to define the quantity of the item that will fit into a location group's dimensions.

Defining quantities by item dimension group is faster, because you do not have to define quantities and capacities for every item that you stock.

You can:

- Define location capacity by item

- Define location capacity by item dimension group

3.8.1 What You Should Know About

Topic	Description
Setting the type of capacity checking	When you define units of measure by item or by item group, you can set the type of capacity checking to use. You can check a location's capacity by volume, layering, or quantity. You use capacity definition by item only if you use quantity capacity checking.

To define location capacity by item

On Capacity Definition by Item

Figure 3–12 Capacity Definition by Item screen
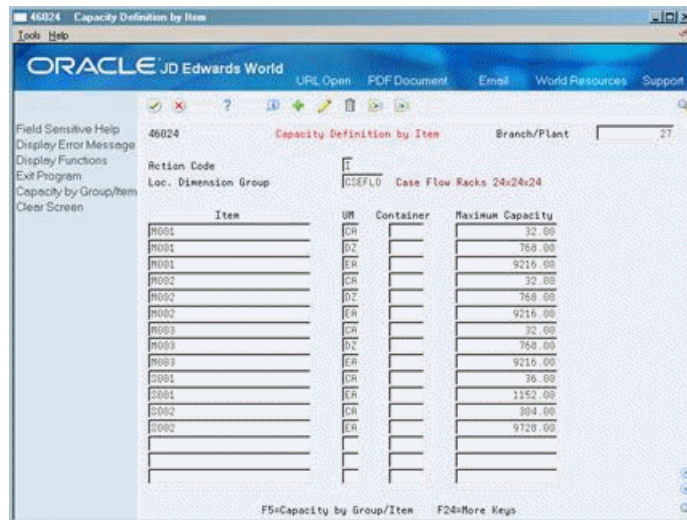
Complete the following fields:

- Branch/Plant

- Location Dimension Group

- Item

- Unit of Measure

- Container Code

- Maximum Capacity

Field	Explanation
Loc. Dimension Group	A code (system 46/type LD) that identifies a group of locations that share the same dimensions. A location dimension group defines the dimensions for all locations that belong to the group. After you set up a location dimension group, you can assign locations to the group through Location Profile Detail (P460201). You must define location dimensions if you plan to use volume-based putaway.
Item	A number that the system assigns to an item. It can be in short, long, or 3rd item number format.
UM	A user defined code (00/UM) that indicates the quantity in which to express an inventory item, for example, CS (case) or BX (box).
Container Code	A code (system 46/type EQ) that identifies a storage container or a shipping carton. A storage container can be an open container where items are stored on the container (for example, a pallet), or a closed container where items are stored in the container (for example, a box). You use Container and Carton Codes (P46091) to define storage containers.
Maximum Capacity	The maximum of an item or item dimension group that can fit in the specified location dimension group. You can also define a storage container to limit the quantity.

To define location capacity by item dimension group

On Capacity Definition by Group

Figure 3–13   Capacity Definition by Group screen
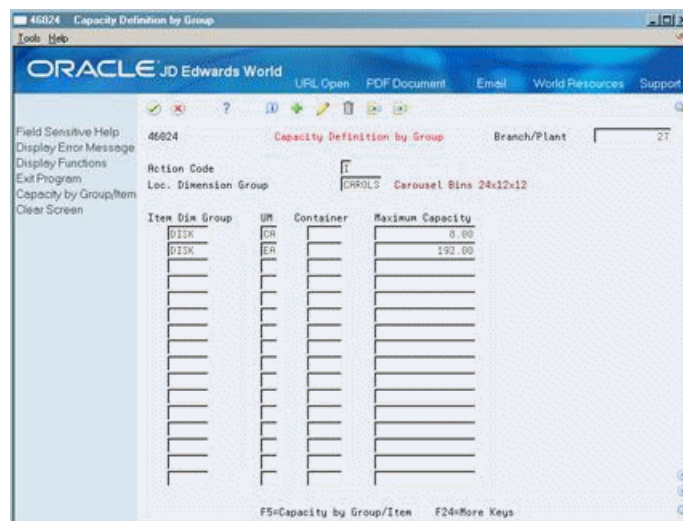
Complete the following fields

- Branch/Plant

- Location Dimension Group

- Item Dimension Group

- Unit of Measure

- Container Code

■   Maximum Capacity

3.8.2 Processing Options

See Section 24.2, "Location Capacity Definition (P46024)."

3.9 Building the Tie-Breaker Table

Navigation

From Advanced Warehouse Management (G46), enter 27

From Warehouse Advanced and Technical Operations (G4641), choose Build Tiebreaker Information

Whenever you move inventory, the system uses movement instructions (F46095) to suggest locations for picking, putaway, or replenishment. If several locations satisfy these instructions, the system uses the information stored in a tiebreaker table to select the optimum location. To determine tiebreaker information for putaway, you must create a tiebreaker table that stores the following information about every location in the warehouse:

■   Sequence number

■   Available space

■   Proximity to a base location

You build the tiebreaker table using a program that selects locations and calculates their proximity and available space. You can use the generic program to build a tiebreaker table for all locations in your warehouse, or you can modify the program to create a table with fewer locations.

You must rebuild the tie-breaker table whenever you change any of the following:

■   Putaway, Picking, or Replenishment Sequence Code

■   Location characteristics

■   Location dimensions

■   Location proximity (latitude, longitude, or height)

If you change characteristics for any random locations, you must regenerate the Random Locations table before building the tiebreaker table, because the system uses random rules to determine tiebreaker information.

3.9.1 Processing Options

See Section 24.3, "Build Tiebreaker Files (P46027)."

4

Set Up Fixed Locations and Zones

A fixed location is a place that you use for the same purpose, such as putaway, picking, and replenishment for a given item. A zone is a group of locations that you use for a particular purpose. For example, a flow rack near the shipping dock always holds the same item for picking, and a bulk location near the receiving dock always holds pallets of the same item. You use a fixed zone as one large location, from which to replenish fixed picking locations.

This chapter contains these topics:

- Section 4.1, "Setting Up Fixed Putaway Locations,"
- Section 4.2, "Setting Up Fixed Picking Locations,"
- Section 4.3, "Setting Up Fixed Replenishment Zones."

Before You Begin
- Verify that the appropriate movement instruction table can access fixed locations

4.1 Setting Up Fixed Putaway Locations

Navigation

From Advanced Warehouse Management (G46), enter 27

From Warehouse Advanced and Technical Operations (G4631), choose Warehouse Movement Rules

From Warehouse Movement Rules (G46311), choose Fixed Putaway Locations

You set up fixed putaway locations to use the same locations consistently for storage of a given item. This allows you to segregate putaway locations for certain items from other locations or to keep putaway locations near their picking and replenishment locations. Often, your fixed putaway locations are the same as your fixed picking locations.

To set up fixed putaway locations
On Fixed Putaway Locations

Figure 4–1   Fixed Putaway Locations screen
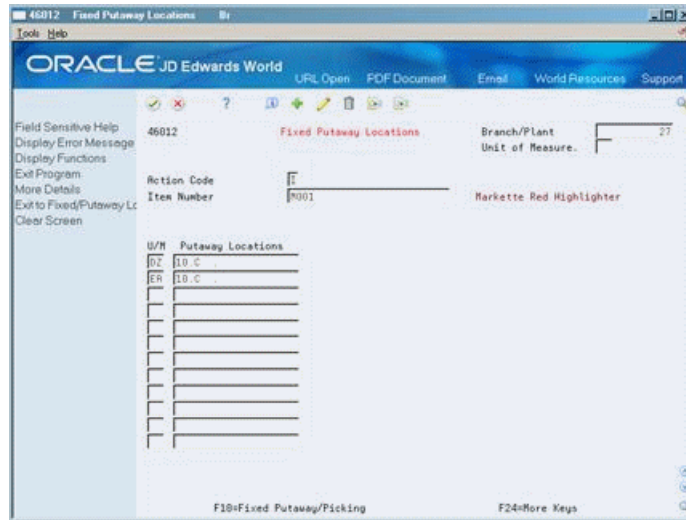
Complete the following fields:

■ Branch/Plant

■ Item Number

■ Unit of Measure

■ Putaway Locations

4.2 Setting Up Fixed Picking Locations

Navigation

From Advanced Warehouse Management (G46), enter 27

From Warehouse Advanced and Technical Operations (G4631), choose Warehouse Movement Rules

From Warehouse Movement Rules (G46311), choose Fixed Picking Locations

You set up fixed picking locations to use the same locations consistently for picking of a given item. This allows you to segregate picking locations from other locations or to keep certain items' picking locations near their putaway and replenishment locations. Often, your fixed picking locations are the same as your fixed putaway locations.

To set up fixed picking locations

On Fixed Picking Locations

Figure 4–2   Fixed Picking Locations screen

1. Complete the following fields:

   - Branch/Plant

   - Item Number

   - Unit of Measure

   - Pick Location

   - Maximum Pick Quantity

   - Maximum Replenishment Quantity

2. Access the fold area.

3. Complete the following fields:

   - Normal Replenishment Point

   - Minimum Replenishment Point

Field	Explanation
Maximum Pick Quantity	The number you enter here indicates the maximum quantity to be picked for an item in a specific unit of measure at a location. The system will not suggest this location if the quantity to be picked exceeds the maximum pick quantity you define in this field.
Max Replenishment Quantity	The number you enter here specifies the maximum quantity to be replenished to a fixed picking location. You must enter a quantity in this field if you will be doing economic replenishment. You specify in the processing options for the Location Selection Driver program (P46171) for automatic, or online, replenishment and in the processing options for the Batch Replenishment program (P461601) that you want to perform economic replenishment.

Field	Explanation
Normal Replenishment Point	A number that indicates the normal level of inventory at a fixed picking location that the system uses during batch replenishments to generate replenishment requests. You can have the system perform replenishment when the quantity in a fixed picking location reaches either the normal replenishment point or the minimum replenishment point. During automatic, or online, replenishment, the system uses the minimum replenishment point. For batch replenishment, you specify in the processing options of the Batch Replenishment program (P461601) which replenishment point you want the system to use.
Min Replenishment Point	A number that indicates the minimum quantity of inventory at a fixed picking location that the system uses to generate an online replenishment request. You can have the system perform replenishment when the quantity in a fixed picking location reaches either the normal replenishment point or the minimum replenishment point. During automatic, or online, replenishment, the system uses the minimum replenishment point. For batch replenishment, you specify in the processing options of the Batch Replenishment program (P461601) which replenishment point you want the system to use.

4.2.1 What You Should Know About

Topic	Description
Setting replenishment quantities	Verify that the sum of each picking location's normal replenishment quantity and maximum replenishment quantity do not exceed the location's maximum capacity quantity. The system will print movement documents to replenish a greater quantity than the picking location can hold, and you might not be able to store all of the items in the picking location.

4.3 Setting Up Fixed Replenishment Zones

Navigation

From Advanced Warehouse Management (G46), enter 27

From Warehouse Advanced and Technical Operations (G4631), choose Warehouse Movement Rules

From Warehouse Movement Rules (G46311), choose Fixed Replenishment Zones

You set up fixed replenishment zones to tie replenishment locations to picking locations. These replenishment locations then refill the same picking locations consistently. This allows you to segregate replenishment zones from other locations, or to keep certain items' replenishment locations near their picking locations.

To set up fixed replenishment zones

On Fixed Replenishment Zones

Figure 4–3   Fixed Replenishment Zones screen

Complete the following fields:

- Branch/Plant

- Pick Zone

- Pick Location

- Replenishment Zone

Field	Explanation
Pick Zone	A code (system 46/type ZN) that identifies an area from which items are picked for shipment.
	Form-specific information
	Enter a pick location code if you want to define the list of zones for a specific zone. If you define fixed replenishment zones for both a specific-location and a pick zone, the location-specific table overrides the location zone table.
	You can replenish a single pick zone from multiple replenishment zones.
Replenishment Zone	A code (system 46/type ZN) that identifies the areas in the warehouse from which items are retrieved to replenish or refill picking locations.
	Form-specific information
	Type a replenishment zone code in this field for each zone you want in the list. The system does not use the sequence field to search for locations.

4.3.1 What You Should Know About

Topic	Description
Defining replenishment zones by picking location versus picking zone	During replenishment of a picking location, the system searches for a replenishment zone attached to the picking location. If you have not set up a replenishment zone for the picking location, the system searches for a replenishment zone attached to a picking zone. If you have not set up a picking zone, the system displays an error.

Topic	Description
Restricting replenishment zones	You can limit replenishment of a picking location to a single replenishment zone by entering that zone in the location's replenishment instruction.

4.3.2 Processing Options

See

5

Set Up Item Warehouse Information

You must provide warehouse information about each item before the system can process items. For example, you can classify items by their size or by the amount of demand for the items. You must set up units of measure, such as eaches and boxes, and define a unit of measure structure that describes the relationship of each unit of measure to the other units of measure. You also need to specify default locations for items and whether items can mix with different items in the same locations.

This chapter contains these topics:

- Section 5.1, "Defining Unit of Measure Structures,"
- Section 5.2, "Defining Item Classification Codes,"
- Section 5.3, "Setting Up Item Unit of Measure Definitions,"
- Section 5.4, "Setting Up Item Profiles."

5.1 Defining Unit of Measure Structures

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse Management General Setup (G4641), choose Basic Item Master Data

You must define a unit of measure structure to process an item in the Advanced Warehouse Management system. A unit of measure structure describes the relationship between the smallest unit of measure and larger units of measure, such as eaches to boxes, boxes to cases, and cases to pallets. For example, if you lack bulk floor space, and you receive a pallet of 500 items, the unit of measure structure allows you to convert pallets to eaches automatically and to store the items in smaller locations. Conversely, if you lack small locations, you can convert eaches to pallets, to store the items efficiently in larger locations. The system uses the unit of measure structure to choose the most efficient unit of measure for picking, putaway, and replenishment.

You can define an unlimited number of unit of measure conversions for an item. For example, you can define conversions such as 24 items per case, 16 cases per pallet, and so on. However, the system limits the unit of measure structure to 5 units of measure. You assign a code (1 through 5) to each unit of measure in the structure. Each item must have a primary unit of measure, which is the smallest unit of measure that the system can track. You should assign a structure code of 1 to the largest unit of measure, such as a pallet. The system assigns the largest numerical structure code (up to the number 5) to the primary (smallest) unit of measure automatically.

The system uses the unit of measure conversions based on how you set the unit of measure conversion in System Constants. You can use conversions that were defined for the item in a specific branch/plant. If you do not set the unit of measure conversion, the system searches for the item's conversion in the Item Master table.

The system overrides the Unit of Measure structures for each item you have assigned a serial number. For these items, the primary unit of measure will always be in level one, with a quantity of one. The system tracks serial numbers using one record for each serial number. You cannot merge these records.

To define unit of measure structures

On Basic Item Master Data

Figure 5–1   Basic Item Master Data screen
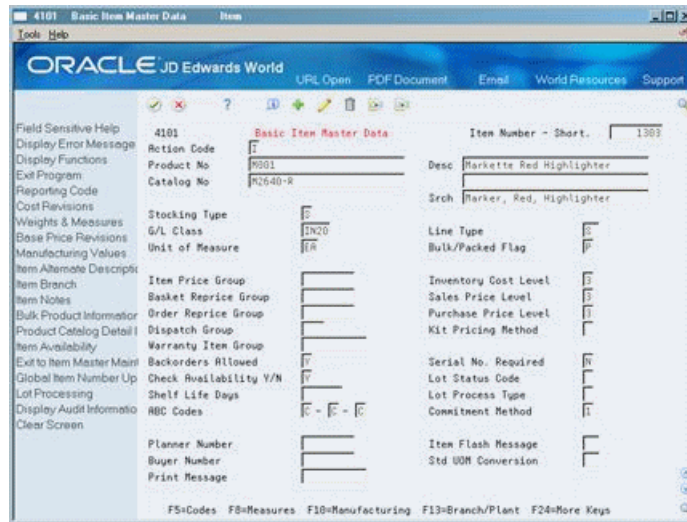
1. Locate the item for which you want to define a unit of measure structure.

2. Access Default Units of Measure.

Figure 5–2   Default Units of Measure screen
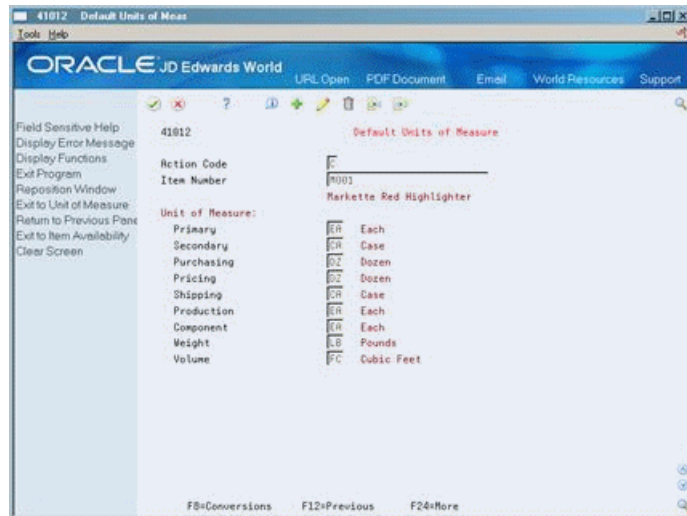
3. On Default Units of Measure, access Item Units of Measure.

Figure 5–3   Item Units of Measure screen
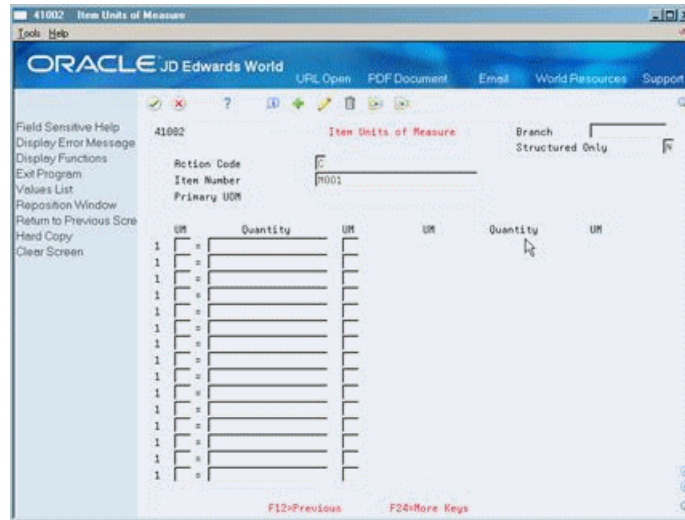
4. On Item Units of Measure, complete the following fields:

    ■   Item Number

    ■   Unit of Measure

    ■   Quantity

    ■   Unit of Measure

5. Access the fold area.

6. Complete the following field for up to five levels in the structure:

    ■   Structure Code

Field	Explanation
Item Number	A number that the system assigns to an item. It can be in short, long, or 3rd item number format.
UM	A user defined code (system 00/type UM) that identifies the unit of measurement for an amount or quantity. For example, it can represent a barrel, box, cubic yard, gallon, an hour, and so on.
	Form-specific information
	This unit of measure to which you are converting.
Quantity	The factor that the system uses to convert one unit of measure to another unit of measure.
	Form-specific information
	The quantity and the unit of measure from which you are converting must equal the unit of measure to which you are converting.

Field	Explanation
Structure Code	A code that determines the hierarchy of items in containers or pallets.
	For example:
	Unit of Measure
	1 Pallet = 24 Cases - structure code 1
	1 Case = 12 Interpacks - structure code 2
	1 Interpack = 3 Boxes - structure code 3
	1 Box = 6 Eaches - structure code 4
	Assign structure code 1 to the largest unit of measure, with smaller units assigned to codes 2, 3, and 4.
	Given the above structure example, when one item is stored in the warehouse the location detail (F4602) would have a structure of:
	1 Pallet/ with 24 Cases on the Pallet/ with 12 Interpacks in each Case/ with 3 Boxes in each Interpack/ with 6 Eaches in each Box
	Note: It is not necessary to define your primary unit of measure within a structure. It always defaults in as the lowest level. Or, if you are changing the structure in a program, the system verifies that the primary is present in the structure and is the lowest level.

5.2 Defining Item Classification Codes

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse Management General Setup (G4641), choose Basic Item Master Data

An item classification code is a group to which you assign an item. During inventory movement (putaway, picking, and replenishment), the system uses these codes to choose the movement tables that determine location selection. You use two types of item classification codes for the warehouse:

- Item dimension group
- Warehouse process groups

For example, you can assign a compact disc to the item dimension group DISK and to the warehouse process group FAST, because it is a popular item and does not remain in stock very long.

To define item classification codes

On Basic Item Master Data

Figure 5–4   Basic Item Master Data (Item Classification) screen
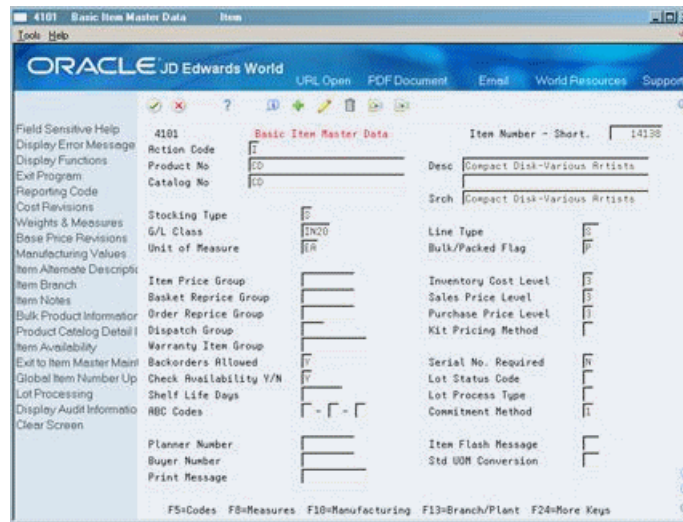
1. Locate the item.

2. Access Classification Codes.

Figure 5–5   Classification Codes screen
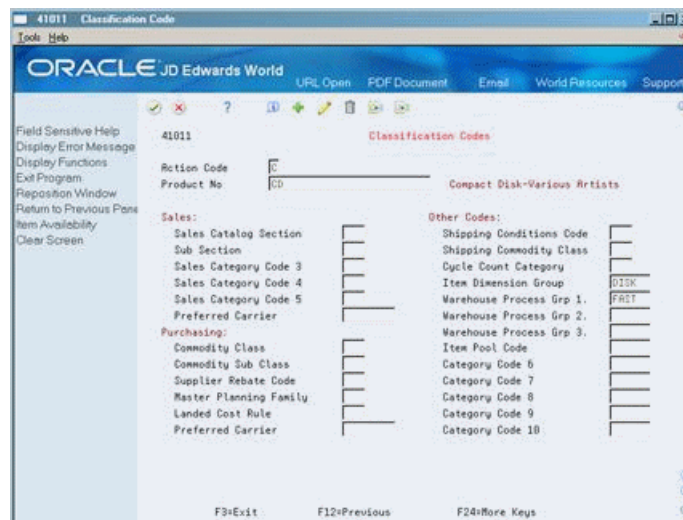
3. On Classification Codes, complete the following optional field:

    ■   Item Dimension Group

4. To define warehouse process groups for the item, complete the following fields:

    ■   Warehouse Process Group 1

    ■   Warehouse Process Group 2

    ■   Warehouse Process Group 3

Field	Explanation
Item Dimension Group	A code (system 41/type 01) that identifies a group of items that share the same size specifications, such as height and width. An item dimension group defines the size specifications for all items that belong to the group. After you set up an item dimension group, you can assign items to the group through Classification Codes.
Warehouse Process Grp 1	A code (system 41/type 02) that identifies a group of items that you want to move the same way. An item's process group determines the movement instructions the system uses to put away, pick, and replenish the item. You assign items to process groups using Classification Codes.
	Form-specific information
	You must define at least one process group for each item to have warehouse processes take place.
	You use Process Selection to define putaway, picking, and replenishment instructions for warehouse process groups.
Warehouse Process Grp 2	A code (system 41/type 02) that identifies a group of items that you want to move the same way. An item's process group determines the movement instructions the system uses to put away, pick, and replenish the item. You assign items to process groups using Classification Codes (P41011).
	Form-specific information
	You must define at least one process group for each item to have warehouse processes take place.
	You use Process Selection to define put away, picking, and replenishment instructions for warehouse process groups.
Warehouse Process Grp 3	A code (system 41/type 02) that identifies a group of items that you want to move the same way. An item's process group determines the movement instructions the system uses to put away, pick, and replenish the item. You assign items to process groups using Classification Codes (P41011).
	Form-specific information
	You must define at least one process group for each item to have warehouse processes take place.
	You use Process Selection to define put away, picking, and replenishment instructions for warehouse process groups.

See Also:

- Section 12.3, "Defining Process Selection" for information about how warehouse process groups control which movement instructions the system uses.

5.3 Setting Up Item Unit of Measure Definitions

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse Management General Setup (G4641), choose an option

You define information about each item's units of measure, such as eaches, boxes, cases, and so on, to allow the system to perform putaway, picking, and replenishment

of that item. You define the item's units of measure when you create the Item Master record for the item.

Each item's unit of measure definition includes:

- The default storage container

- A switch that controls license plate tracking for that unit of measure

- The dimensions that the system uses to calculate volume

A unit of measure structure describes the relationship of eaches to boxes, boxes to cases, cases to pallets, and so on. If you use a unit of measure structure, you define each unit of measure in the structure using Item Units of Measure during the creation of the Basic Item Master Data record for the item. If you do not use a unit of measure structure, you must define the primary unit of measure for the item.

You use Unit of Measure Definition to define the unit of measure's dimensions and how the system processes the unit of measure. You can:

- Define units of measure by item

- Define units of measure by group

You choose an item dimension group from User Defined Code Revisions. If the predefined item dimension groups do not meet your needs, you can define a new item dimension group on User Defined Code Revisions and then reference that group on Unit of Measure Definition by Group.

To define units of measure by item

On U/M Definition by Item

Figure 5–6   U/M Definition by Item screen

1. Complete the following fields:

   - Branch/Plant

   - Item Number

   - Unit of Measure

   - Capacity Method

   - Allow Rotation

- Unit of Measure Usage

2. If you measure volume using one of the two capacity methods, complete the following fields:

- Gross Width

- Gross Depth

- Gross Height

- Gross Weight

3. Complete the following optional fields:

- Carton Recommendation Method

- Default Pack Code

- Default Container

Field	Explanation
Capacity Method	A code that indicates the capacity method the system uses to calculate whether the quantity to be put away will fit in a location.
	Valid methods are:
	1 – Volume checking. The system compares the available cubic dimensions of a location to the cubic dimensions of the item to be put away.
	2 – Layering. The system compares the item's dimensions to the usable dimensions of the location. This method lets you layer goods in a location. If you specify this capacity method, you must also specify whether the item can be rotated. If there is enough available volume, and the item's dimensions fit in the location, the system suggests the location for putaway.
	3 – Quantity checking. The system examines the quantity of the item that should fit in the location, as you defined it through Location Capacity Definition (P46024).
Allow Rotation (Y/N)	A code that indicates whether you allow the system to rotate an item 90 degrees to determine whether the item fits into a location.
	Valid codes are:
	Y – Yes, rotate the item 90 degrees during putaway
	N – No, do not rotate the item 90 degrees during putaway
	Note: You must enter a code in this field if you use capacity method 2 (layering).

Field	Explanation
U/M Usage	A code that indicates whether the default storage container assigned to the specified item in this unit of measure is an open, pallet-type container or a closed, box-type container. The system calculates the item's volume and weight based on container type.
	Valid codes are:
	1 – The container is an open, pallet-type container. The system calculates its volume and weight as follows:
	■ Height = the height of the container plus the height of the items on the container
	■ Weight = the weight of the container plus the weight of the items on the container
	■ Width = the larger of the width of the container or the items on the container
	■ Depth = the larger of the depth of the container or the items on the container
	2 – The container is a closed, box-type container. The system calculates its volume and weight as follows:
	■ Weight = The weight of the container plus the weight of the goods in the container
	■ Height, width, and depth are pulled from Container and Carton Code (P46091) information, where you also define the container's weight.
	Note: If you do not specify a default container for the specified item in this unit of measure, the system uses the height, width, depth, and weight that you define on this form.
Gross Width	The gross width of the location(s) defined within the location dimension group, the gross width of an item as defined in the Unit Of Measure Definition (by item or group), or the gross width of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants - Page 2 (P410012).
Gross Depth	The gross depth of the location(s) defined within the location dimension group, the gross depth of an item as defined in the Unit Of Measure Definition (by item or group), or the gross depth of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants - Page 2 (P410012).
Gross Height	The gross height of the location(s) defined within the location dimension group, the gross height of an item as defined in the Unit Of Measure Definition (by item or group), or the gross height of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants - Page 2 (P410012).
Gross Weight	The gross weight of one unit of the item in this unit of measure, or the weight of an empty storage container or shipping carton. These values default to the location detail (F4602) and the system uses the values in maximum weight calculations for specified locations during putaway.

Field	Explanation
Carton Rcmd Method	A code that indicates the method the system uses to recommend a carton for the specified item in this unit of measure.
	Valid codes are:
	blank – Do not recommend cartons for the specified item in this unit of measure
	1 – Recommend shipping cartons for the specified item in this unit of measure based on the volume of the item and the volume of the shipping carton
	2 – Recommend shipping cartons for the specified item in this unit of measure based on the percentage of the shipping carton that the item and unit of measure occupy
	You define the dimensions of the carton through Container and Carton Codes (P46091). You define an item's dimensions through Item/Unit of Measure Profile (P46011).
Default Pack Code	A code (system 46/type PK) that identifies the packing materials to use (such as opaque shrink wrap, or foam nuggets) if repacking is required before putaway. If you set the Repack (Y/N) field to Y, you must enter a code in this field. You define the packing codes on User Defined Code Revisions.
Default Container	A code (system 46/type EQ) that identifies a storage container or a shipping carton. A storage container can be an open container where items are stored on the container (for example, a pallet), or a closed container where items are stored in the container (for example, a box). You use Container and Carton Codes (P46091) to define storage containers.

To define units of measure by group

On U/M Definition by Group

Figure 5–7 U/M Definition by Group screen
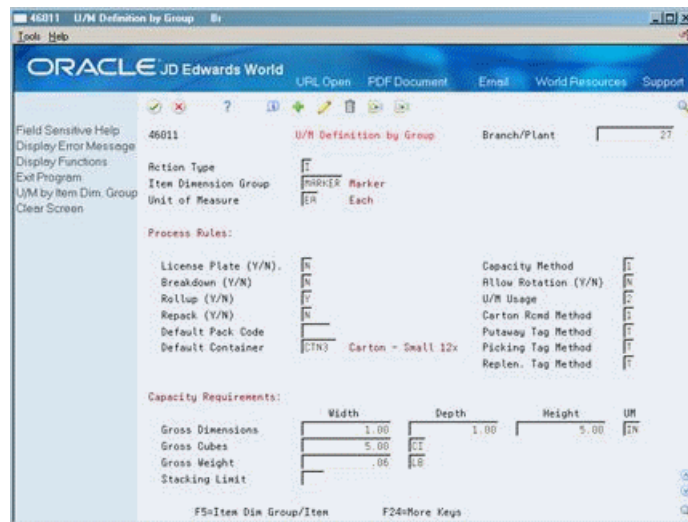
1. Complete the following fields:

   ■ Branch/Plant

   ■ Item Dimension Group

- Unit of Measure

- Capacity Method

- Allow Rotation

- Unit of Measure Usage

2. If you measure volume by the capacity method, complete the following fields:

- Gross Width

- Gross Depth

- Gross Height

- Gross Weight

3. Complete the following optional fields:

- Carton Recommendation Method

- Default Pack Code

- Default Container

Field	Explanation
Item Dimension Group	A code (system 41/type 01) that identifies a group of items that share the same size specifications, such as height and width. An item dimension group defines the size specifications for all items that belong to the group. After you set up an item dimension group, you can assign items to the group through Classification Codes.

5.3.1 What You Should Know About

Topic	Description
Unit of measure hierarchy	If you set up an item unit of measure definition, it always overrides an item group unit of measure definition. This is because the item unit of measure is specific to that item, whereas you use the item group unit of measure to supply the unit of measure for all items in the group during inventory movement. You can set up an item dimension group and then set up item unit of measure definitions for items that vary from the normal dimensions of the group.

5.3.2 Processing Options

See Section 24.6, "Unit of Measure Maintenance (P46011)."

5.4 Setting Up Item Profiles

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse Management General Setup (G4641), choose Item Profile

Every item that you process through your warehouse must have an item profile. The item profile contains basic information, such as:

- Whether you can store items of different types or ages in the same location

- Whether to use one or two-phase confirmation for putaway, picking, and replenishment

- The item's various default locations

For example, you can set up a profile for item Compact Disc to:

- Allow mixing with other items

- Use two-phase putaway, picking, and replenishment

- Use location R/ / as its default receiving location

To set up item profiles

On Item Profile

Figure 5–8 Item Profile screen
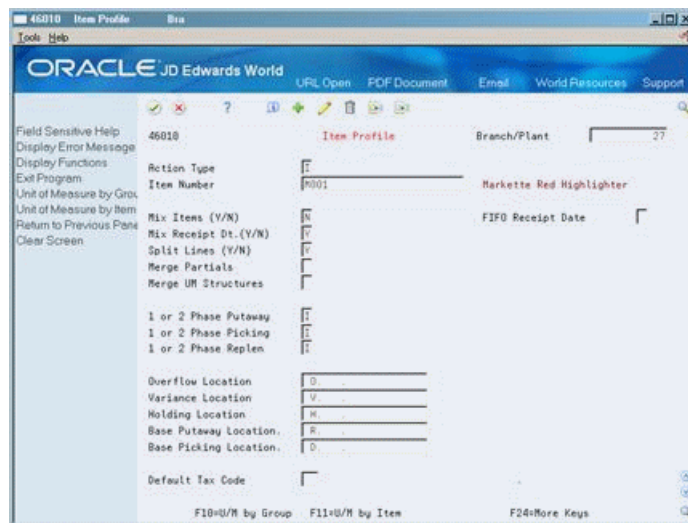
1. Complete the following fields:

   - Branch/Plant

   - Item Number

   - Mix Items

   - Mix Receipt Date

   - Split Lines

   - 1 or 2 Phase Putaway

   - 1 or 2 Phase Picking

   - 1 or 2 Phase Replenishment

   - Overflow Location

   - Variance Location

   - Holding Location

   - Base Putaway Location

   - Base Picking Location

2. Complete the following optional fields:

- Default Tax Code
- Merge Partials
- Merge UM Structures
- FIFO Receipt Date

Field	Explanation
Mix Items (Y/N)	A code that indicates whether you want the system to store different items in the same location.
	Valid codes are:
	Y – Yes, allow different items to be stored in the same location
	N – No, do not allow different items to be stored in the same location
Mix Receipt Dt.(Y/N)	A code that indicates how you want the system to assign items to a location.
Split Lines (Y/N)	A code that indicates whether the system can split a purchase order line when you create a putaway suggestion for the order line.
	Valid codes are:
	Y – Yes, split purchase order lines when making putaway suggestions
	N – No, do not split purchase order lines when making putaway suggestions
1 or 2 Phase Putaway	A code that indicates whether you use 1- or 2-phase confirmation during putaway.
	■ 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location.
	■ 2-phase confirmation means the process is confirmed in two steps: the first when the goods have moved from the starting location to the staging location, and the second when the goods have moved from the staging location to the destination location.
	If you use 2-phase confirmation, you can specify whether the confirmation is logical or physical.
	■ Logical 2-phase confirmation generates one document and does not indicate physical movement to the staging location.
	■ Physical 2-phase confirmation generates two documents: the first indicates movement from the starting location to the staging location, and the second indicates movement from the staging location to the destination location.
	Valid codes are:
	I – Use 1-phase confirmation
	L – Use logical 2-phase confirmation
	P – Use physical 2-phase confirmation

Field	Explanation
1- or 2-Phase Picking	A code that indicates whether you use 1- or 2-phase confirmation during picking.
	■ 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location.
	■ 2-phase confirmation means the process is confirmed in two steps: the first when the goods have moved from the starting location to the staging location, and the second when the goods have moved from the staging location to the destination location.
	If you use 2-phase confirmation, you can specify whether the confirmation is logical or physical.
	■ Logical 2-phase confirmation generates one document and does not indicate physical movement to the staging location.
	■ Physical 2-phase confirmation generates two documents: the first indicates movement from the starting location to the staging location, and the second indicates movement from the staging location to the destination location.
	Valid codes are:
	I – Use 1-phase confirmation
	L – Use logical 2-phase confirmation
	P – Use physical 2-phase confirmation
1 or 2 Phase Replen	A code that indicates whether you use 1- or 2-phase confirmation during replenishment.
	■ 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location.
	■ 2-phase confirmation means the process is confirmed in two steps: the first when the goods have moved from the starting location to the staging location, and the second when the goods have moved from the staging location to the destination location.
	If you use 2-phase confirmation, you can specify whether the confirmation is logical or physical.
	■ Logical 2-phase confirmation generates one document and does not indicate physical movement to the staging location.
	■ Physical 2-phase confirmation generates two documents: the first indicates movement from the starting location to the staging location, and the second indicates movement from the staging location to the destination location.
	Valid codes are:
	I – Use 1-phase confirmation
	L – Use logical 2-phase confirmation
	P – Use physical 2-phase confirmation
Overflow Location	A code that identifies the location that the system uses when an item cannot fit into the suggested putaway locations. You can monitor movement suggestions for the overflow location by accessing the audit report (P46175) or by inquiring on the location detail (F4602).

Field	Explanation
Variance Location	A code that identifies the location that the system uses when you confirm a smaller quantity than the suggested quantity during putaway confirmation. You do this through Change/Split Suggestion during putaway confirmation, where you enter a quantity that is smaller than the suggested quantity, and confirm with a variance to the suggested quantity. The system places the variance (remaining) quantity in the variance location.
Holding Location	A code that identifies the location that the system uses when you confirm a larger quantity than the suggested pick quantity during pick confirmation. You do this through Change/Split Suggestion during pick confirmation, where you enter a quantity that is greater than the suggested quantity, and confirm with a variance to the suggested quantity. The system places the variance (extra) quantity in the holding location.
Base Putaway Location	A code that identifies the base putaway location that the system uses to calculate proximity when you specify proximity as the tiebreaker in a putaway instruction. If you use a tiebreaker that sequences locations according to proximity, the system ranks the locations based on their distance from this base putaway location. The system calculates distance based on the coordinates (longitude, latitude, and height) you defined in the location profile (P46020).
Base Picking Location	A code that identifies the base picking location that the system uses to calculate proximity when you specify proximity as the tiebreaker in a picking instruction. If you use a tiebreaker that sequences locations according to proximity, the system ranks the locations based on their distance from this base picking location. The system calculates distance based on the coordinates (longitude, latitude, and height) you defined in the location profile (P46020).
Default Tax Code	A code (system 46/type LT) that indicates whether the location contains tax-paid inventory (in-bond vs. duty paid). If an item has an assigned tax code, the system puts the item away only in locations with the same tax code.
	You assign tax codes to items through Item Profile (P46010).
Merge Partials	A code that indicates whether a partial unit of measure can be added to another partial unit of measure in the Location Detail File (F4602). A partial quantity is a quantity in any UM in a structure that is less than one. For example, an item with a case-each structure, where case = 10 each, would have a partial quantity if there were 5 each of the item.
	Valid Codes are:
	blank – Do not merge two partial units of measure.
	1 – Merge two partial units of measure.
	Form-specific information
	To merge partials, you must also set this field to one on the Location Profile Detail form.
Merge UM Structures	A code that indicates whether two unit of measure structures can be merged. Valid Codes are:
	blank – Do not merge unit of measure structures.
	1 – Merge unit of measure structures.
	Form-specific information
	To merge UM structures, you must also set this field to one on the Location Profile Detail form.

Field	Explanation
FIFO Receipt Date	A code that indicates if the receipt date is required for FIFO when you select locations for picking and replenishment. If the receipt date is not required, records with different dates will be merged. The Location Detail record will retain the last receipt date (which may not be the latest date).
	Valid Codes are:
	blank – Receipt Date is not required for FIFO.
	1 – Receipt date is required for FIFO.
	To merge records with different FIFO receipt dates, you must set the Mix Dates/Lots field to Y on both the Item Profile form and the Location Profile Detail form.

5.4.1 What You Should Know About

Topic	Description
Merging partial quantities, unit of measure structures, or FIFO receipt dates	You can merge partial quantities, UM structures, and FIFO receipt dates to minimize the number of location detail records created by the system.
	If you merge FIFO receipt dates, the system retains the last receipt date.
	To merge partial quantities or UM structures, you must set the Merge Partials or Merge UM Structures field to 1 in both the Item Profile and Location Profile Detail form. Merging partials or UM structures can cause the system to over or understate the available space in a location.
	See Section A.13, "Merging Location Detail Records."

6

Set Up Inclusion Rules

This chapter contains the topic:

-

6.1 Setting Up Inclusion Rules

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse Management General Setup (G4641), choose Inclusion Rules

An inclusion rule specifies which order type, line type, and status combinations that you process through your warehouse. This determines the steps at which the system creates putaway requests (during purchase order receipts entry) or picking requests (during sales order entry).

You must define the inclusion rule and include the order type, next status, and line type for the order for which you want to create a putaway or picking request.

To set up inclusion rules

On Inclusion Rules

Figure 6–1   Inclusion Rules screen
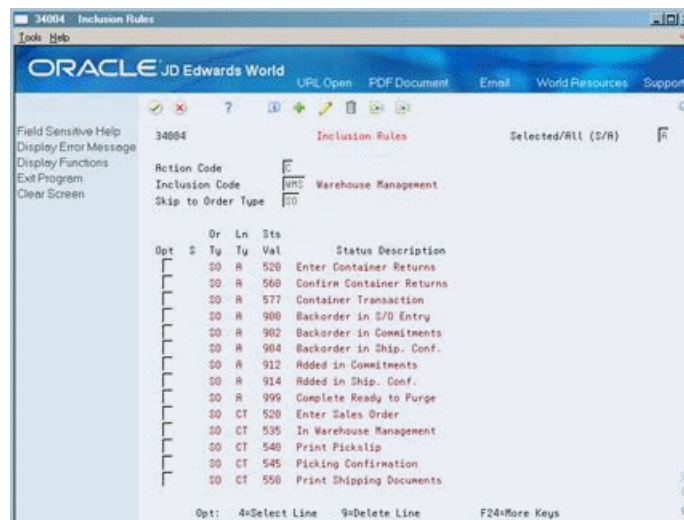
1. Locate the inclusion rule for Warehouse Management by completing the following field:

   ■ Inclusion Code

2. To limit the information that displays, complete the following field:

   ■ Skip to Order Type

3. To add or delete an order type, complete the following field and press Enter:

   ■ Option

4. Exit Inclusion Rules.

5. Access the Warehouse System Setup menu.

6. From the Warehouse System Setup menu, choose *Branch/Plant Constants*.

7. Access Branch/Plant Constants - Pg 2.

Figure 6–2   Branch/Plant Constants - Page 2 screen
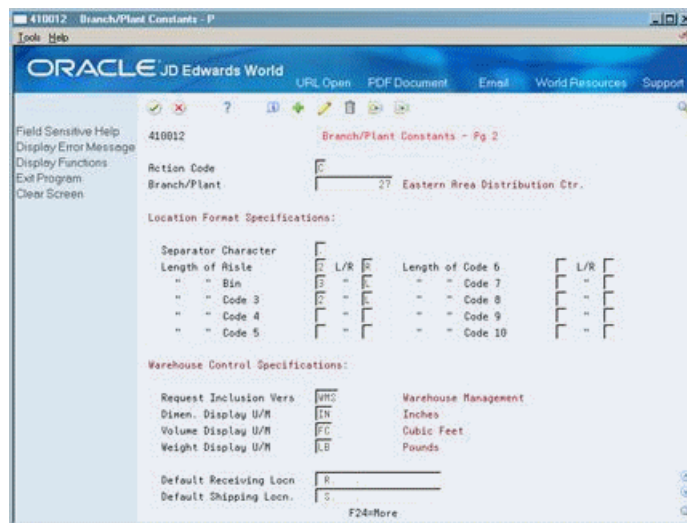
8. On Branch/Plant Constants - Pg 2, complete the following field:

   ■ Request Inclusion Version

Field	Explanation
Selection Code	A code used to select All or a Selected part of a list of items.
Request Inclusion Vers	A user defined code (system 40/type RV) that identifies an inclusion rule that you want the system to use for this branch/plant. The Manufacturing and Advanced Warehouse Management systems use inclusion rules as follows: For Manufacturing ■ Allows multiple versions of resource rules for running MPS, MRP, or DRP. For Advanced Warehouse Management ■ Allows multiple versions of inclusion rules for running putaway and picking. The system processes only those order lines that match the inclusion rule for a specified branch/plant.

Field	Explanation
Order Type	A user defined code (00/DT) that identifies the type of document. This code also indicates the origin of the transaction. JD Edwards World has reserved document type codes for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program. (These entries are not self-balancing when you originally enter them.)
	The following document types are defined by JD Edwards World and should not be changed:
	P – Accounts Payable documents
	R – Accounts Receivable documents
	T – Payroll documents
	I – Inventory documents
	O – Purchase Order Processing documents
	J – General Accounting/Joint Interest Billing documents
	S – Sales Order Processing documents
Selection Exits	Selection exit codes are options and function keys that are used to perform a specific function for a selected line or form of data. The most commonly used selection exits for each program are displayed in highlighted text at the bottom of the form. To display all available selection exits, press F24. Press F1 in the Option field to display all available Options for the program.

6.1.1 Processing Options

See Section 24.7, "Supply/Demand Inclusion Rules (P34004)."

7

Set Up Order Groups

This chapter contains the topic:

7.1 Setting Up Order Groups

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse Management General Setup (G4641), choose Order Groups

An order group is a set of document types, such as purchase orders or sales orders, that you use as a group for putaway, picking, and replenishment. You define the order group to identify which putaway, picking, or replenishment instruction table to choose during process selection.

You must assign each order type that you use to an order group. You can assign an order type to only one order group.

Additionally, you must set up order groups if you want to perform online replenishment.

To set up order groups

On Order Groups

Figure 7–1   Order Groups screen
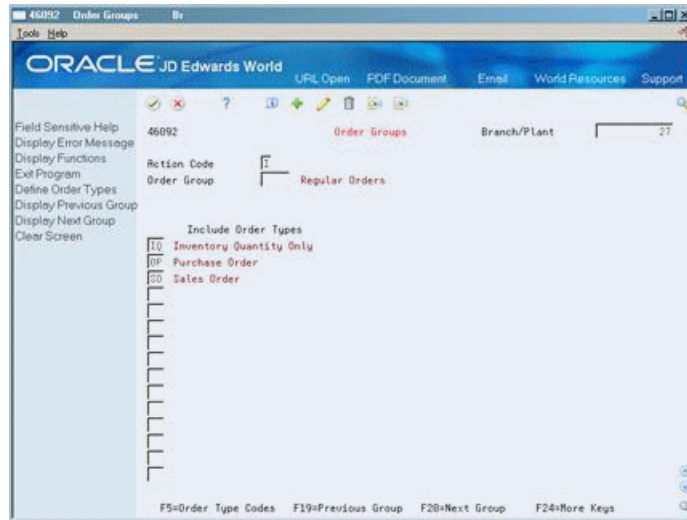
Complete the following fields:

■   Branch/Plant

■   Order Group

■   Include Order Types

Field	Explanation
Order Group	A code (system 46/type DT) that identifies a group of order types that you want to process as one for putaway, picking, and replenishment transactions.
	You set up order group codes on User Defined Codes, and then add order types to the code on Order Groups (P46092). You specify an order group on Picking Instructions (P46095) to limit the order types that trigger replenishment after picking.
Order Type	A user defined code (00/DT) that identifies the type of document. This code also indicates the origin of the transaction. JD Edwards World has reserved document type codes for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program. (These entries are not self-balancing when you originally enter them.)
	The following document types are defined by JD Edwards World and should not be changed:
	P – Accounts Payable documents
	R – Accounts Receivable documents
	T – Payroll documents
	I – Inventory documents
	O – Purchase Order Processing documents
	J – General Accounting/Joint Interest Billing documents
	S – Sales Order Processing documents

7.1.1 What You Should Know About

Topic	Description
Naming order groups	You can use a blank for the name of your most commonly used order group. As a result, the system displays your order group automatically when you access Order Groups.
Mandatory document types	You must assign document type IQ (Inventory Quantity) to each order group that you use. The system uses document type IQ for replenishment.

8

Set Up Unit of Measure Groups

This chapter contains the topic:

- Section 8.1, "Setting Up Unit of Measure Groups."

8.1 Setting Up Unit of Measure Groups

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse Management General Setup (G4641), choose Unit of Measure Groups

A unit of measure group is a set of items in the same unit of measure that you want the system to process the same way. For example, if you have one thousand different items that you normally count in eaches, you can assign the items to the EACHES unit of measure group, so you do not have to individually define each item's unit of measure. This saves you time during warehouse setup. You can use unit of measure groups by assigning the groups to movement instruction tables to control inventory movement.

You can assign a unit of measure to only one unit of measure group.

To set up unit of measure groups

On Unit of Measure Groups

Figure 8–1   Unit of Measure Groups screen
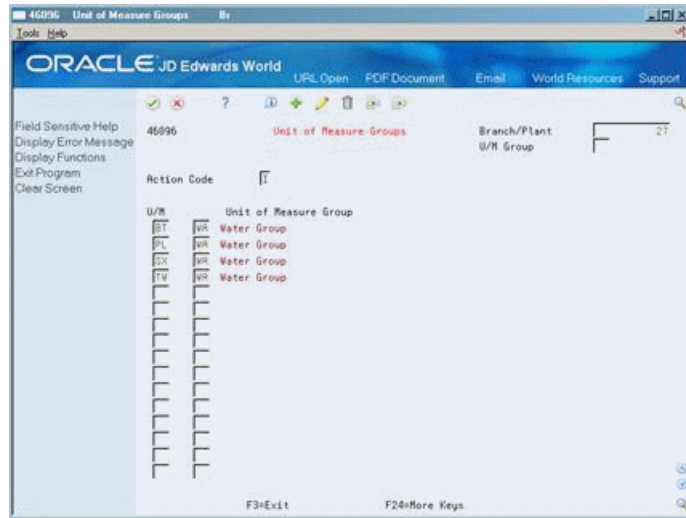
Complete the following fields:

- Branch/Plant

- Unit Of Measure

- Unit of Measure Group

Field	Explanation
Unit of Measure Group	A code (system 46/type UG) that identifies a group of units of measure that you want to process as one for putaway, picking, and replenishment transactions.
	You use unit of measure groups to set up movement instructions for putaway, picking, or replenishment.
	Form-specific information
	Use the UOM Group field in the upper right portion of the form to enter the code for a specific group if you want to display only units of measure for that group.
	Use the UOM Group field in the lower portion of the form to identify the unit of measure group to which each unit of measure is assigned.
Unit of Measure as Input	A user defined code (00/UM) that indicates the quantity in which to express an inventory item, for example, CS (case) or BX (box).

9

Set Up Storage Containers

This chapter contains these topics:

9.1 Setting Up Storage Containers

You can use storage containers, such as boxes, canisters, or pallets, to store items while they are in your warehouse. You set up storage containers to specify how much space the container requires in the storage location. You can also specify which containers are allowed in a particular location. The system uses this information to choose locations during putaway.

Two types of storage containers are available:

- Open, or pallet-type containers, which you can overfill to exceed the container's dimensions
- Closed, or box-type containers, which you cannot overfill

9.2 Defining Storage Containers

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse Management General Setup (G4641), choose Container and Carton Codes

You define the dimensions, weight, and capacity of each container that you want to use in your warehouse. The system uses this information to choose locations for putaway.

To define storage containers

On Container and Carton Codes

Figure 9–1   Container Carton Codes screen
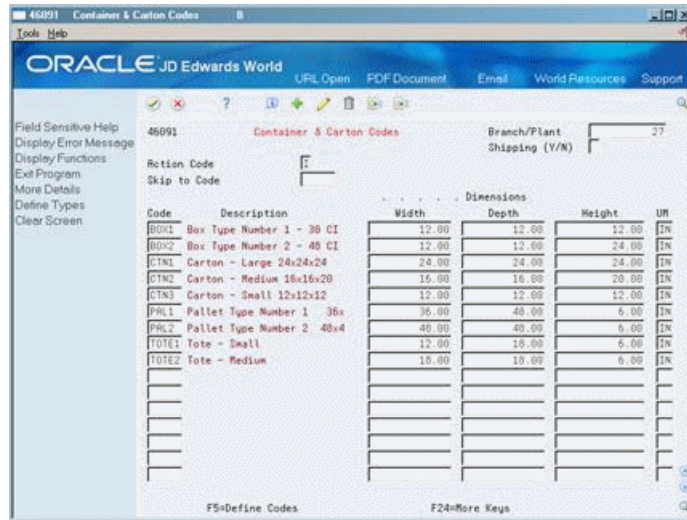
1. Complete the following fields:

    ■   Branch/Plant

    ■   Shipping Container

    ■   Container Code

    ■   Width

    ■   Depth

    ■   Height

    ■   Unit of Measure

2. Access the fold area.

3. Complete the following fields:

    ■   Shipping Container

    ■   Cubes

    ■   Unit Of Measure

    ■   Available

    ■   Weight

    ■   Unit Of Measure

    ■   Beginning Tolerance

    ■   Ending Tolerance

Field	Explanation
Shipping (Y/N)	A code that indicates whether the container can be used as a shipping carton. The system uses only items that can be used as shipping cartons when it makes carton recommendations.
	Valid codes are:
	Y – Yes, use this container as a shipping carton
	N – No, do not use this container as a shipping carton
	Form-specific information
	■ Enter Y in the Shipping Y/N field in the upper-right corner to specify that you want to review only containers that can be shipped. Blank displays all containers, both shippable and non-shippable.
	■ The Shipping Y/N field in the fold allows you to define whether the container is shippable. A Y in this field indicates that the system will consider this container when making carton recommendations.
Container Code	A code (system 46/type EQ) that identifies a storage container or a shipping carton. A storage container can be an open container where items are stored on the container (for example, a pallet), or a closed container where items are stored in the container (for example, a box). You use Container and Carton Codes (P46091) to define storage containers.
	Form-specific information
	■ Skip to Code field: Enter a container code in this field if you want to display a specific code at the top of the list.
	■ Code field: The code in this field identifies the container whose dimensions display on the line.
Gross Width	The gross width of the location(s) defined within the location dimension group, the gross width of an item as defined in the Unit Of Measure Definition (by item or group), or the gross width of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants - Page 2 (P410012).
Gross Depth	The gross depth of the location(s) defined within the location dimension group, the gross depth of an item as defined in the Unit Of Measure Definition (by item or group), or the gross depth of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants - Page 2 (P410012).
Gross Height	The gross height of the location(s) defined within the location dimension group, the gross height of an item as defined in the Unit Of Measure Definition (by item or group), or the gross height of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants - Page 2 (P410012).
UM	A user defined code (system 00/type UM) that identifies the unit of measure that the system uses to display dimensions for the warehouse. The system provides the ability to establish inches, centimeters, meters, and so forth, as a measuring standard.

Field	Explanation
Cubic Dimensions - Gross	The gross cubic dimensions of the locations defined within the location dimension group, the gross cubic dimensions of an item as defined in the Unit Of Measure Definition (by item or group), or the gross cubic dimensions of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants - Page 2 (P410012). *Form-specific information* The system calculates the cubic dimension of the container after you enter the container's dimensions (height multiplied by depth multiplied by width).
Available (Y/N)	A code that indicates whether this container is available as a shipping carton for packing picked items. The system uses available containers during carton recommendation. Valid codes are: Y – Yes, this container is available as a shipping carton N – No, this container is not available as a shipping carton
Weight - Gross Weight	The gross weight of one unit of the item in this unit of measure, or the weight of an empty storage container or shipping carton. These values default to the location detail (F4602) and the system uses the values in maximum weight calculations for specified locations during putaway.
Tolerance	The minimum percentage of a shipping carton that must be filled before it can be shipped. If the content of the carton does not reach this percentage, the system recommends a smaller carton. The default minimum percentage is 85%.
Percentage - Maximum Fill	The maximum percentage of a shipping carton that can be filled before the system recommends a larger carton. The default maximum percentage is 90%.

9.2.1 What You Should Know About

Topic	Description
Predefined container codes	If the predefined container codes do not meet your needs, add a new container definition on User Defined Code Revisions.

9.3 Setting Up Allowed Containers for Each Location

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse Management General Setup (G4641), choose Location Profile Detail

The system allows you to put any type of container in a location. However, you can restrict the container types that the system allows in a location. You can enter a single container code, or you can define a list of allowed containers.

To set up allowed containers for each location

On Location Profile Detail

Figure 9–2   Location Profile Detail screen
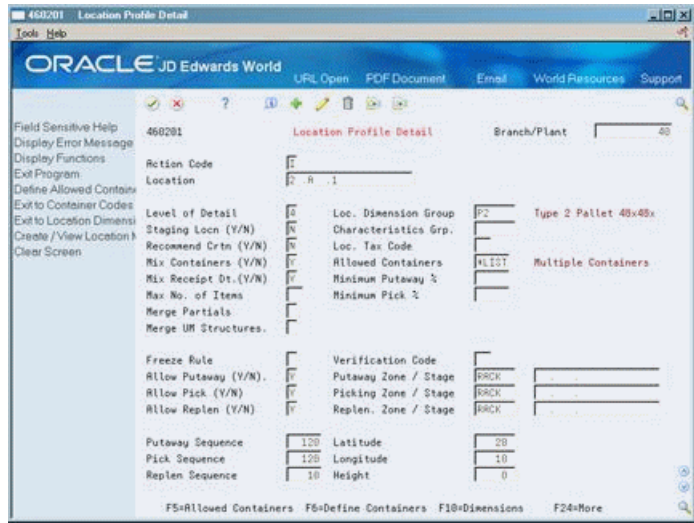
1. Locate the location for which you want to set up allowed containers.

2. Complete the following field:

   ■   Allowed Containers

   If you enter *LIST in Allowed Containers, you can define a list of containers.

3. To define a list of containers, access Allowed Containers.

Figure 9–3   Allowed Containers screen
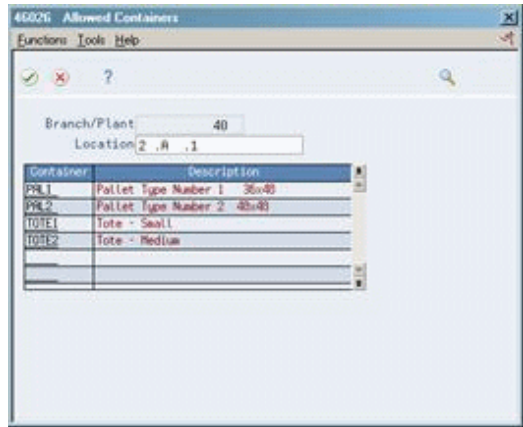
4. On Allowed Containers, complete the following field for each container that you want to include in the list:

   ■   Container

Field	Explanation
Container	A code (system 46/type EQ) that identifies a storage container or a shipping carton. A storage container can be an open container where items are stored on the container (for example, a pallet), or a closed container where items are stored in the container (for example, a box). You use Container and Carton Codes (P46091) to define storage containers.

9.3.1 What You Should Know About

Topic	Description
Pallets (open containers) versus boxes (closed containers)	To calculate the space required for a storage container, you must define whether the container is pallet-type (open) or box-type (closed).

10

Set Up Shipping Cartons and Recommendation

You use shipping cartons, such as boxes and cases, to ship items out of your warehouse. A shipping carton can be identical to a storage container, except that you can ship only closed, box-type cartons. You can have the system recommend a shipping carton when you pick an item.

This chapter contains these topics:

- Section 10.1, "Setting Up Shipping Cartons,"
- Section 10.2, "Setting Up Carton Recommendation."

10.1 Setting Up Shipping Cartons

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse Management General Setup (G4641), choose Container and Carton Codes

You set up shipping cartons to define what cartons exist, which cartons are available, and the percentage of space in the carton that an item can fill. The system uses this information to recommend shipping cartons during picking.

To set up shipping cartons

On Container and Carton Codes

Figure 10–1 Container and Carton Codes screen
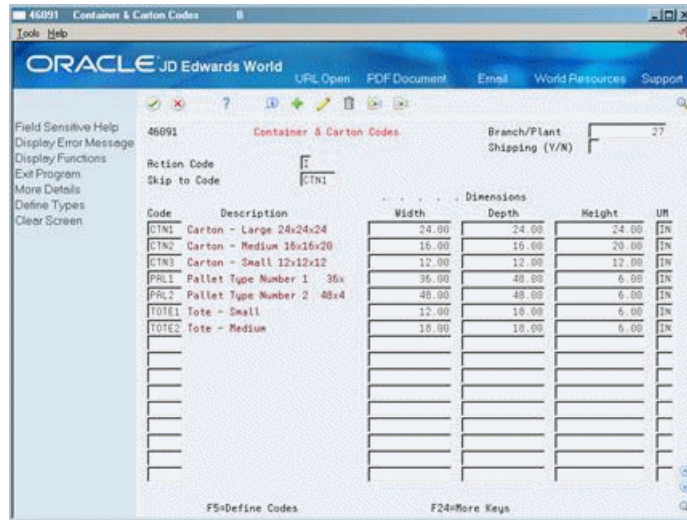
1. Complete the following fields:

   ■ Branch/Plant

   ■ Shipping Container

   ■ Container Code

   ■ Width

   ■ Depth

   ■ Height

   ■ Unit Of Measure

2. Access the fold area (F4).

3. Complete the following fields:

   ■ Ship Priority

   ■ Shipping Container

   ■ Cubes

   ■ Unit Of Measure

   ■ Available Carton

   ■ Weight

   ■ Unit Of Measure

   ■ Tolerance

Field	Explanation
Ship Priority	A number that identifies this shipping carton's place in the priority list that the system uses to make carton recommendations. When the system makes a carton recommendation, it uses shipping priority to determine which carton it should choose first, second, third, and so forth. If you want the system to look from large to small containers (downsizing), you should assign priority 1 to the largest container, priority 2 to the next largest, and so forth.

Field	Explanation
Tolerance	The minimum and maximum percentages that a shipping carton must be filled before the system recommends a different size carton. If the percentage of fill falls below the minimum tolerance, the system recommends a smaller carton. If the percentage of fill exceeds the maximum tolerance, the system recommends a larger carton. The default minimum percentage is 85% and the default maximum percentage is 90%.

10.2 Setting Up Carton Recommendation

You can have the system recommend a shipping carton for an item during picking.

The system checks the ship priority information to find a satisfactory shipping carton. The system does not recommend cartons that are not available.

Setting up carton recommendation includes the following tasks:

- Setting up locations for carton recommendation

- Setting up carton recommendation methods for items

- Setting up carton fill percentages for items

10.2.1 What You Should Know About

Topic	Description
Setting the Create Picking Tasks program to recommend shipping cartons	You must set a processing option in the Create Picking Tasks program to recommend shipping cartons while it creates tasks and trips for picking locations.

10.2.2 Setting Up Locations for Carton Recommendation

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse Management General Setup (G4641), choose Location Profile Detail

You must set up picking locations to allow carton recommendation during picking.

To set up locations for carton recommendation

On Location Profile Detail

Figure 10–2   Location Profile Detail screen
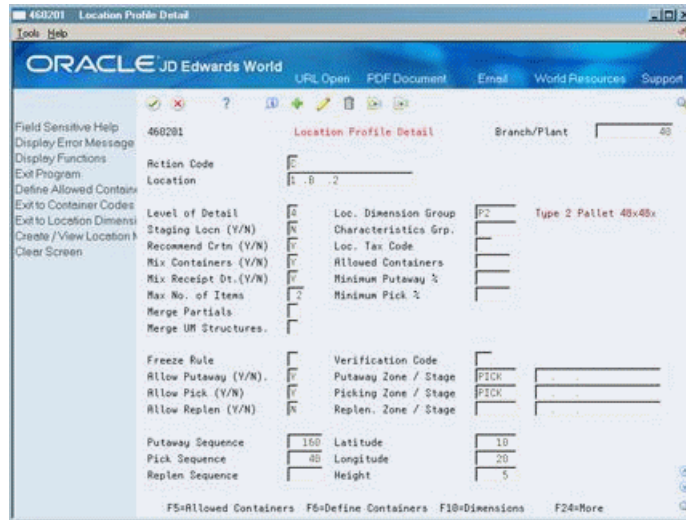
1. Locate the location for which you want to recommend cartons during picking.

2. Complete the following field:

   ■   Recommend Carton

Field	Explanation
Recommend Crtn (Y/N)	A code that indicates whether the system recommends shipping cartons when it picks from this location.
	Valid codes are:
	Y – Yes, recommend cartons when picking from this location. The system recommends a carton only if you have set up the Carton Recommendation Method for the item.
	N – No, do not make carton recommendations when picking from this location.

10.2.3 Setting Up Carton Recommendation Methods for Items

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse Management General Setup (G4641), choose Unit of Measure Definition by Item

You must set up each item's carton recommendation method in that item's unit of measure definition. You can recommend cartons by item volume or by the percentage of the carton that the item fills.

To set up carton recommendation methods for items

On U/M Definition by Item

Figure 10–3   U/M Definition by Item screen

1. Locate the item for which you want to set up carton recommendation.

2. Complete the following field:

    ■   Carton Recommendation Method

Field	Explanation
Carton Rcmd Method	A code that indicates the method the system uses to recommend a carton for the specified item in this unit of measure.
	Valid codes are:
	blank – Do not recommend cartons for the specified item in this unit of measure
	1 – Recommend shipping cartons for the specified item in this unit of measure based on the volume of the item and the volume of the shipping carton
	2 – Recommend shipping cartons for the specified item in this unit of measure based on the percentage of the shipping carton that the item and unit of measure occupy
	You define the dimensions of the carton through Container and Carton Codes (P46091). You define an item's dimensions through Item/Unit of Measure Profile (P46011).

10.2.4 Processing Options

See Section 24.6, "Unit of Measure Maintenance (P46011)."

10.2.5 Setting Up Carton Fill Percentages for Items

Navigation

From Advanced Warehouse Management (G46), enter 27

From Warehouse Advanced and Technical Operations (G4631), choose Warehouse Movement Rules

From Warehouse Movement Rules (G46311), choose an option

Each item can fill a portion of each available shipping carton. If you choose cartons according to the percentage of the carton that an item occupies, you must define how much of each carton's space that a particular item can fill. You must set minimum and maximum allowable fill percentages to define the space the item can take up in the carton. During carton recommendation, the system uses these minimum and maximum percentages to determine which carton to choose for the picked item.

You can:

- Define fill percentages for individual items

- Define fill percentages for item dimension groups

If you store the item in a container, you must specify each valid container. The fill percentage that you enter should take into account the dimensions of the item's container.

To define fill percentages for individual items

On Item/Carton Setup by Item

Figure 10–4   Item/Carton Setup by Item screen
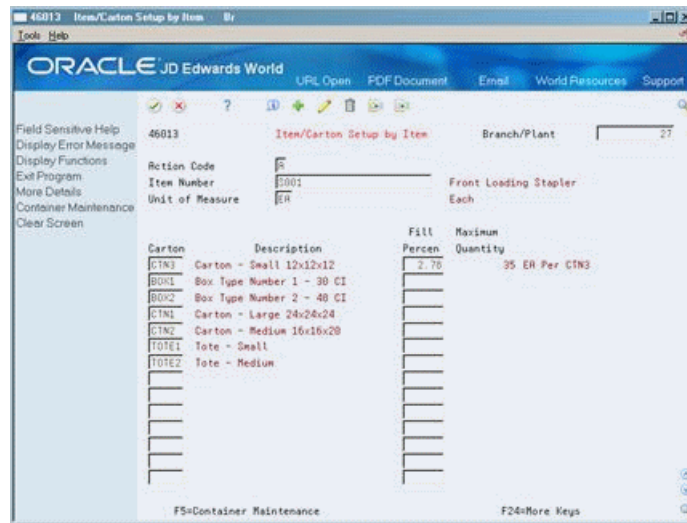
1. Complete the following fields:

    - Branch/Plant

    - Item Number

    - Unit of Measure

    - Carton Code

    - Fill Percentage

2. If you store the item in a container, access the fold area.

3. Complete the following field:

    - Container Code

To define fill percentages for item dimension groups

On Item/Carton Setup by Group

Figure 10–5   Item/Carton Setup by Group screen

1. Complete the following fields:

    ■   Branch/Plant

    ■   Item Dimension Group

    ■   Unit of Measure

    ■   Carton

    ■   Fill Percentage

    ■   Maximum Quantity

2. If you store the item in a container, access the fold area.

3. Complete the following field:

    ■   Container Code

Field	Explanation
Item Dim Group	A code (system 41/type 01) that identifies a group of items that share the same size specifications, such as height and width. An item dimension group defines the size specifications for all items that belong to the group. After you set up an item dimension group, you can assign items to the group through Classification Codes.
Item Number	A number that the system assigns to an item. It can be in short, long, or 3rd item number format.
Unit of Measure	A user defined code (00/UM) that indicates the quantity in which to express an inventory item, for example, CS (case) or BX (box).
Carton	A code (system 46/type EQ) that identifies a storage container or a shipping carton. A storage container can be an open container where items are stored on the container (for example, a pallet), or a closed container where items are stored in the container (for example, a box). You use Container and Carton Codes (P46091) to define storage containers.
Description	A user-defined name or remark.

Field	Explanation
Fill Percen	The percentage of space in a carton that a single quantity of the unit of measure will occupy. If the item is in a container when you pick it, this percentage indicates how much space the container will take up in the carton.
	The system uses the fill percentage if you use fill percentage as the carton recommendation method for the item's unit of measure. You define an item's carton recommendation method through Unit of Measure Definition by Item/Item Group (P46011).
Maximum Quantity	The maximum quantity of an item that will fit in the selected shipping carton type.
Container Code	A code that identifies the container the item is stored on or in when in a location in the warehouse. If an item is stored on or in a container when it is picked, you must update this field for the system to be able to make recommendations for shipping cartons.

10.2.6 Processing Options

See Section 24.8, "Carton Recommendation Rules (P46013)."

11

Set Up Warehouse Subsystem

This chapter contains the topic:

- Section 11.1, "Setting Up the Warehouse Subsystem."

11.1 Setting Up the Warehouse Subsystem

Navigation

From Advanced Warehouse Management (G46), enter 27

From Warehouse Advanced and Technical Operations (G4631), choose Define Subsystem

The Warehouse subsystem provides a rapid way of processing warehouse transactions such as putaway, pick, and replenishment requests. The subsystem does not use DREAM Writer to process transactions.

The subsystem program is P46970 and the data for the subsystem resides in the library named in Parameter 1.

To activate the warehouse subsystem

On Define Subsystem

Figure 11–1   Define Subsystem screen
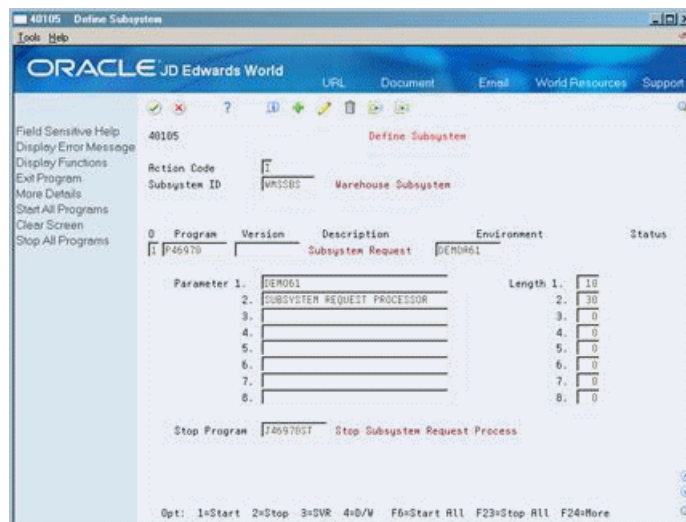
1. Enter 1 in the O (Option) field to the left of the Program field.

2. Press Enter to start.

> **Note:** You must have a stop program specified in the Stop Program field.

You can also start the subsystem by choosing Start Subsystem on the Advanced Warehousing Advanced & Technical Operations menu (G4631).

To process orders

Change the Warehouse Processing processing option behind DREAM Writer to 2 (Generate requests and process using the subsystem).

Since the subsystem program does not have a DREAM Writer, you cannot use data selection.

Once the system has generated a request, the subsystem will process the request and create a suggestion. You can look at the spooled file of the job to view the reports.

To stop the subsystem

On Define Subsystem

Figure 11–2 Define Subsystem (Process Orders) screen
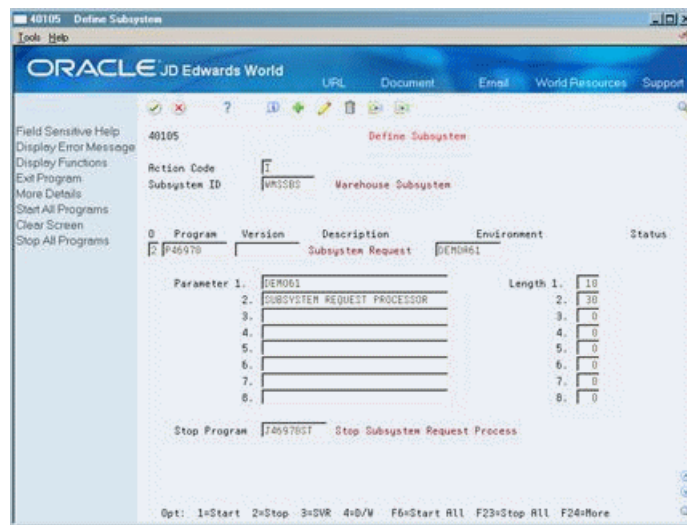
1. Enter 2 in the O (Option) field to the left of the Program field.

2. Press Enter to stop.

You can also stop the subsystem by choosing Stop Subsystem on the Advanced Warehousing Advanced & Technical Operations menu (G4631).

Part II

Process Selection and Movement Instructions

This part contains these chapters:

12

Process Selection

This chapter contains the topic:

-

12.1 Objectives

- To define combinations of order groups and warehouse process groups as a basis to select an action, such as putaway, picking, and replenishment

12.2 About Process Selection

You automate inventory movement through your warehouse by defining rules that match items to movement instructions. The rules that match an item to a movement instruction are process selection rules.

Process selection matches the warehouse process group(s) and the order process group defined for an item to a specific process selection rule. The process selection rule points to a particular movement instruction. The document that creates the movement request determines which movement instruction the system uses. For example, a sales order for an item belonging to warehouse process group BULK and order group DISK might use the picking instruction table PICK1.

Process selection takes place after you create a movement request, but before you create location suggestions.

> **See Also:**
>
> - Chapter 7, "Set Up Order Groups,"
> - Chapter 5, "Set Up Item Warehouse Information" for information about setting up warehouse process groups,
> - Chapter 13, "Movement Instructions."

12.3 Defining Process Selection

Navigation

From Advanced Warehouse Management (G46), enter 27

**From Warehouse Advanced and Technical Operations (G4631), choose Warehouse Movement Rules**

From Warehouse Movement Rules (G46311), choose Process Selection

You automate inventory movement through your warehouse by defining rules that match items to movement instructions. The rules that match an item to a movement instruction are process selection rules.

You use process selection to determine which movement instruction table to use during putaway, picking, or replenishment. This decision is based on the item's warehouse process group and order group, and on the source of the request, such as a purchase order receipt, a sales order, or a replenishment. You define process selection by assigning process groups and order groups to specific movement instruction tables.

When you define process selection, you also specify the process mode, which describes whether you want the system to:

- Maximize space, by filling locations to their maximum capacity and emptying partially filled locations as quickly as possible

- Maximize productivity, by minimizing the number of trips that your employees make through the warehouse

- Use other criteria that you define

You specify the process mode for each movement instruction table that you include in your process selection table.

To define process selection

On Process Selection

Figure 12–1   Process Selection screen
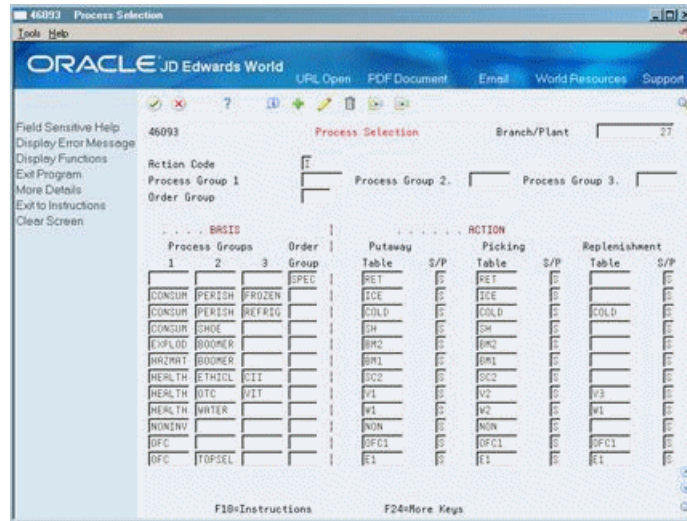
1. Complete the following field:

   - Branch/Plant

2. To view an existing process selection rule, you can limit the information that displays by completing the following fields in the upper portion of the form:

   - Process Group 1

   - Process Group 2

   - Process Group 3

   - Order Group

3. In the lower portion of the form, complete the following fields:

   - Process Group 1

   - Process Group 2

   - Process Group 3

   - Order Group

4. Complete one of the following fields for the process selection rule that you are defining:

   - Putaway Table

   - Picking Table

   - Replenishment Table

5. To modify the movement instruction table, complete the following field:

   - Process Mode

6. To use a custom program to create location suggestions, access the fold area.

Figure 12–2   Process Selection (Fold) screen
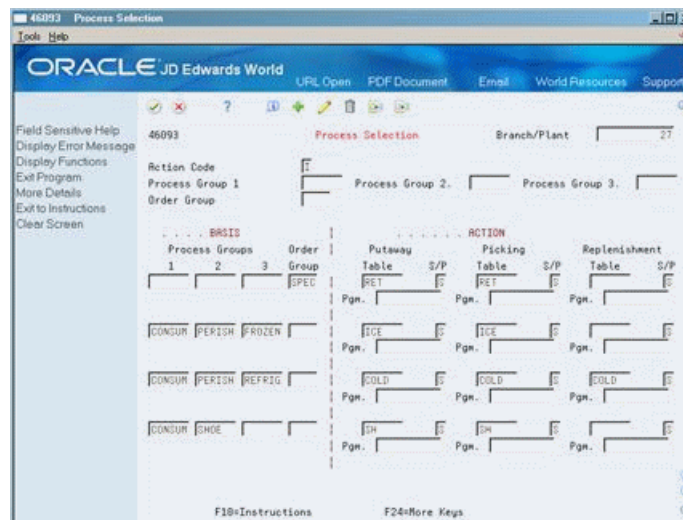
7. Complete the following field:

   - User Defined Program

Field	Explanation
Group - Warehouse Process 1	A code (system 41/type 02) that identifies a group of items that you want to move the same way. An item's process group determines the movement instructions the system uses to put away, pick, and replenish the item. You assign items to process groups using Classification Codes.
Group - Warehouse Process 2	A code (system 41/type 02) that identifies a group of items that you want to move the same way. An item's process group determines the movement instructions the system uses to put away, pick, and replenish the item. You assign items to process groups using Classification Codes (P41011).

Field	Explanation
Group - Warehouse Process 3	A code (system 41/type 02) that identifies a group of items that you want to move the same way. An item's process group determines the movement instructions the system uses to put away, pick, and replenish the item. You assign items to process groups using Classification Codes (P41011).
Order Group	A code (system 46/type DT) that identifies a group of order types that you want to process as one for putaway, picking, and replenishment transactions.
	You set up order group codes on User Defined Codes, and then add order types to the code on Order Groups (P46092). You specify an order group on Picking Instructions (P46095) to limit the order types that trigger replenishment after picking.
Putaway Table	A code (system 46/type IT) that identifies a putaway table. The putaway table defines how the system selects locations for putaway. You create putaway tables using Putaway Instructions (P46095).
Putaway Process Mode	A code (system 46/type PC) that identifies a putaway processing method.
	Valid codes are:
	P – Productivity mode. The system suggests the fewest locations possible to minimize the number of putaway and picking trips. The system minimizes the number of replenishment trips by replenishing from the fewest locations possible.
	S – Space maximization mode. The system maximizes space use by trying to top off partially filled locations to minimize inventory fragmentation.
Picking Table	A code (system 46/type IT) that identifies a picking table. The picking table defines how the system selects locations for picking. You create picking tables using Picking Instructions (P46095).
Picking Process S/P	A code (system 46/type PC) that identifies a picking processing method.
	Valid codes are:
	P – Productivity mode. The system suggests the fewest locations possible to minimize the number of putaway and picking trips. The system minimizes the number of replenishment trips by replenishing from the fewest locations possible.
	S – Space maximization mode. The system maximizes space use by trying to top off partially filled locations to minimize inventory fragmentation.
Replenishment Table	A code (system 46/type IT) that identifies a replenishment table. The replenishment table defines how the system selects locations for replenishment. You create replenishment tables using Replenishment Instructions (P46095).

Field	Explanation
Replenishment Process S/P	A code (system 46/type PC) that identifies a replenishment processing method.
	Valid codes are:
	P – Productivity mode. The system suggests the fewest locations possible to minimize the number of putaway and picking trips. The system minimizes the number of replenishment trips by replenishing from the fewest locations possible.
	S – Space maximization mode. The system maximizes space use by attempting to top off partially filled locations to minimize inventory fragmentation.
Program - User Defined 1	A number that specifies the program you can write to determine valid putaway locations. The system uses this program instead of the JD Edwards World program.
Program - User Defined 2	A number that specifies the program you can write to determine valid pick locations. The system uses this program instead of the JD Edwards World program.
Program - User Defined 3	A number that specifies the program you can write to determine valid replenishment locations. The system uses this program instead of the JD Edwards World program.

13

Movement Instructions

This chapter contains these topics:

13.1 Objectives

- To create tables that determine which putaway, picking, or replenishment locations to suggest

13.2 About Movement Instructions

You define movement instructions to control which locations the system suggests for putaway, picking, and replenishment. A movement instruction table contains many parameters that you use to refine the list of potential locations to the smallest possible number.

The system creates suggestions for only the locations that match all of the movement instruction table's parameters. You can set up many different movement instruction tables for putaway, picking, and replenishment.

You determine how the system chooses locations by setting parameters, such as:

- Whether to choose fixed locations or random locations

- Whether to limit the search for locations to a specific zone

- Which tiebreaker method to use to rank otherwise equally suitable locations

> **See Also:**
>
> - Appendix A, "Advanced Topics" for information about random locations.

13.3 Defining Movement Instructions

Navigation

From Advanced Warehouse Management (G46), enter 27

From Warehouse Advanced and Technical Operations (G4631), choose Warehouse Movement Rules

From Warehouse Movement Rules (G46311), choose an option

You define movement instructions to control which locations the system suggests for putaway, picking, and replenishment. A movement instruction table contains many parameters that you use to refine the list of potential locations to the smallest possible number.

When you set up your movement instructions, you define the following information:

- Whether to use fixed or random locations
- Which random rule to use, if you use random locations
- Whether to restrict the movement to a zone
- Which zone to use for the location search, if you use zones
- Which tiebreaker method to use to rank possible locations
- Whether to use minimum and maximum percentages for putaway and picking

You can also define specific movement instructions.

For putaway, you can define:

- Whether to choose empty locations or existing locations that already contain the same items as those you need to store
- Whether to allow the system to convert larger units of measure into smaller units of measure
- Whether to completely fill partially filled locations
- Whether to store partial units of measure, such as half-filled pallets

For picking and replenishment movements, you can define:

- Whether to move the oldest items in a location first, to avoid spoilage or obsolescence
- Whether to allow the system to convert smaller units of measure into larger units of measure, such as combining 24 cases to form a pallet

You define a fixed location to use for one purpose. Conversely, a random location is any location that matches the criteria that you define, such as:

- The location characteristic(s) specified in the random rule
- Whether the location characteristic is required or optional
- The priority of the optional characteristic
- Whether the system should include or exclude the specified location characteristic for the search

When you search for locations, the system identifies many locations that match the search criteria. You can use tiebreakers to select the best location from all the eligible locations. You can also specify the process mode to use. You can choose to:

- Maximize warehouse space

- Maximize employee productivity

- Use other criteria that you define

    See Also:

    - Chapter 4, "Set Up Fixed Locations and Zones,"

    - Appendix A, "Advanced Topics" for information about random locations.

13.4 Setting the Process Mode

Typically, warehouses have limited space, so you might use the available space as efficiently as possible. If you do not have enough employees, you might use each employee's trips through the warehouse as efficiently as possible, to move as many items as you can per trip.

You set the process mode to direct the system to a movement instruction table that:

- Maximizes space, by filling locations to their maximum capacity and emptying partially filled locations as quickly as possible

- Maximizes productivity, by minimizing the number of putaway, picking, and replenishment trips in the warehouse

- Uses other criteria that you define

To set the process mode

On Putaway Instructions, Picking Instructions, or Replenishment Instructions

Figure 13–1 Putaway Instructions screen

Complete the following field:

- Processing Mode

13.5 Defining Common Movement Instruction Criteria

Putaway, picking, and replenishment instructions share many of the same parameters. You set these parameters to refine the list of potential locations to the smallest possible number.

To define common movement instruction criteria

On Putaway Instructions, Picking Instructions, or Replenishment Instructions

Figure 13–2 Putaway Instructions (Common Movement) screen
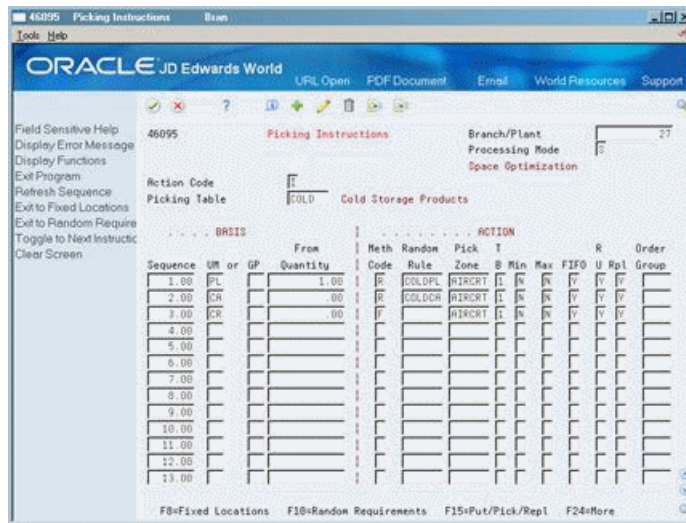
Complete the following fields:

■ Unit of Measure

■ Unit of Measure Group

■ From Quantity

■ Method Code

■ Random Rule

Field	Explanation
Unit of Measure	A user defined code (system 00/type UM) that identifies the unit of measurement for an amount or quantity. For example, it can represent a barrel, box, cubic yard, gallon, an hour, and so on.
	Form-specific information
	When the system tries to carry out a movement instruction, it compares the unit of measure from the transaction to the unit of measure in the instruction. If the unit of measure is valid for the item, the instruction is valid for the item.
	■ For putaway, the system uses the instruction for the level 1 unit of measure.
	■ For picking and replenishment, the system compares the unit of measure in the first instruction to the item's unit of measure structure. If the unit of measure is in the structure, the system uses that instruction. If not, the system continues to compare until it finds a match.

Field	Explanation
Group - Unit of Measure	A code (system 46/type UG) that identifies a group of units of measure that you want to process as one for putaway, picking, and replenishment transactions.
	You use unit of measure groups to set up movement instructions for putaway, picking, or replenishment.
	Form-specific information
	If different units of measure follow the same instruction, you can group the units of measure so that you only need to define one instruction for all of them.
	If any valid unit of measure for an item on a transaction belongs to the specified unit of measure group, the instruction is valid for the item.
From Quantity	The quantity that must exist in a location before the system considers the movement instruction.
Method Code - Movement Instructions	A code that identifies the method of putaway, picking, or replenishment the system uses for this instruction.
	Valid codes are:
	F – Use only fixed locations. This code is valid for putaway, picking and replenishment.
	R – Use only random locations. You assign characteristics to random rules and to locations. The system compares rules to locations and builds a table of locations based on the number of matching characteristics. During random processing, the system chooses locations from the random location table. This code is valid for putaway, picking and replenishment.
	E – Use only empty locations. This code is valid for putaway only.
	X – Use only existing locations that already have the same item stored there. This code is valid for putaway only.
Random Rule	A code (system 46/type SR) that identifies a random requirements table. If you use Random, Empty, or Existing locations for the movement method, you must enter a random rule code to consider only locations whose characteristics match the random rule.

13.5.1 What You Should Know About

Topic	Description
Moving items with serial numbers	Items with assigned serial numbers are tracked individually in the primary unit of measure, and you cannot group them into greater units of measure. During the putaway, picking, and replenishment processes, all movement reports and transactions for items with serial numbers display one item for each detail line.
	On the movement instruction tables, you must set the From Quantity for items with serial numbers to 1 or 0. The system does not allow you to use breakdown, top off, or minimum utilization percentages with these items.

13.6 Defining Specific Movement Instruction Criteria

Putaway, picking, and replenishment each have parameters that are specific to each movement type. These parameters further refine the list of potential locations.

Complete the following tasks:

- Define specific movement instruction criteria for putaway

- Define specific movement instruction criteria for picking

- Define specific movement instruction criteria for replenishment

To define specific movement instruction criteria for putaway

On Putaway Instructions

Figure 13–3   Putaway Instructions (Movement Instruction) screen
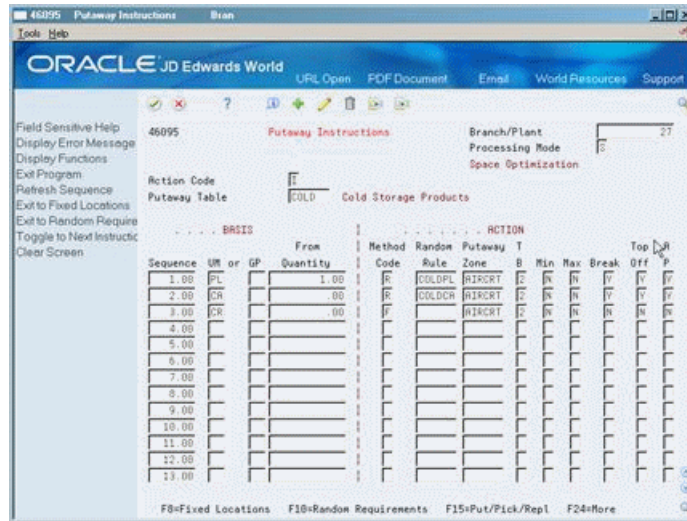
Complete the following fields:

- Putaway Zone

- Putaway Tiebreaker Rules

- Minimum Utilization Percentage

- Maximum Putaway Quantity

- Breakdown

- Top Off

- Allow Partial Units

Field	Explanation
Putaway Zone	A code (system 46/type ZN) that identifies areas in the warehouse where goods are put away or stored.
	Form-specific information
	Enter a code in this field if you want the system to select only locations in the specified putaway zone when it uses this rule.

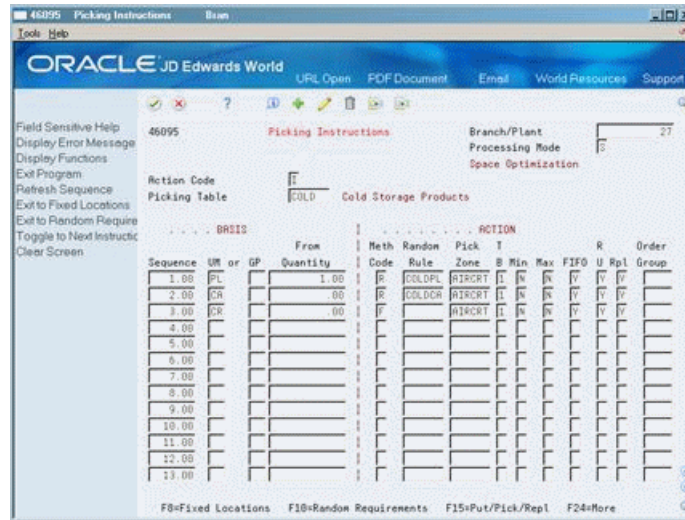| Field	Explanation
Putaway Tie Breaker Rules	A number that identifies the tiebreaker you want to use for this putaway rule when multiple locations satisfy the criteria. The system uses the tiebreaker to rank the tied locations. Tiebreakers are (hard coded) as follows:
	1 – Sequence locations by the putaway sequence number. If you do not assign sequence numbers, and you use this tiebreaker, the system chooses between equal locations based on their alphanumeric sequence. You define sequences using Location Profile (P46020).
	2 – Sequence locations by greatest available space. The system uses locations that can hold the greatest quantity of the item in the specified unit of measure and container first.
	3 – Sequence locations by least available space. The system uses locations that can hold the least quantity of the item in the specified unit of measure and container first.
	4 – Sequence locations by least available space, but minimize the number of locations used. This code is the same as tiebreaker 3, except the system tries to use the least number of locations.
	5 – Sequence locations by proximity from the sending location (usually the receiving dock), using the closest locations first.
	6 – Sequence locations by proximity to the base putaway location, using the closest locations first.
	7 – Sequence locations by proximity to the base picking location, using the closest locations first.
Use Minimum Utilization % (Y/N)	A code that indicates whether the system suggests a location if putaway will not fill that location to at least the minimum percentage capacity defined through Location Profile Detail (P460201).
	Valid codes are:
	Y – Use the minimum utilization percentage when searching for putaway locations
	N – Do not use the minimum utilization percentage when searching for putaway locations
Use Maximum Quantity (Y/N)	A code that indicates whether you want the system to suggest locations according to the maximum quantity of an item in the specified unit of measure that you can put away in a zone. You define maximum quantities for items in a specified unit of measure using Maximum Quantity by Zone (P46025).
	Valid codes are:
	Y – Yes, use the maximum quantity allowed in a zone to suggest locations, and if the quantity in a zone exceeds the maximum, suggest another location for the remaining quantity
	N – No, do not use maximum quantity when suggesting locations

Field	Explanation
Breakdown (Y/N)	A code that indicates whether you allow the system to break a unit of measure (such as a pallet) down into smaller units of measure (such as cases).
	Valid codes are:
	Y – Yes, allow breakdown into smaller units of measure
	N – No, do not allow breakdown into smaller units of measure
	Form-specific information
	Enter Y in this field to specify that the system should attempt to break down units of measure when putting away goods. For example, if a quantity remains to be put away after processing all locations selected by an instruction, the system will check whether breakdown is allowed. If this field is set to Y, it tries to put away the remaining goods by breaking down the unit of measure to a smaller unit of measure using the same set of locations. The system can do this only if it is allowed for the item/unit of measure, which you define in through Item Unit of Measure Definition (P46011), and only if you use a unit of measure structure.
Top Off	A code that indicates whether you want the system to attempt to complete an incomplete unit of measure (such as a half-filled pallet) in an existing location during putaway.
	Valid codes are:
	Y – Yes, search for locations with incomplete units of measure to top them off
	N – No, do not search for locations with incomplete units of measure
Yes or No - Allow Partial Units	A code that indicates whether you want the system put away partial units of measure. You must also specify on Unit of Measure Definition by Item (P46011) that you allow breakdown. If you set Allow Partial Units to N, you must also set Breakdown to N.
	Valid codes are:
	Y – Yes, put away partial units of measure
	N – No, do not put away partial units of measure

To define specific movement instruction criteria for picking

On Picking Instructions

Figure 13–4   Picking Instructions screen

Complete the following fields:

- Picking Zone
- Picking Tiebreaker
- Minimum Picking Percentage
- Maximum Picking Quantity
- First In First Out Picking
- Rollup
- Allow Replenishment
- Order Group

Field	Explanation
Picking Tie Breaker Rules	A number that identifies the tiebreaker you want to use for this picking rule when multiple locations satisfy the criteria. The system uses the tiebreaker to rank the tied locations. Tiebreakers are (hard coded) as follows:
	1 – Sequence locations using "pick to clear" logic. The system uses the locations containing the smallest available quantity first.
	2 – Sequence locations using "pick from fewest with best fit" logic. The system uses the locations that will contain the least residual quantity when the pick is complete.
	3 – Sequence locations using "pick from fewest" logic. The system uses the location containing the greatest available quantity first. If there is not enough quantity to fill the request, the system suggests additional locations, but only the least number of locations that are necessary to complete the request.
	4 – Sequence locations according to the picking sequence number. If you do not assign sequence numbers, and you use this tiebreaker, the system chooses between equal locations based on their alphanumeric sequence. You define sequences on Location Profile (P46020).
	5 – Sequence locations according to proximity to the shipping location, using the closest locations first.

Field	Explanation
Use Minimum Pick % (Y/N)	A code that indicates whether the system suggests a location if picking will not deplete that location to at least the minimum percentage capacity defined through Location Profile Detail (P460201).
	Valid codes are:
	Y – Yes, use the minimum utilization percentage when searching for pick locations
	N – No, do not use the minimum utilization percentage when searching for pick locations
Use Maximum Picking Quantity (Y/N)	A code that indicates whether you want the system to suggest locations according to the maximum quantity of an item that you can pick from a location. You use maximum picking quantity only for fixed locations, which you define through Fixed Locations (P46012).
	Valid codes are:
	Y – Yes, use the maximum quantity that you can pick from a location to suggest locations, and if the quantity requested exceeds the maximum pick quantity for the location, search for another location
	N – No, do not use the maximum picking quantity when suggesting picking locations
FIFO Picking (Y/N)	A code that indicates whether the system considers an item's receipt date when it searches for pick locations.
	Valid codes are:
	Y – Yes, use the oldest receipt date (First In First Out method) when searching for pick locations
	N – No, do not use the oldest receipt date when searching for pick locations
Rollup (Y/N)	A code that indicates whether you allow rollup during picking. Valid codes are:
	Y – Allow rollup
	N – Do not allow rollup
	Form-specific information
	Enter Y to have the system convert the pick quantity to the highest unit of measure available at the location, provided the quantity justifies the rollup.
Allow Replenishment (Y/N)	A code that indicates whether you allow replenishment from a location (Location Profile (P46020) and Location Profile Detail (P460201)) or whether a picking instruction triggers replenishment (Picking Instructions (P46095)).
	Form-specific information
	Enter Y to trigger replenishments when there is not enough inventory to satisfy pick requests at the selected locations. This is online replenishment and works only when you pick from fixed locations. Replenishment also occurs if a pick drives a location below the minimum replenishment point defined on Fixed Picking Locations (P46012).

Field	Explanation
Order Group	A code (system 46/type DT) that identifies a group of order types that you want to process as one for putaway, picking, and replenishment transactions.
	You set up order group codes on User Defined Codes, and then add order types to the code on Order Groups (P46092). You specify an order group on Picking Instructions (P46095) to limit the order types that trigger replenishment after picking.

13.6.1 What You Should Know About

Topic	Description
Cross docking	For all items you want to cross dock, you must set up your Picking Instructions to pick from the default receiving location first.
Selecting locations for picking	While processing movement criteria for picking, the system excludes locations that do not have adequate on-hand or inbound inventory.

To define specific movement instruction criteria for replenishment

On Replenishment Instructions

Figure 13–5   Replenishment Instructions screen
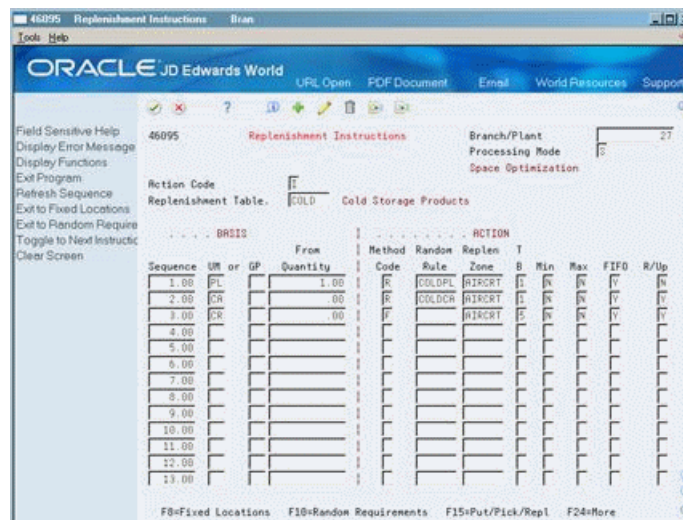
Complete the following fields:

- Replenishment Zone

- Replenishment Tiebreaker

- Minimum Utilization Percentage

- Maximum Replenishment Quantity

- First In First Out Picking

- Rollup

Field	Explanation
Replenishment Zone	A code (system 46/type ZN) that identifies the areas in the warehouse from which items are retrieved to replenish or refill picking locations.
	Form-specific information
	Enter a zone in this field to restrict the list of replenishment zones to this one zone. You define replenishment zones on Fixed Replenishment Zones (P46051).
Replenishment Tie Breaker Rules	A number that identifies the tiebreaker you want to use for this replenishment rule when multiple locations satisfy the criteria. The system uses the tiebreaker to rank the tied locations. Tiebreakers are (hard coded) as follows:
	1 – Sequence locations using "pick to clear" logic. The system uses the locations containing the smallest available quantity first.
	2 – Sequence locations using "pick from fewest with best fit" logic. The system uses the locations that will contain the least residual quantity when the replenishment is complete.
	3 – Sequence locations using "pick from fewest" logic. The system uses the location containing the smallest available quantity first. If there is not enough quantity to fill the request, the system suggests additional locations, but only the least number of locations that are necessary to complete the request.
	4 – Sequence locations according to the replenishment sequence number. If you do not assign sequence numbers, and you use this tiebreaker, the system chooses between equal locations based on their alphanumeric sequence. You define sequences on Location Profile (P46020).
	5 – Sequence locations according to proximity to the shipping location, using the closest locations first.
Use Minimum Pick % (Y/N)	A code that indicates whether the system suggests a location if picking will not deplete that location to at least the minimum percentage capacity defined through Location Profile Detail (P460201).
	Valid codes are:
	Y – Yes, use the minimum utilization percentage when searching for pick locations
	N – No, do not use the minimum utilization percentage when searching for pick locations
Use Maximum Picking Quantity (Y/N)	A code that indicates whether you want the system to suggest locations according to the maximum quantity of an item that you can pick from a location. You use maximum picking quantity only for fixed locations, which you define through Fixed Locations (P46012).
	Valid codes are:
	Y – Yes, use the maximum quantity that you can pick from a location to suggest locations, and if the quantity requested exceeds the maximum pick quantity for the location, search for another location
	N – No, do not use the maximum picking quantity when suggesting picking locations

Field	Explanation
FIFO Picking (Y/N)	A code that indicates whether the system considers an item's receipt date when it searches for pick locations.
	Valid codes are:
	Y – Yes, use the oldest receipt date (First In First Out method) when searching for pick locations
	N – No, do not use the oldest receipt date when searching for pick locations
Rollup (Y/N)	A code that indicates whether you allow rollup during picking. Valid codes are:
	Y – Allow rollup
	N – Do not allow rollup
	Form-specific information
	Enter Y to have the system convert the pick quantity to the highest unit of measure available at the location, provided the quantity justifies the rollup.

13.6.2 What You Should Know About

Topic	Description
Selecting locations for Replenishment	While processing movement criteria for replenishment, the system excludes locations that do not have adequate on-hand or inbound inventory.

13.6.3 Processing Options

See Section 25.1, "Movement Instructions (P46095)."

Part III

Putaway

This part contains these chapters:

14

Overview to Putaway

This chapter contains these topics:

- Section 14.1, "Objectives,"
- Section 14.2, "About Putaway."

14.1 Objectives

- To create putaway requests
- To locate existing putaway requests
- To create suggestions for putaway requests
- To confirm suggestions for putaway requests

14.2 About Putaway

You use putaway to receive the items into the warehouse and move them from the receiving dock to a storage location. The receiving dock is usually the default location for incoming items, but you can put away items directly to stocking locations and bypass the receiving dock.

You create a putaway request in response to a purchase order (or a manufacturing completion, for manufacturing systems). The system can also generate putaway requests in response to sales credit order returns. You use putaway requests to generate suggestions for locations in which to store items. The system tracks the items in each location. You can find locations with available space and characteristics that match the incoming item and then create suggestions to store items in those locations.

You can use the locations that the system suggests for you or use different locations. You then confirm your chosen locations to move the items from the receiving dock to the putaway location, and to update the system's inventory records.

The putaway process includes:

- Working with putaway requests
- Working with putaway reservations (optional)
- Working with putaway suggestions

> **See Also:**
> - Appendix B, "Manufacturing Information" for information on creating putaway requests through manufacturing systems.

15

Work with Putaway Requests

You create putaway requests to store items that you receive in the warehouse. A putaway request contains information about the item, such as:

- Branch/plant

- Item

- Unit of measure

- Quantity

- Transaction document information

The system uses this information to create suggestions for putaway, based on the putaway instructions that you define.

This chapter contains these topics:

- Section 15.1, "Creating Putaway Requests,"

- Section 15.2, "Locating Existing Putaway Requests."

> **See Also:**
>
> - Appendix B, "Manufacturing Information" for information about creating putaway requests through manufacturing processes.

15.1 Creating Putaway Requests

You create putaway requests to generate suggestions for putaway locations. You can:

- Create putaway requests interactively

- Create putaway requests manually

15.1.1 Creating Putaway Requests Interactively

Navigation

From Advanced Warehouse Management (G46), choose Inbound Operations

From Inbound Warehousing Operations (G4611), choose Enter Receipts by PO or Item

After you receive the items on a purchase order, you can create a putaway request to store the items. This is the most common method of creating putaway requests. (You also can create putaway requests manually, or reserve locations for putaway.) You use these putaway requests to create suggestions for putaway locations.

You can set the processing options in Enter Receipts by PO or Item (or Work Order Entry for manufacturing systems) to determine whether you:

- Create requests only

- Create and process requests using the subsystem

- Receive items directly into reserved locations

- Do not create any requests

If you create putaway requests only, you must create location suggestions and confirm location suggestions separately.

If you create and process putaway requests using the subsystem, the subsystem creates putaway suggestions. The subsystem also can confirm the putaway suggestions, create tasks and trips, and print movement tags, slips, and audit reports (depending on how you set the processing options in each program).

You also can receive items directly into reserved putaway locations. You first must create reservations using Online Reservations or Batch Reservations before you receive the items. When you run the Process Putaway Requests program, the system creates a putaway suggestion for the reserved location.

If you do not create putaway requests through purchase order receipts, items that you receive will remain in your receiving location. You can then:

- Create putaway requests manually

- Create putaway requests by reversing receipt of the order(s), setting the program's processing options to create putaway requests, and receiving the order(s) again

Complete the following tasks:

- Create putaway requests interactively

- Override the unit of measure structure

During receipt of a purchase order, you can override the item's default unit of measure structure if the item's actual unit of measure structure is different. You remove the largest unit of measure, such as a pallet, from the incoming item's unit of measure structure, and use the next-largest unit of measure for putaway. You do this to avoid occupying pallet space in your warehouse with partial pallets, which reduces the efficient use of your space. For example, if you receive a partial pallet of compact discs, you can override the pallet's unit of measure and use cases or eaches for putaway.

You can also override the quantity, containers, weight, repack code, and tax code for each level of the unit of measure structure. This alters the item characteristics and can change the location you use for putaway.

The system displays Warehouse Overrides only if you activate warehouse control in Branch/Plant Constants.

Items with assigned serial numbers are tracked individually in the primary unit of measure, and you cannot group them into greater units of measure. The system creates one putaway request for each item with a serial number.

To create putaway requests interactively

On Enter Receipts by PO or Item

1. Complete the following fields:

   - Branch/Plant

   - Order Number

- Document Type

2. Choose Receive for each purchase order line that you want to receive.

Field	Explanation
Document (Order No, Invoice, etc.)	The number that identifies an original document. This can be a voucher, an order number, an invoice, unapplied cash, a journal entry number, and so on.
Order Type	A user defined code (00/DT) that identifies the type of document. This code also indicates the origin of the transaction. JD Edwards World has reserved document type codes for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program. (These entries are not self-balancing when you originally enter them.)
	The following document types are defined by JD Edwards World and should not be changed:
	P – Accounts Payable documents
	R – Accounts Receivable documents
	T – Payroll documents
	I – Inventory documents
	O – Purchase Order Processing documents
	J – General Accounting/Joint Interest Billing documents
	S – Sales Order Processing documents

15.1.2 Cross Docking

Cross Docking

Cross docking allows you to immediately fill back orders by transferring quantities from incoming purchase orders directly to a shipping location for picking.

The system can identify items in inbound purchase orders that have been back ordered by customers, and upon receipt of the item, create a putaway request that leaves the inventory in the default receiving location for cross docking, and creates a putaway request to move the balance of the receipt (if any) to a storage location. (The cross docking putaway request has a new status code to differentiate it from a normal putaway. This request is for audit purposes only, and is not turned into a suggestion.)

To use cross docking, you must set up Picking Instructions (P46095) to select the default receiving location first. You must also set processing options in the following programs;
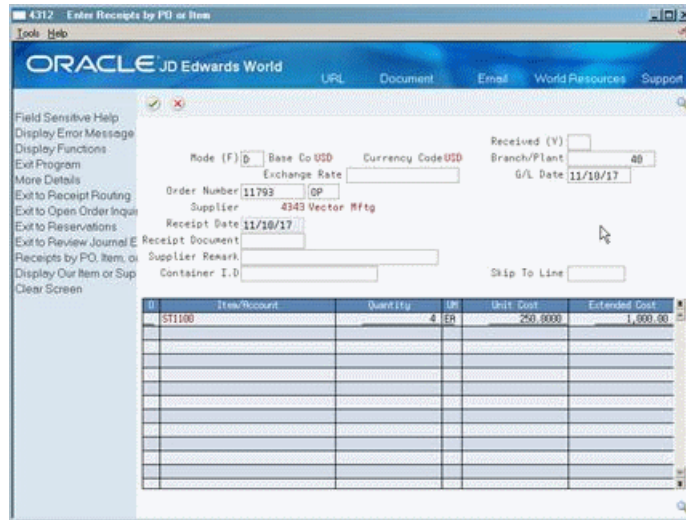
On Receipts by PO or Item (P4312), set the following processing options to 1:

- Option 12: Display sales order back orders
- Option 41: Perform warehouse cross docking

Optionally, you can set the processing options on the following programs to print the Mark For Address on Move Tags and Move Slips:

- Option 5 on Summary Document (P46472)
- Option 11 on Pick Confirmation (P4617)
- Option 5 on Batch Putaway Reservations (P461301)

Figure 15–1 Enter Receipts by PO or Item screen

15.1.3 What You Should Know About

Topic	Description
Purchase order detail location	After you activate warehouse control, the system inputs the receipt location when you enter a purchase order. You specify this location in Default Receiving Location on Branch/Plant Constants - Pg 2.
Receipt routing	Receipt routing in the Purchase Management system allows you to divert items between receipt and putaway, so you can perform quality analysis on the items. If you use receipt routing, the system creates a putaway request when you move the items to the on-hand step, which creates a receipt.
Two-phase processing	You can confirm the movement of merchandise for a putaway process in a two-phase process, if necessary. After you decide on a To location and an intermediate staging location, set the two-phase flag on the Item Profile screen to P for a physical location or to L for a logical location:
	P – This is a two-phase confirmation for an actual location that the item will be moved to for staging. The system will print Move tags for each movement.
	L – This is a two-phase confirmation where the item is not physically moved to a new location, so the system prints no Move tags. This is used when the item requires some intermediate task before you move it to its final location.

15.1.4 Processing Options
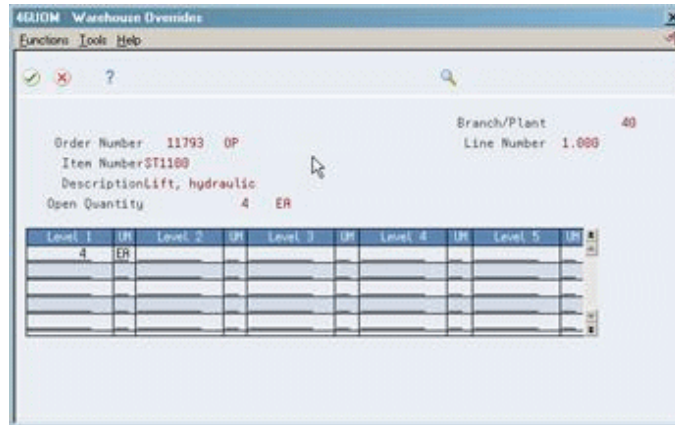
See Section 25.2, "Enter Receipts (P4312)."

To override the unit of measure structure

On Enter Receipts by PO or Item

1. Complete the following fields:

   ■ Branch/Plant

   ■ Order Number

- Document Type

2. Choose Warehouse Overrides for the line whose unit of measure structure you want to change.

Figure 15–2   Warehouse Overrides screen

3. On Warehouse Overrides, complete the following fields:

   - Level 1
   - Unit Of Measure
   - Level 2
   - Unit Of Measure
   - Level 3
   - Unit Of Measure
   - Level 4
   - Unit Of Measure
   - Level 5
   - Unit Of Measure

4. Access the fold area (F4).

5. Complete the following optional fields:

   - Weight
   - Container
   - Repack
   - Pack
   - Location Tax Code

Field	Explanation
Level 1	The total quantity of the item in the item's level 1 unit of measure. You use Unit of Measure Conversion Information (P41002) to define unit of measure levels. When you define a unit of measure structure, define your largest unit of measure as level 1, and your smallest, or primary, unit of measure as the last level. The system supplies an item's unit of measure structure to a location's detail information (F4602) during inventory movement, but you can override the structure, if necessary.
UM	The item's level 1 unit of measure. You use Unit of Measure Conversion Information (P41002) to define an item's unit of measure structure. You define the largest unit of measure in the structure as the level 1 unit of measure. The smallest unit of measure, which is also the primary unit of measure, is the highest level in the structure.
	For example, a unit of measure structure could be as follows:
	Level Unit of Measure
	1 – Pallet
	2 – Box, where 10 boxes equal 1 pallet
	3 – Case, where 5 cases equal 1 box
	4 – Interpack, where 8 interpacks equal 1 case
	5 – Each, where 10 eaches equal 1 interpack
	In this example, the level 1 unit of measure is a pallet, and the level 5 unit of measure is an each, which is the primary unit of measure.
	You can have five levels in an item's unit of measure structure.
Level 2	The total quantity of the item in the item's level 2 unit of measure. You use Unit of Measure Conversion Information (P41002) to define unit of measure levels. When you define a unit of measure structure, define your largest unit of measure as level 1, and your smallest, or primary, unit of measure as the last level. The system supplies an item's unit of measure structure to a location's detail information (F4602) during inventory movement, but you can override the structure, if necessary.
UM	The item's level 2 unit of measure. You use Unit of Measure Conversion Information (P41002) to define an item's unit of measure structure. You define the largest unit of measure in the structure as the level 1 unit of measure. The smallest unit of measure, which is also the primary unit of measure, is the highest level in the structure.
	For example, a unit of measure structure could be as follows:
	Level Unit of Measure
	1 – Pallet
	2 – Box, where 10 boxes equal 1 pallet
	3 – Case, where 5 cases equal 1 box
	4 – Interpack, where 8 interpacks equal 1 case
	5 – Each, where 10 eaches equal 1 interpack
	In this example, the level 1 unit of measure is a pallet, and the level 5 unit of measure is an each, which is the primary unit of measure.
	You can have five levels in an item's unit of measure structure.

Field	Explanation
Level 3	The total quantity of the item in the item's level 3 unit of measure. You use Unit of Measure Conversion Information (P41002) to define unit of measure levels. When you define a unit of measure structure, define your largest unit of measure as level 1, and your smallest, or primary, unit of measure as the last level. The system supplies an item's unit of measure structure to a location's detail information (F4602) during inventory movement, but you can override the structure, if necessary.
UM	The item's level 3 unit of measure. You use Unit of Measure Conversion Information (P41002) to define an item's unit of measure structure. You define the largest unit of measure in the structure as the level 1 unit of measure. The smallest unit of measure, which is also the primary unit of measure, is the highest level in the structure.
	For example, a unit of measure structure could be as follows:
	Level Unit of Measure
	1 – Pallet
	2 – Box, where 10 boxes equal 1 pallet
	3 – Case, where 5 cases equal 1 box
	4 – Interpack, where 8 interpacks equal 1 case
	5 – Each, where 10 eaches equal 1 interpack
	In this example, the level 1 unit of measure is a pallet, and the level 5 unit of measure is an each, which is the primary unit of measure.
	You can have five levels in an item's unit of measure structure.
Level 4	The total quantity of the item in the item's level 4 unit of measure. You use Unit of Measure Conversion Information (P41002) to define unit of measure levels. When you define a unit of measure structure, define your largest unit of measure as level 1, and your smallest, or primary, unit of measure as the last level. The system supplies an item's unit of measure structure to a location's detail information (F4602) during inventory movement, but you can override the structure, if necessary.
UM	The item's level 4 unit of measure. You use Unit of Measure Conversion Information (P41002) to define an item's unit of measure structure. You define the largest unit of measure in the structure as the level 1 unit of measure. The smallest unit of measure, which is also the primary unit of measure, is the highest level in the structure.
	For example, a unit of measure structure could be as follows:
	Level Unit of Measure
	1 – Pallet
	2 – Box, where 10 boxes equal 1 pallet
	3 – Case, where 5 cases equal 1 box
	4 – Interpack, where 8 interpacks equal 1 case
	5 – Each, where 10 eaches equal 1 interpack
	In this example, the level 1 unit of measure is a pallet, and the level 5 unit of measure is an each, which is the primary unit of measure.
	You can have five levels in an item's unit of measure structure.

Field	Explanation
Level 5	The total quantity of the item in the item's level 5 unit of measure. You use Unit of Measure Conversion Information (P41002) to define unit of measure levels. When you define a unit of measure structure, define your largest unit of measure as level 1, and your smallest, or primary, unit of measure as the last level. The system supplies an item's unit of measure structure to a location's detail information (F4602) during inventory movement, but you can override the structure, if necessary.
UM	The item's level 5 unit of measure. You use Unit of Measure Conversion Information (P41002) to define an item's unit of measure structure. You define the largest unit of measure in the structure as the level 1 unit of measure. The smallest unit of measure, which is also the primary unit of measure, is the highest level in the structure.
	For example, a unit of measure structure could be as follows:
	Level Unit of Measure
	1 – Pallet
	2 – Box, where 10 boxes equal 1 pallet
	3 – Case, where 5 cases equal 1 box
	4 – Interpack, where 8 interpacks equal 1 case
	5 – Each, where 10 eaches equal 1 interpack
	In this example, the level 1 unit of measure is a pallet, and the level 5 unit of measure is an each, which is the primary unit of measure.
	You can have five levels in an item's unit of measure structure.
Wt	The weight of one item per unit of measure, or the weight of the item and container in the level 1 unit of measure. You define weights for an item through Unit of Measure Definition by Item (P46011) and for the container through Container Codes (P46091).
Contnr	A code (table 46/EQ) that identifies the storage container for this item in its level 1 unit of measure. A storage container can be:
	■ An open container, where items are stored on the container (for example, a pallet)
	■ A closed container, where items are stored in the container (for example, a box)
	You use Container Codes (P46091) to define storage containers. You use Unit of Measure Definition by Item or Group (P46011) to assign a storage container to an item in a specific unit of measure.
Repack / Code	A code that determines whether the specified item in this unit of measure should be repacked before putaway. Valid codes are:
	Y – Yes, repack the item
	N – No, do not repack the item
	You must also specify a packing method by entering a code in the Default Pack Code field.

Field	Explanation
Code - Packing	A code (system 46/type PK) that identifies the packing materials to use (such as opaque shrink wrap, or foam nuggets) if repacking is required before putaway. If you set the Repack (Y/N) field to Y, you must enter a code in this field. You define the packing codes on User Defined Code Revisions.
Loc. Tax Code	A code (system 46/type LT) that indicates whether the location contains tax-paid inventory (in-bond vs. duty paid). If an item has an assigned tax code, the system puts the item away only in locations with the same tax code.
	You assign tax codes to items through Item Profile (P46010).

15.1.5 What You Should Know About

Topic	Description
Changing units of measure	You can use Warehouse Overrides to delete a unit of measure so that the system uses a smaller unit of measure during putaway. You cannot use Warehouse Overrides to specify a larger unit of measure if you have not defined it on Item Units of Measure.
Changing a unit of measure structure	After you change a unit of measure structure, the system verifies the following:
	■ The last level you specified in the structure is the primary unit of measure.
	■ The units of measure are listed in order from largest to smallest.
	■ The structure uses whole number conversions between units of measure.
	■ Each unit of measure contains only one partial quantity for that unit.
Serial number overrides of unit of measure structures	The system automatically overrides unit of measure structures for items with assigned serial numbers. These items are listed individually (quantity of 1) in Level 1 as the primary unit of measure.

15.1.6 Creating Putaway Requests Manually

Navigation

From Advanced Warehouse Management (G46), choose Replenishment Operations

From Replenishment Operations (G4613), choose Manual Replenishment

You can create manual putaway requests to create suggestions for putaway locations. You create manual putaway requests to:

■ Store incoming items in the warehouse if the system did not automatically create a putaway request through purchase order receipts or manufacturing completions

■ Store incoming items that have a document type that the system normally would not consider for putaway during receipts

To create a manual putaway request, you must have actually received the item into the warehouse.

To create putaway requests manually

On Manual Replenishment

Figure 15–3   Manual Replenishment screen
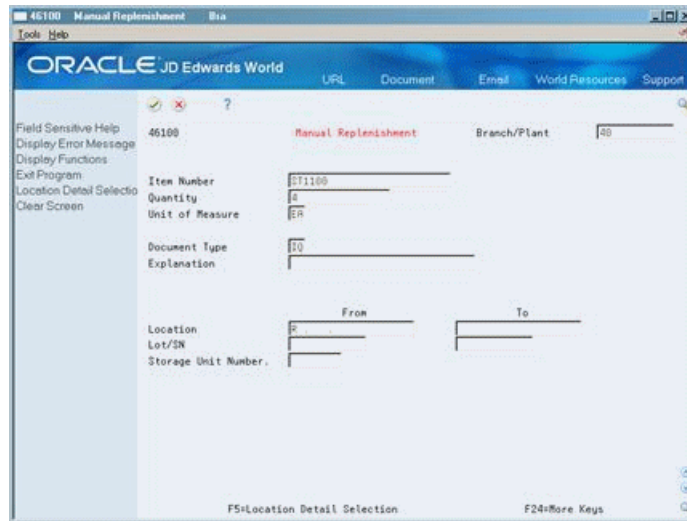
Complete the following fields:

- Branch/Plant

- Item Number

- Quantity

- Unit of Measure

- From Location

Field	Explanation
Item Number	A number that the system assigns to an item. It can be in short, long, or 3rd item number format.
Location - From	The storage location from which goods will be moved.
	Form-specific information
	The system creates either a putaway or a replenishment request based on how you complete the From Location and the To Location fields:
	■ Putaway Requests -To create a putaway request, enter a location in the From Location field.
	■ Replenishment Requests -To create a replenishment request, enter a location in both the From Location and the To Location fields, or enter a location in only the To Location field.

15.1.7 What You Should Know About

Topic	Description
Using manual replenishment to create putaway requests	On Manual Replenishment, if you specify only the From Location, you take inventory from that location and create a suggestion for putaway. To transfer inventory from a specific location, such as the receiving dock, and put it away to another specific location, you must complete the To Location (either by itself or with a From Location) to initiate a manual replenishment.

15.2 Locating Existing Putaway Requests

Navigation

From Advanced Warehouse Management (G46), choose Inbound Operations

From Inbound Warehousing Operations (G4611), choose Putaway Requests

You might need to locate an existing putaway request. For example, to verify that you have created a putaway request for an incoming item, you locate the request using unique criteria, such as an order number, a document type, or an item number.

To locate existing putaway requests

On Putaway Requests

Figure 15–4   Putaway Requests screen
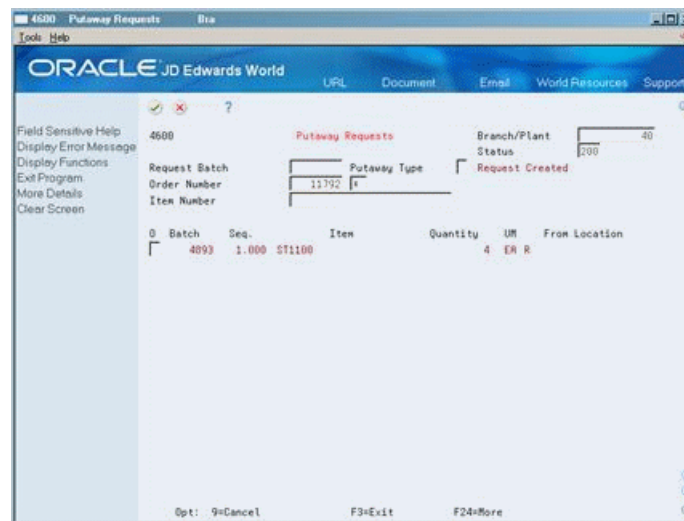
1. Complete the following field:

    ■   Branch/Plant

2. Complete one or more of the following optional fields:

    ■   Status

    ■   Request Batch

    ■   Order Number

    ■   Document Type

- Item Number

Field	Explanation
Status - Task / Trip	A code (system 46/type PS) that identifies the current status of a putaway, picking, or replenishment request (F4600) or trip (F4611) within the Advanced Warehouse Management system.
Batch Number - Requests	The batch number assigned to one set of putaway, picking, or replenishment requests. This number comes from next numbers for system 46.
Order Number	The number that identifies an original document. This can be a voucher, an order number, an invoice, unapplied cash, a journal entry number, and so on.
Order Type	A user defined code (00/DT) that identifies the type of document. This code also indicates the origin of the transaction. JD Edwards World has reserved document type codes for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program. (These entries are not self-balancing when you originally enter them.)
	The following document types are defined by JD Edwards World and should not be changed:
	P – Accounts Payable documents
	R – Accounts Receivable documents
	T – Payroll documents
	I – Inventory documents
	O – Purchase Order Processing documents
	J – General Accounting/Joint Interest Billing documents
	S – Sales Order Processing documents

15.2.1 What You Should Know About

Topic	Description
Canceling putaway requests	You can use Putaway Requests to cancel putaway requests. You cancel requests to stop further processing and putaway. For example, if the items you received are damaged, you would cancel the putaway request.
	You must first cancel any existing putaway suggestions for the request before you cancel the putaway request.
	You can also cancel putaway requests by reversing receipt of a purchase order.

15.2.2 Processing Options

See

16

Work with Putaway Reservations

You create putaway reservations to receive incoming items directly into specific locations that you reserve, instead of receiving items into your default receiving location. This makes putaway more efficient, because space is already reserved for the items prior to receipt. (You can also create putaway reservations during location selection after you receive the items.) When you receive the items, you have the choice of using the reservation or allowing the system to suggest putaway locations. You can create a reservation for all the items on a purchase order line or you can split the line into multiple location reservations.

Working with reservations is an optional task during putaway.

This chapter contains these topics:

- Section 16.1, "Creating Putaway Reservations,"
- Section 16.2, "Changing Existing Putaway Reservations."

What You Should Know About

Topic	Description
Processing reservations using the Level 1 unit of measure	While creating suggestions for putaway reservation locations, the system uses the Level 1 (largest) unit of measure for each item in the unit of measure structure. If you do not use a unit of measure structure, the system uses the primary unit of measure.

16.1 Creating Putaway Reservations

You create putaway reservations to set aside space in specific locations for incoming items. You can enter the locations you want to reserve or allow the system to suggest locations to reserve for putaway.

Complete the following tasks:

- Create putaway reservations interactively
- Create putaway reservations by batch
- Create alternate putaway reservations

You create alternate reservations to replace existing reservations with which you do not agree.

See Also:

- for information about automatic putaway requests.

16.1.1 Creating Putaway Reservations Interactively

Navigation

**From Advanced Warehouse Management (G46), choose Inbound Operations**

From Inbound Warehousing Operations (G4611), choose Online Reservations

You create putaway reservations interactively to reserve locations for incoming items. For example, you create a reservation interactively for one item in an incoming shipment. You can enter your location reservations directly online.

Complete the following tasks:

- Create putaway reservations for all order lines
- Create putaway reservations for individual order lines

Figure 16–1   Online Reservations screen
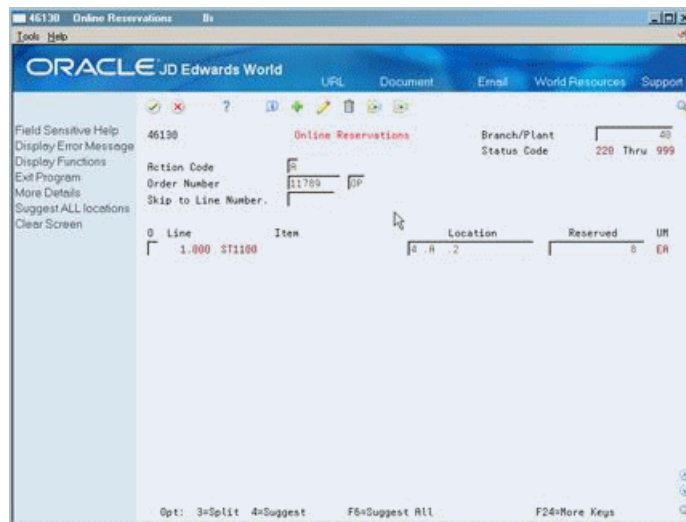
16.1.2 What You Should Know About

Topic	Description
Canceling putaway reservations	You can use Online Reservations to cancel reservations. You cancel reservations to make reserved locations available again.

Topic	Description
Creating online reservations	When you create putaway reservations online:
	■ If the item quantity is too large to fit in one location, the system might suggest multiple locations.
	■ If the system cannot create a suggestion for a purchase order line, it displays an error message. You still can create reservations manually for any remaining lines on the purchase order.
	■ If the error relates to only part of the purchase order line's quantity, you can still make reservations for the remaining line quantity. The system displays an error message only for the quantity in error.

To create putaway reservations for all order lines

On Online Reservations

1. Complete the following fields:

   - Branch/Plant

   - Order Number

   - Order Type

2. Choose Suggest All to create reservations.

To create putaway reservations for individual order lines

On Online Reservations

1. Complete the following fields:

   - Branch/Plant

   - Order Number

   - Order Type

   - Location

   - Quantity Reserved

2. To split suggestions for individual purchase order line reservations, access Split/Suggest.

   The system displays Split/Suggest with the system's suggestion(s) for a reservation location and quantity.

Figure 16–2   Split/Suggest screen
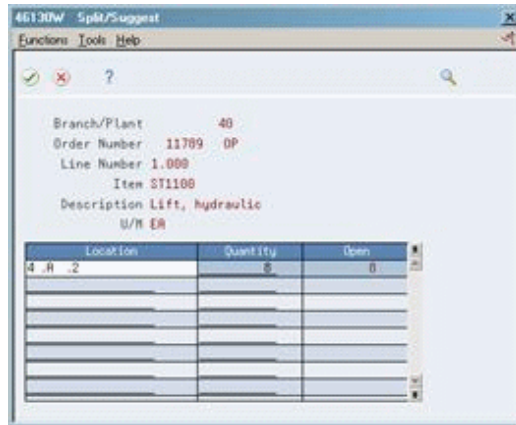
3. On Split/Suggest, modify the system's information with the appropriate information in the following fields:

   - Location

   - Quantity

16.1.3 Creating Putaway Reservations by Batch

Navigation

From Advanced Warehouse Management (G46), choose Inbound Operations

From Inbound Warehousing Operations (G4611), choose Batch Reservations

You can reduce the system processing time required for creating reservations by creating them in a batch for many purchase orders at one time. This eliminates the need to enter reservations one order at a time.

When you run the Batch Reservations program, the system can:

- Create putaway reservations

- Create putaway location suggestions

- Print movement tags and slips

- Print audit reports

You control which functions the system performs by setting processing options in the Batch Putaway Reservations program.

Batch Reservations is a DREAM Writer program.

16.1.4 Processing Options

See Section 25.5, "Batch Reservations - Purchase Order (P461301)."

16.1.5 Creating Alternate Putaway Reservations

Navigation

From Advanced Warehouse Management (G46), choose Inbound Operations

From Inbound Warehousing Operations (G4611), choose Online Reservations

You can create alternate putaway reservations if you do not agree with the system's suggestions for reserved putaway locations.

To create alternate putaway reservations

On Online Reservations

1. Complete the following fields:
   - Branch/Plant
   - Order Number
   - Order Type
   - Location
   - Quantity Reserved

2. Choose Suggest for the purchase order line for which to suggest reservation locations.

   The system displays Split/Suggest with the suggested reserved Location and Quantity for the purchase order line.

3. To accept the new reservation, press Enter.

16.1.6 What You Should Know About

Topic	Description
Excluding locations	As you create alternate suggestions for reserved locations, the system displays new locations for possible reservations, but does not display the previously reserved location.

16.2 Changing Existing Putaway Reservations

Navigation

From Advanced Warehouse Management (G46), choose Inbound Operations

From Inbound Warehousing Operations (G4611), choose Online Reservations

You can change a reserved putaway location to a different location. You would do this if you wanted to change the current reserved location to a location that is more convenient for your employees or is closer to locations containing other similar items.

You can:

- Change existing reservations by splitting order lines
- Change existing reservations manually

To change existing reservations by splitting order lines

On Online Reservations

1. Complete the following fields:
   - Branch/Plant
   - Order Number
   - Order Type
   - Location

- ■ Quantity Reserved

2. Choose Split for each purchase order line that you want to split into multiple location reservations.

3. Complete the following fields for each location into which you want to split the purchase order line:

   - ■ Location
   - ■ Quantity

To change existing reservations manually

On Online Reservations

1. Complete the following fields:

   - ■ Branch/Plant
   - ■ Order Number
   - ■ Order Type
   - ■ Location
   - ■ Quantity Reserved

2. Replace the existing information with your own information in the following fields:

   - ■ Location
   - ■ Quantity

16.2.1 What You Should Know About

Topic	Description
Quantity checking	The system does not verify that the total item quantity for which you have reserved locations equals the total item quantity for the purchase order line.

16.2.2 Processing Options

See Section 25.4, "Online Reservations (P46130)."

17

Work with Putaway Suggestions

After you create putaway requests, you create putaway suggestions to move the items to warehouse locations.

This chapter contains these topics:

- Section 17.1, "Creating Putaway Suggestions,"
- Section 17.2, "Confirming Putaway Suggestions."

Before You Begin

- Verify that you have set up order groups and process groups for your stock items
- Verify that you have set up putaway instruction tables to designate specific locations based on the items' order and process groups

17.1 Creating Putaway Suggestions

After you create putaway requests, you create putaway suggestions to move items into storage locations.

You can create putaway suggestions by batch (with the Process Putaway Requests program), or interactively (using the subsystem to create suggestions, confirm suggestions, and print move tags and audit reports). You can create alternate putaway suggestions by changing the movement instruction table and running the Resuggest Putaway Requests program to replace existing suggestions with which you do not agree.

Complete the following tasks:

- Create putaway suggestions by batch
- Create putaway suggestions interactively
- Create alternate putaway suggestions

17.1.1 Creating Putaway Suggestions by Batch

Navigation

From Advanced Warehouse Management (G46), choose Inbound Operations

From Inbound Warehousing Operations (G4611), choose Process Putaway Requests

You create putaway suggestions by batch to process putaway requests and move inventory on a regular basis. You can compensate for a large volume of purchase

orders by creating putaway suggestions several times each day. You typically run batch programs during off-peak hours, when more system resources are available.

When you run the Process Putaway Requests program, the system can:

- Select all outstanding putaway requests

- Update each request's status in the Warehouse Requests table (F4600)

- Create putaway location suggestions

- Assign tasks and trips

- Print movement tags and slips

- Print audit reports

- Confirm putaway suggestions

You control which functions the system performs by setting processing options in the Process Putaway Requests program.

Process Putaway Requests is a DREAM Writer program.

Figure 17–1   Putaway Audit Report

17.1.2 Creating Putaway Suggestions Interactively

You create putaway suggestions interactively to process putaway requests as you create them. You do this by setting a processing option in Enter Receipts by PO or Item to create a putaway request and process it using the subsystem. As soon as you create a putaway request, the subsystem can process it immediately. When you use this method, the system can:

- Create putaway suggestions

- Assign tasks and trips

- Print movement tags and slips

- Print audit reports

- Confirm putaway suggestions

17.1.2.1 Before You Begin

- Before you can use the subsystem, you must first set it up using the Advanced Warehouse and Technical Operations menu. JD Edwards World provides a predefined subsystem. However, you can create different versions or change the processing options in individual programs controlled by the subsystem. You define how the system creates suggestions, confirms suggestions, and prints movement documents by changing the processing options in the programs.

17.1.3 Creating Alternate Putaway Suggestions

Navigation

From Advanced Warehouse Management (G46), choose Inbound Operations

From Inbound Warehousing Operations (G4611), choose Process Putaway

You can create alternate putaway suggestions if you do not agree with the system's suggestions for putaway locations. You create alternate suggestions by running the Resuggest Putaway Requests program.

Creating alternate suggestions replaces any previous location suggestions. With alternate suggestions, you can access new inventory locations that you might have added since you created the first suggestion(s).

If you have not changed inventory locations in your warehouse, and you want to create suggestions for locations that differ from previous suggested locations, you must change the putaway instructions table. For example, you could change the putaway instructions table to choose a new putaway zone or use a different tiebreaker rule to choose locations. If you do not change the putaway instructions, the Resuggest Putaway Requests program suggests the same locations as in the previous suggestions.

When you run the Resuggest Putaway Requests program, the system can:

■   Delete existing putaway suggestions

■   Reset each request's status in the Warehouse Requests table (F4600)

■   Create alternate putaway location suggestions

■   Assign tasks and trips

■   Print movement tags and slips

■   Print audit reports

■   Confirm putaway suggestions

You control which functions the system performs by setting processing options in the Resuggest Putaway Requests program.

Resuggest Putaway Requests is a DREAM Writer program.

Figure 17–2   Putaway Audit Report (Resuggest)

```
   46475                                    JD Edwards World                           Page No. . .      20
                                            Putaway Audit Report                       Date - . . . 14.05.17
   . . . . . Request . . . . .                          . . . Quantity . . .   Pr Ll Usg
   Type      Number  Sequence Item Number      Location   Attempted  Suggested  UM UM Code          Description
   --------- -------- -------- ------------     ---------- ---------- ---------- -- -- ---- --------------------------------
   Putaway    3215    1,000 M001               4.B   .4      6000                EA CA 3226 Cannot mix this item
                                               4.B   .5      6000                EA CA 3226 Cannot mix this item
                                               5.B   .1      6000                EA CA 3226 Cannot mix this item
                                               5.B   .2      6000                EA CA 3226 Cannot mix this item
                                               5.B   .3      6000                EA CA 3226 Cannot mix this item
                                               5.B   .4      6000                EA CA 3226 Cannot mix this item
                                               5.B   .5      6000                EA CA 3226 Cannot mix this item
                                               5.C   .5      6000                EA CA 3226 Cannot mix this item
                                               5.C   .4      6000                EA CA 3226 Cannot mix this item
                                               5.C   .3      6000                EA CA 3226 Cannot mix this item
                                               5.C   .2      6000                EA CA 3226 Cannot mix this item
                                               5.C   .1      6000                EA CA 3226 Cannot mix this item
                                               4.C   .5      6000                EA CA 3226 Cannot mix this item
                                               4.C   .4      6000                EA CA 3226 Cannot mix this item
                                               4.C   .3      6000                EA CA 3226 Cannot mix this item
                                               4.C   .2      6000                EA CA 3226 Cannot mix this item
                                               4.C   .1      6000                EA CA 3226 Cannot mix this item
                                               4.D   .1      6000                EA CA 3226 Cannot mix this item
                                               4.D   .2      6000                EA CA 3226 Cannot mix this item
                                               4.D   .3      6000                EA CA 3226 Cannot mix this item
                                               4.D   .4      6000                EA CA 3226 Cannot mix this item
                                               4.D   .5      6000                EA CA 3226 Cannot mix this item
```

17.2 Confirming Putaway Suggestions

Navigation

From Advanced Warehouse Management (G46), choose Inbound Operations

From Inbound Warehousing Operations (G4611), choose Putaway Confirmation

If you agree with the system's suggestions for putaway locations, you confirm them using Putaway Confirmation. If you do not agree, you can create alternate suggestions or cancel the existing suggestions. You can also change suggested locations or split a suggestion for one location into two locations.

During confirmation, you can also confirm with variance. When you confirm with variance, you confirm that you are putting away a quantity that is less than the original quantity. The system moves the remaining unconfirmed quantity to the variance location you defined in the item profile. For example, if your warehouse employees damaged part of the incoming shipment, you would send the damaged items to the variance location.

When you confirm suggestions for putaway, you:

- Reduce on-hand inventory in the receiving location

- Increase on-hand inventory in the putaway location

Putaway confirmation ensures that the system's records match actual inventory movements by updating the following tables:

- Item Location (F41021)

- Location Detail Information (F4602)

- Item Ledger (F4111)

- Warehouse Requests (F4600)

- Warehouse Suggestions (F4611)

- Task Header (F4601)

Complete the following tasks:

- Confirm putaway suggestions

- Change or split putaway suggestions

Figure 17–3   Putaway Confirmation screen
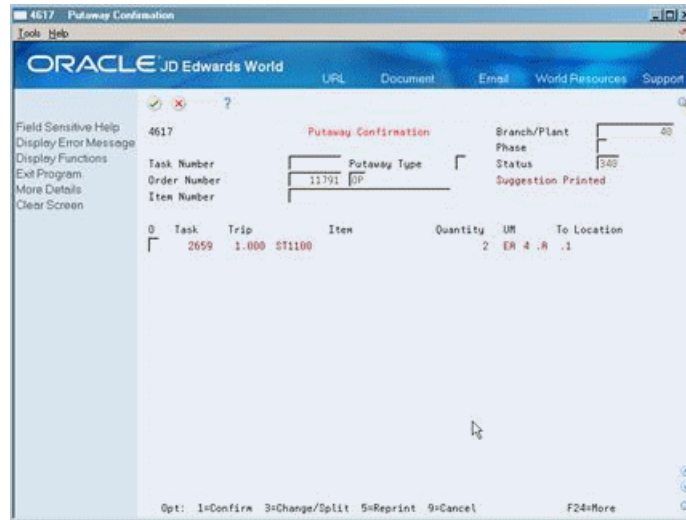
To confirm putaway suggestions

On Putaway Confirmation

1. Complete the following fields:

   - Branch/Plant

   - Task Number

   - Order Number

   - Document Type

   - Item Number

2. To confirm the suggested locations and quantities, choose Confirm.

To change or split putaway suggestions

On Putaway Confirmation

1. Complete the following fields:

   - Branch/Plant

   - Task Number

   - Order Number

   - Document Type

   - Item Number

2. To split or change a putaway suggestion, access Change/Split Suggestion.

Figure 17–4   Change/Split Suggestion screen
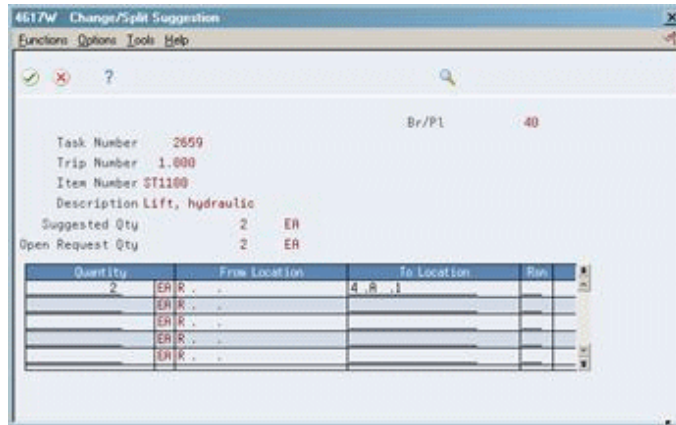
3. On Change/Split Suggestion, complete the following fields for each location into which you want to split or change the suggestion:

   ■ Quantity

   ■ To Location

   ■ Reason

4. To confirm a smaller quantity than the suggested quantity and move the remainder to the designated variance location, choose Confirm with Variance.

5. To confirm the suggested locations and quantities, choose Confirm.

Field	Explanation
Phase	A number that identifies which phase of 2-phase movement suggestions that the system displays.
	Valid numbers are:
	1 – Display phase 1 of the movement suggestions
	2 – Display phase 2 of the movement suggestions
	blank – Do not display 2-phase movement suggestions
Task Number	A unique number assigned to every putaway request that is created by a receipt.
Reason Code	Reason representing the change or override of a warehouse management suggestion.

17.2.1 What You Should Know About

Topic	Description
Creating new suggestions for different quantities	If you confirm a quantity less than the original quantity, and you do not choose Confirm with Variance to move the remainder to the variance location, the system creates a new suggestion for the remaining quantity. The remaining quantity stays open on the original suggestion so you can confirm it separately.
Canceling putaway suggestions	You can use Putaway Confirmation to cancel putaway suggestions. You cancel suggestions to stop further processing and putaway.

17.2.2 Processing Options

See Section 25.6, "Process Movement Requests (P46171)."

Part IV

Picking

This part contains these chapters:

-
-
-

18

Overview to Picking

This chapter contains these topics:

- Section 18.1, "Objectives,"
- Section 18.2, "About Picking."

18.1 Objectives

- To create pick requests
- To locate existing pick requests
- To create suggestions for pick requests
- To confirm suggestions for pick requests
- To confirm shipment of items

18.2 About Picking

You use picking to remove items from stock and move them to the shipping dock to be shipped. The shipping dock is usually the default location for outgoing items.

You create a pick request in response to a sales order (or a parts list, for manufacturing systems). You use pick requests to generate suggestions for locations from which to pick items. The system tracks the items in each location. You can find locations containing the items you need to ship and then create suggestions to pick from those locations.

You can use the locations that the system suggests for you or use different locations. You then confirm your chosen locations to move the items from the picking location to the shipping dock and to update the system's inventory records. Then, you confirm shipment to indicate that you shipped the items to the customer.

The picking process includes:

- Working with pick requests
- Working with pick suggestions

> **See Also:**
>
> - Appendix B, "Manufacturing Information" for information on creating pick requests through manufacturing systems.

19

Work with Pick Requests

You create pick requests to pick and ship items for a sales order. A pick request contains information about the item, such as:

- Branch/plant
- Item
- Unit of measure
- Quantity
- Transaction document information

The system uses this information to create suggestions for picking, based on the picking instruction tables that you define.

This chapter contains these topics:

- Section 19.1, "Creating Pick Requests,"
- Section 19.2, "Locating Existing Pick Requests."

Before You Begin

- Verify that you have set up inclusion rules on Branch/Plant Constants - Pg 2 to select the steps in the order activity rules for the order type that you want to process. Only the steps that you select will generate pick requests.

> **See Also:**
>
> - Appendix B, "Manufacturing Information" for information about creating pick requests through manufacturing processes.

19.1 Creating Pick Requests

You create pick requests to generate suggestions for picking locations. You can:

- Create pick requests interactively
- Create pick requests by batch

19.1.1 Creating Pick Requests Interactively

Navigation

From Advanced Warehouse Management (G46), choose Outbound Operations

From Outbound Warehousing Operations (G4612), choose Sales Order Entry

After you enter a sales order, you can create a pick request to fill the sales order. This is the most common method of creating pick requests. (You can also create pick requests by batch.) You use these pick requests to create suggestions for picking locations.

You set the processing options for Sales Order Entry (or a manufacturing completions program) to determine whether you:

- Create requests only

- Create requests and process them using the subsystem

- Do not create requests

If you create pick requests only, you must create and confirm location suggestions separately.

If you create and process pick requests using the subsystem, the subsystem creates pick suggestions. The subsystem also can confirm the pick suggestions, create tasks and trips, and print movement tags, slips, and audit reports (depending on how you set the processing options in each program).

If you do not create pick requests through Sales Order Entry, you must use the Batch Pick program to create pick requests.

To create pick requests interactively

On Sales Order Entry

Figure 19–1   Sales Order Entry screen
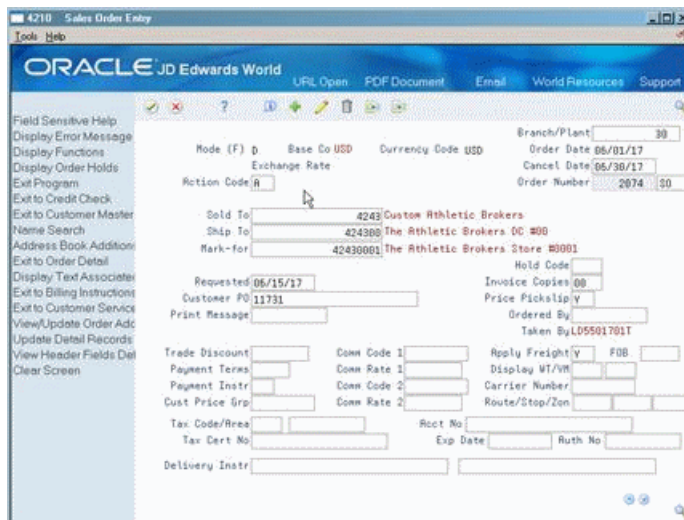
1. Complete the following fields:

   - Sold To

   - Ship To

   - Quantity

   - Item

   - Unit Of Measure

   - Unit Price

The system automatically inputs the order number and prompts you to confirm the order.

2. Complete the following field:

   ■ Update

Field	Explanation
Address Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other Address Book members.
Amount - Price per Unit	The list or base price to be charged for one unit of this item. In sales order entry, all prices must be set up in the Base Price table (F4106). *Form-specific information* If this item is not set up on the Base Price form, you must type a price in this field. This price overrides all other prices. **Note:** If you enter the extended price, the system can calculate the unit price.
Amount - Extended Price	The number of units multiplied by the unit price.
Update (Y/N)	When you perform an action that requires the system to update a file, the system asks this question before it updates the file. If you enter Y, you indicate the data is valid for update and subsequent processing. If you enter N or leave this field blank, you indicate that you want the system to redisplay the screen so you can correct or modify the data.

19.1.2 What You Should Know About

Topic	Description
Pick requests for items with serial numbers	Items with assigned serial numbers are tracked individually in the primary unit of measure, and you cannot group them into greater units of measure. The system creates one pick request for each item with a serial number.
FIFO flag in picking	When you use commitment methods 1, 2, or 3, make sure the FIFO flag in the picking instructions is set to Y.
Two-phase processing	You can confirm the movement of merchandise for a picking process in a two-phase process, if necessary. After you decide on a To location and an intermediate staging location, set the two-phase flag on the Item Profile screen to P for a physical location or to L for a logical location: P – This is a two-phase confirmation for an actual location that the item will be moved to for staging. The system will print Move tags for each movement. L – This is a two-phase confirmation where the item is not physically moved to a new location, so the system prints no Move tags. This is used when the item requires some intermediate task before you move it to its final location.

19.1.3 Processing Options

See Section 26.1, "Sales Order Entry (P4211)."

19.1.4 Creating Pick Requests by Batch

Navigation

From Advanced Warehouse Management (G46), choose Outbound Operations

From Outbound Warehousing Operations (G4612), choose Batch Pick Requests

If you don't create pick requests during sales order entry, you must create pick requests by batch. Run the Batch Pick Requests program to select all orders at a desired status and create pick requests for them. You typically run the batch program during off-peak hours, when more system resources are available.

When you run the Batch Pick Requests program, the system can:

- Select all sales orders at a status that you define through the Data Selection processing options

- Create pick requests

- Update each request's status in the Warehouse Requests table (F4600)

Batch Pick Requests is a DREAM Writer program.

19.1.5 What You Should Know About

Topic	Description
Changing sales order information	You cannot make changes to the order after you begin processing it using the Advanced Warehouse Management system.

19.2 Locating Existing Pick Requests

Navigation

From Advanced Warehouse Management (G46), choose Outbound Operations

From Outbound Warehousing Operations (G4612), choose Pick Requests

You might need to locate an existing pick request. For example, to verify that you have created a pick request for an item specified on a sales order, you locate the request using unique criteria, such as an order number, a document type, or an item number.

To locate existing pick requests

On Pick Requests

Figure 19–2 Pick Requests screen
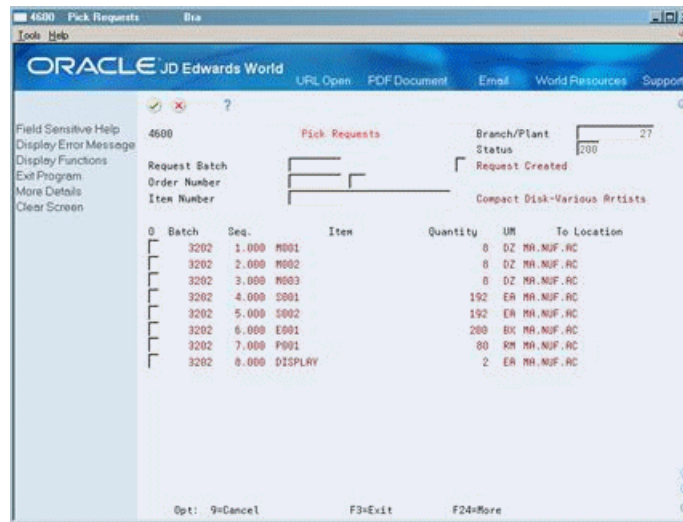
1. Complete the following field:

   ■ Branch/Plant

2. Complete one or more of the following optional fields:

   ■ Status

   ■ Request Batch

   ■ Order Number

   ■ Document Type

   ■ Item Number

19.2.1 What You Should Know About

Topic	Description
Canceling pick requests	You can use Pick Requests to cancel pick requests. You cancel requests to stop further processing and picking. For example, if the customer cancels the sales order, or the items are damaged, you would cancel the pick request.
	You must first cancel any existing pick suggestions for the request before you cancel the pick request.

19.2.2 Processing Options

See Section 25.6, "Process Movement Requests (P46171)."

20

Work with Pick Suggestions

After you create pick requests, you create pick suggestions to pick and ship items.

This chapter contains these topics:

Before You Begin

- Verify that you have set up order groups and process groups for your stock items
- Verify that you have set up picking instruction tables to designate specific locations based on the items' order and process groups

20.1 Creating Pick Suggestions

After you create pick requests, you create pick suggestions to move items from storage locations and to ship them.

You can create pick suggestions by batch (with the Process Pick Requests program) or interactively (using the subsystem to create suggestions, confirm suggestions, and print move tags and audit reports). You can create alternative pick suggestions by using the Resuggest Pick Requests program to replace existing suggestions with which you do not agree.

Complete the following tasks:

- Create pick suggestions by batch
- Create pick suggestions interactively
- Create alternative pick suggestions

20.1.1 Creating Pick Suggestions by Batch

Navigation

From Advanced Warehouse Management (G46), choose Outbound Operations

From Outbound Warehousing Operations (G4612), choose Process Pick Requests

You normally create pick suggestions by batch to process pick requests and move inventory on a regular basis. You can compensate for a large volume of sales orders by creating pick suggestions several times each day. You typically run batch programs during off-peak hours, when more system resources are available.

While processing pick suggestions, the system excludes all locations that do not have adequate on-hand or inbound inventory.

When you run the Process Pick Requests program, the system can:

- Select all outstanding pick requests

- Update each request's status in the Warehouse Requests table (F4600)

- Create picking location suggestions

- Assign tasks and trips

- Print movement tags and slips

- Print audit reports

- Confirm pick suggestions

You control which functions the system performs by setting processing options in the Process Pick Requests program.

Process Pick Requests is a DREAM Writer program.

Figure 20–1 Picking Audit Report (Pick Requests)

```
46475                              JD Edwards World                          Page No. . .        2
                                   Picking Audit Report                      Date - . . . 14.05.17
. . . . . Request . . . . .                        . . . Quantity . . .   Pr Ll Usg
  Type      Number  Sequence Item Number    Location     Attempted Suggested UM UM Code    Description
---------- -------- -------- ---------------- ---------------- --------- --------- -- -- ---- ------------------------------
Picking     3217    1,000  M001          .  .              600              EA PL 3586 Insufficient qty for UOM.
                                          .  .              600              EA PL 3583 Qty insufficient for instr.
                                       4.B  .2             600        576   EA CA 3595 Used as random location.
                                      10.C  .               24         24   EA DZ 3594 Used as fixed location.
```

20.1.2 What You Should Know About

Topic	Description
Using automatic replenishment	As you create suggestions for picking locations (and you are using automatic replenishment), the system runs the appropriate programs to create and process replenishment requests for depleted picking locations.

20.1.3 Creating Pick Suggestions Interactively

You create pick suggestions interactively to process pick requests as you create them. You do this by setting a processing option in the Sales Order Entry program to create a pick request and process it using the subsystem. As soon as you create a pick request, the subsystem can process it immediately. When you use this method, the system can:

- Create pick suggestions

- Assign tasks and trips

- Print movement tags and slips

- Print audit reports

- Confirm pick suggestions

20.1.3.1 Before You Begin

- Before you can use the subsystem, you must first set it up using the Advanced Warehouse and Technical Operations menu. JD Edwards World provides a predefined subsystem. However, you can create different versions or change the processing options in individual programs controlled by the subsystem. You

define how the system creates suggestions, confirms suggestions, and prints movement documents by changing the processing options in the programs.

20.1.4 Creating Alternative Pick Suggestions

Navigation

From Advanced Warehouse Management (G46), choose Outbound Operations

From Outbound Warehousing Operations (G4612), choose Process Pick Requests

You can create alternative pick suggestions if you do not agree with the system's suggestions for picking locations. You create alternative suggestions by running the Resuggest Pick Requests program.

Creating alternative suggestions replaces any previous location suggestions. With alternative suggestions, you can access new inventory locations that you might have added since you created the first suggestion(s).

If you have not changed inventory locations in your warehouse, and you want to create suggestions for locations that differ from previous suggested locations, you must change the picking instructions table. For example, you could change the picking instructions table to choose a new pick zone or to use a different tiebreaker rule to choose locations. If you do not change the picking instructions, the Resuggest Pick Requests program suggests the same locations as in the previous suggestions.

When you run the Resuggest Pick Requests program, the system can:

- Delete existing pick suggestions
- Reset each request's status in the Warehouse Requests table (F4600)
- Create alternative picking location suggestions
- Assign tasks and trips
- Print movement tags and slips
- Print audit reports
- Confirm pick suggestions

You control which functions the system performs by setting processing options in the Resuggest Pick Requests program.

Resuggest Pick Requests is a DREAM Writer program.

Figure 20–2   Picking Audit Report (Resuggest Pick Requests)

20.2 Confirming Pick Suggestions

Navigation

From Advanced Warehouse Management (G46), choose Outbound Operations

From Outbound Warehousing Operations (G4612), choose Pick Confirmation

If you agree with the system's suggestions for picking locations, you confirm them using Pick Confirmation. If you do not agree, you can create alternative suggestions or cancel the existing suggestions. You can also change suggested locations or split a suggestion for one location into two locations.

During confirmation, you can also confirm with variance. When you confirm with variance, you confirm that you are picking a quantity that is less than the original quantity. The system moves the remaining unconfirmed quantity to the holding location that you defined in the item profile. For example, if your warehouse employees damaged part of the outgoing shipment, you would send the damaged items to the holding location.

During confirmation, you can also overpick. When you overpick, you confirm that you are picking a quantity that is greater than the original quantity. The system moves the excess quantity to the overflow location you defined in the item profile. For example, for an order of 20 items, it is easier to pick a case of 24 items and send 4 of them to the overflow location than it is to pick 20 eaches.

When you confirm suggestions for picking, you:

- Reduce on-hand inventory in the picking location
- Reverse the commitment of inventory in the picking location
- Increase on-hand inventory in the shipping location
- Commit inventory to the shipping location

Pick confirmation ensures that the system's records match actual inventory movements by updating the following tables:

- Item Location (F41021)
- Location Detail Information (F4602)
- Item Ledger (F4111)
- Warehouse Requests (F4600)
- Warehouse Suggestions (F4611)
- Task Header (F4601)

Complete the following tasks:

- Confirm pick suggestions
- Change or split pick suggestions

To confirm pick suggestions

On Picking Confirmation

Figure 20–3 Picking Confirmation screen
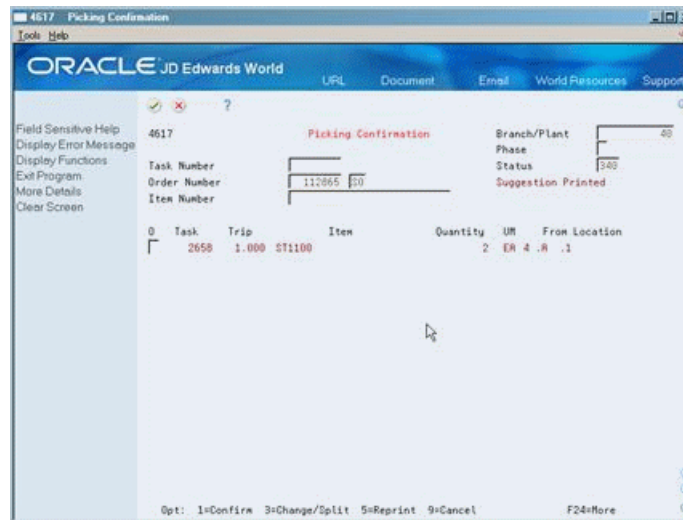
1. Complete the following fields:

   ■ Branch/Plant

   ■ Task Number

   ■ Order Number

   ■ Document Type

   ■ Item Number

2. To confirm the suggested locations and quantities, choose Confirm.

To change or split pick suggestions

On Picking Confirmation

1. Complete the following fields:

   ■ Branch/Plant

   ■ Phase

   ■ Task Number

   ■ Order Number

   ■ Document Type

   ■ Item Number

2. To split or change a pick suggestion, access Change/Split Suggestion.

Figure 20–4 Change/Split Suggestion screen
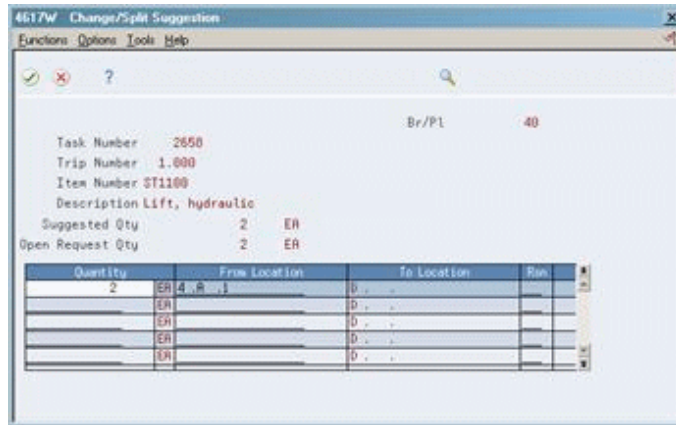
3. On Change/Split Suggestion, complete the following fields for each location into which you want to split or change the suggestion:

   - Quantity

   - From Location

   - Reason

4. To confirm a smaller quantity than the suggested quantity and move the remainder to the designated holding location, choose Confirm with Variance.

5. To confirm a greater quantity than the suggested quantity and move the excess to the designated overflow location, choose Overpick.

6. To confirm the suggested locations and quantities, choose Confirm.

20.2.1 What You Should Know About

Topic	Description
Creating new suggestions for different quantities	If you confirm a quantity less than the original quantity, and you do not choose Confirm with Variance to move the remainder to the holding location, the system creates a new suggestion for the remaining quantity. The remaining quantity stays open on the original suggestion so you can confirm it separately.
Canceling pick suggestions	You can use Pick Confirmation to cancel pick suggestions. You cancel suggestions to stop further processing and picking.

20.2.2 Processing Options

See Section 25.6, "Process Movement Requests (P46171)."

20.3 Confirming Shipment

Navigation

From Advanced Warehouse Management (G46), choose Outbound Operations

From Outbound Warehousing Operations (G4612), choose Ship Confirm

After you finish processing a pick request, you must indicate that the items have left the warehouse for shipment to the customer.

> **Caution:** You must actually ship the item when you confirm shipment to avoid balance discrepancies between system inventory records and actual inventory.

Shipment confirmation ensures that the system's records match actual inventory movements by updating the following tables:

- Item Location (F41021)
- Location Detail Information (F4602)

To confirm shipment

On Ship Confirm

Figure 20–5   Ship Confirm screen
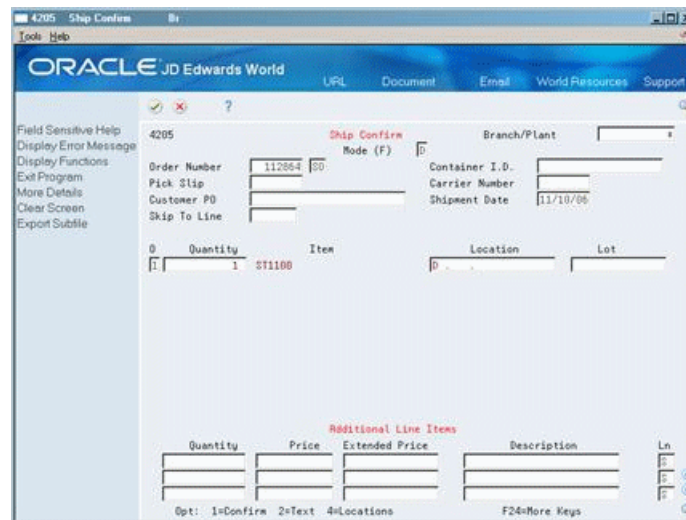
1. Complete the following field:
   - Order Number

2. Choose Confirm for the order lines for which you want to confirm shipment.

   The system prompts you to confirm shipment.

3. Complete the following field:
   - Update

20.3.1 What You Should Know About

Topic	Description
Defining document types for shipment confirmation	You must list the sales order document types (for example, SO) in the user defined codes table 40/IU to permit the system to update the inventory records when you confirm shipment.

Part V

Replenishment

This part contains these chapters:

21

Overview to Replenishment

This chapter contains these topics:

- Section 21.1, "Objectives,"
- Section 21.2, "About Replenishment."

21.1 Objectives

- To create replenishment requests
- To locate existing replenishment requests
- To create suggestions for replenishment requests
- To confirm suggestions for replenishment requests

21.2 About Replenishment

You use replenishment to refill fixed picking locations with items. You obtain these items from a replenishment location that you have set up to refill picking locations. You can tie specific replenishment zones to specific picking locations or zones.

You can create a replenishment request in response to picking that depletes the items in a location. You use replenishment requests to generate suggestions for locations from which to replenish items. The system tracks the items in each location. You can find locations containing the items you need to replenish and then create suggestions to replenish from those locations.

You can use the locations that the system suggests for you or use different locations. You then confirm your chosen locations to move the items from the replenishment location to the picking location, and to update the system's inventory records.

The replenishment process includes:

- Working with replenishment requests
- Working with replenishment suggestions

22

Work with Replenishment Requests

You create replenishment requests to refill picking locations in which items are depleted. A replenishment request contains information about the item, such as:

- Branch/plant
- Item
- Unit of measure
- Quantity

The system uses this information to create suggestions for replenishment, based on the replenishment instruction tables you define.

This chapter contains these topics:

- Section 22.1, "Creating Replenishment Requests,"
- Section 22.2, "Locating Existing Replenishment Requests."

22.1 Creating Replenishment Requests

You create replenishment requests to generate suggestions for replenishment locations. You can:

- Create replenishment requests interactively
- Create replenishment requests by batch
- Create replenishment requests automatically

22.1.1 Creating Replenishment Requests Interactively

Navigation

From Advanced Warehouse Management (G46), choose Replenishment Operations

From Replenishment Operations (G4613), choose Manual Replenishment

You can replenish items in picking locations where the items have been depleted. You use Manual Replenishment to move a specific quantity of a specific item to another location. For example, you use Manual Replenishment to move a group of obsolete items to a specific location for recycling or disposal. You use these replenishment requests to create suggestions for replenishment locations. After you create replenishment requests interactively, you must create suggestions.

To create replenishment requests interactively

On Manual Replenishment

Figure 22–1   Manual Replenishment screen
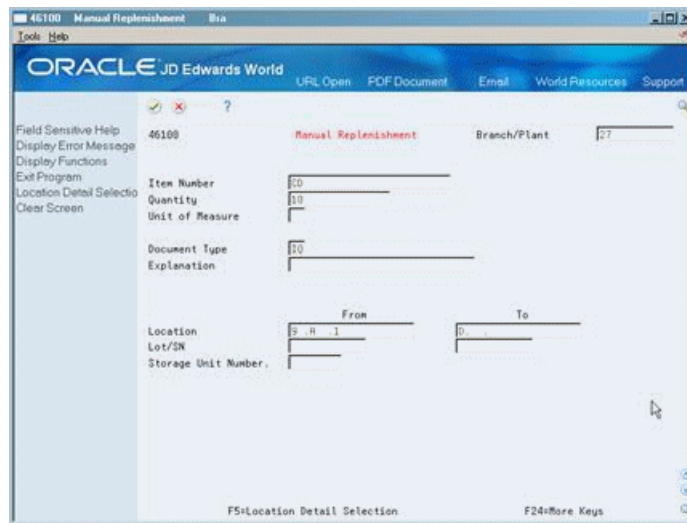
1. Complete the following fields:

    ■   Branch/Plant

    ■   Item Number

    ■   Quantity

    ■   Unit of Measure

    ■   To Location

2. To specify the location from which to replenish items, complete the following field:

    ■   From Location

3. Complete the following optional fields:

    ■   From Lot Number

    ■   To Lot Number

    ■   From Storage Unit Number

Field	Explanation
Location - To	The storage location to which goods will be moved.
	Form-specific information
	The system creates either a putaway or a replenishment request based on how you complete the From Location and the To Location fields:
	■ Putaway Requests - To create a putaway request, enter a location in the From Location field.
	■ Replenishment Requests - To create a replenishment request, enter a location in both the From Location and the To Location fields, or enter a location in only the To Location field.

Field	Explanation
Lot - From	The lot number of the goods being putaway, picked or replenished.
Lot - To	The lot number to which you are adding goods. In most cases, this will be the same as the From Lot number.
Storage Unit Number - From	A number that uniquely identifies goods in a specific location. Each location detail record contains a storage unit number if you turn on license plate tracking (P46011) for that item's level one unit of measure in the Item Unit of Measure.
	Form-specific information
	The storage unit number being put away to or replenished from.

22.1.2 What You Should Know About

Topic	Description
Using inappropriate locations during manual replenishment	Verify that the location to which you manually replenish is included in the picking instruction table. If it is not, the replenished items will remain in that location until you change the pick or replenishment instruction tables, or until you manually pick from the location.
Replenishment requests for items with serial numbers	Items with assigned serial numbers are tracked individually in the primary unit of measure, and you cannot group them into greater units of measure. The system creates one replenishment request for each item with a serial number.
Two-phase processing	You can confirm the movement of merchandise for a replenishment process in a two-phase process, if necessary. After you decide on a To location and an intermediate staging location, set the two-phase flag on the Item Profile screen to P for a physical location or to L for a logical location:
	P – This is a two-phase confirmation for an actual location that the item will be moved to for staging. The system will print Move tags for each movement.
	L – This is a two-phase confirmation where the item is not physically moved to a new location, so the system prints no Move tags. This is used when the item requires some intermediate task before you move it to its final location.

22.1.3 Creating Replenishment Requests by Batch

Navigation

From Advanced Warehouse Management (G46), choose Replenishment Operations

From Replenishment Operations (G4613), choose Batch Replenishment

You create replenishment requests by batch under normal warehouse operating conditions. You select all depleted fixed picking locations and create replenishment requests for them. You typically run the batch program during off-peak hours, when more system resources are available.

Each picking location has two letdown points (the quantity level that determines whether the Batch Replenishment program creates a replenishment request):

- Normal replenishment (for example, 25 percent capacity)

- Minimum replenishment (for example, 10 percent capacity)

You can set the processing options for the Batch Replenishment program to use either the normal or minimum replenishment point when you create replenishment requests. Typically, you use the normal replenishment point for the batch replenishment process (which you usually run once each day). You use the minimum replenishment point for automatic replenishments, which can occur any time you create pick suggestions.

You must also set the processing options in Batch Replenishment processing options to determine the quantity that the system should replenish, as follows:

- Economic (a specific quantity that you determine)

- Maximum (the quantity required to completely refill the location)

When you create replenishment requests by batch, the system creates suggestions immediately. This helps to prevent over-replenishment, because you would move inventory quickly before a pick cancellation could eliminate the need for a location's replenishment.

When you run the Batch Replenishment program, the system can:

- Select the picking locations that are below the normal or minimum replenishment point

- Create replenishment requests

- Create replenishment suggestions

- Update each request status in the Warehouse Requests table (F4600)

- Assign tasks and trips

- Print movement tags and slips

- Print audit reports

You control which functions the system performs by setting processing options in the Batch Replenishment program.

Batch Replenishment is a DREAM Writer program.

Figure 22–2   Putaway Audit Report (Batch Replenishment)

22.1.4 What You Should Know About

Topic	Description
Performing economic replenishments by batch	When you use batch replenishment for economic (versus maximum) replenishment, verify that the sum of each picking location's normal replenishment quantity and maximum replenishment quantity do not exceed the location's maximum capacity quantity. The system will print movement documents to replenish a greater quantity than the picking location can hold, and you might not be able to store all of the items in the picking location.

22.1.5 Processing Options

See Section 27.1, "Batch Replenishment (P461601)."

22.1.6 Creating Replenishment Requests Automatically

You can automatically replenish picking locations when picking depletes the stock to minimum replenishment levels. This keeps picking locations sufficiently stocked.

With automatic replenishment, the system creates a replenishment request when it cannot fill a pick request from fixed picking locations. When you create picking location suggestions, the system can:

- Create replenishment requests for depleted picking locations

- Create replenishment location suggestions

- Assign tasks and trips

- Print movement tags and slips

- Print audit reports

- Confirm replenishment suggestions

You control which functions the system performs by setting processing options in each program that the subsystem controls.

22.1.6.1 Before You Begin

- Verify that you have set up picking instructions for replenishment

- Verify that you have set up location profiles for replenishment

- Verify that you have set up replenishment instructions for replenishment

- Verify that you have set up fixed picking locations for replenishment

- Verify that you have set up fixed replenishment zones for replenishment

- Verify that you have set a processing option in the Process Replenishment Requests program to create replenishment requests automatically

    See Also:

    - Section 13.3, "Defining Movement Instructions,"

    - Section 3.7, "Defining Location Profile Information,"

    - Chapter 4, "Set Up Fixed Locations and Zones,"

    - Chapter 23, "Work with Replenishment Suggestions."

22.2 Locating Existing Replenishment Requests

Navigation

From Advanced Warehouse Management (G46), choose Replenishment Operations

From Replenishment Operations (G4613), choose Replenishment Requests

You might need to locate an existing replenishment request. For example, to verify that you have created a replenishment request for an item that you just picked, you locate the request using unique criteria, such as an order number, a document type, or an item number.

To locate existing replenishment requests

On Replenishment Requests

Figure 22–3   Replenishment Requests screen
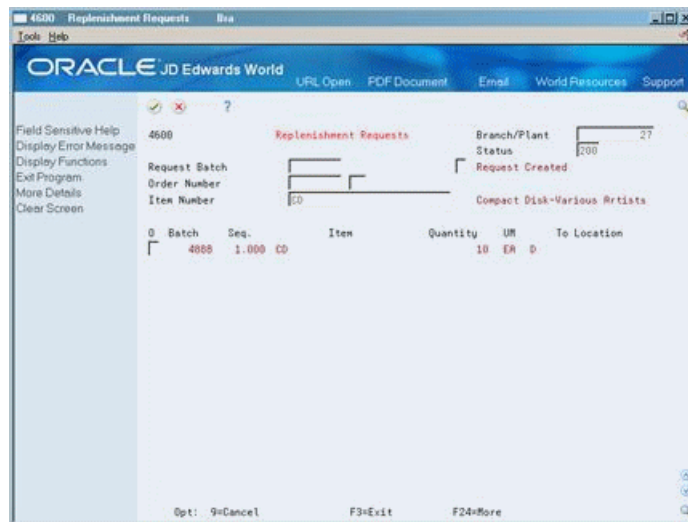
1. Complete the following field:

   ■ Branch/Plant

2. Complete one or more of the following optional fields:

   ■ Status

   ■ Request Batch

   ■ Order Number

   ■ Document Type

   ■ Item Number

22.2.1 What You Should Know About

Topic	Description
Canceling replenishment requests	You can use Replenishment Requests to cancel replenishment requests. You cancel requests to stop further processing and replenishment. For example, if the customer cancels a sales order, you would cancel the pick request for the order. Because you did not pick those items, you do not need to replenish the picking location.
	You must first cancel any existing replenishment suggestions for the request before you cancel the replenishment request.

22.2.2 Processing Options

See Chapter 25.6, "Process Movement Requests (P46171)."

23

Work with Replenishment Suggestions

After you create replenishment requests, you create replenishment suggestions for locations from which to move items to refill depleted picking locations.

This chapter contains these topics:

-
-

Before You Begin

- Verify that you have set up order groups and process groups for your stock items
- Verify that you have set up replenishment instruction tables to designate specific locations based on the items' order and process groups

23.1 Creating Replenishment Suggestions

After you create replenishment requests, you create replenishment suggestions to move items from replenishment locations and refill depleted picking locations.

You can create replenishment suggestions by batch (using the Batch Replenishment program), or automatically (with the Process Replenishment Requests program). You can create alternative replenishment suggestions with the Resuggest Replenishment Requests program to replace existing suggestions with which you do not agree.

Complete the following tasks:

- Create replenishment suggestions by batch
- Create replenishment suggestions automatically
- Create alternative replenishment suggestions

23.1.1 Creating Replenishment Suggestions by Batch

You create replenishment suggestions by batch to process replenishment requests and move inventory on a regular basis. You can compensate for the rapid depletion of fixed picking locations by creating replenishment suggestions several times each day. You typically run batch programs during off-peak hours, when more system resources are available.

Complete the following tasks:

- Run Process Replenishment Requests
- Run Batch Replenishment

23.1.2 Running Process Replenishment Requests

Navigation

From Advanced Warehouse Management (G46), choose Replenishment Operations

From Replenishment Operations (G4613), choose Process Replenishment Requests

When you run the Process Replenishment Requests program, the system can:

- Select all outstanding replenishment requests

- Update each request's status in the Warehouse Requests table (F4600)

- Create replenishment location suggestions

- Assign tasks and trips

- Print movement tags and slips

- Print audit reports

- Confirm replenishment suggestions

You control which functions the system performs by setting processing options in the Process Replenishment Requests program.

Process Replenishment Requests is a DREAM Writer program.

Figure 23–1 Replenishment Audit Report

```
46475                                    JD Edwards World                            Page No. . .        2
                                      Replenishment Audit Report                      Date - . . . 14.05.17
. . . . . Request . . . . .                               . . . Quantity . . .   Pr Ll Usg
Type        Number  Sequence Item Number      Location      Attempted  Suggested  UM UM Code    Description
---------  -------- -------- ---------------- --------------------- ---------- ---------- -- -- ---- -------------------------------
Replenish    3220    1,000 P002              R.  .                    10         10 CR CR 3596 Request overrode location.
```

23.1.3 What You Should Know About

Topic	Description
Selecting locations for replenishment	While processing replenishment suggestions, the system excludes all locations that do not have adequate on hand or inbound inventory.

23.1.4 Running Batch Replenishment

Navigation

From Advanced Warehouse Management (G46), choose Replenishment Operations

From Replenishment Operations (G4613), choose Batch Replenishment

When you run the Batch Replenishment program, the system can:

- Select all fixed picking locations at or below the normal or minimum replenishment point

- Create replenishment requests

- Create suggestions for locations to replenish from

- Update each request's status in the Warehouse Requests table (F4600)

- Assign tasks and trips

- Print movement tags and slips

■ Print audit reports

■ Confirm replenishment suggestions

You control which functions the system performs by setting processing options in the Batch Replenishment program.

Batch Replenishment is a DREAM Writer program.

Figure 23–2   Putaway Audit Report (Batch Replenishment)

23.1.5 What You Should Know About

Topic	Description
Performing economic replenishments by batch	When you use batch replenishment for economic (versus maximum) replenishment, verify that the sum of each picking location's normal replenishment quantity and maximum replenishment quantity do not exceed the location's maximum capacity quantity. The system will print movement documents to replenish a greater quantity than the picking location can hold, and you might not be able to store all of the items in the picking location.

See Also:

■ Section 22.1.3, "Creating Replenishment Requests by Batch" for information about how the batch program selects locations for replenishment.

23.1.6 Creating Replenishment Suggestions Automatically

You can replenish fixed picking locations automatically when picking depletes the stock to minimum replenishment levels. This keeps picking locations sufficiently stocked.

With automatic replenishment, the system creates a replenishment request when it cannot fill a pick request from fixed picking locations. When you create picking location suggestions, the system also creates replenishment requests for picking locations which contain a quantity that is smaller than the minimum replenishment quantity. The system then runs the appropriate programs to:

■ Select all outstanding replenishment requests

■ Update each request's status in the Warehouse Requests table (F4600)

■ Create replenishment location suggestions

■ Assign tasks and trips

■ Print movement tags and slips

- Print audit reports

- Confirm replenishment suggestions

You control which functions the system performs by setting processing options in the following programs:

- Process Replenishment Requests

- Create Replenishment Tasks

- Replenishment Document and Tags

23.1.6.1 Before You Begin

- Verify that you have set up picking instructions for replenishment

- Verify that you have set up location profiles for replenishment

- Verify that you have set up replenishment instructions for replenishment

- Verify that you have set up fixed picking locations for replenishment

- Verify that you have set up fixed replenishment zones for replenishment

- Verify that you have set a processing option in the Process Replenishment Requests program to create replenishment requests automatically

> **See Also:**
>
> - Section 13.3, "Defining Movement Instructions,"
>
> - Section 3.7, "Defining Location Profile Information,"
>
> - Chapter 4, "Set Up Fixed Locations and Zones,"
>
> - Section 23.1, "Creating Replenishment Suggestions."

23.1.7 Creating Alternative Replenishment Suggestions

Navigation

From Advanced Warehouse Management (G46), choose Replenishment Operations

From Replenishment Operations (G4613), choose Process Replen. Requests

You can create alternative replenishment suggestions if you do not agree with the system's suggestions for replenishment locations. You create alternative suggestions by running the Resuggest Replenishment Requests program.

Creating alternative suggestions replaces any previous location suggestions. With alternative suggestions, you can access new inventory locations that you may have added since you created the first suggestion(s).

> **Caution:** To create alternative replenishment suggestions, you must cancel the original replenishment suggestions manually. This is done by inquiring on the task in the Replenishment Confirmation program and taking the Cancel option. The Resuggest Replenishment Requests program does not cancel existing suggestions.

If you have not changed inventory locations in your warehouse, and you want to create suggestions for locations that are different than previous suggested locations, you must change the replenishment instructions table. For example, you could change

the replenishment instructions table to choose a new replenishment zone or to use a different tiebreaker rule to choose locations. If you do not change the replenishment instructions, the Resuggest Replenishment Requests program suggests the same locations as in the previous suggestions.

When you run the Resuggest Replenishment Requests program, the system can:

- Create alternative replenishment location suggestions

- Assign tasks and trips

- Print movement tags and slips

- Print audit reports

- Confirm replenishment suggestions

You control which functions the system performs by setting processing options in the Resuggest Replenishment Requests program.

Resuggest Replenishment Requests is a DREAM Writer program.

Figure 23–3   Replenishment Audit Report (Resuggest Replenishment)

```
46475                              JD Edwards World                          Page No. . .        4
                                 Replenishment Audit Report                  Date - . . . . 14.05.17
. . . . . Request . . . . .                        . . . Quantity . . .  Pr L1 Usg
Type      Number  Sequence Item Number     Location   Attempted  Suggested  UM UM Code     Description
--------  --------  --------  --------------------   ----------  ---------  -- -- ----  --------------------------------
Replenish   19,000 CREAM CHEESE    . .           480                CR PL 3583 Qty insufficient for instr.
                                     .  .         480                CR PL 3586 Insufficient qty for UOM.
                                  12.A  .         480                CR CA 3457 Location is not picking loc.
                                  12.B  .         480                CR CA 3457 Location is not picking loc.
                                  12.C  .         480                CR CA 3457 Location is not picking loc.
                                  12.D  .         480                CR CA 3457 Location is not picking loc.
                                  12.E  .         480                CR CA 3457 Location is not picking loc.
                                  12.F  .         480                CR CA 3457 Location is not picking loc.
                                  12.G  .         480                CR CA 3457 Location is not picking loc.
                                  12.H  .         480                CR CA 3636 Same From and To Location
                                  14.C  .3        480        480     CR CR 3595 Used as random location.
          3220     1,000 P002        R.  .         10         10     CR CR 3594 Used as fixed location.
```

23.2 Confirming Replenishment Suggestions

Navigation

From Advanced Warehouse Management (G46), choose Replenishment Operations

From Replenishment Operations (G4613), choose Confirm Replenishment

If you agree with the system's suggestions for replenishment locations, you confirm them using Replenishment Confirmation. If you do not agree, you can create alternative suggestions or cancel the existing suggestions. You can also change suggested locations or split a suggestion for one location into two locations.

During confirmation, you can also confirm with variance. When you confirm with variance, you confirm that you are replenishing a quantity that is smaller than the original quantity. The system moves the remaining unconfirmed quantity to the variance location you defined in the item profile. For example, if your warehouse employees damaged some of the items when they moved them from the replenishment location, you would send the damaged items to the variance location.

During confirmation, you can also overpick. When you overpick, you confirm that you are replenishing a quantity that is greater than the original quantity. The system moves the excess quantity to the overflow location you defined in the item profile. For example, for a replenishment request of 20 items, it is easier to pick a case of 24 items and send 4 of them to the overflow location than it is to replenish 20 eaches.

When you confirm suggestions for replenishment, you:

- Reduce on-hand inventory in the replenishment location

- Reverse the commitment of inventory in the replenishment location

- Increase on-hand inventory in the picking location

- Reverse the commitment of inbound inventory in the picking location

Replenishment confirmation ensures that the system's records match actual inventory movements by updating the following tables:

- Item Location (F41021)

- Location Detail Information (F4602)

- Item Ledger (F4111)

- Warehouse Requests (F4600)

- Warehouse Suggestions (F4611)

- Task Header (F4601)

Complete the following tasks:

- Confirm replenishment suggestions

- Change or split replenishment suggestions

Figure 23–4 Replenishment Confirmation screen
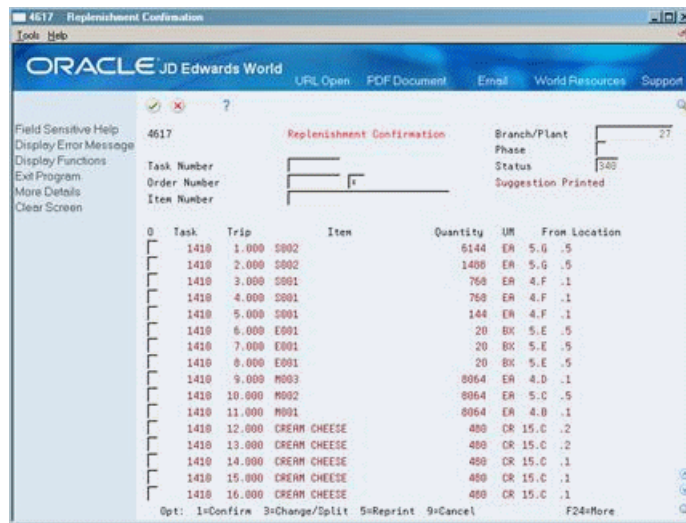
To confirm replenishment suggestions

On Replenishment Confirmation

1. Complete the following fields:

   - Branch/Plant

   - Task Number

   - Order Number

   - Document Type

   - Item Number

2. To confirm the suggested locations and quantities, choose Confirm.

To change or split replenishment suggestions

On Replenishment Confirmation

1. Complete the following fields:

   ■ Branch/Plant

   ■ Task Number

   ■ Order Number

   ■ Document Type

   ■ Item Number

2. To split or change a replenishment suggestion, access Change/Split Suggestion.

Figure 23–5   Change/Split Suggestions screen
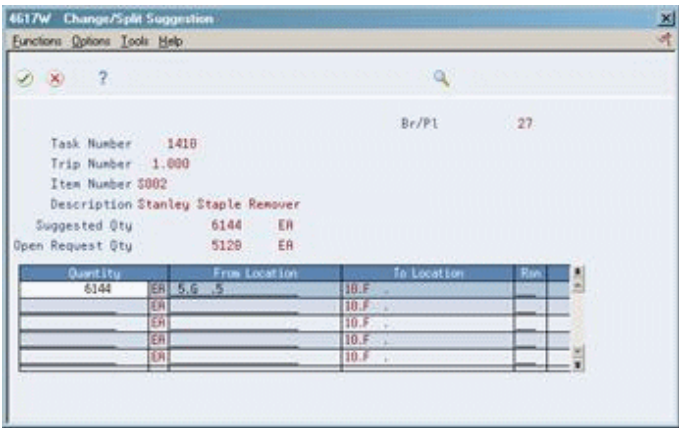
3. On Change/Split Suggestion, complete the following fields for each location into which you want to split or change the suggestion:

   ■ Quantity

   ■ From Location

   ■ Reason

4. To confirm a smaller quantity than the suggested quantity and move the remainder to the designated variance location, choose Confirm with Variance.

5. To confirm a greater quantity than the suggested quantity and move the excess to the designated overflow location, choose Overpick.

6. To confirm the suggested locations and quantities, choose Confirm.

23.2.1 What You Should Know About

Topic	Description
Creating new suggestions for different quantities	If you confirm a quantity less than the original quantity, and you do not choose Confirm with Variance to move the remainder to the variance location, the system creates a new suggestion for the remaining quantity. The remaining quantity stays open on the original suggestion so you can confirm it separately.

Topic	Description
Canceling replenishment suggestions	You can use Replenishment Confirmation to cancel replenishment suggestions. You cancel suggestions to stop further processing and replenishment.

23.2.2 Processing Options

See

Part VI

Processing Options

This part contains these chapters:

24

Warehouse Setup Processing Options

This chapter contains these topics:

24.1 Location Profile (P46020)

Processing Option	Processing Options Requiring Further Description
DEFAULT PROCESSING:	
1. Enter the default sequence code (from the following list) to be used when the program is called:	
' ' = Location Sequence,	
'1' = Putaway Sequence,	
'2' = Pick Sequence,	
'3' = Replenishment Sequence.	

24.2 Location Capacity Definition (P46024)

Processing Option	Processing Options Requiring Further Description
DEFAULT PROCESSING:	
1. Enter a '1' to enter capacities by item dimension group.	
If left blank, capacities will be entered by item number.	

24.3 Build Tiebreaker Files (P46027)

Processing Option	Processing Options Requiring Further Description
1. If using proximity tiebreakers, enter one of the following:	Proximity tiebreakers are defined by populating the Tiebreaker Rules field with a 5, 6, or 7 in the Putaway and/or Picking Instruction.
'1' - Build proximity from base putaway location.	
'2' - Build proximity from base picking location.	
'3' - Build proximity from both base putaway and picking locations.	
Leave the option blank if you do not want proximities built.	

24.4 Build Location Master - Warehouse Management (P41820)

Processing Option	Processing Options Requiring Further Description
UPDATE OPTION:	
1. Enter a '1' to update locations that already exist with data dictionary default values.	
WAREHOUSE MANAGEMENT:	
2. Enter a '1' to create Location Detail records (file F4602) for item location information.	
3. Enter a '1' to apply the item's default unit of measure structure.	

24.5 Fixed Locations (P46012)

Processing Option	Processing Options Requiring Further Description
FORMAT OPTIONS:	
1. Enter a '1' to display the Fixed Putaway Locations format.	
Enter a '2' to display the Fixed Picking/Replenishment format.	
If left blank, the Fixed Putaway Locations format is displayed.	

24.6 Unit of Measure Maintenance (P46011)

Processing Option	Processing Options Requiring Further Description
PROMPTING CONTROL:	
1. Enter a '1' to display the Item format.	
Default of blank will display the Item Dimension Group format.	

24.7 Supply/Demand Inclusion Rules (P34004)

Processing Option	Processing Options Requiring Further Description
DOCUMENT TYPES: 1. Enter the Document Types for Work Order and Rate you want to setup Inclusion Rules for. The document types can be stacked one after the other for multiple document types. If left blank, 'WOSC' will be used.	

24.8 Carton Recommendation Rules (P46013)

Processing Option	Processing Options Requiring Further Description
PROCESS CONTROL: 1. Enter a '1' to display Item format. Default of blank will display the Item Dimension Group format.	

25

Putaway Processing Options

This chapter contains these topics:

25.1 Movement Instructions (P46095)

Processing Option	Processing Options Requiring Further Description
FORMAT OPTIONS:	
1. Enter the type of instructions to be defined:	
1 = Putaway	
2 = Picking	
3 = Replenishment	
(If left blank, format 1 is used)	

25.2 Enter Receipts (P4312)

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES:	
1. Order Type	
2. Receipt Document Type	If an order line does not display for receipt, check the Next Status on the line (via Purchase Order Entry- P4311) to verify it matches one of the three status codes you set below.
Incoming Acceptable Next Status Codes:	
3. Status Code 1	

Processing Option	Processing Options Requiring Further Description
4. Status Code 2	
5. Status Code 3	
Outgoing Next Status Codes:	
6. Partial receipt	If you perform partial receipts, you want to update the next status on purchase order lines:
	1. To indicate that a partial receipt has taken place, and
	2. So you can lock down the status in Purchase Order Entry so users cannot make changes to partially received lines.
7. Close balance of line	Should normally be 999.
8. Cancel balance of line	Should normally be 999.
PROMPTING CONTROL:	
Enter a '1' to:	
9. Select all lines for receipt.	
10. Be prompted to accept the receipt.	
11. Display lot/layer information.	
12. Display Sales Order Backorders.	Set this processing option to 1 to have the Backorder Release screen (V42117) display after you perform a receipt to release backorders that might exist for the items you just received.
13. Record serial number information for inventory items.	
14. Protect lot number, lot expiration date, and lot status on orders with automatically generated or assigned lot numbers.	
15. Enter a '1' to protect prices, or a '2' to make prices non-display.	
If left blank, the update of prices is allowed.	
16. Enter a '1' to require manual entry of the quantity.	
If left blank, the quantity field will be loaded.	
17. Enter a '1' to display description.	
If left blank, the item/account number will be displayed.	
18. Enter the format to be displayed.	
1 = Receipts by Purchase Order	
2 = Receipts by Item	
3 = Receipts by G/L Account	
(If left blank, format 1 is used.)	
LANDED COST PROCESSING:	

Processing Option	Processing Options Requiring Further Description
19. Enter a '1' to display the landed cost screen, or a '2' to perform blind landed cost processing.	
If left blank, no landed cost processing is performed.	
TOLERANCE CHECKING:	
Enter a '1' for a warning message, or a	
'2' to prohibit entry.	
If left blank, no tolerance checking is performed.	
20. Quantity, Unit Cost, Amount	
21. Receipt Date	
ITEM BRANCH/LOCATION PROCESSING:	
22. Enter a '1' to update the supplier when an item is purchased the first time, or a '2' to update the supplier every time the item is purchased.	Use this option to update the Supplier address number in the branch record for an inventory item (P41026). The address number is then used by the Purchase Order Generator program (P43011) to create orders for the supplier.
If left blank, no supplier update is performed.	
23. Enter a '1' to default the Location and Lot Number from the primary item balance location, if the Location and Lot Number are both blank.	
DREAM WRITER VERSIONS:	
Enter the version for each program:	
If left blank, ZJDE0001 will be used.	
24. Open Order Inquiry (P430301)	
25. G/L Functional Server (XT0911Z1)	
26. SO Backorder Release (P42117)	
27. Receipt Traveler (P43512)	
28. Receipt Routing (P43250)	
DOCUMENT PROCESSING:	
29. Enter a '1' to automatically print a Receipt Traveler Document following each receipt.	
KIT PROCESSING:	
30. Enter a '1' to display the kit parent item, or a '2' to display the kit component items.	
If left blank, no kit information is displayed.	
Note: Stock items must be received at the component level.	
SUPPLIER ANALYSIS:	

Processing Option	Processing Options Requiring Further Description
31. Enter a '1' to capture supplier analysis information. If left blank, no supplier analysis information is captured.	Enter 1 to have the system create a record in the Supplier/Item Relationship file (F43090) if it doesn't already exist, and also to update order information to the file.
ASSOCIATED TEXT PROCESSING:	
32. Enter a '1' to purge the associated text when the line is fully received. If left blank, the text is retained.	
RECEIPT ACKNOWLEDGMENT:	
33. Enter a '1' to send a PPAT message to the purchase order originator regarding the receipt.	
34. Enter the next status code that the Sales Order should be updated to upon full receipt of a direct ship purchase order line.	Use this option to update the Next Status on a direct ship sales order that corresponds to a purchase order to ensure that it is ready for ship confirmation or update.
RECEIPT ROUTING:	
35. Enter a '1' to initiate the receipt routing process. If left blank, all items will be received directly into stock.	
36. Enter the default route type to be used to search for a receipt route. If left blank, the program will search for route type equivalent to blank.	
SUMMARIZATION:	
37. Enter a '1' to summarize journal entries. If left blank, journal entries are written in detail. **Note:** If tracking commitments in the PA/PU ledgers, this option may NOT be used.	
WAREHOUSE PROCESSING:	
38. Enter the Directed Putaway mode: Blank =No Directed Putaway Requests 1 = Request Putaway only 2 = Request Putaway and process using the subsystem 3 = Receive directly to reserved locations (No requests).	
39. If processing putaway requests through the subsystem, enter the DREAM Writer version to be used. If blank, XJDE0001 is used. (See Form ID P46171).	

Processing Option	Processing Options Requiring Further Description
40. Enter the DREAM Writer version of On-Line Reservations to be used.	
If blank, ZJDE0001 is used.	
(See Form ID P46130)	
41. Enter a '1' to perform warehouse Cross-Docking. This is only valid with processing option 12 to perform sales backorder processing set on.	
CURRENCY PROCESSING:	
42. Enter the date to be used when retrieving the currency exchange rate.	
If left blank, the purchase order exchange rate will be used.	
1 = G/L Date	
2 = Current Date	
43. Enter a '1' to protect the exchange rate field.	
BULK ITEM PROCESSING:	
44. Enter '1' to record the difference between ambient and standard quantities received as a temperature gain/loss.	
Enter '2' to update the unit cost as the extended cost divided by the standard quantity.	
Leave blank if quantities are purchased and received in standard.	
45. Enter a '1' if you want Receipts Routing integration with the Four Point Analysis file.	
46. Enter the DREAM Writer Version for the Bulk Stock Movement program called for Lot Controlled product.	
If left blank, ZJDE0005 will be used.	
DIRECT SHIP ORDER PROCESSING:	
(LOAD & DELIVERY MANAGEMENT ONLY)	
47. Enter a '1' if related sales order lines should be automatically load and deliver confirmed.	
48. Enter the sales order next status code beyond which sales orders will not be automatically load and deliver confirmed.	
49. Enter the version of the transportation transaction server to be used to automatically load and deliver confirm orders.	
QUALITY MANAGEMENT:	

Processing Option	Processing Options Requiring Further Description
50. Enter the version of Test Results Revisions (P3711) to call.	
If left blank, ZJDE0002 will be used.	
CASCADING RECEIPTS:	
51. Enter '1' to initiate Cascading Receipts	
52. Enter the type of tolerance check to perform in Cascading Receipts	
1 = Percentage Tolerance	
2 = Units Tolerance	
53. Enter the tolerance value. This is used in conjunction with the previous option.	
G/L POST	
54. Enter a '1' to automatically submit the G/L Post.	
If left blank, post WILL NOT be automatically submitted.	
55. Enter the DREAM Writer version of the G/L Post to be used.	
If left blank, ZJDE0033 will be used. This is used in conjunction with the previous option.	
56. Enter a value for processing when the G/L Date of the receipt is outside the fiscal year of the G/L Date on the original order ' '= Ignore '1' = Issue Warning '2' = Issue Hard error	Set this option to accommodate encumbrance and commitment accounting such that relief of a commitment cannot occur after the year in which the commitment was entered. Commitment accounting only applies to order lines types with an Inventory Interface of A or B.

25.3 Request Inquiry (P4600)

Processing Option	Processing Options Requiring Further Description
DISPLAY OPTION:	
1. Enter the type of requests to view:	
1 = Putaway Requests	
2 = Pick Requests	
3 = Replenishment Requests	
(If blank, putaway requests will display.)	
DEFAULT VALUE:	
2. Enter the default Request Status to use.	
If blank, the "Ready to Suggest" status (200) is used.	
PICKING OPTION:	

Processing Option	Processing Options Requiring Further Description
3. Enter the override next status for sales order lines when requests are canceled.	
PUTAWAY OPTIONS:	
4. Enter a '1' to view credit order putaways.	

25.4 Online Reservations (P46130)

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES:	
1. Order Type	
RECORD SELECTION CONTROL:	
2. Enter the From Status code and Thru Status code to be used for Purchase Order Selection:	
From Status Code	
Thru Status Code	

25.5 Batch Reservations - Purchase Order (P461301)

Processing Option	Processing Options Requiring Further Description
UPDATE OPTION:	
1. Enter a '1' to re-suggest location reservations for selected purchase order lines.	
If blank, only lines without open reservations will be suggested.	
MOVE TAG OPTIONS:	
Enter a '1' to:	
2. Print move tags.	
3. Print bar coded information.	
4. Print the U/M structure.	
5. Print Mark For address.	
6. Enter the item/location quantity to be printed on the tags:	
' ' = Do not print a quantity.	
'1' = On-hand quantity.	
'2' = On-hand + inbound - outbound - committed.	
7. Enter the number of duplicate copies to print for each tag.	

Processing Option	Processing Options Requiring Further Description
8. Enter the DREAM Writer version to be used for the desired printer overrides.	
If blank, XJDE0001 is used (See Form ID P46473).	
AUDIT CONTROL:	
9. Enter a '1' to generate the audit Report,	
'2' to generate the Audit along with a glossary for any messages, or a	
'3' to generate the report with a complete glossary at the end.	
If blank, no report will be generated.	
10. Enter the DREAM Writer version of the Selection Audit report to use.	
If blank, XJDE0001 is used. (See form ID P46475.)	

25.6 Process Movement Requests (P46171)

Processing Option	Processing Options Requiring Further Description
TASK AND TRIP ASSIGNMENT:	
1. Enter a '1' to do immediate task and trip assignment.	
If blank, no tasks/trips will be assigned.	
2. Enter the DREAM Writer version of the Task and Trip Assignment program to use.	
If blank, XJDE0001 is used. (See Form ID P46471).	
AUDIT CONTROL:	
3. Enter a '1' to generate the audit report,	
'2' to generate the audit along with a glossary for any messages, or a	
'3' to generate the report with a complete glossary at the end.	
If blank, no report will be generated	
4. Enter the DREAM Writer version of the Selection Audit report to use for the desired printer overrides.	
If blank, XJDE0001 is used. (See Form ID P46475.)	
CONFIRMATION CONTROL:	
5. Enter a '1' to automatically confirm suggestions.	
6. Enter the override next status for the confirmed sales order lines.	
(Pick Processing Only).	
RESUGGESTIONS:	

Processing Option	Processing Options Requiring Further Description
7. Enter a '1' to resuggest movement requests.	
If blank, only new requests will be processed.	
REPLENISHMENT CONTROL:	
8. Enter the method to use for replenishment quantities.	
If blank, method '2' is used.	
'1' = Economic Replenishment.	
The quantity to replenish is retrieved from the fixed location definition.	
'2' = Maximum Replenishment.	
The quantity to replenish is the quantity which would fill the location.	
9. Enter the DREAM writer version of the Task and Trip Assignment program to run for replenishments.	
If blank XJDE0003 is used. (See form ID P46471)	
LOT PROCESSING:	
10. Enter '1' to include immature lots (those not yet in effect).	
If left blank, an immature lot will not be counted as available.	

26

Picking Processing Options

This chapter contains these topics:

26.1 Sales Order Entry (P4211)

Processing Option	Processing Options Requiring Further Description
SALES ORDER DEFAULT VALUES:	
1. Document Type (Required)	Enter the document type relevant to this particular version of Sales Order Entry. You will likely have multiple versions of P4211 to accommodate each of the different document types you use, for example, sales orders, blanket orders, quote orders, ECS orders, and so on.
2. Line Type (Optional)	Enter the line type to default to all order lines; otherwise, the system retrieves the line type from Item Branch Information (P41026) or Item Master Information (P4101) set up for the item number. You can also manually enter a line type.
3. Beginning Status (Optional)	
4. Override Next Status (Optional)	
5. Unit of Measure (Optional)	
6. Line Number Increment (Optional)	
7. Reason Code (Optional)	
UNIT OF MEASURE DEFAULT VALUES:	
8. Enter '1' to use the Pricing UOM as the default Transaction UOM.	
If left blank, the Primary UOM will be used instead.	
WORK ORDER DREAM WRITER VERSIONS:	
Enter the version for each program.	
If left blank, ZJDE0001 will be used:	
9. Work Order Entry (P48013)	

Processing Option	Processing Options Requiring Further Description
10. WO Server for Sale Order (X4201WO)	
ORDER DUPLICATION DEFAULT VALUES:	
11. Document Type	Enter the document type for new orders you create when you press F21 to copy an existing order.
12. Beginning Status	Enter the Last Status for new orders you create when you press F21 to copy an existing order.
13. Enter text duplication selection	
'1' to copy line text	
'2' to copy line and order text	
'3' to copy order text	
ADDRESS BOOK DEFAULT VALUES:	
14. Address Book default branch.	
'1' - Ship To Address	
'2' - Sold To Address	
' ' - User default location	
DOWNLOAD HEADER INFORMATION:	
15. Enter '1' to automatically load header values to the detail lines after a change.	
If left blank, it must be done manually.	
PROMPTING CONTROL:	
16. Enter the Screen Format:	
1 = Quantity, Item, Price	
2 = Quantity, Item, Description	
3 = Item, Quantity, Price	
4 = ECS format	
5 = Aggregates format (If left blank, format 1 is used.)	
Enter a '1' to:	
17. Display Headings first.	
18. Be prompted to accept the order. **Note:** Two-cycle order entry is not recommended for configured items.	Set this to blank if you enter configured items. Two-cycle order entry is not valid for configured items as the configuration is recorded on the first cycle.
19. Allow the addition of a Customer Master record, if not set up.	Set this to 1 to have the Customer Master screen (P01053) automatically appear when you enter a sold-to or ship-to address for which master information does not currently exist. If you don't set this option to 1, you can add an order without Customer Master information. However, the system will error on the order at Sales Update (P42800).
20. Load Online Invoice information before the order is accepted.	

Processing Option	Processing Options Requiring Further Description
21. Enter which Item Search screen is to be used to return items: 1 = Item Search window allowing the return of multiple items 2 = Full Item Search screen with Query capabilities (If left blank, the Item Search window allowing the return of a single item will be used.)	The option you choose determines the item search screen that displays when you press F1 on the Item Number field in the detail screen. A blank in this option prompts the P40ITM1 window. Option 1 prompts the P40ITM2 window, and option 2 prompts the P41200 screen.
ORDER HOLD CODES:	
22. Customer Credit Checking	
23. Order Margin Checking	
24. Order Line Margin Checking	
25. Order Minimum Value Checking	
26. Order Maximum Value Checking	
27. Partial Order Hold	
28. Product Allocation Hold	
LINE CONTROL STATUS:	
29. Enter the next status code beyond which a detail line cannot be changed. If left blank, no restriction will be put on the changing of a line.	
FIELD DISPLAY CONTROL:	
Enter '1' to protect or '2' to suppress	
30. Cost Fields	
31. Price Fields	
Enter '1' to protect the following:	
32. Status Codes	
33. Price adjustment driver fields	Set this to 1 to protect the following fields: Branch, Adjustment Schedule, Trade Discount, Payment Terms, Payment Instructions, and Item Price Group. The value also protects freight charge related fields including Shipping Commodity Code, Shipping Condition, Rate Code, Route, Stop and Zone.
34. Sold To field on the header	
Enter a '1' to suppress the following:	
35. Closed Detail Lines	
36. Credit Card Information	
37. Freight and Carrier Information	
38. Commission Information	
CREDIT ORDER PROCESSING:	

Processing Option	Processing Options Requiring Further Description
39. Enter the status code to select when retrieving credit orders.	This option is relevant to the Credit Orders from History program (P42045).
40. Enter '1' if the previous status is the last status.	This option is relevant to the Credit Orders from History program (P42045).
If left blank it will be the Next Status.	
CROSS REFERENCE INFORMATION:	
41. Enter the Cross Reference Type for:	
- Substitute Items	
- Associated Items	
- Replacement Items	
42. Enter '1' to use the substitute item's Unit Price.	
If left blank, the original item's price will be used to order the substitutes.	
KIT PROCESSING:	
43. Enter '1' to suppress Kit Component lines.	
44. Enter the version of Kit Inquiry to call.	
If left blank, version ZJDE0001 will be called.	
45. Enter '1' to suppress availability information in the Kit Window.	
AVAILABILITY CHECKING:	
46. Enter '1' to be notified of an automatic backorder or cancel.	
Enter '2' to be notified but not create the backorder or cancel.	
Enter '3' to create the backorder or cancel automatically and update the order without issuing the warning.	
If left blank, no availability checking will be done.	
COMMITMENT CONTROL:	

Processing Option	Processing Options Requiring Further Description
47. Enter '1' for commitment to Other Quantity 1. Enter '2' for commitment to Other Quantity 2. This option is typically used in conjunction with a Blanket or Quote Order. If this option is used, the commitment preference will be ignored.	This option applies to stock items only. You set the option to 1 or 2 if you do not want the items you enter on the order to affect availability. For example, you usually do not want items on blanket orders or quote orders to affect availability. If you leave this option blank, all stock items you enter on the order will accumulate to either the soft, hard, or future commitment buckets in the Item Balance file (F41021). If you set the option to 1 or 2, quantities accumulate to the SO Quantity 1 or SO Quantity 2 buckets. You can view cumulative quantities for an item in Detailed Availability (P41023). When you set this option to 1 or 2, the system also updates the Other Quantity 1 or 2 fields (SDOTQY) in the Sales Order Detail file (F4211). It also prevents the system from updating the Open Order Amount (SHOTOT) in the Sales Order Header file (F4201). If you release items from blanket or quote orders using the Release Orders program (P420111), the program assumes released orders were initially recorded to the other quantity 1 or 2 buckets.
AUTOMATIC PROCESSING: 48. Enter '1' to automatically display the Supply and Demand screen when a new sales detail line is backordered.	
49. Enter '1' to print pick slips or a '2' to print invoices through the subsystem. Enter '3' for on-line commitment or a '4' for subsystem commitment. **Note:** If ECS is on, '1' will print order-based packed loading notes through a subsystem.	Set this option to 3 to have the system automatically hard commit orders, in which case P4211 calls the Batch Commitment program (P42997) to perform the hard commitment.
50. Enter '1' for auto order repricing.	
DREAM WRITER VERSIONS: Enter the version for each program. If left blank, ZJDE0001 will be used: 51. Pick Slip Print (P42520) 52. Supply and Demand (P4021) 53. Std Order/Basket Reprice (P421301) or Adv Order/Basket Reprice (P42750) 54. Customer Service (P42045) 55. Online Invoice (P42230) 56. Preference Profile (P40400) 57. Check Price (Advanced) (P40721) 58. Customer Master (P01053)	

Processing Option	Processing Options Requiring Further Description
59. TM Rate & Route server PSMR9100	
CONFIGURATOR PROCESSING:	
60. Enter one of the following for the mode of Specification Entry.	
If left blank, '2' will be used:	
'1' = Text Mode	
'2' = Assisted Mode	
'3' = Assisted Prompt Mode	
TRANSFER PRICE UPDATE:	
61. Enter the order type(s) that the system will use to invoke inter-branch updates.	
To specify more than one order type, type them one after the other along this field.	
62. Enter the transfer pricing method to be used.	
Default method is 1.	
1 = Branch cost mark-up	
2 = Transfer pricing	
63. Enter '1' to allow inter-branch invoicing.	
If left blank, no inter-branch invoice can be run.	
WAREHOUSE PROCESSING:	
64. Enter the request processing mode:	
' ' = No pick requests	
'1' = Generate requests only	
'2' = Generate requests and process using the subsystem	
65. If processing pick requests using the subsystem, enter the DREAM Writer version to use.	
If blank, XJDE0002 is used.	
(See Form ID P46171.)	
66. Enter an override next status for sales order lines for which requests have been generated.	
ORDER TEMPLATE PROCESSING:	
67. Enter a '1' to use the Sold-to address number for order template.	
Enter a '2' to use the Ship-to address number.	
If left blank, no automatic order template processing will be performed.	
68. Enter the order template name.	
BLANKET/QUOTE PROCESSING:	

Processing Option	Processing Options Requiring Further Description
69. Enter '1' for automatic access to the blanket/quote release processing by Sold To address.	
Enter '2' for automatic access to the blanket/quote release processing by Ship To address.	
If left blank, no automatic access to the blanket/quote release processing will be performed.	
PREFERENCE PROFILE PROCESSING:	
70. Enter a '1' to use preference profile defaults.	If you enter 1 in this field, you must also set up a corresponding version of the Preference Processing program (P40400) and attach it to processing option 56.
If left blank, no preference profile information will be defaulted.	
71. Enter a '1' to use the Inventory Commitment Preference to source from multiple branches or to view grade or potent items in the commitment window.	
CURRENCY PROCESSING:	
72. Enter the tolerance limit percentage to warn you of currency rate changes. A 15.0 indicates a warning if the rate is 15 percent greater or less than the current rate.	
LOAD CONFIRM PROCESSING: (ECS):	
73. Enter '1' to automatically branch to load confirm when order are added.	
74. Enter the version of Bulk Load Confirm (P49510) to be used.	
75. Enter the version of Packaged Load Confirm (P49530) to be used.	
AVIATION/MARINE PROCESSING: (ECS):	
76. Enter the version of the Additional Parameters program (P49510A) to be used.	
TRIP ASSIGNMENT WINDOW: (ECS):	
77. Enter the version of the Trip Assignment window (P49200) to be used.	
MARK-FOR ADDRESS PROCESSING:	
78. Enter '1' to display Mark-for Address.	
ADVANCED LOT MANAGEMENT:	
79. Enter '1' to issue an error when the Ship Ascending Date Rule is violated.	
If left blank, only a warning will be issued.	
80. Enter '1' to issue a warning when an immature lot (one not yet in effect) is entered and to include immature lots in the calculation of availability.	
If left blank, an error will be issued and immature lots will not be counted as available.	

Processing Option	Processing Options Requiring Further Description
SERVICE WARRANTY MANAGEMENT:	
81. Enter '1' to submit a batch job upon exiting Sales Order Entry to automatically assign service warranties to sales order detail lines.	
82. Enter the DREAM Writer version for Batch Assign Service Warranty (P42404).	
If left blank, XJDE0001 is used.	

26.2 Process Movement Requests (P46171)

Processing Option	Processing Options Requiring Further Description
TASK AND TRIP ASSIGNMENT:	
1. Enter a '1' to do immediate task and trip assignment.	
If blank, no tasks/trips will be assigned.	
2. Enter the DREAM Writer version of the Task and Trip Assignment program to use.	
If blank, XJDE0001 is used. (See Form ID P46471).	
AUDIT CONTROL:	
3. Enter a '1' to generate the audit report,	
'2' to generate the audit along with a glossary for any messages, or a	
'3' to generate the report with a complete glossary at the end.	
If blank, no report will be generated	
4. Enter the DREAM Writer version of the Selection Audit report to use for the desired printer overrides.	
If blank, XJDE0001 is used. (See Form ID P46475.)	
CONFIRMATION CONTROL:	
5. Enter a '1' to automatically confirm suggestions.	
6. Enter the override next status for the confirmed sales order lines.	
(Pick Processing Only).	
RESUGGESTIONS:	
7. Enter a '1' to resuggest movement requests.	
If blank, only new requests will be processed.	
REPLENISHMENT CONTROL:	

Processing Option	Processing Options Requiring Further Description
8. Enter the method to use for replenishment quantities.	
If blank, method '2' is used.	
'1' = Economic Replenishment.	
The quantity to replenish is retrieved from the fixed location definition.	
'2' = Maximum Replenishment.	
The quantity to replenish is the quantity which would fill the location.	
9. Enter the DREAM writer version of the Task and Trip Assignment program to run for replenishments.	
If blank XJDE0003 is used. (See form ID P46471)	
LOT PROCESSING:	
10. Enter '1' to include immature lots (those not yet in effect).	
If left blank, an immature lot will not be counted as available.	

27

Replenishment Processing Options

This chapter contains these topics:

- Section 27.1, "Batch Replenishment (P461601),"
- Section 27.2, "Process Movement Requests (P46171)."

27.1 Batch Replenishment (P461601)

Processing Option	Processing Options Requiring Further Description
DEFAULT PROCESSING:	
1. Enter the order group to use.	You must assign document type IQ (Inventory Quantity) to each order group that you use. The system uses doc type IQ for replenishment.
REPLENISHMENT CONTROL:	
2. Enter the letdown point to use.	
If blank, the normal replenishment point is used.	
'1' = Normal Replenishment Point.	
'2' = Minimum Replenishment Point.	
3. Enter the method to use for replenishment quantities.	
If blank, method '2' is used.	
'1' = Economic Replenishment.	
The quantity to replenish is retrieved from the fixed location definition.	
'2' = Maximum Replenishment.	
The quantity to replenish is the quantity which would fill the location.	
AUDIT CONTROL:	
4. Enter a '1' to generate the audit report,	
'2' to generate the audit along with the glossary for any messages, or a	
'3' to generate the report with a complete glossary at the end.	
If blank, no report will be generated.	

Processing Option	Processing Options Requiring Further Description
5. Enter the DREAM Writer version of the Selection Audit report to use for the desired printer overrides.	
If blank, XJDE0003 is used. (See Form ID P46475)	
TASK AND TRIP ASSIGNMENT:	
6. Enter a '1' to do immediate task and trip assignment.	
If blank, no tasks/trips will be assigned.	
7. Enter the DREAM Writer version of the Task and Trip Assignment program to use.	
If blank, XJDE0003 is used. (See Form ID P46471).	

27.2 Process Movement Requests (P46171)

Processing Option	Processing Options Requiring Further Description
TASK AND TRIP ASSIGNMENT:	
1. Enter a '1' to do immediate task and trip assignment.	
If blank, no tasks/trips will be assigned.	
2. Enter the DREAM Writer version of the Task and Trip Assignment program to use.	
If blank, XJDE0001 is used. (See Form ID P46471).	
AUDIT CONTROL:	
3. Enter a '1' to generate the audit report,	
'2' to generate the audit along with a glossary for any messages, or a	
'3' to generate the report with a complete glossary at the end.	
If blank, no report will be generated	
4. Enter the DREAM Writer version of the Selection Audit report to use for the desired printer overrides.	
If blank, XJDE0001 is used. (See Form ID P46475.)	
CONFIRMATION CONTROL:	
5. Enter a '1' to automatically confirm suggestions.	
6. Enter the override next status for the confirmed sales order lines.	
(Pick Processing Only).	
RESUGGESTIONS:	

Processing Option	Processing Options Requiring Further Description
7. Enter a '1' to resuggest movement requests.	
If blank, only new requests will be processed.	
REPLENISHMENT CONTROL:	
8. Enter the method to use for replenishment quantities.	
If blank, method '2' is used.	
'1' = Economic Replenishment.	
The quantity to replenish is retrieved from the fixed location definition.	
'2' = Maximum Replenishment.	
The quantity to replenish is the quantity which would fill the location.	
9. Enter the DREAM writer version of the Task and Trip Assignment program to run for replenishments.	
If blank XJDE0003 is used. (See form ID P46471)	
LOT PROCESSING:	
10. Enter '1' to include immature lots (those not yet in effect).	
If left blank, an immature lot will not be counted as available.	

28

Advanced Topics Processing Options

This chapter contains these topics:

- Section 28.1, "Warehouse Location Integrity (P46990),"
- Section 28.2, "Purge Movement Information (P4600P)."

28.1 Warehouse Location Integrity (P46990)

Processing Option	Processing Options Requiring Further Description
1. Enter the type of comparison to process.	
A blank will process all.	
'1' = Both the Location Detail and Item Branch have a negative quantity.	
'2' = The Location Detail has a negative quantity and the Item Branch has a zero balance or does not exist.	
'3' = The Location Detail has a negative quantity and the Item Branch has a positive balance.	
'4' = The balance of the Location Detail records do not match the Item Branch.	
Note: If you want to compare the balance for a location regardless of whether it has a negative quantity, then use the DREAM Writer version for Location Detail/Item Branch balances. Otherwise, only locations with a negative quantity will be compared.	
2. Enter a '1' to generate the report along with a glossary for any messages, or a '2' to generate the report with a complete glossary at the end.	
If blank, a glossary will not be printed.	

28.2 Purge Movement Information (P4600P)

Processing Option	Processing Options Requiring Further Description
PROGRAM MODE:	

Processing Option	Processing Options Requiring Further Description
1. Enter '1' to run this program in final mode.	
If left blank, this program will produce only the report and will perform no file updates.	
SAVE PURGED RECORDS:	
2. Enter a '1' to save the purged records to a special purge library.	
If left blank, purged records will NOT be saved.	
Note: This option is valid only for final mode.	
DEFINE ELIGIBILITY FOR PURGE:	
3. Enter a work order status at or above which any related putaway requests may be purged.	
If left blank, only putaway requests related to purged work orders will be purged.	

29

Manufacturing Information Processing Options

This chapter contains these topics:

29.1 Manufacturing Work Order Entry (P48013)

Processing Option	Processing Options Requiring Further Description
BACKSCHEDULING INFORMATION:	
1. Enter the Unit of Measure Code.	HR for hours is the normal unit of measure for this field. If this option is left blank backscheduling will not be calculated correctly.
RECALCULATION OPTIONS:	
2. Enter a '1' to automatically recalculate Parts List and Routing dates, hours and quantities.	This updates the Work Order Variance file (F3102).
ITEM BRANCH/PLANT VALIDATION:	
3. Enter a '1' to validate for existing Branch/Item record.	
LOT NUMBER CONTROL:	
4. Enter a '1' to protect the lot number on the parts list.	
CHARGE TO BUSINESS UNIT DEFAULT:	
5. Enter a '1' to default the Charge to Business Unit from the Job number in the Business Unit Master file (F0006).	
If left blank, the Branch/Plant will be used.	
BILL AVAILABILITY:	
6. Enter the version of Bill Availability to be called.	
If left blank, 'ZJDE0001' will be used.	
DEFAULT VALUES:	

Processing Option	Processing Options Requiring Further Description
7. Document Type (Default is 'WO')	
8. Type (Optional)	
9. Priority (Optional)	
10. Beginning Status (Optional)	
CATEGORY CODES:	
11. Enter defaults for the following:	
Category Code 1 (Optional)	
Category Code 2 (Optional)	
Category Code 3 (Optional)	
Or, enter the Item Branch Class Code fields from which to retrieve values:	
Category Code 1 (Optional)	
Category Code 2 (Optional)	
Category Code 3 (Optional)	
SALES ORDER HOLD CODE:	
12. Enter the Hold Code for the related sales order if the work order quantity or date changes.	
If left blank, the sales order will not be updated.	
PURCHASE ORDER HOLD CODE:	
13. Enter the Hold Code to be updated to the related purchase order if the work order quantity or date changes.	
If left blank, the purchase order will not be updated.	
Note: The purchase order will be updated only if the work order routings are to be recalculated.	
FIELD DISPLAY:	
14. Enter a '1' by the following fields to activate them:	
Bill Type	
Routing Type	
PROCESS MANUFACTURING PROCESSING:	
15. Enter a '1' to create the Resource List records for Co-/By-Products when a process work order is entered.	
If left blank, Resource List records will be created when ingredients list is attached to the work order.	
INTERACTIVE BILL/ROUTING ATTACHMENT:	

Processing Option	Processing Options Requiring Further Description
16. Enter a '1' to automatically create the WO Routing Instructions when creating the WO Parts List on-line.	
17. Enter a '1' to automatically create the WO Parts List when creating the WO Routing Instructions on-line.	
SUBSTITUTE PROCESSING:	
18. Enter the substitute processing method to be used when creating the Work Order Parts List on-line.	
1 = Use substitutes for shortages.	
(Commitment processing must be used if '1' is selected.)	
2 = Display the substitute availability window when substitute quantity available can cover shortage.	
If left blank, substitute processing will not be done.	
COMMITMENT PROCESSING:	
19. Enter a '1' to bypass commitment processing when creating the Parts List on-line.	
If left blank, commitments will be processed per Commitment Control in Manufacturing Constants (P3009).	
ECO PROCESSING:	
20. Enter the version of the ECO header to call from Revisions Window.	
If left blank, 'ZJDE0001' will be used.	
SERIAL NUMBER PROCESSING:	
21. Enter the version of Assign Serial Numbers to call.	
If left blank, 'ZJDE0001' will be used.	
PRIOR REVISIONS:	
22. Enter a '1' to permit attaching parts lists at prior revision levels.	
WAREHOUSE PROCESSING:	
23. Enter the request processing mode.	
1 = Generate requests only	
2 = Generate requests and process using the subsystem	
If left blank, no pick requests will be generated.	
24. If processing pick requests using the subsystem, enter the version of Process Pick Requests (P46171) to call.	
If left blank, 'XJDE0002' will be used.	

Processing Option	Processing Options Requiring Further Description
25. Enter the default staging location for moving goods out of the warehouse.	
26. Enter a '1' if the default staging location should be checked for availability. If the part is available at the staging location a request will NOT be generated.	
Note: This option only applies to parts with no work center locations.	
GENERIC TEXT COPY OPTIONS:	
27. Enter a '1' to copy the component's generic text to the parts list.	
28. Enter a '1' to copy the operation's generic text to the work order routing.	
OBSOLETE ITEMS:	
29. Enter the cross reference code for retrieving item replacements for obsolete items.	
USER-DEFINED PROGRAM:	
30. Enter the program name to be called when the function key is selected from the Parts/Ingredients List program (P3111).	
PHANTOM OPERATION SEQUENCE NUMBER:	
31. Enter a '1' to default the phantom's (parent) operation sequence for the components on the parts list.	
If left blank, the component's operation sequence will be used.	
FROZEN COST FOR ITEM:	
32. Enter a '1' to get a hard error if no frozen cost exists for the item.	
If left blank (default), a warning will be issued instead.	
WORK ORDER START DATE UPDATE:	
33. Enter a '1' to update the Work order Start Date with the Start Date of the first routing operation for variable Lead time.	
If left blank, no updating will be performed.	
CHARGE TO CC (COST CENTER) FIELD:	
34. If the Parent WO Number field is input as part of a Component Work Order, populate the Charge to CC field (MCU) by entering a:	
' ' to retrieve from the Parent's Work Order Charge to CC field (MCU). Blank is the default.	
'1' to retrieve from the Component Work Order Branch/Plant field (MMCU).	
LOT EXPIRATION DATE:	

Processing Option	Processing Options Requiring Further Description
35. Select the date that will be used to determine the eligibility of lot /serial numbered components.	
Only lots with effective dates less than or equal to the date specified AND expiration dates (based on the item's commitment date method) greater than or equal to the date specified will be considered.	
' ' = Parts list required date (default)	
'1' = Work order start date	
'2' = Work order requested (completion) date	
AUTOMATIC LOT NUMBER GENERATION:	
36. Enter a '1' to automatically generate a lot number upon work order creation for items with a Lot Process Type of 1 or 2.	
PURCHASE ORDER INFORMATION:	
37. Enter the version of Write Purchase Orders program (P3420).	
If left blank, 'ZJDE0002' will be used.	
QUALITY MANAGEMENT:	
38. Enter the version of Test Results Revisions program (P3711). If left blank, 'ZJDE0002' will be used.	

29.2 Generate and Print Work Orders (P31410)

Processing Option	Processing Options Requiring Further Description
GENERATION INFORMATION:	
1A. Enter one of the following:	**Note:** If using Backflush to Work Center location in Manufacturing Constants, then routings must be attached first for commitments to be made correctly.
1 = Parts List only	
2 = Routing only	
3 = Both Parts List and Routing	
If left blank, neither parts list nor routing will be generated.	
1B. Enter a '1' to prevent the update of existing parts list and routing instructions. Commitment and substitute processing of parts lists will occur as usual.	**Note:** If transactions have occurred against the order the parts list and routing should be protected from update.
If left blank, existing parts list and/or routing will be rewritten.	
2. Enter a '1' to use the W.O. Date for effectivity checking.	
If left blank, the W.O. Start Date is used.	
UPDATE INFORMATION:	

Processing Option	Processing Options Requiring Further Description
3. Enter the new Status Code for the work order/rate header.	
If left blank, status will not be changed.	
WORK ORDER PRINT INFORMATION:	
4. Enter a '1' to print work orders.	
If printing work orders:	
PARTS LIST PRINT INFORMATION:	
5. Enter a '1' to print Parts List	
6. Enter a '1' to print the 2nd line of information, which is scrap and related work center.	
7. Enter a '1' to print Parts List on a new page.	
8. Enter the version of the Parts List program (P31415).	
If left blank, 'ZJDE0001' will be used.	
9. Enter a '1' to print a consolidated Parts List.	
ROUTING PRINT INFORMATION:	
10. Enter a '1' to print the Routing.	
11. Enter a '1' to print Routing on a new page.	
12. Enter the version of the Routing Instructions program (P314151).	
If left blank, the operation sequence is used.	
BACKSCHEDULING INFORMATION:	
13. Enter the Unit of Measure for backscheduling.	**Note:** Hours is the standard unit of measure for backscheduling. If this option is left blank, backscheduling will not calculate correctly.
SHOP PACKET SUMMARY INFORMATION:	
14a. Enter a '1' to print the Shop Packet Summary.	
14b. Enter the version of the Shop Packet Summary program (P31416). If left blank, 'ZJDE0001' will be used.	
SHORTAGE REPORT INFORMATION:	
15. Enter the version of the Shortage Report program (P31418).	
If left blank, no shortage report will be printed.	
BAR CODE INFORMATION:	
16. Enter the version of the Bar Code Print program (P31413) for the desired print overrides.	
INVENTORY ISSUE INFORMATION:	

Processing Option	Processing Options Requiring Further Description

17. Enter the version of Batch Inventory Issues program (P31420).

If left blank, Inventory Issues will not be called.

PURCHASE ORDER INFORMATION:

18. Enter the version of Write Purchase Orders program (P3420).

If left blank, 'ZJDE0002' will be used.

SALES ORDER INFORMATION:

19. Enter the new Line Type for kit and configured components. This is used to avoid issuing inventory from Sales Order processing. The Line Type used should be inventory interface 'N'.

If left blank, Line Type will not be changed.

20. Enter the Next Status for Sales Order kit and configured component lines. (This is used to bypass the normal flow of the order, i.e., Pick Slip.)

If left blank, next status will not be changed.

21. Enter a '1' to delete the existing Work Order Text and copy the Sales Order Text to the Work Order.

Enter a '2' to append the Sales Order Text to the end of the existing Work Order Text.

If left blank (default) the Work Order Text will not be updated.

CONFIGURED ITEM COSTS:

22. Enter one of the following options for calculating the standard cost for configured items in the Work Order Variance file (F3102).

1 = Always calculate the standard cost

2 = Only calculate the standard cost if it has not already done (no variance records exist)

If left blank, standard cost will not be calculated.

BOM SUBSTITUTES:

23. Enter '1' to allow the use of Bill of Material substitutes in case of a shortage.

PURCHASING JOURNAL ENTRIES:

24. Enter a '1' to load the Work Order Number into the Subledger field of the purchasing J/E's.

BLANKET/QUOTE PROCESSING:

25. Enter a '1' for automatic blanket order release processing.

BUILD AGAINST PRIOR REVISIONS:

Processing Option	Processing Options Requiring Further Description
26. Enter a '1' to permit building work orders against prior revision levels. The revision level in the work order header (F4801) will be used to select the parts list to attach to the work order.	
If left blank, prior revision level bills will not be selected.	
WAREHOUSE PROCESSING:	
27. Enter the request processing mode:	
1 = Generate requests only	
2 = Generate requests and process using the subsystem.	
If left blank, requests will not be generated.	
28. If processing pick requests using the subsystem, enter the version of Process Pick Requests (P46171) to call.	
If left blank, 'XJDE0002' will be used.	
29. Enter the default staging location for moving goods out of the warehouse.	
30. Enter a '1' if the default staging location should be checked for availability. If the part is available at the staging location a request will NOT be generated.	
Note: This option only applies to parts with no work center locations.	
GENERIC TEXT PRINT OPTIONS:	
31. Enter a '1' to print the component's generic text on the Parts List.	
32. Enter a '1' to print the operation's generic text on the Routing.	
BAR CODE INFORMATION:	
34. Enter the format for bar code printing.	
1 = Code 3 of 9 (Code 39)	
2 = Code 128	
If left blank, bar codes will not print.	
COMMITMENT PROCESSING:	
35. Enter a '1' to bypass commitment processing when creating the Parts List.	
If left blank, commitments will be processed per Commitment Control in Manufacturing Constants (P3009).	
QUALITY MANAGEMENT:	
36. Enter '1' to print Manufacturing Specifications.	
37. Enter the version of the Manufacturing Specifications print program to call (P37470).	
If left blank, 'ZJDE0001' will be used.	

Processing Option	Processing Options Requiring Further Description
PHANTOM OPERATION SEQUENCE NUMBER:	
38. Enter a '1' to default the phantom's (parent) operation sequence for the components on the parts list.	
If left blank, the component's operation sequence will be used.	
WORK ORDER START DATE UPDATE:	
39. Enter a '1' to update the Work order Start Date with the Start Date of the first routing operation for variable lead time.	
If left blank no updating will be performed	
LOT EXPIRATION DATE:	
40. Select the date that will be used to determine the eligibility of lot/ /serial numbered components. Only lots with effective dates less than or equal to the date specified AND expiration dates (based on the item's commitment date method) greater than or equal to the date specified will be considered.	
' ' = Parts list required date (default)	
'1' = Work order start date	
'2' = Work order requested (completion) date	
AUTOMATIC LOT NUMBER GENERATION:	
41. Enter a '1' to automatically generate a lot number upon co/by products creation for items with a lot process type of 1 or 2.	

29.3 Work Order Completion - Full (P31114)

Processing Option	Processing Options Requiring Further Description
INVENTORY INTERFACE:	
1. Enter the Document Type associated with an Inventory Completion.	
2. Enter the Document Type associated with an Inventory Scrap.	
WORK ORDER ISSUES:	
3. Enter a '1' to call the Work Order Issues program.	
4. Enter the DREAM Writer version of Work Order Issues to be called.	
If left blank, 'ZJDE0001' will be used.	
WORK ORDER HEADER:	
5. Enter the Status Code for update to the work order header. (optional)	

Processing Option	Processing Options Requiring Further Description
EDIT INFORMATION:	
6. Enter the Status Code beyond which completions may not be made.	
LOT HOLD CODES:	
7. Enter the Lot Hold Codes (up to 5) to allow completions to, or enter a '*' to allow completions to all held lots.	
If left blank, completions will not be allowed to held lots.	
SALES ORDER OPTIONS:	
8. Select one of the following:	
1 = Sales Order Number will default to the Work Order Completion Lot	
2 = Sales Order Number will default to the Work Order Completion Location, and the Sales Order Line Number will default to the Work Order Completion Lot	
3 = Work Order Number will Default to the Work Order Completion Lot	
9. Enter a '1' to update the Sales Detail fields (Lot Number & Location) as defined in Option 8.	
If left blank, Sales Detail will not be updated.	
NOTE: Processing Option 9 must be used in conjunction with Option 8. If Option 8 is blank, then Option 9 must also be blank.	
10. Enter an override Sales Order Next Status or leave blank to use the Sales Order Next Status from the Order Activity Rules.	
11. Enter a '1' to update the Sales Next Status Code on the related sales order.	
12. Enter a '1' to display the Back- Order Release screen for completed backordered items.	
If left blank, backordered sales orders will not be displayed.	
13. Enter the DREAM Writer version of Backorder Release (P42117) to be called.	
If left blank, 'ZJDE0001' will be used.	
SHORTAGE WORKBENCH:	
14. Enter the DREAM Writer version of Shortage Workbench to be called.	
If left blank, 'ZJDE0001' will be used.	
RECEIPT ROUTING:	
15. Enter a '1' to initiate the receipt routing process.	
If left blank, all items will be completed directly into stock.	

Processing Option	Processing Options Requiring Further Description
LOT/SERIAL NUMBER OPTIONS:	
16. Enter the Lot/SN control:	
1 = Allow overriding the Lot/SN during completions	
2 = Protect the Lot/SN from entry If left blank, once the Lot/SN is specified the value can not be overridden.	
WORK ORDER ENTRY:	
17. Enter the DREAM Writer version of Work Order Entry to be called.	
If left blank, 'ZJDE0001' will be used.	
PROCESS MANUFACTURING OPTIONS:	
18. Enter a '1' to allow unplanned Co/By-product completions.	
19. Enter a '1' to issue ingredients for each Co/By-product separately.	
If left blank, ingredient issues will be consolidated for the process.	
WAREHOUSE PROCESSING:	
20. Enter the directed putaway mode:	
1 = Request putaway only	
2 = Request putaway and process using the subsystem	
If left blank, no putaway requests will be generated.	
21. If processing putaway requests through the subsystem, enter the version of Putaway Requests (P46171) to call.	
If left blank, 'ZJDE0001' will be used.	
SERIAL NUMBER PROCESSING:	
22. Enter a '1' to allow a completion to a serial number that exists in the system with a zero quantity.	
23. Enter a '1' to default to multiple associations format window.	
If left blank, single format will default.	
24. Enter the Document Type used for Serial Number Issues.	
If left blank, 'IM' will be used.	
QUALITY MANAGEMENT:	
25. Enter the version of Test Results Revisions (P3711) to call.	
If left blank, 'ZJDE0002' will be used.	
BRANCH/PLANT CONTROL:	

Processing Option	Processing Options Requiring Further Description
26. Enter a '1' to display the completion Branch/Plant field.	
LOT EXPIRATION DATE:	
27. Enter a '1' to display Lot Expiration Date.	
The default is blank to not display the lot expiration date.	
ITEM COST:	
28. Enter a '1' to not allow the completion for the item without cost.	
If left blank, completion will be performed.	
OVER COMPLETION:	
29. Enter a '1' to not allow over completion beyond the tolerance defined in PO # 30 (below).	
If left blank, only a warning message will be received upon over completion.	
30. Enter the over completion tolerance.	
Example: enter 10 if you want to be able to over complete up to 10%.	
Over completion tolerance is used in conjunction with a value of '1' in PO # 29.	
If left blank, only a warning message will be received upon over completion.	

29.4 Super Backflush (P31123)

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES:	
1. Operation Status for partial completions (Optional)	
2. Operation Status for full completions (Optional)	
3. Status Code for update to the Work Order Header (Optional)	
WORK ORDER ISSUES INFORMATION:	
4. Enter the Version of the Material Issues Program to call.	
If left blank, 'ZJDE0001' will be used.	
5. Enter a '1' to call the Material Issues Program in a blind mode.	
SHOP FLOOR ACTIVITY INFORMATION:	
6. Enter the Version of the Hours and Quantity Program to call.	
If left blank, 'ZJDE0001' will be used.	

Processing Option	Processing Options Requiring Further Description
7. Enter a '1' to call the Hours and Quantity Program in a blind mode.	
8. Enter a '1' to automatically update hours & quantities data.	
Note: This eliminates the need for a separate interactive or batch update but the data will not be available for review on the Hours and Quantities screen.	
WORK ORDER COMPLETION INFORMATION:	
9. Enter the Version of the Work Order Completions Program to call.	
If left blank, 'ZJDE0001' will be used.	
10. Enter a '1' to call the Work Order Completion Program in a blind mode.	
QUANTITY COMPLETION CONTROL:	
11. Enter a '1' to verify that, for a given operation, the total of the quantity completed plus scrapped does not exceed the 'Quantity At Operation.'	
If left blank, the verification is not performed.	
QUALITY MANAGEMENT:	
12. Enter the version of Test Results Revisions (P3711) to call.	
If left blank, 'ZJDE0002' will be used.	

A

Advanced Topics

This appendix contains these topics:

A.1 About Advanced Topics

The procedures in Advanced Topics are not required to operate your warehouse. However, they provide more flexibility in inventory movement, record keeping, and so on. You can:

- Generate detailed movement records by confirming movement out of one location and into another in two separate steps

- Segregate tax-paid inventory in special locations according to tax codes that you assign

- Reduce putaway trips to a location by placing a hold on putaway until you deplete the inventory in the location

- Track large units of measure of an item by assigning special tracking numbers

- Reduce the number of picking trips by combining (or rolling up) small units of measure into larger units during picking

- Protect your inventory by packing items in suitable storage containers during putaway

- Reduce warehouse traffic congestion and the effects of pick equipment failure by setting the maximum quantity for an item in a zone

- Change the effect of movement instructions by changing an item's warehouse process groups

- Use warehouse space more efficiently by setting up rules to randomly select locations

- Prevent errors in system records by updating the Warehouse Suggestions, Item Location, and Location Detail Information tables with identical information

- Merge location detail records to minimize system and user resources when processing these records

- Generate reports of location detail information (in unusual circumstances, such as system failure, where you need to reconstruct information)

- Generate reports of discrepancies between Inventory Location Information (F41021) and Warehouse Location Detail Information (F4602)

- Purge files of closed or canceled requests, suggestions, and tasks

A.2 Setting Up Two-Phase Movement Confirmation

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse Management General Setup (G4641), choose Item Profile

You use one-phase confirmation to confirm inventory movement as one step, after you move the items out of the From location and into the To location. You use two-phase confirmation to confirm inventory movement:

- When you move the items out of the From location and into a staging location

- When you move the items out of the staging location and into the To location

You can use two-phase movement confirmation to generate reports for audit purposes that show the movement of items during each phase.

You can use either a physical (real) staging location, or a logical staging location that exists only in the system's database. You use a logical staging location to generate separate documents for movement out of the From location and into the To location without actually using a physical staging location.

If you use two-phase confirmation, you must set it up for each item and for each From location.

To set up two-phase confirmation

On Item Profile

Figure A–1   item Profile screen

1. To use two-phase confirmation, complete the following fields for each item:

    ■   Branch/Plant

    ■   Item Number

    ■   1 or 2 Phase Putaway

    ■   1 or 2 Phase Picking

    ■   1 or 2 Phase Replenishment

2. Access Location Profile Detail.

Figure A–2   Location Profile Detail screen

3. On Location Profile Detail, complete the following fields for each location that requires two-phase confirmation:

    ■   Branch/Plant

    ■   Location

    ■   Putaway Stage

- Picking Stage

- Replenishment Stage

Field	Explanation
1 or 2 Phase Putaway	A code that indicates whether you use 1- or 2-phase confirmation during putaway. ■ 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location. ■ 2-phase confirmation means the process is confirmed in two steps: the first when the goods have moved from the starting location to the staging location, and the second when the goods have moved from the staging location to the destination location. If you use 2-phase confirmation, you can specify whether the confirmation is logical or physical. ■ Logical 2-phase confirmation generates one document and does not indicate physical movement to the staging location. ■ Physical 2-phase confirmation generates two documents: the first indicates movement from the starting location to the staging location, and the second indicates movement from the staging location to the destination location. Valid codes are: I – Use 1-phase confirmation L – Use logical 2-phase confirmation P – Use physical 2-phase confirmation
1 or 2 Phase Picking	A code that indicates whether you use 1- or 2-phase confirmation during picking. ■ 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location. ■ 2-phase confirmation means the process is confirmed in two steps: the first when the goods have moved from the starting location to the staging location, and the second when the goods have moved from the staging location to the destination location. If you use 2-phase confirmation, you can specify whether the confirmation is logical or physical. ■ Logical 2-phase confirmation generates one document and does not indicate physical movement to the staging location. ■ Physical 2-phase confirmation generates two documents: the first indicates movement from the starting location to the staging location, and the second indicates movement from the staging location to the destination location. Valid codes are: I – Use 1-phase confirmation L – Use logical 2-phase confirmation P – Use physical 2-phase confirmation

Field	Explanation
1 or 2 Phase Replenishment	A code that indicates whether you use 1- or 2-phase confirmation during replenishment.
	■ 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location.
	■ 2-phase confirmation means the process is confirmed in two steps: the first when the goods have moved from the starting location to the staging location, and the second when the goods have moved from the staging location to the destination location.
	If you use 2-phase confirmation, you can specify whether the confirmation is logical or physical.
	■ Logical 2-phase confirmation generates one document and does not indicate physical movement to the staging location.
	■ Physical 2-phase confirmation generates two documents: the first indicates movement from the starting location to the staging location, and the second indicates movement from the staging location to the destination location.
	Valid codes are:
	I – Use 1-phase confirmation
	L – Use logical 2-phase confirmation
	P – Use physical 2-phase confirmation
Staging Location - Putaway	A code that specifies a warehouse location where you hold items temporarily (either physically or logically) before moving them somewhere else. You use the putaway staging location when the system suggests movement from one location to another while using two-phase confirmation. In two-phase confirmation, you confirm the movement from the first location to the staging location, and then confirm the movement from the staging location to the final location.
Staging Location - Picking	A code that specifies a warehouse location where you hold items temporarily (either physically or logically) before moving them somewhere else. You use the picking staging location when the system suggests movement from one location to another while using two-phase confirmation. In two-phase confirmation, you confirm the movement from the first location to the staging location, and then confirm the movement from the staging location to the final location.
Staging Location - Replenishment	A code that specifies a warehouse location where you hold items temporarily (either physically or logically) before moving them somewhere else. You use the replenishment staging location when the system suggests movement from one location to another while using two-phase confirmation. In two-phase confirmation, you confirm the movement from the first location to the staging location, and then confirm the movement from the staging location to the final location.

A.3 Assigning Tax Codes

You assign a tax code to a location to allow only items with the same tax code to be stored in that location. For example, if you have an item on which you have already paid tax, you can assign the same tax code to the item and to specific locations so that the system uses only those locations for putaway. You can use tax codes for import or export items.

To assign tax codes

On Item Profile

1. To assign a tax code to an item, complete the following fields:

   - Branch/Plant

   - Item Number

   - Default Tax Code

2. Access Location Profile Detail.

3. On Location Profile Detail, complete the following field for each location to which you want to assign a tax code:

   - Location Tax Code

Field	Explanation
Code - Location Tax Status	A code (system 46/type LT) that indicates whether the location contains tax-paid inventory (in-bond vs. duty paid). If an item has an assigned tax code, the system puts the item away only in locations with the same tax code.
	You assign tax codes to items through Item Profile (P46010).

A.4 Setting Up Freeze Rules

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse Management General Setup (G4641), choose Location Profile Detail

You use a freeze rule to determine how the system refills a pick location after picking. You can use a freeze rule to reduce the number of putaway trips that warehouse employees make to the location.

You must set up the freeze rule for each location for which you want to restrict putaway after picking.

To set up freeze rules

On Location Profile Detail

Figure A–3   Location Profile Detail (Freeze Rules) screen

Complete the following fields:

- Branch/Plant

- Location

- Freeze Rule

Field	Explanation
Freeze Rule	A code that indicates what putaway restrictions you want to place on a location during the pick process.
	Valid codes are:
	Blank – No freeze. The system does not perform any automatic restrictions.
	1 – Freeze when empty. Do not put away to this location after you pick the location empty.
	2 – Freeze when picked (auto reset). Do not put away to this location after picking. When you pick the location empty, the system automatically resets the putaway flag to allow putaway to this location.
	3 – Freeze when picked (manual reset). Do not put away to this location after picking. When you pick the location empty, you must manually reset the putaway flag to allow putaway to this location.

A.5 Setting Up Tracking Numbers

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse Management General Setup (G4641), choose Unit of Measure Definition by Item or Group

You can track large units of measure, such as a pallet, by assigning a tracking number when you create a movement request. For example, you can assign a "license plate" tracking number to a pallet of expensive stereo equipment to locate it easily.

If you use license plate tracking for a particular item/unit of measure combination, the system generates one tracking number for each unit of measure of that item.

To set up tracking numbers

On U/M Definition by Item or Group

Figure A–4   U/M Definition by Item or Group screen
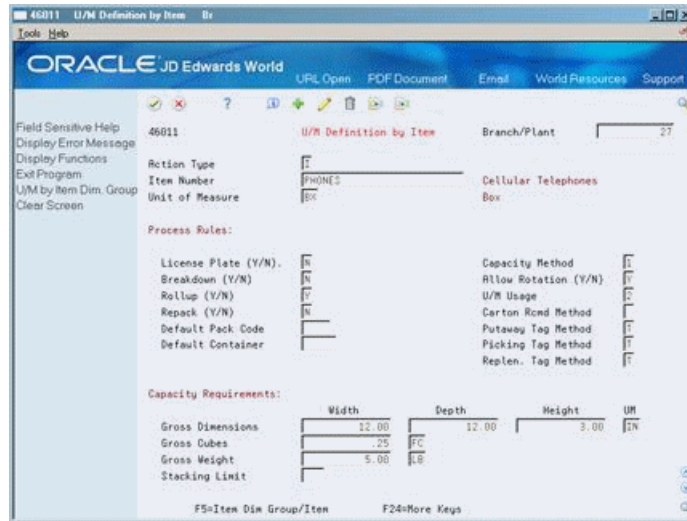
Complete the following fields:

- Branch/Plant

- Item Number or Item Dimension Group

- Unit of Measure

- License Plate

Field	Explanation
License Plate (Y/N)	A code that indicates whether you want the system to assign a tracking number to the specified item in this unit of measure when the system creates a request. This tracking number follows the item through the warehouse. License plate tracking is optional, and you should use it only for the level 1 (largest) unit of measure.
	Valid codes are:
	Y – Yes, assign a tracking number to the item
	N – No, do not assign a tracking number to the item

A.5.1 What You Should Know About

Topic	Description
Limitations of license plate tracking	You should use license plate tracking only for an item's Level 1 unit of measure (the largest in the unit of measure structure, such as a pallet).

A.6 Setting Up Rollup

You can convert large units of measure into smaller units of measure during putaway. You can also convert small units of measure into larger units of measure during picking. For example, if 24 cases of compact discs equal a pallet, you can pick a pallet instead of the requested 24 cases. This improves warehouse efficiency by using the most appropriate unit of measure for picking.

You set up the unit of measure definition for an item or a group to use rollup. You also must set up your pick instructions to use rollup.

To set up rollup

On U/M Definition by Item or Group

Figure A–5   U/M Definition by Item or Group (Rollup) screen

1. Complete the following fields:

   - Branch/Plant

   - Item Number or Item Dimension Group

   - Unit of Measure

   - Rollup

2. Access Picking Instructions.

3. On Picking Instructions, select the appropriate picking instruction table and complete the following field for each unit of measure to use rollup:

   - Rollup

A.7 Setting Up Repack

You use repack to specify whether you want to pack items in new containers before you send them to storage. For example, if your inventory items arrive in containers that are not suitable for storage, you would repack the items during putaway.

To set up repack

On Unit of Measure Definition by Item or Group

Complete the following fields:

- Branch/Plant

- Item Number or Item Dimension Group

- Unit of Measure

- Repack

Field	Explanation
Repack (Y/N)	A code that determines whether the specified item in this unit of measure should be repacked before putaway. Valid codes are:
	Y – Yes, repack the item
	N – No, do not repack the item
	You must also specify a packing method by entering a code in the Default Pack Code field.

A.8 Defining Maximum Quantity by Zone

Navigation

From Advanced Warehouse Management (G46), enter 27

From Warehouse Advanced and Technical Operations (G4631), choose Warehouse Movement Rules

From Warehousing Movement Rules (G46311), choose Maximum Quantity by Zone

You can define a maximum quantity of items to store in a zone to prevent the zone from being dominated by one particular item. For example, if you are concerned about the risk of fire for a certain item, you would specify a maximum quantity of the item to minimize losses in the event of a fire. Or, to minimize warehouse traffic for a zone that stores a popular item, you would limit the quantity of the popular item that you store in the zone.

To define maximum quantity by zone

On Maximum Quantity by Zone

Figure A–6   Maximum Quantity by Zone screen
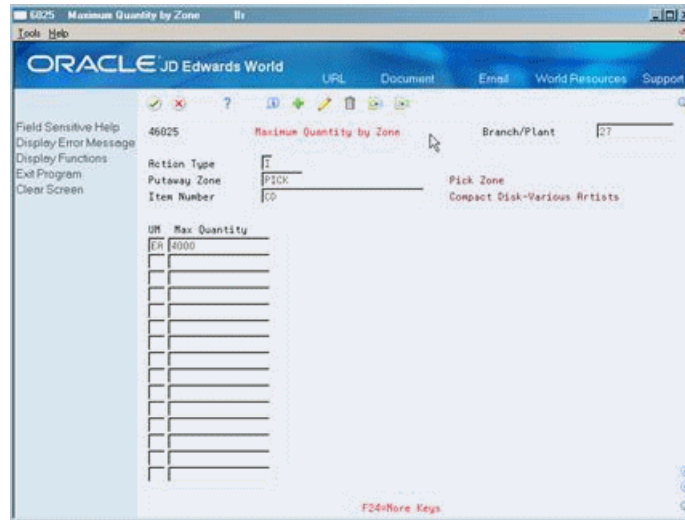
Complete the following fields:

- Branch/Plant

- Putaway Zone

- Item Number

- Unit of Measure

- Maximum Putaway Quantity

Field	Explanation
Max Quantity	This indicates the maximum quantity to be putaway in a particular putaway zone. This quantity can be defined by putaway zone and unit of measure or putaway zone, item and unit of measure. For example, you may want to limit the quantity in a zone so if your picking devices fail in that zone you can then pick it from another zone.

A.9 Working with Item Dimension and Warehouse Process Groups

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse Management General Setup (G4641), choose Speed Group Maintenance

You can quickly review or change an item's dimension group or warehouse process group. By changing the process groups for an item, you can change which movement instruction table you choose. This can change the putaway, picking, or replenishment location you use during inventory movement.

To work with item dimension and warehouse process groups

On Speed Group Maintenance

Figure A–7   Speed Group Maintenance screen
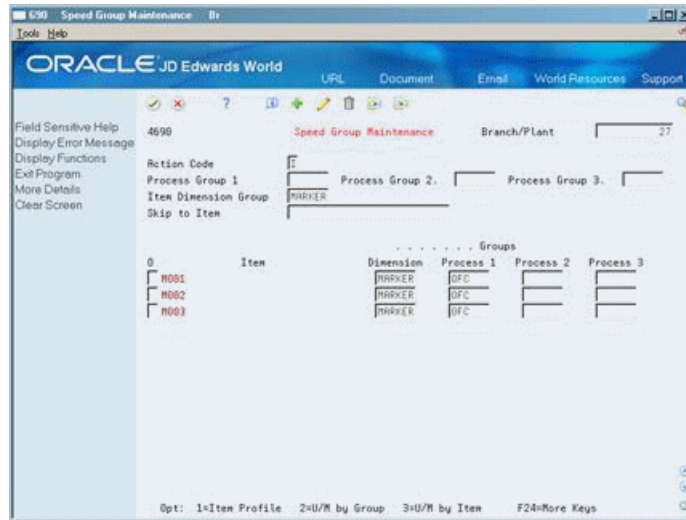
1. To limit the information that displays, complete the following fields in the upper part of the form:

   ■ Process Group 1

   ■ Process Group 2

   ■ Process Group 3

   ■ Item Dimension Group

   ■ Skip to Item

2. To change groups for a particular item, complete the following fields in the lower part of the form:

   ■ Item Dimension Group

   ■ Process Group 1

   ■ Process Group 2

   ■ Process Group 3

Field	Explanation
Item Dimension Group	A code (system 41/type 01) that identifies a group of items that share the same size specifications, such as height and width. An item dimension group defines the size specifications for all items that belong to the group. After you set up an item dimension group, you can assign items to the group through Classification Codes.
Process Group 1	A code (system 41/type 02) that identifies a group of items that you want to move the same way. An item's process group determines the movement instructions the system uses to put away, pick, and replenish the item. You assign items to process groups using Classification Codes.
Process Group 2	A code (system 41/type 02) that identifies a group of items that you want to move the same way. An item's process group determines the movement instructions the system uses to put away, pick, and replenish the item. You assign items to process groups using Classification Codes (P41011).

Field	Explanation
Process Group 3	A code (system 41/type 02) that identifies a group of items that you want to move the same way. An item's process group determines the movement instructions the system uses to put away, pick, and replenish the item. You assign items to process groups using Classification Codes (P41011).

A.10 Setting Up Random Rules

Navigation

From Advanced Warehouse Management (G46), enter 27

From Warehouse Advanced and Technical Operations (G4631), choose Warehouse Movement Rules

 From Warehousing Movement Rules (G46311), choose Random Requirements

You use random rules to make location selection more efficient by randomly distributing items throughout the warehouse instead of using fixed locations for putaway, picking, and replenishment. You create a random rule using random requirements that are based on location characteristics.

After you set up a random rule, you can specify that random rule in a putaway, picking, or replenishment instruction table.

To set up random rules

On Random Requirements

Figure A–8 Random Requirements screen
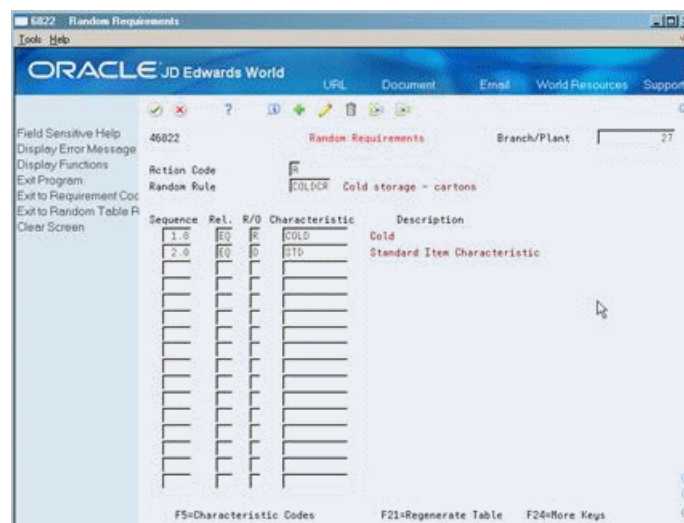
Complete the following fields:

- Branch/Plant

- Random Rule

- Sequence

- Relationship

- Required/Optional

■ Characteristic

Field	Explanation
Branch/Plant	An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, or branch/plant.
	You can assign a business unit to a voucher, invoice, fixed asset, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.
	Security for this field can prevent you from locating business units for which you have no authority.
	Note: The system uses this value for Journal Entries if you do not enter a value in the AAI table.
Random Rule	A code (system 46/type SR) that identifies a random requirements table. If you use Random, Empty or Existing locations for the movement method, you must enter a random rule code to consider only locations whose characteristics match the random rule.
Random Sequence	A number that ranks optional characteristics in a random rule. During random putaway, picking, and replenishment, the system selects locations with characteristics that match the random rule's characteristics, according to the random characteristic sequence. If a characteristic is required, the system does not use the random sequence.
Relationship	A code that indicates what location characteristics should be included or excluded when choosing locations with a random rule. Each characteristic specified on a random rule must have a relationship code. You assign relationships on Random Tables (P46822).
	Valid values are:
	EQ – Search for locations with characteristics that equal the random rule characteristics
	NE – Search for locations with characteristics that do not equal the random rule characteristics
Required/Optional	A code that indicates whether a location characteristic is required or optional for a random rule to select the location. The random rule selects locations that have characteristics matching the random rule's required characteristics. The random rule does not necessarily select locations matching the random rule's optional characteristics.
	Valid codes are:
	R – Use only locations that have this required characteristic
	O – Use locations that have this optional characteristic, if possible
Characteristic	A code (system 46/type DF) defines a characteristic for a location or location group. You can define unlimited characteristics (such as Cold, Dark, Dry, Heavy, and Secure) for any location or location group.

A.10.1 What You Should Know About

Topic	Description
Rebuilding the Random Location table	After you add or change a random rule or a location characteristic, you must rebuild the Random Location table using the Build Random Location Table program (P46821). This updates the table with the changes you made.
	Run the Build Random Location Table program in batch mode from the Warehouse Advanced and Technical Operations menu, instead of running it interactively from Random Requirements. This ensures that your terminal remains free for other processing.
Automatically rebuilding the Random Location table during putaway	If you do not run the Build Random Location Table program, the next putaway request that uses the random rule will cause the system to automatically rebuild the Random Location table. This might result in slower processing of the movement request.

A.11 Creating the Random Location Table

Navigation

From Advanced Warehouse Management (G46), enter 27

From Warehouse Advanced and Technical Operations (G4631), choose Build Random Location Table

The Random Locations table contains a list of all the random locations and their characteristics. You run the Build Random Location Table after you change your random rule requirements or after you change the characteristics of random locations.

When you run the Build Random Location Table program, the system matches location characteristics with random rule characteristics and updates the Random Locations table (F46821).

Build Random Location Table is a DREAM Writer program.

A.12 Reposting Open Location Suggestions

Navigation

From Advanced Warehouse Management (G46), enter 27

From Warehouse Advanced and Technical Operations (G4631), choose Repost Open Suggestions

An open suggestion selects a location for an item based on the total quantity, volume, or weight of the item. The system creates open suggestions for items you have posted putaway, picking, or replenishment suggestions, but for which you have not confirmed the movement. You repost open location suggestions in the event that the location suggestion information in the Item Location, Location Detail Information, and Warehouse Suggestions tables does not match.

When you run the Repost Open Suggestions program, the system:

■ Examines the suggestions in Warehouse Suggestions (F4611)

■ Updates the suggestion information in Item Location (F41021)

- Updates the inbound quantity, outbound quantity, reserved cubes, and reserved weight in Location Detail Information (F4602)

Repost Open Suggestions is a DREAM Writer program.

A.13 Merging Location Detail Records

During daily operations, the system creates location detail records for each item as it is stored in each location in the warehouse. Among other information, the location detail record lists the following:

- Item number

- Location

- Unit of measure structure

- Used space

- On-hand quantity

- Volume

- Weight of the item

In some cases, the system creates multiple records for each combination of item and location. These records can accumulate quickly and slow down the process of selecting locations for items. To limit the number of location detail records, the system can merge all compatible records. This action is effective when it results in only one location detail record for an item in a location.

For records to be compatible, the information in all of the following fields must be identical:

- Unit of measure (UM) code

- Quantity per UM (in the primary unit of measure)

- Container code

- UM dimensions and weight

- Container dimensions

- Quantity required to fill the next greatest UM in the structure

- UM group

- UM usage

In a standard merge, the system does not merge records with the following attributes:

- Different FIFO receipt dates

- Items with partial quantities in both the FROM and TO locations. A partial quantity is a quantity in any UM in a structure that is less than one. (For example, an item with a case-each structure, where case = 10 each, would have a partial quantity if there were 5 each of the item.)

- Items with different UM structures. (For example, the system does not merge a case-each structure with a pallet-case-each structure.)

The system provides the following fields that you can set to override the above rules:

- FIFO Receipt Date

- Merge Partials

■ Merge UM Structures

You can merge records by any or all of these categories.

A.13.1 What You Should Know About

Topic	Description
Merging FIFO receipt dates	When merging FIFO receipt dates, the system retains the last receipt date.
	To merge records with different FIFO receipt dates during picking or replenishment, you must set the Mix Dates field to Y on both the Item Profile form and the Location Profile Detail form.
	You must not merge FIFO receipt dates if the Commitment Method field on the Item Master Information form (4101) is:
	■ 2, and the item does not have a lot number
	■ 3, and the item does not have an expiration date
Merging Partial quantities	When you merge partial quantities, the system converts the merged quantity to the primary UM and calculates the combined volume based on this UM. This calculation can cause the combined volume to be over or understated. The system uses the combined volume to calculate the available space in a location and determine suitable locations for putaway. When you merge partial quantities, the system might overfill a location or overlook an available location. To prevent this error, you need to know the characteristics of your inventory and determine how it is stored in a location.
	The system assumes that partial quantities are physically combined at the location. If you do not combine the inventory, you will have less space than the system calculates.
Merging UM Structures	When you merge UM structures, the system converts the merged quantity to the primary UM and calculates the combined volume, based on this UM. This calculation can cause the combined volume to be over or understated. The system uses the combined volume to calculate the available space in a location and determine suitable locations for putaway. When you merge partial quantities, the system might overfill a location or overlook an available location. To prevent this error, you need to know the characteristics of your inventory and determine how it is stored in a location.
	When you merge UM structures, the system creates a new structure, using the highest level 1. For example, merging a pallet-case-box-each structure with a box-each structure creates a pallet-case-box-each structure. If you never store pallets at that location, the volume will be overstated.
	You cannot merge structures in which one structure is missing an intermediate UM. For example, you can not merge a case-each structure with a pallet-case-box-each structure, because the first structure does not contain the box unit of measure.
	If you perform a Cycle Count on an item and you need to adjust the quantity, the system attempts to update an existing location detail record. If there is no record, the system creates a new record with a default UM structure. If you do not use the largest UM in the default UM structure, the system overstates the used volume.

Topic	Description
Merging items with assigned serial numbers	Items with assigned serial numbers are tracked individually in the primary unit of measure, and you cannot group them into greater units of measure. Each item with a serial number has a unique location detail record that you cannot merge.

A.14 Managing Location Detail Information

Navigation

From Advanced Warehouse Management (G46), enter 27

From Warehouse Advanced and Technical Operations (G4631), choose Location Detail Maintenance

You can review and change information in the Location Detail Information table. You might do this after a system failure and you need to reconstruct information about locations.

> **Caution:**   JD Edwards World recommends that you limit the use of this program. If you change information in the Location Detail Information table, you must also update the Warehouse Requests and Warehouse Suggestions tables to avoid mismatched information and unpredictable inventory movements.

To manage location detail information

On Location Detail Maintenance

Figure A–9   Location Detail Maintenance (Branch) screen
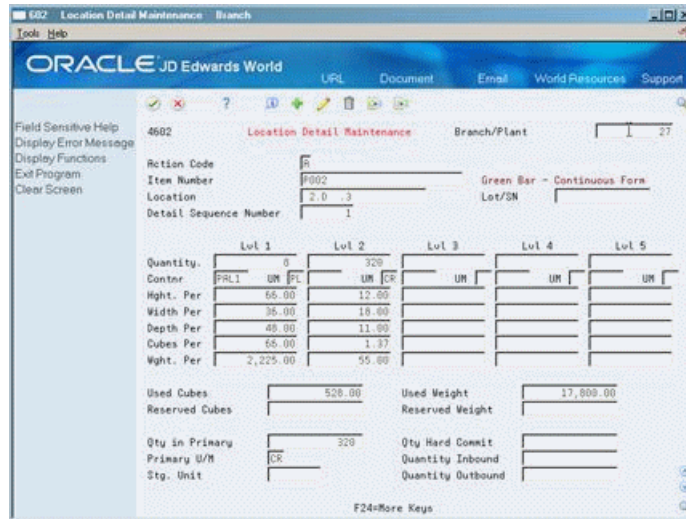
1. Complete the following fields:

    ■ Branch/Plant

    ■ Item Number

    ■ Location

    ■ Lot Serial Number

- Detail Sequence Number

2. Complete the following fields for item unit of measure level (1 through 5):

- Quantity

- Container

- Unit of Measure

- Height Per Unit of Measure

- Width Per Unit of Measure

- Depth Per Unit of Measure

- Cubes Per Unit of Measure

- Weight Per Unit of Measure

3. Complete the following fields:

- Used Cubes

- Reserved Cubes

- Used Weight

- Reserved Weight

- Quantity in Primary

- Primary Unit of Measure

- Storage Unit Number

- Quantity Hard Committed

- Quantity Inbound

- Quantity Outbound

Field	Explanation
Lot/SN	A number that identifies a lot or a serial number. A lot is a group of items with similar characteristics.
Detail Sequence Number	The sequence number that identifies a record in the Location Detail table (F4602). The system uses this number to distinguish between the different pallets, cases, and so forth, for the same item in the same location.
Quantity - Total Level 1	The total quantity of the item in the item's level 1 unit of measure. You use Unit of Measure Conversion Information (P41002) to define unit of measure levels. When you define a unit of measure structure, define your largest unit of measure as level 1, and your smallest, or primary, unit of measure as the last level. The system supplies an item's unit of measure structure to a location's detail information (F4602) during inventory movement, but you can override the structure, if necessary.
Height per - Level 1	The height of the item as defined in the item/unit of measure profile for level 1 of your unit of measure structure, or the height of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that height when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system adds the height of the container and the height of the item.

Field	Explanation
Width per - Level 1	The width of the item as defined in the item/unit of measure profile for level 1 of your unit of measure structure, or the width of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses this width when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system uses the width of the container or the width of the item, whichever is greater.
Depth per - Level 1	The depth of the item as defined in the item/unit of measure profile for level 1 of your unit of measure structure, or the depth of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that depth when it assigns a storage container. If you set the U/M Usage field to 1 for a pallet type, the system uses the depth of the container or the depth of the carton, whichever is greater.
Cubic Dimensions per - Level 1	The gross cubic dimensions of one item/unit of measure, or the cubic dimensions of the container for the item's level 1 unit of measure. If you set the U/M Usage field in the item's unit of measure profile to 2 for a box type container, the system uses only the gross cubic dimensions of that container. If you set the U/M Usage field to 2 for a pallet type container, the system adds the gross cubic dimensions of the item and the container.
Weight per - Level 1	The weight of one item per unit of measure, or the weight of the item and container in the level 1 unit of measure. You define weights for an item through Unit of Measure Definition by Item (P46011) and for the container through Container Codes (P46091).
Quantity - Total Level 2	The total quantity of the item in the item's level 2 unit of measure. You use Unit of Measure Conversion Information (P41002) to define unit of measure levels. When you define a unit of measure structure, define your largest unit of measure as level 1, and your smallest, or primary, unit of measure as the last level. The system supplies an item's unit of measure structure to a location's detail information (F4602) during inventory movement, but you can override the structure, if necessary.
Height per - Level 2	The height of the item as defined in the item/unit of measure profile for level 2 of your unit of measure structure, or the height of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that height when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system adds the height of the container and the height of the item.
Width per - Level 2	The width of the item as defined in the item/unit of measure profile for level 2 of your unit of measure structure, or the width of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses this width when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system uses the width of the container or the width of the item, whichever is greater.
Depth per - Level 2	The depth of the item as defined in the item/unit of measure profile for level 2 of your unit of measure structure, or the depth of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that depth when it assigns a storage container. If you set the U/M Usage field to 1 for a pallet type, the system uses the depth of the container or the depth of the carton, whichever is greater.

Field	Explanation
Cubic Dimensions per - Level 2	The gross cubic dimensions of one item/unit of measure, or the cubic dimensions of the container for the item's level 2 unit of measure. If you set the U/M Usage field in the item's unit of measure profile to 2 for a box type container, the system uses only the gross cubic dimensions of that container. If you set the U/M Usage field to 2 for a pallet type container, the system adds the gross cubic dimensions of the item and the container.
Weight per - Level 2	The weight of one item per unit of measure, or the weight of the item and container in the level 2 unit of measure. You define weights for an item through Unit of Measure Definition by Item (P46011) and for the container through Container Codes (P46091).
Quantity - Total Level 3	The total quantity of the item in the item's level 3 unit of measure. You use Unit of Measure Conversion Information (P41002) to define unit of measure levels. When you define a unit of measure structure, define your largest unit of measure as level 1, and your smallest, or primary, unit of measure as the last level. The system supplies an item's unit of measure structure to a location's detail information (F4602) during inventory movement, but you can override the structure, if necessary.
Height per - Level 3	The height of the item as defined in the item/unit of measure profile for level 3 of your unit of measure structure, or the height of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that height when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system adds the height of the container and the height of the item.
Width per - Level 3	The width of the item as defined in the item/unit of measure profile for level 3 of your unit of measure structure, or the width of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses this width when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system uses the width of the container or the width of the item, whichever is greater.
Depth per - Level 3	The depth of the item as defined in the item/unit of measure profile for level 3 of your unit of measure structure, or the depth of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that depth when it assigns a storage container. If you set the U/M Usage field to 1 for a pallet type, the system uses the depth of the container or the depth of the carton, whichever is greater.
Cubic Dimensions per - Level 3	The gross cubic dimensions of 1 item/unit of measure, or the cubic dimensions of the container for the item's level 3 unit of measure. If you set the U/M Usage field in the item's unit of measure profile to 2 for a box type container, the system uses only the gross cubic dimensions of that container. If you set the U/M Usage field to 2 for a pallet type container, the system adds the gross cubic dimensions of the item and the container.
Weight per - Level 3	The weight of one item per unit of measure, or the weight of the item and container in the level 3 unit of measure. You define weights for an item through Unit of Measure Definition by Item (P46011) and for the container through Container Codes (P46091).

Field	Explanation
Quantity - Total Level 4	The total quantity of the item in the item's level 4 unit of measure. You use Unit of Measure Conversion Information (P41002) to define unit of measure levels. When you define a unit of measure structure, define your largest unit of measure as level 1, and your smallest, or primary, unit of measure as the last level. The system supplies an item's unit of measure structure to a location's detail information (F4602) during inventory movement, but you can override the structure, if necessary.
Height per - Level 4	The height of the item as defined in the item/unit of measure profile for level 4 of your unit of measure structure, or the height of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that height when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system adds the height of the container and the height of the item.
Width per - Level 4	The width of the item as defined in the item/unit of measure profile for level 4 of your unit of measure structure, or the width of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses this width when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system uses the width of the container or the width of the item, whichever is greater.
Depth per - Level 4	The depth of the item as defined in the item/unit of measure profile for level 4 of your unit of measure structure, or the depth of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that depth when it assigns a storage container. If you set the U/M Usage field to 1 for a pallet type, the system uses the depth of the container or the depth of the carton, whichever is greater.
Cubic Dimensions per - Level 4	The gross cubic dimensions of 1 item/unit of measure, or the cubic dimensions of the container for the item's level 4 unit of measure. If you set the U/M Usage field in the item's unit of measure profile to 2 for a box type container, the system uses only the gross cubic dimensions of that container. If you set the U/M Usage field to 2 for a pallet type container, the system adds the gross cubic dimensions of the item and the container.
Weight per - Level 4	The weight of one item per unit of measure, or the weight of the item and container in the level 4 unit of measure. You define weights for an item through Unit of Measure Definition by Item (P46011) and for the container through Container Codes (P46091).
Quantity - Total Level 5	The total quantity of the item in the item's level 5 unit of measure. You use Unit of Measure Conversion Information (P41002) to define unit of measure levels. When you define a unit of measure structure, define your largest unit of measure as level 1, and your smallest, or primary, unit of measure as the last level. The system supplies an item's unit of measure structure to a location's detail information (F4602) during inventory movement, but you can override the structure, if necessary.
Height per - Level 5	The height of the item as defined in the item/unit of measure profile for level 5 of your unit of measure structure, or the height of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that height when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system adds the height of the container and the height of the item.

Field	Explanation
Width per - Level 5	The width of the item as defined in the item/unit of measure profile for level 5 of your unit of measure structure, or the width of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses this width when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system uses the width of the container or the width of the item, whichever is greater.
Depth per - Level 5	The depth of the item as defined in the item/unit of measure profile for level 5 of your unit of measure structure, or the depth of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that depth when it assigns a storage container. If you set the U/M Usage field to 1 for a pallet type, the system uses the depth of the container or the depth of the carton, whichever is greater.
Cubic Dimensions per - Level 5	The gross cubic dimensions of 1 item/unit of measure, or the cubic dimensions of the container for the item's level 5 unit of measure. If you set the U/M Usage field in the item's unit of measure profile to 2 for a box type container, the system uses only the gross cubic dimensions of that container. If you set the U/M Usage field to 2 for a pallet type container, the system adds the gross cubic dimensions of the item and the container.
Weight per - Level 5	The weight of one item per unit of measure, or the weight of the item and container in the level 5 unit of measure. You define weights for an item through Unit of Measure Definition by Item (P46011) and for the container through Container Codes (P46091).
Reserved Cubes	The cubic space (volume) that has been reserved for items. You use the Reservations program (P46130) to create reservations. The system suggests reserved locations when you create suggestions. The amount comes from the item/unit of measure profile and the cubic dimensions of the storage container if the level 1 unit of measure in the location detail has a container.
Reserved Weight	The weight that has been reserved for items in this location. The system creates reserved weight when you use the Reservations program (P46130) to reserve space in the warehouse for items you expect to receive. The amount comes from the item/unit of measure profile and the weight for the storage container if the level 1 unit of measure in the location detail has a container.
Qty in Primary	The total quantity of an item to be reworked or scrapped as the result of a disposition on an ECO.
Storage Unit Number	A number that uniquely identifies goods in specific location detail information. Location detail contains a storage unit number if you turn on license plate tracking in the Item/UOM Profile (P46011) for the item's level 1 unit of measure. The system assigns a storage unit number to a storage unit when it creates a request or suggestion.
Qty Hard Commit	The number of units committed to a specific location and lot. *Form-specific information* When the system creates a suggestion for picking from a specific location, it also updates the committed quantity for that location. When you confirm the suggestion, the system removes the committed quantity from the location you picked from and adds the quantity to the quantity in the destination location, which is usually your shipping location.

Field	Explanation
Quantity Inbound	A quantity in the primary unit of measure that you expect to add to the location detail after you confirm a putaway or replenishment suggestion.
Quantity Outbound	A quantity in the primary unit of measure that you expect to remove from the location after you confirm a picking or replenishment suggestion.

A.15 Comparing Inventory and Warehouse Item Balance

Navigation

From Advanced Warehouse Management (G46), choose Inquiries and Reports

From Inquiries and Reports (G4614), choose Warehouse Location Integrity

When you perform a cycle or tag count of items in selected locations in your inventory, the system records the variance between the expected on-hand quantity and the quantity determined from a physical count of the inventory. The system uses this information to update Inventory Item Branch records (F41021) and Warehouse Location Detail records (F4602). If you record a negative variance (missing inventory), the system subtracts this variance from existing records and can make both sets of records negative. In the cycle or tag process, the system can also create discrepancies between these records.

Warehouse Location Integrity generates a report that compares the warehouse and inventory records for all locations and items, and displays imbalances between the records. You can set processing options to specify the type of imbalance you want to display.

Figure A–10   Warehouse Integrity Report

A.15.1 Processing Options

See Section 28.1, "Warehouse Location Integrity (P46990)."

> **See Also:**
>
> - Processing a Cycle Count and Process a Tag Count in the *JD Edwards World Inventory Management Guide* for more information about cycle and tag counts.

A.16 Purging Closed Requests, Suggestions, and Tasks

Navigation

From Advanced Warehouse Management (G46), enter 27

From Warehouse Advanced and Technical Operations (G4631), choose Purge Movement Information

When you create requests, suggestions, and tasks, the system stores this information in files that take up storage space and increase processing time for any job that references them. To solve this problem, you can use the Purge Movement Information program to purge unnecessary records. The purge program searches through requested files, finds the related suggestions and tasks, and purges those in which all associated processing has been completed. A request and its associated suggestions and tasks must meet all of the following criteria before you can purge them:

- You must close or cancel the request

- You must confirm or cancel the associated suggestions

- You must complete or cancel the warehouse processing of all associated tasks

- You cannot purge any request, associated suggestion, or associated task until all are eligible for purge

In cases where a task is shared by several work orders (such as Work Order Completions Putaway requests) or sale order lines (such as Sales Order Pick requests), you specify the work or sales order line status at which you can purge the task. You can purge the task when all of the following criteria are met:

- All requests and suggestions associated with the task are either closed, complete, or cancelled

- Any single work order or sales order line associated with the task meets the status requirement

The Purge Movement Information program allows you to select the requests to purge. The program generates a report that lists all requests, suggestions, and tasks that are not eligible for purge and the cause of ineligibility. The report also lists the total number of requests, suggestions, and tasks that are eligible and ineligible for purging.

Figure A–11   Request Purge Eligibility Report

A.16.1 Processing Options

See

B

Manufacturing Information

You can create putaway requests and pick requests within the Advanced Warehouse Management system. You also can create putaway requests and pick requests using manufacturing systems.

This appendix contains these topics:

- Section B.1, "Creating Pick Requests through Manufacturing Systems,"
- Section B.2, "Setting Processing Options in Manufacturing Programs,"
- Section B.3, "Creating Putaway Requests through Manufacturing Systems."

B.1 Creating Pick Requests through Manufacturing Systems

You can set up your manufacturing system so that the creation of a parts list triggers the creation of a pick request for the necessary parts.

Some items that are used in the manufacturing process might be out of stock temporarily, so they are not eligible for picking. You can choose to identify the items that are ineligible for picking to avoid creating a pick request for those items.

After you create a pick request through manufacturing systems, you process the pick request normally through the Advanced Warehouse Management system. After you create and confirm location suggestions, you also update the parts list in the manufacturing systems. Finally, you reduce the on-hand quantity in the From location and increase the on-hand quantity in the manufacturing area's To location where manufacturing employees retrieve the parts and build the product.

Complete the following tasks:

- Create the parts list
- Identify ineligible items (optional)
- Set processing options in manufacturing programs

B.1.1 What You Should Know About

Topic	Description
Origin code	The system identifies manufacturing pick requests as originating from a work order instead of the usual sales order.

Topic	Description
In warehouse and out of warehouse status	After you create a pick request, the material status in the parts list changes to In Warehouse. After you create and confirm a pick suggestion, the Material Status changes to Out of Warehouse to indicate that the parts have moved from the warehouse into the manufacturing environment.

B.1.2 Creating the Parts List

To create a pick request through manufacturing systems, you must create a parts list that identifies the items to pick. You can create a parts list:

- Interactively, through work order entry

- By batch, with an order processing program

Complete the following tasks:

- Create the parts list interactively

- Create the parts list by batch

Creating the Parts Lists Interactively

Navigation

From Shop Floor Control (G31), choose Daily Order Preparation - Discrete

From Daily Order Preparation - Discrete (G3111), choose Enter/Change Order

As you enter a work order, you can also identify the parts to include in the work order parts list. You use this method if you have not already defined the product's component parts, or if the product must contain non-standard items.

To create the parts list interactively

On Enter/Change Order

Figure B–1 Enter/Change Order screen
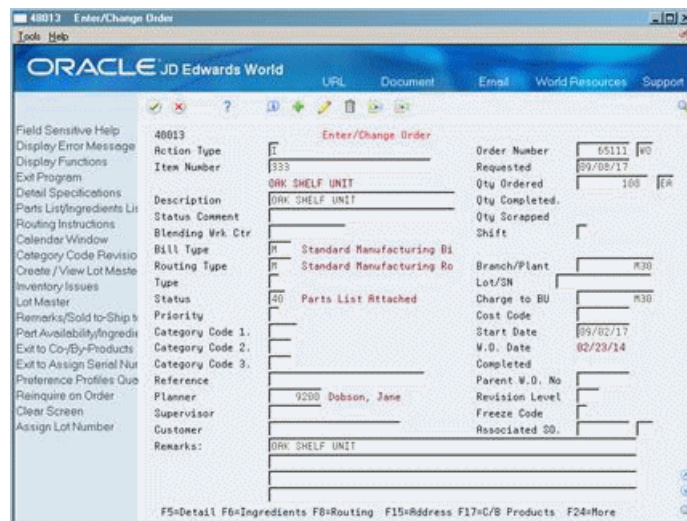
1. Access Work Order Parts List.

Figure B–2   Work Order Parts List screen
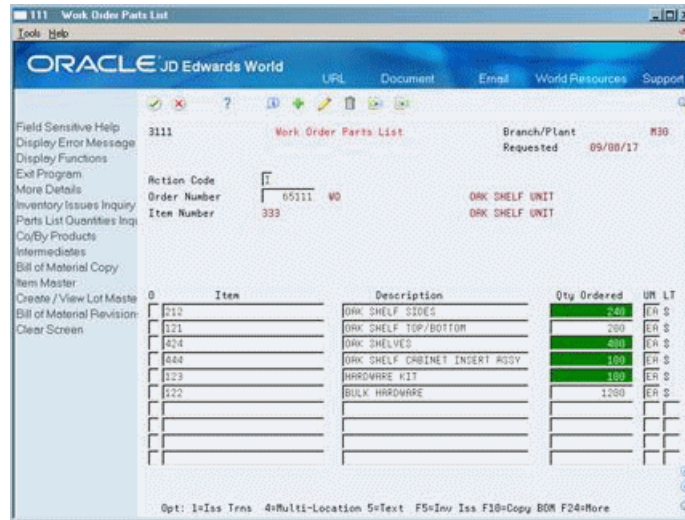
2. On Work Order Parts List, complete the following fields:

    ■   Item

    ■   QTY Ordered

    ■   Unit of Measure

Creating the Parts List by Batch

Navigation

From Shop Floor Control (G31), choose Daily Order Preparation - Discrete

From Daily Order Preparation - Discrete (G3111), choose Order Processing

You create a parts list by batch with the Generate and Print Work Orders program. You typically run the batch program during off-peak hours, when more system resources are available.

> **See Also:**
>
>   ■   Enter Kit Information in the *JD Edwards World Inventory Management Guide* for more information about assigning parts to manufacturing products.
>
>   ■   Section B.2, "Setting Processing Options in Manufacturing Programs" for more information about creating a parts list by batch.

B.1.3 Identifying Ineligible Items

You can skip certain items, such as items that are out of stock temporarily, when you create pick requests from a manufacturing parts list. You can choose to identify the items that are not eligible for picking to avoid creating a pick request for them. The system still prints the ineligible item on the parts list. However, you do not process the item in the Advanced Warehouse Management system for this particular order.

Complete the following tasks:

■   Identify ineligible items through item master information

■ Identify ineligible items through the work order parts list

To identify ineligible items through item master information

Navigation

From Advanced Warehouse Management (G46), enter 29

From Warehouse Management General Setup (G4641), choose Basic Item Master Data

On Basic Item Master Data

Figure B–3 Basic Item Master Data screen
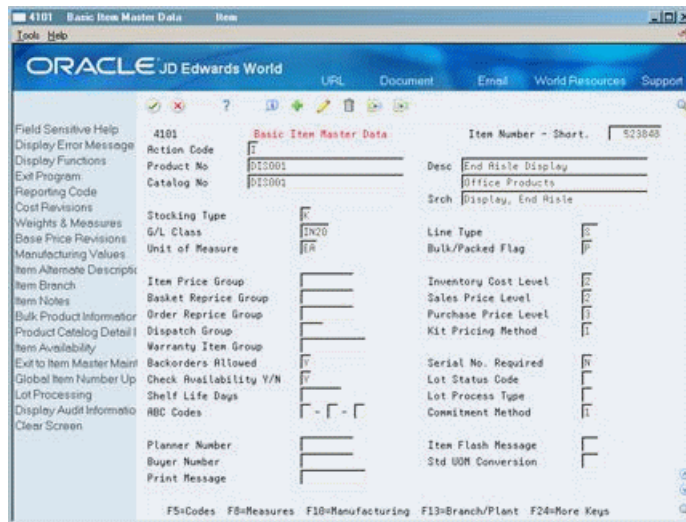
1. Access Manufacturing Values Entry (F10).

Figure B–4 Manufacturing Values Entry screen
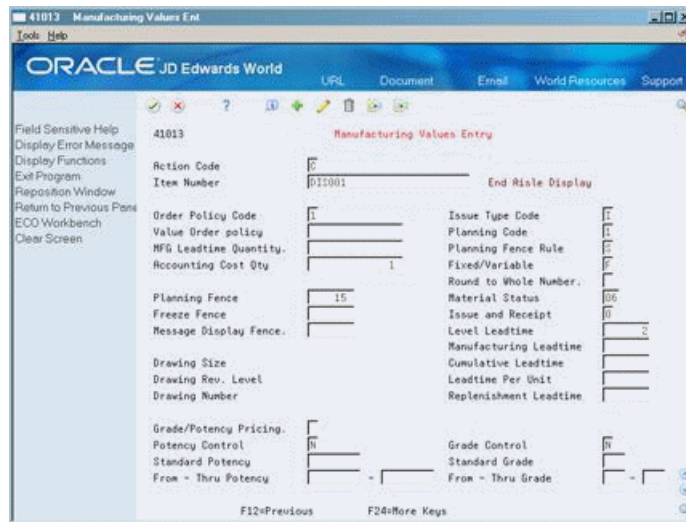
2. On Manufacturing Values Entry, complete the following fields:

■ Item Number

■ Material Status

Field	Explanation
Material Status	A code (table 31/MS) that designates the status of an item.
	Form-specific information
	The system pulls the value from this field to the Material Status field of the Parts List table.

To identify ineligible items through the work order parts list

On Enter/Change Order

1. Access Work Order Parts List.

2. On Work Order Parts List, complete the following field:

   ■ Order Number

3. Do one of the following:

   ■ In JD Edwards World, access the fold area

   ■ In WorldVision, access Item Master and then Manufacturing Values Entry

Figure B–5   Work Order Parts List screen
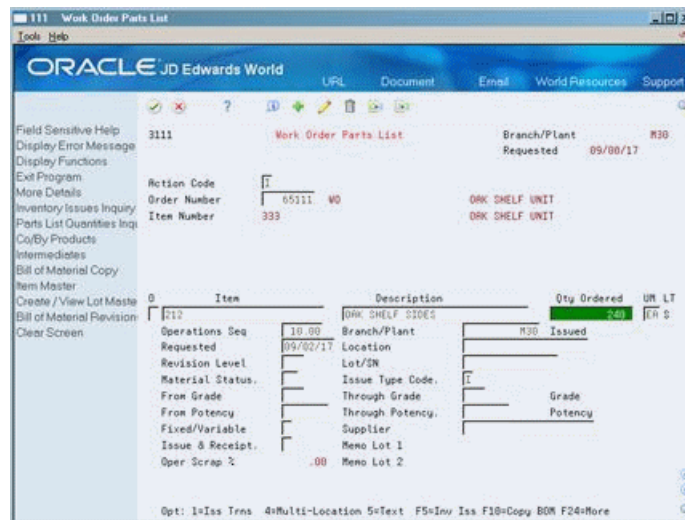
4. Complete the following field for each item that is ineligible for picking:

   ■ Material Status

Field	Explanation
Material Status Code W.O	A code (table 31/MS) that identifies the current status of a particular component on the work order.

B.2 Setting Processing Options in Manufacturing Programs

To create picking requests through manufacturing programs, set the processing options for one or both of these programs:

■ Work Order Processing (P31410)

■ Work Order Entry (P48013)

B.2.1 What You Should Know About

Topic	Description
Availability checking	You can check for item availability when you create a pick request.
	If the item is attached to a work center:
	■ The system does not create a pick request if enough quantity of the item is in the work center to complete the work order.
	■ The system creates a pick request if there is not enough quantity of the item in the work center to complete the work order. The system splits the parts list line into a commitment for the amount that is available in the work center and a soft commitment for the unavailable quantity. You specify in Manufacturing Constants whether the commitment for the work center quantity is hard (committed to a specific location) or soft (committed to the item's primary location).
	If the item is not attached to a work center, and if you have set the manufacturing order entry program's processing options to check the staging location for item availability:
	■ The system does not create a pick request if enough quantity of the item is in the staging location to complete the work order.
	■ The system creates a pick request if there is not enough quantity of the item in the staging location to complete the work order. The system creates a hard or soft commitment to the default staging location that you specified in the processing options. If you did not specify a default staging location, the system creates a soft commitment to the item's primary location.
	If you use lot processing, the system also searches through lots to find items on the parts list.

B.2.2 Processing Options

See Section 29.1, "Manufacturing Work Order Entry (P48013)."

See Section 29.2, "Generate and Print Work Orders (P31410)."

B.3 Creating Putaway Requests through Manufacturing Systems

You can set up your manufacturing systems so that the completion of a work order triggers the creation of a putaway request for the manufactured product.

After you create a putaway request through your manufacturing systems, you process the putaway request normally through the Advanced Warehouse Management system. After you create and confirm location suggestions, you reduce the on-hand quantity in the manufacturing location and increase the on-hand quantity in the putaway location, where you will store the item.

B.3.1 Setting Processing Options in Manufacturing Programs

To control the creation of putaway requests through manufacturing completions, set the processing options for one or more of these programs:

■ Work Order Inventory Completion (P31114)

■ Super Backflush (P31123)

B.3.2 Processing Options

See Section 29.3, "Work Order Completion - Full (P31114)."

See Section 29.4, "Super Backflush (P31123)."

C

Technical Information

The following information describes the function of the Location Selection Driver program, which exists in six predefined versions in the Advanced Warehouse Management system:

This appendix contains these topics:

C.1 Running the Process Putaway Requests Program

You run the Location Selection Driver program to process all movement requests at a particular status and create location suggestions. The same program processes putaway, picking, and replenishment requests. If you create your own version of the Location Selection Driver, you can define the type of request to process on Data Selection in the program's processing options.

Process Putaway Requests and Resuggest Putaway Requests are DREAM Writer programs.

When you run the Process Putaway Requests program, the program performs the following functions:

Function	Description
Locates outstanding putaway requests	The system searches for outstanding requests (requests for which you have not yet created suggestions) in the Warehouse Requests table (F4600). The system selects the requests that have a warehouse code of 1 (putaway). The Data Selection function of the program controls this process.

Function	Description
Creates error messages	The system creates an error message, which it displays during putaway confirmation, in the following instances:
	■ The putaway request's status is not 200 (Request Created) or 220 (Suggestion Created).
	■ Putaway suggestions already exist, and you have not set the program's processing options to create alternative suggestions.
	■ You tried to create alternative putaway suggestions after you confirmed the original suggestions.
	■ The warehouse (branch/plant) is not a valid warehouse in the address book.
	■ The system cannot convert the transaction's unit of measure into the item's primary unit of measure.
	■ The item's primary branch/plant record does not exist.
	■ The item's warehouse process groups and order group do not reference a valid putaway instruction table.
Chooses an instruction table	During process selection, the system selects a putaway instruction table for an item by comparing the item's warehouse process groups and order group to the groups specified in the process selection table. The system uses the following priorities:
	■ Match all three warehouse process groups and the order group
	■ Match all three warehouse process groups
	■ Match the order group
	After the system locates the most accurate match, it uses the putaway instruction table that you specified for that combination of groups. The putaway instruction table must include a unit of measure that also exists in the item's unit of measure structure, or the system cannot create putaway suggestions.
Chooses location types	After the system selects a putaway instruction table, the method code attached to the table determines which location type the system suggests. You can set the method code to select:
	■ Fixed locations
	■ Random locations
	■ Existing locations, which already contain the same item that you are moving
	■ Empty locations
	If you specified a zone in the putaway instructions, the system searches for locations only within that putaway zone.
Chooses locations using location requirements	From the eligible locations, the system selects the locations that:
	■ You can use for putaway
	■ Have the same tax code as the item (optional)
	■ Are not the location from which you are moving the item (usually the receiving dock)

Function	Description
Chooses locations using putaway instructions	The system ranks the remaining eligible locations according to the tiebreaker that you specified in the putaway instruction table. If you use the following criteria, the system selects the locations for which you:
	■ Avoid exceeding the maximum putaway quantity for the location
	■ Meet the minimum utilization percentage
	■ Convert large units of measure into smaller units of measure, if necessary
	■ Complete partial units of measure, such as half-filled pallets
Chooses locations using the item profile	If you use the following criteria, the system selects locations where the item's profile allows you to:
	■ Mix different items in a location
	■ Mix items with different dates or lot numbers in a location
	■ Split an order line into more than one location suggestion
	■ Move the items to a default location that you specify, if there is not enough space in the eligible locations
Chooses locations using the item unit of measure profile	If you use the following criteria, the system selects locations based on whether the item's unit of measure definition allows you to:
	■ Convert large units of measure to smaller units of measure
	■ Put the item in the location, according to the capacity method that you specified for the item
	You can use one of three capacity methods to decide if the item will fit:
	■ Divide the usable cubic capacity of the locations by the dimensions of the item you want to store in the location. The result must be less than or equal to 1.
	■ Compare the item's dimensions to the location's usable dimensions. You must also have specified whether you allow the system to rotate the item, and defined the stacking limit for the item unit of measure.
	■ Verify that the quantity of the item to store is equal to or less than the quantity that you defined for the location on Location Capacity Definition.

Function	Description
Chooses locations using the location profile	If you use the following criteria, the system selects locations based on whether the location profile detail allows you to:

- Use the location for putaway
- Include the location in the putaway zone, if you specified one in the movement instructions
- Use the location for staging (unlimited capacity)
- Mix different containers in the location
- Mix items with different dates or lot numbers in the location
- Store the item without exceeding the location's maximum number of items
- Store the item based on the item's tax code
- Store the item based on whether you allow the item's container to exist in the location
- Store the item if it exceeds the location's minimum putaway percentage
- Use the location's putaway sequence number as a tiebreaker to rank locations that are otherwise equally suitable
- Use the location's proximity (latitude, longitude, and height) to the receiving location as a tiebreaker to rank locations that are otherwise equally suitable

C.2 Running the Process Pick Requests Program

You run the Location Selection Driver program to process all movement requests at a particular status and create location suggestions. The same program processes putaway, picking, and replenishment requests. If you create your own version of the Location Selection Driver, you can define the type of request to process on Data Selection in the program's processing options.

Process Pick Requests and Resuggest Pick Requests are DREAM Writer programs.

When you run the Process Pick Requests program, the program performs the following functions:

Function	Description
Locates outstanding pick requests	The system searches for outstanding requests (requests for which you have not yet created suggestions) in the Warehouse Requests table. The system selects the requests that have a warehouse code of 2 (picking). The Data Selection function of the program controls this process.

Function	Description
Creates error messages	The system creates an error message, which it displays during pick confirmation, in the following instances:
	■ The pick request's status is not 200 (Request Created) or 220 (Suggestion Created).
	■ Pick suggestions already exist, and you have not set the program's processing options to create alternative suggestions.
	■ You tried to create alternative pick suggestions after you confirmed the original suggestions.
	■ The warehouse (branch/plant) is not a valid warehouse in the branch/plant constants.
	■ The system cannot convert the transaction's unit of measure into the item's primary unit of measure.
	■ The item's primary branch/plant record does not exist.
	■ The item's warehouse process groups and order group do not reference a valid picking instruction table.
Chooses an instruction table	During process selection, the system selects a picking instruction table for an item by comparing the item's warehouse process groups and order group to the groups specified in the process selection table. The system uses the following priorities:
	■ Match all three warehouse process groups and the order group
	■ Match all three warehouse process groups
	■ Match the order group
	After the system locates the most accurate match, it uses the picking instruction table that you specified for that combination of groups. The picking instruction table must include a unit of measure that also exists in the item's unit of measure structure, or the system cannot create picking suggestions.
Chooses location types	After the system selects a picking instruction table, the method code attached to the table determines which location type the system suggests;
	■ Fixed locations
	■ Random locations
	If you specified a zone in the picking instructions, the system searches for locations only within that pick zone.
Chooses locations using location requirements	From the remaining eligible locations, the system selects the locations that:
	■ You can use for picking
	■ Are not the location to which you are moving the item (usually the shipping dock)

Function	Description
Chooses locations using pick instructions	The system ranks the eligible locations according to the tiebreaker that you specified in the picking instruction table.
	If you use the following criteria, the system selects the locations for which you can:
	■ Meet or exceed the minimum pick percentage for the location
	■ Avoid exceeding the maximum pick quantity for the location
	■ Combine smaller units of measure into larger units of measure, if necessary
	■ Require automatic replenishment after you deplete the items in the location (for fixed picking locations only)
	■ Use the First In First Out (FIFO) picking method based on the commitment method you specify on Branch/Plant Constants
	You can set the picking method to:
	■ Avoid using FIFO. Instead, rank locations according to the tiebreaker.
	■ Rank locations from the lowest lot number to the highest lot number.
	■ Rank locations from the earliest expiration date to the latest expiration date for the date you stored the item.
	■ Rank locations from the oldest date to the newest date you received the item.
Chooses locations using the location profile	If you use the following criteria, the system selects locations based on whether the location profile detail allows you to:
	■ Use the location for picking
	■ Include the location in the pick zone, if you specified one in the movement instructions
	■ Use the location's picking sequence number as a tiebreaker to rank locations that are otherwise equally suitable
	■ Use the location's proximity (latitude, longitude, and height) to the shipping location as a tiebreaker to rank locations that are otherwise equally suitable
Picks from locations according to item availability	From the eligible locations, the system picks items according to the following priority:
	■ Pick from locations with available quantity, ignoring inbound quantities (incoming purchase orders)
	■ Pick from locations using any available inbound quantities
	■ Pick from locations that you replenished as a result of automatic replenishment
	The system displays an error message if it cannot satisfy the pick request using available, incoming, or replenished quantities. If the customer does not allow the partial shipment of an order, the system automatically deletes any pick suggestions for the order, and you do not fill the order.

C.3 Running the Process Replenishment Requests Program

You run the Location Selection Driver DREAM Writer program to process all movement requests at a particular status and create location suggestions. The same

program processes putaway, picking, and replenishment requests. If you create your own version of the Location Selection Driver, you can define the type of request to process on Data Selection in the program's processing options.

Process Replenishment Requests and Resuggest Replenishment Requests are DREAM Writer programs.

When you run the Replenishment Location Selection Driver program, the program performs the following functions:

Function	Description
Locates outstanding replenishment requests	The system searches for outstanding requests (requests for which you have not yet created suggestions) in the Warehouse Requests table. The system selects the requests that have a warehouse code of 3 (replenishment). The Data Selection function of the program controls this process.
Creates error messages	The system creates an error message, which it displays during replenishment confirmation, in the following instances: ■ The replenishment request's status is not 200 (Request Created) or 220 (Suggestion Created). ■ Replenishment suggestions already exist, and you did not delete the existing suggestions to create alternative suggestions. ■ You tried to create alternative replenishment suggestions after you confirmed the original suggestions. ■ The warehouse (branch/plant) is not a valid warehouse in the branch/plant constants. ■ The system cannot convert the transaction's unit of measure into the item's primary unit of measure. ■ The item's primary branch/plant record does not exist. ■ The item's warehouse process groups and order group do not reference a valid replenishment instruction table.
Chooses an instruction table	During process selection, the system selects a replenishment instruction table for an item by comparing the item's warehouse process groups and order group to the groups specified in the process selection table. The system uses the following priorities: ■ Match all three warehouse process groups and the order group ■ Match all three warehouse process groups ■ Match the order group After the system locates the most accurate match, it uses the replenishment instruction table that you specified for that combination of groups. The replenishment instruction table must include a unit of measure that also exists in the item's unit of measure structure, or the system cannot create replenishment suggestions.
Chooses location types	After the system selects a replenishment instruction table, the method code attached to the table determines which location type the system suggests. You can set the method code to select: ■ Fixed locations ■ Random locations

Function	Description
Chooses locations using location requirements	From the eligible locations, the system selects the locations that: ■ You can use for replenishment ■ Are not the location to which you are moving the item (usually a pick location)
Chooses locations using replenishment instructions	The system ranks the remaining eligible locations according to the tiebreaker that you specified in the replenishment instruction table. If you use the following criteria, the system selects the locations for which you can: ■ Meet the minimum utilization percentage ■ Avoid exceeding the maximum replenishment quantity ■ Combine smaller units of measure into larger units of measure, if necessary ■ Use the First In First Out (FIFO) picking method based on the commitment method you specify on Branch/Plant Constants You can set the picking method to: ■ Avoid using FIFO. Instead, rank locations according to the tiebreaker. ■ Rank locations from the lowest lot number to the highest lot number. ■ Rank locations from the earliest expiration date to the latest expiration date for the date you stored the item. ■ Rank locations from the oldest date to the newest date you received the item.
Chooses locations using the location profile	If you use the following criteria, the system selects locations based on whether the location profile detail allows you to: ■ Use the location for replenishment ■ Include the location in the replenishment zone, if you specified one in the replenishment instructions ■ Use the location's replenishment sequence number as a tiebreaker to rank locations that are otherwise equally suitable ■ Use the location's proximity (latitude, longitude, and height) to the To location as a tiebreaker to rank locations that are otherwise equally suitable
Replenishes from locations according to item availability	From the eligible locations, you replenish items according to the following priority: ■ Replenish from locations with available quantity, ignoring inbound quantities (incoming purchase orders) ■ Replenish from locations with inbound quantities

C.4 Working with Request and Suggestion Statuses

The system uses status codes to track movement requests and suggestions. The following status codes are hard coded in a user defined codes table (system 46/type PS):

■ 200 Request created

■ 220 Request suggested

- 250 Request in confirmation
- 291 Request canceled
- 299 Request closed
- 300 Location suggested
- 320 Suggestion assigned to tasks
- 340 Suggestion printed
- 391 Suggestion canceled
- 399 Suggestion confirmed

C.5 Working with Putaway Reservation Statuses

The system uses status codes to track putaway reservations. The following status codes are hard coded in a user defined codes table (system 46/type PS):

- 100 Reservation created
- 191 Reservation canceled
- 199 Reservation closed

D

Dimension and Weight Calculations

This appendix contains the topic:

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D.1 Calculating Dimensions and Weights for Putaway

The Advanced Warehouse Management system calculates each item's volume and weight to select a location during putaway. The system bases all volume and weight calculations on the Level 1 (largest) unit of measure and stores the resulting values in the Item Unit of Measure Profile table (F46011).

The system calculates item dimensions and weight for:

- Complete units of measure
- Partial units of measure

The system also performs calculations for:

- Items with storage containers
- Items without storage containers

D.1.1 Calculating Weight for a Complete Level 1 Unit of Measure

Item	Calculation
Items with Storage Containers	Total Weight = (Gross Weight + Container Weight) x Quantity
Items without Storage Containers	Total Weight = Gross Weight x Quantity

D.1.2 Calculating Volume for a Complete Level 1 Unit of Measure

Item	Calculation
Items with Open Storage Containers	Total Volume = Width x Depth x Height of the container or the items' collective dimensions, whichever is greater
Items with Closed Storage Containers	Total Volume = Width x Depth x Height of the container
Items without Storage Containers	Total Volume = Gross Volume x Quantity

D.1.3 Calculating Weight for a Partial Level 1 Unit of Measure

Percentage Filled = Number of primary units of measure present / number of primary units of measure required to complete a Level 1 unit of measure

Total Weight = Weight of a Level 1 unit of measure x Percentage Filled

D.1.4 Calculating Volume for a Partial Level 1 Unit of Measure

Percentage Filled = Number of Level 2 units of measure present / number of Level 2 units of measure required to complete a Level 1 unit of measure

Total Volume = Volume of a Level 1 unit of measure x Percentage Filled

E

Functional Servers

This appendix contains the topic:

- Section E.1, "About Functional Servers."

E.1 About Functional Servers

Several JD Edwards World programs access functional servers. The purpose of functional servers is to provide a central location for standard business rules about entering documents, such as vouchers, invoices, and journal entries. These business rules establish the following:

- Data dictionary default values

- Field edits and valid values

- Error processing

- Relationships between fields or applications

The advantages of a functional server are:

- It reduces maintenance of entry programs because edit rules reside in one central location.

- You can standardize documents across all applications because you create them using the same business rules.

- Generally, the user interface (appearance and interaction) of a form is now separate from how a program works.

To set up business rules for an entry program

The steps for setting up business rules for an entry program are:

1. Create a DREAM Writer version for a specific functional server program (for example, XT0411Z1 for voucher entry).

2. Set the processing options within the version according to your company requirements.

3. Specify the version you want the entry program to use in the processing options for that entry program.

You can have all your entry programs use the same DREAM Writer version (and thus, use the same rules) or you can set up different DREAM Writer versions. JD Edwards World provides DREAM Writer version ZJDE0001 as the default functional server version for your entry programs.

> **Caution:** Only the person responsible for system-wide setup should make changes to the functional server version. For more information about how to set up DREAM Writer versions, see the *JD Edwards World Technical Foundation Guide.*

E.1.1 Example: Voucher Processing Functional Server

The following programs use the voucher processing functional server. JD Edwards World provides two demo versions of the functional server, ZJDE0001 and ZJDE0002.

- Speed Voucher Entry (P040015)
- Standard Voucher Entry (P04105)
- Void Payment Entry (P4704103)
- Credit Tied to Debit Bill (P041010)
- Multi-Voucher (P041017)
- Calculate Withholding (P04580)

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