Send Us Your Comments

Preface

1 Overview of Oracle Yard Management
   Overview of Oracle Yard Management ................................................................. 1-1
   Benefits and Main Features of Oracle Yard Management ........................................ 1-2

2 Setting Up Oracle Yard Management
   Setting Up Oracle Yard Management .................................................................... 2-1
   Defining Yards .......................................................................................................... 2-2
   Configuring Yard Areas and Parking Spots .............................................................. 2-7
   Synchronizing Dock Doors ...................................................................................... 2-9
   Creating Remote Organization ............................................................................... 2-10
   Creating Equipment Types ...................................................................................... 2-11
   Creating Drivers and Yard Personnel ..................................................................... 2-13
   Defining Rules ......................................................................................................... 2-16
   Assigning Oracle Yard Management Responsibilities ........................................... 2-17
   Related Setups ......................................................................................................... 2-18
   Other Product Integrations with Oracle Yard Management ..................................... 2-24

3 Managing Yard Operations
   Performing Yard Check-Ins .................................................................................... 3-1
   Managing Equipment Details .................................................................................. 3-5
   Performing Yard Check-Outs ................................................................................... 3-7
   Viewing and Scheduling Dock Appointments ......................................................... 3-9
4 Performing Yard Transactions Using Mobile Devices (MSCA Transactions)

Overview of Yard Transactions Using Mobile Devices................................. 4-1
Sealing and Unsealing Equipment (Mobile Seal UI ) .................................... 4-2
Viewing/Updating Equipment.................................................................. 4-4
Performing Yard Moves........................................................................ 4-6

5 Yard Requests (Reports) and Labels

Yard Requests and Reports................................................................... 5-1
Labels for Yards................................................................................ 5-4

6 Alerts and Notifications

Using Alerts and Notifications................................................................. 6-1

7 Windows and Navigation Paths

Windows and Navigation Paths................................................................ 7-1

A Example Rules

Example Rules.................................................................................. A-1

Glossary

Index
Oracle welcomes customers’ comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: appsdoc_us@oracle.com

Please give your name, address, electronic mail address, and telephone number (optional).

If you need assistance with Oracle software, then please contact your support representative or Oracle Support Services.

If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at www.oracle.com.
Preface

Intended Audience


This guide is intended for implementers, administrators, and users of Oracle Yard Management.

See Related Information Sources on page viii for more Oracle E-Business Suite product information.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Structure

1 Overview of Oracle Yard Management
2 Setting Up Oracle Yard Management
3 Managing Yard Operations
4 Performing Yard Transactions Using Mobile Devices (MSCA Transactions)
5 Yard Requests (Reports) and Labels
6 Alerts and Notifications
7 Windows and Navigation Paths
A  Example Rules
Glossary

Related Information Sources

Oracle E-Business Suite User’s Guide

This guide explains how to navigate, enter and query data, and run concurrent requests using the user interface (UI) of Oracle E-Business Suite. It includes information on setting preferences and customizing the UI. In addition, this guide describes accessibility features and keyboard shortcuts for Oracle E-Business Suite.

Oracle Warehouse Management User’s Guide

Oracle Warehouse Management Implementation Guide

Oracle Inventory User’s Guide

Oracle Purchasing User’s Guide

Oracle Order Management User’s Guide

Oracle Order Management Implementation Guide

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite’s business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the Oracle E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite data unless otherwise instructed.

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

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

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

Overview of Oracle Yard Management

To gain a competitive advantage, companies must achieve many goals: optimize inventory management, lower inventory levels, shorten order cycle times, provide better fill rates, and maximize the inventory flow both inside the warehouse and outside in the yard. Oracle Yard Management, a software product within the E-Business Suite, provides many advantages to help your company maximize the inventory flow in the yard of your manufacturing facility, warehouse, or distribution center.

Using Oracle Yard Management, you can define the entities required for yard operations and capture the transactions happening within the yard in real-time. You can view the location of trailers in the yard and enable yard employees to move trailers from parking to docks to fill orders in an efficient manner.

• For more information about Oracle Yard Management, see the following white paper on My Oracle Support: Oracle Yard Management, A White Paper (Doc ID 1672890.1).

• You need to run Oracle License Manager to enable this product.

Understanding Yards

A yard, by default, is an extension of the warehouse, and therefore plays a pivotal role in inventory management. Oracle Yard Management provides visibility into inventory in your yard and the equipment checking into and out of the yard for both inbound and outbound operations.

After a trailer is checked in, the trailer may need to be directed to an appointed dock door/empty dock door, or if none is available, to an empty parking space in the yard. The information channel needs to be handled in such a way the system automatically directs the trailer based on an appointment schedule. However, after the trailer is
emptied or loaded, it may need to be moved into the yard area until the tractors are available for the onward destination to the customer or carrier location.

Users of Oracle Yard Management
Oracle Yard Management can accommodate multiple users who may have different responsibilities to manage and access the yard. These users may include:

- Warehouse managers/shift supervisors.
- Shipping and receiving managers.
- Yard supervisors.
- Jockeys/hostlers/switchers who move trailers.
- Security guards and gate clerks who check trailers into and out of the yard.

For information about assigning responsibilities to users, see Assigning Oracle Yard Management Responsibilities, page 2-17.

Benefits and Main Features of Oracle Yard Management
Oracle Yard Management provides the following benefits to help you better manage and improve your yard operations:

- Real-time Location and Status Information
To ensure smooth yard operations, Oracle Yard Management provides real-time location and status information about trailers, parking slots, and dock doors.

- **Support for Yard Transactions**
  Oracle Yard Management enables you to manage yard transactions like yard check-ins, check-outs, sealing and unsealing operations, and trailer movements in the yard.

- **Alerts/Notifications for Business Events**
  Manage and send alerts/notifications during yard warehouse operations for check-in and yard move events as described in the following examples:
  - **Check-ins**
    --Late/early/on-time appointment for the equipment being checked in.
    --Seal validation at the time of the check-in.
    --Incorrect equipment for an already scheduled appointment.
  - **Yard Scheduling**
    --Appointment check if the equipment is in the yard.
    --Past due appointments for the equipment in the yard.
  - **Yard Move**
    --Past due appointments when yard move is initiated.

- **Other related benefits**
  - Schedule and maintain appointments for incoming and outgoing trailers.
  - Supports shipping and receiving material from the warehouses through the yard.
  - Ensures liability tracking by supporting cost and general ledger (GL) accounting for the trailer and its contents.

- **Visibility into Yard Inventory (for Oracle Inventory users)**
  If you have licensed and installed Oracle Inventory, Oracle Yard Management enhances the Material Workbench (in Oracle Inventory) to provide information about yard inventory including the location of trailers/trucks and the quantity of the contained material. For example, if there is a shortage of material in the warehouse, the warehouse manager can use the Material Workbench to find the required material.
Setting Up Oracle Yard Management

This chapter covers the following topics:

- Setting Up Oracle Yard Management
- Defining Yards
- Configuring Yard Areas and Parking Spots
- Synchronizing Dock Doors
- Creating Remote Organization
- Creating Equipment Types
- Creating Drivers and Yard Personnel
- Defining Rules
- Assigning Oracle Yard Management Responsibilities
- Related Setups
- Other Product Integrations with Oracle Yard Management

Setting Up Oracle Yard Management

Oracle Yard Management interacts with the following Oracle products in the Oracle E-Business Suite. Although licensing and implementing the following products is optional, they can help optimize your business processes and operations:

- Oracle Inventory
- Oracle Order Management
- Oracle Purchasing
- Oracle Shipping
You must complete the following steps to set up Oracle Yard Management:

1. Define the yard.
2. Configure yard areas and parking spots.
3. Synchronize dock doors.
4. Create equipment types.
6. Related setups:
   - Set up accounting open/close periods.
   - Set up yard organization parameters (system provides initial default values).
   - Set up costing and cost groups (system provides initial default values).
   - Set up yard lookups (system provides initial default values).

**Defining Yards**

A yard is an external area typically adjacent to a warehouse where trucks and containers with material wait to be loaded or unloaded for shipment. A yard can be associated to one or more inventory organizations within the same operating unit since a yard may be common to multiple warehouses. A yard can be further configured by dividing it into logical areas that represent activities such as inbound, outbound, or parking operations.

**Important:** A yard is defined as an organization in the Oracle E-Business Suite. The system provides default yard parameters that control the operations and transactions for a yard organization. You must use the Oracle Yard Management application to create yard organizations, but if you have installed and licensed Oracle Inventory, you can view the related yard setup parameters in the Organization Parameters window.

**To define a yard:**

1. Navigate to the Define Yard, page 7-1 window.
2. Choose one of the following methods to create your yard:

- **Web ADI**: Use the Oracle Web Applications Desktop Integrator (Web ADI) process to download a file (such as a spreadsheet or other supported format), complete your entries, then upload the data to the system. This process is most effective for bulk data uploads.

1. Click the **Create** icon under the Define Yard tab and select the document type to be downloaded. A file will be downloaded to your desktop. When prompted, choose to open the file and to enable macros. If no prompt appears, ensure your browser security settings allow files to be downloaded.

2. Validation messages are returned to the spreadsheet, allowing you to identify and correct invalid data.

3. After your entries are complete, upload the data to the system.
• Create Yard UI: Click the **Create** button (in the Search region) and enter yard information directly into the Create Yard window.

  **Additional Information:** You can also create yards using the web-enabled user interface (WebADI).

3. Enter the following data (selected fields are described):

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Enter a short code that uniquely identifies the yard such as YD1 or YD2.</td>
</tr>
<tr>
<td>Name</td>
<td>Enter a name that easily identifies the yard such as Main Yard North.</td>
</tr>
<tr>
<td>Field Name</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Service Organization | Select the name of the service organization associated with the yard.  
• The yard is a copy of the service organization, therefore they both share the same master organization.  
• Oracle Inventory users can use the Material Workbench to view material and yard-specific elements for the service organization as equipment in the yards. |
| Location         | Select a location code that corresponds to the physical location of the yard.                                                                                                                                 |
| Material Account | A material account is an asset account that tracks material cost. The material account number is a numeric code—each segment of the code represents the company, department, account, sub-account, and product for that material account. For more information, see the following sources:  
• *Oracle General Ledger Implementation Guide: Defining Your Account Structure*  
• My Oracle Support note: Accounting Flexfield Setup and Usage (Doc ID 124333.1) |
| Dock Area        | Enter the dock area.                                                                                                                                                                                        |
| Cost Enabled     | Select Yes to track costs in a yard organization (only average costing is supported).                                                                                                                                 |

**Note:** Yard areas are stored internally as subinventories. The dock area corresponds to the default subinventory to which all dock doors in the yard organization are associated.
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily Calendar</td>
<td>Enter the start and end times for the yard operating hours (this information is used when scheduling dock door appointments).</td>
</tr>
<tr>
<td>Start/End Times</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Enter calendar information according to the database server time zone. For example, if the server is located on the west coast (PST) and the yard is on the east coast (EST), an 8 a.m. start time for the yard corresponds to 5 a.m. on the server. The start time parameter should therefore be set to 5 a.m.

**Additional Information:** An inventory organization can have only one yard organization attached to it and the yard organization should have the same operating unit/legal entity/set-of-books.

4. Click **Apply** to save your changes. Alternatively, if you used the Web ADI process to download a file, upload your changes to the system.

**To update a yard:**

1. Navigate to the Define Yard, page 7-1 window.

2. Do a search to find the yard to be updated, then click the **Update** icon in the Actions column to update the name, start, or end times for the yard.

3. Click **Apply**.

**What's Next**

After you the yard is created, you need to:

- Configure the yard: Subdivide the yard into multiple functional areas such as inbound, outbound, or parking areas.
• Synchronize dock doors (between the yard and warehouse).

Related Topics
To configure yards.
To synchronize dock doors.

Configuring Yard Areas and Parking Spots

Configuring a yard involves dividing it into logical areas that represent activities such as inbound, outbound, or parking operations. A yard area can be further divided into one or more locations called parking spots. A parking spot determines the exact location of a trailer within the yard such as a storage locator (for example, a gate or parking place) or a dock door. Parking spots can accommodate one or more trailers based on the trailer’s capacity. The yard area and parking spots can track the yard entities such as the trailers or power units.

Types of parking spots include:
• Storage locators.
• Dock doors: An opening or door in the warehouse for unloading the inbound material receipt and for loading the outbound material shipments.

Additional Information: A yard area is modelled as a subinventory in Oracle Inventory (Subinventories window) and parking spots as locators in the Stock Locators window.

Similar to subinventories, the following considerations apply to yard areas:
• Non-asset versus asset: For non-cost enabled yards, the yard area will be non-asset.
• Cost groups enable tracking costs to different general ledger accounts.
• By default, yard areas enable you to track equipment like quantity-tracked subinventories.

Prerequisites
☒ You must create a yard before it can be configured. For more information, see Defining Yards, page 2-2.
At least one yard area must be created for a yard organization.

**To configure a yard:**

1. Navigate to the Configure Yard, page 7-1 page.

2. Click the **Create** button, and complete your entries for the area and spot:

   ![Configure Yard](image)

   **Notes**

   - **(Area) Name**: Enter a short name for the yard area. For example, the name could identify the function within the area such as Inbound, Fueling, Cleaning, Dock, or Outbound.
   
   - **(Area) Parking Order**: Enter the parking order priority for the area. For example, a yard area with an order of 1 takes priority over a yard area with parking order 2.
   
   - **(Spot) Name**: Enter a meaningful name that identifies the physical location in the yard. Since parking spots are modeled as locators, they require an internal name that uses the same naming convention as stock locators in the warehouse. However, since parking spots do not usually need a row/rack/bin designation, use the stock locator alias to give the locator a more meaningful name such as P123 for parking locator #123.
     
     **Note**: Locator aliases must be unique within a yard organization.
   
   - **(Spot) Parking Order**: Enter the parking order priority for the spot.
   
   - **Update**: Click the **Update** icon to update the area description, area parking order, alias, and other details.

3. Click **Apply** to save your changes.
Synchronizing Dock Doors

Dock doors are used for loading and unloading trailers. To optimize dock-door usage, you need to establish an alias in the yard for the corresponding dock doors in the serviced facilities.

**Important:** You must create the yard before synchronizing dock doors.

**To synchronize dock doors:**

1. Navigate to the Synchronize Dock Doors, page 7-1 window.
2. Select the yard from the **Yard** drop-down list and click **Go**.
3. Click **Create** to enter the dock door information for the service organization and yard.

![Synchronize Dock Doors](image)

**Notes**

- **(Service) Organization:** Select the service organization for the dock.
- **(Service) Dock:** Select the dock belonging to the service organization to be synchronized with the yard.
- **(Service) Default Staging Area:** Select Yes or No depending on whether you want the selected dock to serve as the default staging area.

**Additional Information:** A default staging area is a subinventory that is created in the service organization, not in the yard. It is applicable only to Oracle Warehouse Management-enabled service organizations. The purpose of
this subinventory is to store staged LPNs that have been loaded into a trailer. The LPNs are moved from the staging lane inside the warehouse into this subinventory, when the loaded trailer is moved from the dock door into a parking spot using a yard move order.

- **(Yard) Dock**: The name you selected in the service dock field automatically defaults in this field but can be changed if desired.

- **(Yard) Dock Alias**: Enter a user-friendly name that enables you to readily identify the dock.

4. Click **Apply**.

### Creating Remote Organization

Remote organizations are placeholder service organizations defined in an external Oracle E-Business Suite instance or an enterprise resource planning application.

To create a remote organization:

1. Navigate to Yard Manager, Yard Setups, and then Remote Organization. The Remote Organization page is displayed.

2. Choose one of the following methods to create a remote organization:
   - **Use Web ADI**: Use the Oracle Web Applications Desktop Integrator (Web ADI) process to download a file (such as a spreadsheet or other supported format), complete your entries, and then upload the data to the system. This process is useful for bulk data uploads. To use this method, perform the following steps:
     - Click the Create icon and select the document type to be downloaded. A file is downloaded to your desktop.
     - When prompted, choose to open the file and to enable macros. If no prompt appears, ensure that your browser security settings allow files to be downloaded.
     - Using the validation messages that are returned to the spreadsheet, identify and correct invalid data.
     - After your entries are complete, upload the data to the system.

     **Note**: If you want to update the file using Web ADI, click the
Update icon and select the document type to be downloaded, updated, and uploaded to the system.

- Use the Create Remote Organization page: Click the Define button and enter remote organization information into the Create Remote Organization page. You can enter details for the following fields: Organization, Name, Calendar, Yard Organization, Location, and Disable Date.

3. Click Apply to save the information you have entered.

Creating Documents for Remote Organizations

You use yard documents to identify contents of the equipment. Yard documents are of type Trip or Delivery. The documents can be inbound or outbound. Examples of yard documents are purchase order, ASN, shipment, and so on. Yard documents are imported to Oracle Yard Management using the Yard Documents public API. To create yard documents Shipping parameters must be set up for the Yard Organization.

Creating Equipment Types

You need to create the various types of equipment such as trailers and powering units that check into and out of your yard so that Oracle Yard Management can capture their movement and operations. Trailers can be freight or cargo trailers that transport goods and other items from one location to another. A cargo trailer is usually not equipped with a means of locomotion so it is normally attached to some means of conveyance to transport it from one location to another. A tractor (or powering unit) refers to a powered vehicle designed and used for towing trailers.

After you create an equipment type, select a seeded category that corresponds to the type of equipment created. For example, use the Trailer category for an equipment type named 40 Foot Trailer. Oracle Yard Management provides the following equipment categories:

- Container
- Power Unit
- Trailer

The system provides seeded category sets and categories to identify equipment types in Oracle Yard Management. You can create equipment in Oracle Yard Management based on these category sets and categories.
**System-Supplied (Seeded) Category Sets and Their Related Categories**

<table>
<thead>
<tr>
<th>Category Set</th>
<th>Related Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yard Container</td>
<td>Container</td>
</tr>
<tr>
<td>Yard Power Unit</td>
<td>Power Unit</td>
</tr>
<tr>
<td>Yard Trailer</td>
<td>Trailer</td>
</tr>
</tbody>
</table>

**Note:** If required, you can create additional categories (category codes).

The following table shows examples of equipment types that can be created from the seeded categories:

<table>
<thead>
<tr>
<th>Equipment Name</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>40 Foot Trailer</td>
<td>Trailer</td>
</tr>
<tr>
<td>60 Foot Trailer</td>
<td>Trailer</td>
</tr>
<tr>
<td>Single Power Unit</td>
<td>Power Unit</td>
</tr>
<tr>
<td>Double Power Unit</td>
<td>Power Unit</td>
</tr>
<tr>
<td>Dry Van</td>
<td>Trailer</td>
</tr>
<tr>
<td>Refrigerated Unit</td>
<td>Trailer</td>
</tr>
<tr>
<td>Vessel Container</td>
<td>Container</td>
</tr>
<tr>
<td>Rail Container</td>
<td>Container</td>
</tr>
</tbody>
</table>

**To create an equipment type:**

1. Navigate to the Equipment Types, page 7-1 window.
2. Select the yard from the **Yard** drop-down list and click Go.
3. Click the **Create** button, and enter your data for the equipment type.
Notes

- **Equipment Type:** Enter a name for the equipment type such as a Rail Container, 60 Foot Trailer, or similar entity.

- **Category:** Select the category that identifies the type of equipment such as trailer, power unit, or container.

- **Dimensions, Weight, Volume:** Enter the related physical dimensions, weight, and other relevant information for the equipment type.

4. Click **Apply** to save your entries.

**What’s Next**

The system assigns a unique internal serial number for each combination of equipment number (or asset ID) and SCAC code. The system uses the internal number (which is not visible to the user) to perform inventory transactions that represent the check-in, yard move(s), and check-out operations.

**Creating Drivers and Yard Personnel**

In Oracle Yard Management, you can add employees or persons such as drivers, jockeys, and other yard personnel who need to access or work in the yard. Typical users who may need yard access include:

- Drivers who drive the power unit with or without the trailer. You can add drivers (and their credentials) to the system during a yard check-in transaction or in advance.

- Hostlers/Switchers who perform the move transactions on the power units.

- Yard jockeys (usually contract laborers) who move the trailer around the yard using
a powering unit. Data communicated to jockeys should be on terminal mounted devices.

- People who access your yard may not be your employees (for example, carriers and their drivers who check material into the yard); however, adding information about people entering your yard provides better tracking, security, and record management options for your organization.

- For Oracle E-Business Suite Users: Drivers and other entities created in Oracle Yard Management are not mapped to employees defined in the Oracle Human Resources Management System (HRMS).

Prerequisites

- For assigning user access to mobile transactions, see Assigning Oracle Yard Management Responsibilities, page 2-18.

To create drivers:

1. Navigate to the Drivers, page 7-1 page.

2. Choose one of the following methods to create drivers:

   - Web ADI: Use the Oracle Web Applications Desktop Integrator (Web ADI) process to download a file (such as a spreadsheet or other supported format), complete your entries, then upload the data to the system. This process is most effective for bulk data uploads.

     1. Click the Create icon under the Drivers tab and select the document type to be downloaded. A file will be downloaded to your desktop. When prompted, choose to open the file and to enable macros. If no prompt appears, ensure your browser security settings allow files to be downloaded.

     2. Validation messages are returned to the spreadsheet, allowing you to
identify and correct invalid data.

- Create Driver UI: Alternatively, on the **Information** tab, click the **Create** button to enter driver information in the Create Driver window.

![Create Driver Window](image)

**Notes**

- **License Number**: Enter the driver's license number.

- **Allowed in Yard**: Select whether this driver is allowed or not allowed into the yard. When the driver arrives at the gate, the security guard or gate clerk can check the system to see if the driver is permitted to enter the yard.

**To update driver information**

You can update a driver's record to change selected information about a driver (some fields cannot be updated).

1. Navigate to the Drivers, page 7-1 page.

2. Do a search to find the driver.

3. Click the **Update** icon to update driver and related information including the carrier, Allowed in Yard designation, and address information.
4. Click Apply.

Defining Rules

You can define two types of yard rules:

1. To direct equipment entering the yard

2. To direct equipment present in the yard, except equipment present at the dock door

You can automate the locator selection for yard equipment using the WMS Rules Engine. Based on yard rules the system suggests a locator during check-in and for movement inside the yard.

To create rules:

1. Navigate to Yard Manager, Yard Setups, and then Rules.
   The Rules page is displayed.

2. Select a Yard and click Go.

3. Click Define.
   The Define Rules page is displayed.

4. Enter values in the following fields: Name, Description, and Weight. In the Applicable To field, select Yard Check-In or Equipment in yard.
   The Applicable To value determines where the rule is used. If you select Yard Check-In, the rule is used when equipment is checked into the yard and area or spot is not specified. If you select Equipment in yard, the rule uses the Yard Moves and Notifications concurrent request.

5. Click Apply to save this rule.
6. You can set the restrictions and sort criteria for the rule using the respective tabs. Use the Update Rules page to make changes to an existing rule.

Assigning Oracle Yard Management Responsibilities

Oracle Yard Management needs to accommodate the diverse needs of users such as:

- Warehouse managers/shift supervisors.

  Warehouse managers and yard supervisors need to oversee yard and warehouse operations typically using desktop applications in an office environment. Yard supervisors perform many duties such as managing the overall operations; tracking movements of trailers/trucks in the yard; monitoring alerts, messages, and logs; and following-up on any remedial actions. Yard supervisors may need to set/modify predefined settings and also override certain system-generated operations. They may need special access to some features so they can send messages/alerts to yard jockeys or manually queue tasks to the yard jockey.

  When material shortages occur in the warehouse, warehouse managers may need to search the entire yard to find that material; therefore, they need an overview of the yard inventory detailing the exact trailer/truck its location and the quantity of that contained material.

- Shipping and receiving managers.

- Yard supervisors.

- Jockeys/hostlers/switchers who move trailers. Yard jockeys tow trailers within the yard and typically receive their data on terminal-mounted devices so that they can operate their equipment hands-free.

- Security guards and gate clerks who check trailers into and out of the yard.

  Note: Jockeys and security guards are generally contract laborers.

To use the Oracle Yard Management features, each application user can be assigned at least one responsibility. A responsibility determines whether the user can access Oracle E-Business Suite or Oracle Mobile Applications; which application functions a user can use; which reports and concurrent programs the user can run; and which data those reports and concurrent programs can access. Oracle Yard Management provides the following responsibilities:

- Yard Manager: Provides access to Oracle Yard Management desktop function and features.

- Yard Mobile User: Provides access to the following mobile application transactions:
• Seal and unseal equipment.
• Move equipment.
• View and update equipment.

**Note:** Assigned users can perform mobile yard move transactions for their assigned and pending tasks but not tasks assigned to other users.

**Prerequisites**

For users who require access to mobile transactions, Oracle Yard Management provides a user-level securing attribute `YMS_TASK_ELIGIBLE` to control whether a user can perform move tasks in the yard (the values are Yes/No). These responsibilities are assigned typically by the system administrator in the Users window.

**Related Setups**

This section describes the following related setups for Oracle Yard Management.

• Accounting Periods
• Yard Lookups
• Costing and Cost Groups (defaulted automatically)
Warning: Although Oracle Yard Management uses Oracle Inventory transactions for check-in, check-out and yard moves, Oracle does not support using Inventory windows or open interfaces to manipulate yard management data. Yard transactions should be performed only from the desktop and mobile windows that are part of the Oracle Yard Management application.

Accounting Periods

Oracle Inventory uses accounting periods to group material and work in process transactions for accounting purposes. Equipment check-ins, check-outs, or moves within the yard are all inventory transactions (in the Yard organization) of the internal serial number assigned to that equipment. The accounting periods must be open to permit these transactions otherwise the transactions will fail. For more information on inventory accounting periods, see the Oracle Inventory User’s Guide.

Yard Lookups

Use the Manufacturing Lookups, page 7-1 window to maintain existing lookups and define additional lookups for your shared lookup types. Oracle Yard Management provides the following initial default lookups and their values:

Additional Information: The following access level settings for a lookup type determine whether you can change its lookup codes:

- System: No changes to the lookup codes are allowed.
- Extensible: New lookup codes can be added. However, you cannot modify seeded lookup codes.

<table>
<thead>
<tr>
<th>Access Level:</th>
<th>Lookup type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extensible</td>
<td>YMS_ACTION_CODE</td>
<td>Create, Query/Update</td>
</tr>
<tr>
<td></td>
<td>YMS_APPT_EXCEPTION</td>
<td>Appointment exception reason: 1) Incorrect Equipment at Dock Door 2) Equipment not in Yard 3) Equipment not at Dock Door 4) Equipment at a different Dock Door 5) No Trailer Activity 6) Appointment ended but Equipment still at Dock Door</td>
</tr>
<tr>
<td>Access Level: Extensible</td>
<td>Lookup type</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>N</td>
<td>YMS_APPT_FREQUENCY</td>
<td>Repeating frequency: 1) Don’t repeat 2) Every day and so on.</td>
</tr>
<tr>
<td>N</td>
<td>YMS_APPT_HOURS</td>
<td>1 AM, 2 AM, 3 AM…11 PM.</td>
</tr>
<tr>
<td>N</td>
<td>YMS_APPT_STATUS</td>
<td>Appointment status: Pending, Active, Exception, Completed.</td>
</tr>
<tr>
<td>N</td>
<td>YMS_APPT_TYPE</td>
<td>Inbound, Outbound, Other.</td>
</tr>
<tr>
<td>N</td>
<td>YMS_CONFIG_SEARCH</td>
<td>Configuring yard search condition: Area Name, Alias.</td>
</tr>
<tr>
<td>N</td>
<td>YMS_DOCUMENT_SOURCE</td>
<td>Indicates document source: E-Business Suite, Other.</td>
</tr>
<tr>
<td>N</td>
<td>YMS_DOCUMENT_STATUS</td>
<td>Document status includes: Pending, In Yard, Complete, Deleted, Archived, and so on.</td>
</tr>
<tr>
<td>Y</td>
<td>YMS_DOCUMENT_TYPE</td>
<td>Shipment document type:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• For inbound: ASN, Purchase Order, Intransit Shipment, RMA, or Other.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• For outbound: Trip, Delivery, OTM Plan, or Other.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note:</strong> The document type Other is available for both inbound and outbound shipments.</td>
</tr>
<tr>
<td>Y</td>
<td>YMS_EQP_CONDITION</td>
<td>Condition of the equipment: Good, Damaged, Leaking, Strong Odor. Others could include: Unacceptable foreign material (metal shavings, glass, powder, etc.), Infestation.</td>
</tr>
<tr>
<td>N</td>
<td>YMS_EQP_LOAD_STATUS</td>
<td>Load Initiated, Unload Initiated, Full, Empty.</td>
</tr>
<tr>
<td>Y</td>
<td>YMS_EQP_LOAD_TYPE</td>
<td>Perishable, Dry, Hazardous, etc.</td>
</tr>
</tbody>
</table>
## Access Level: Extensible

<table>
<thead>
<tr>
<th>Lookup type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y YMS_EQP_OWNER_TYPE</td>
<td>Equipment owner type: Carrier Owned, Leased, Private, Other.</td>
</tr>
<tr>
<td>N YMS_EQP_STATUS</td>
<td>Status of Equipment: Defined but not used, In yard, At Dock, Active, Hold, Ready for Pickup, Checked Out.</td>
</tr>
<tr>
<td>Y YMS_SEAL_STATUS</td>
<td>Sealed, Unsealed, Damaged.</td>
</tr>
<tr>
<td>N YMS_SEARCH_CONDITION</td>
<td>Search condition for Define Yard page: Service Organization, Yard Name, Yard Organization.</td>
</tr>
<tr>
<td>Y YMS_VISIT_PURPOSE</td>
<td>Purpose of visit: Live Load, Live Unload, Live Unload and Live Load, Other</td>
</tr>
</tbody>
</table>

## Costing and Cost Groups

Cost updates are based on the movement transactions of yard equipment. The cost value will be in the functional currency and will run as an average cost update to the equipment instance.

**Note:** Inbound and outbound shipments are supported.

Yards support only average costing using the following cost groups to track liabilities which are derived from the associated service organization. You can change these values based on the accounting definitions defined in general ledger (GL).

- Material
- Material Overhead
- Resource
- Outside Processing
- Overhead
Cost groups provide additional flexibility for cost accounting. A cost group will be created automatically during equipment check-in based on the organization account setups; the cost group name will be unique per equipment instance.

**Calculating Trailer Content Cost**

The total trailer cost is the cost of the contents only. The cost of only the trailer cannot be stored or calculated.

**Inbound Shipments-Trailer Content Cost**

- **ASNs/Purchase Orders**
  
Purchase order line pricing is used to calculate the cost of the entire trailer content.

- **Return Material Authorizations (RMA)**
  
The RMA line selling price is used to calculate the cost of the entire trailer content.

- **Internal Shipments/Internal Requisitions**
  
Shipment cost calculated at the time of shipping is used as the cost of the entire trailer content.

- **For FOB = Shipment, the receiving organization already owns the product when the product is shipped.**

  **Caution:** A transient state exists where the liability may unintentionally be doubled because it will be costed in both Yard Management and the receiving inventory organization.

**Outbound Shipments-Trailer Content Cost**

- **Internal Sales Orders/Internal Requisitions**

  Internal sales order line price is used to calculate the cost of the entire content of the trailer content.

  **Note:** Order line selling price is used if the document type is Delivery or Trip.

- **RTV (Return To Vendor) Shipments**

  Trailer cost updates are considered average cost updates and are initiated by trailer moves. Oracle Yard Management initiates the costing API at the organization level which returns the cost in the functional currency. A cost group level API is run only if the first call returns a zero value.

  **Important:** The following hook API is provided to retrieve the item cost
for a given inventory item in an equipment instance:

- Package: YMS_CUSTOM_PUB Procedure: GET_ITEM_COST.
- Files: YMSCUSPS.pls and YMCSUspB.pls.

You may use this API to write custom logic to derive the item unit cost.

Closing Period Considerations

Period close issues are managed in the following manner:

For both inbound and outbound operations, the transaction date should occur in the present or future (not past).

- Outbound shipments
  In-transit shipments in the inventory organization should use the current date for processing the transaction rather than the date when the pick stop was closed.

  **Note:** No dependency exists between in-transit shipments and yard check-out; however, check-outs cannot occur until the shipment is interfaced.

- Inbound shipments
  Use the current date for processing receipts when material is received in the inventory organization.

  **Important:** There is no dependency between the trailer unload in yard and receipt in the inventory organization.

Yard Valuation Report

The following reports provide the valuation of the yard inventory (in asset subinventories) for any time period:

- Inventory Value Report - by Cost Group
- Inventory Value Report - by Subinventory

For more information on cost group reports, see the *Oracle Cost Management User’s Guide* and Yard Requests and Reports, page 5-1.

Options for General Ledger (GL) Accounting

If you require general ledger (GL) accounting, you need to enable the Transfer To GL parameter and configure the system to prevent double accounting issues; for example, for in-transit shipments with FOB=Shipment, the receiving organization already owns the product and is accounted for in the in-transit account when the shipping organization ships it.
Warning: A double accounting issue may arise when the value of trailer contents (either at the shipping or receiving yard) and the value of the shipment itself appear on the accounting books twice.

Options for No Yard Costing
The following setup is recommended for customers who do not want costing for the yard organization:

- Create yard areas as non-asset areas.
- Enter the following values for material transactions:
  - Transaction Cost = NULL
  - Costed check box = NULL
  - Cost Group ID = NULL

Other Product Integrations with Oracle Yard Management
Oracle Yard Management interacts with many Oracle products in the Oracle E-Business Suite; although licensing and implementing the following products is optional, they help to optimize your business processes and integration with Oracle Yard Management:

- Oracle Order Management
- Oracle Purchasing
- Oracle Shipping

Oracle Order Management Integration
If Oracle Yard Management is licensed and installed, then the order lines in Oracle Order Management will be enhanced to support the capture of trailer information for return material authorizations (RMAs).

Note: Oracle Order Management uses the return material authorization as the full form of RMA, not return merchandise authorization.

In addition, the following business rules apply to RMAs and order management:
- RMAs are used for genuine returns and incorrectly loaded trailers.
- RMAs created using order management store the trailer number at the order line level.
- For RMAs, the following fields appear at a line level and can be entered and updated:
  - Equipment Number
  - SCAC Code: This is a read-only field derived from the value on the Equipment Number field.
  - Container Number: Enter the value of the container number.

- Use the sales order pad and order APIs to enter and update the preceding fields at an order line level.

- When a customer returns the goods, the order management operator enters the container number (supplied by the customer) when booking the RMA. At the time of yard check-in, this container number may or may not be correct, but appears on the order line for informational purposes only.

- After the RMA is received, the equipment ID on the sales order line cannot be updated.

### Oracle Purchasing

Receipts against inbound equipment typically occur when the equipment is unloaded. If Oracle Yard Management is licensed and installed, then the following changes are made to Oracle Purchasing to support Oracle Yard Management:

- Receipts window (desktop UI) for shipments
  - Trailer information appears only if it exists on the inbound document.
  - Equipment number is stored as part of the shipment line (for ASN, PO, ISO Shipments, and RMA).

- Receipt page (for mobile or MSCA receipts): Supports receipt by Dock Door, SCAC Code, and Equipment Number.

### Oracle Shipping Integration

If Oracle Yard Management is licensed and installed, then the following changes are made to the Shipping Transactions window to support both WMS and NON-WMS inventory organizations.

**Note:** The equipment number is not stored on purchase lines or on shipment lines created by the purchase order receipt. The equipment number is stored for the following document types: ASN, Intransit
Shipment, and RMA.

- The trailer number is stored at the delivery detail level.
- Multiple deliveries in one trailer and multiple non-OTM trips in one trailer is supported.
- The time of actual ship confirm is stamped on the shipment records and is honored as the shipment date and time.
- For incorrect shipments, the users can create an RMA to receive the shipments back into inventory.

When performing a query (Query Manager window for the Shipping Transactions window), select from the following yard criteria available at the line and LPN levels:
- Dock Door
- SCAC Code
- Equipment Number
- Loaded To Dock (Yes/No)
- In Yard (check box) Yes/No

**Note:** Linked to the status and available only if the organization has an associated yard.

If Oracle Yard Management is licensed and installed, then the following Shipping Transactions windows display the listed yard fields:
- Dock Door
- SCAC Code
- Equipment number
- Equipment Status

If Oracle Yard Management is licensed and installed, then the following mobile ship confirmation pages are enhanced to capture yard information such as the equipment number (trailer number), dock door, and seal information. Ship confirmation can be initiated by either the trailer number or the dock door.

**Ship Confirm pages**
- Dock Ship mobile page
• LPN Ship mobile page
• Direct Ship mobile page
• Quick Ship mobile page
• Delivery Ship Confirm (MSCA for Inventory Organizations)

**Oracle Distributed Warehouse Management Integration**

To use Oracle Yard Management with distributed warehouse management (DWMS), Oracle recommends that you should:

• Install/upgrade the DWMS instance using release 12.2.4 or later.

• Set up and configure Oracle Yard Management on the DWMS instance. Setting up Oracle Yard Management on DWMS is similar to setting up with a EBS (ERP) 12.2.4 instance. Each yard is identified as a separate inventory organization that can be linked to one or more existing warehouses in the DWMS instance.

Yard organizations on DWMS do not need to be mirrored on the ERP host (unlike warehouses) since inventory contained within equipment (such as a trailer or container) in the yard is not tracked as on-hand balances in the yard organization.

Oracle Yard Management allows the equipment cost to be calculated based on its contents. Costing setups determine the item cost, and then multiplies the item unit cost with the quantity of each item in the equipment to derive the total cost of inventory in the equipment.

When Oracle Yard Management is installed on DWMS, since there is no costing on the DWMS instance and no item costs set up, customers can instead implement the stub API `YMS_CUSTOM_PUB.get_item_cost` to derive item cost for each item in the equipment. This allows the trailer cost to be tracked within Oracle Yard Management. Since yard organizations are not mirrored on the host instance, equipment costs cannot be reflected in the host system financials. For more information, see My Oracle Support `<Doc ID 821294.1>`, Distributed Warehouse Management System.
Managing Yard Operations

This chapter covers the following topics:

- Performing Yard Check-Ins
- Managing Equipment Details
- Performing Yard Check-Outs
- Viewing and Scheduling Dock Appointments
- Using the Yard Workbench to Perform Yard Tasks
- Using Graphical Workbench
- Performing Yard Moves
- Viewing Material with the Material Workbench (Inbound and Outbound Operations)

Performing Yard Check-Ins

A yard check-in refers to the activity of registering a trailer or container as it enters the yard of a warehouse. Typically, a security guard or personnel at the gate performs this action by registering the trailer, powering unit, or container when it enters the yard.

Check-ins can occur for both inbound and outbound shipments with or without appointments: a loaded trailer can check in to unload the material, or an empty trailer may check in to pick up material. During the yard check-in process, you can capture additional details such as driver information, reference documents, and related information.

After a trailer checks in, it needs to be moved to a parking place or to a dock door for unloading or loading material. A trailer can be moved within the yard by either creating a yard move order or through a user-initiated trailer transfer. Yard move order will be a transfer transaction for the equipment instance (serial number). Yard manager can query and manage the yard tasks using the Yard Workbench (Move Details tab).
Additional Considerations

- The system automatically generates a cost group per unique serial number using the account definitions at the yard organization level. This cost group tracks the liability of the yard at a given point of time.

- For tandem units: To check in tandem units (such as a power unit and two trailers), you need to perform three check-ins: one for the power unit, and two for the trailers. These three transactions can be entered (on separate lines) on the Check-In window, and submitted as a set.

  **Note:** Checking in power units is optional. Some yards may choose not to track power units that are the yard for short periods of time (to pick up or drop off trailers).

- If the seal code is not intact, you can raise an exception to alert the yard manager. Optionally, you can also unseal and perform an inspection of the material in the trailer.

- If no appointment exists or the vehicle arrives earlier than scheduled, you can still check-in to a holding yard area/location and put a hold status on the trailer. If the trailer is on hold, you can re-query the trailer ID to change the status and move it to an active yard area/location.

- If one or more equipments is checked into the same dock door, system will check-in the first equipment to the dock door and the remaining will go the regular yard storage based on picking order of the parking spots.

  **Caution:** Although Oracle Yard Management uses Oracle Inventory transactions for check-in, check-out and yard moves, Oracle does not support using Inventory windows or open interfaces to manipulate yard management data. Yard transactions should be performed only from the desktop and mobile windows that are part of the Oracle Yard Management application.

To perform yard check-ins:

A check-in transaction can be completed for any equipment type. For example, a check-in can be performed for a loaded trailer attached to an inbound shipment, or an empty trailer required for an outbound shipment.

1. Navigate to the Check-In, page 7-1 window.

2. Select the yard from the **Yard** drop-down list, and click **Go**.

3. Complete your yard check-in entries as required.
Notes

- **Purpose of Visit**: Select the reason for the yard visit:
  
  Live Load: For load operations such as an empty trailer entering the yard to pick up materials.
  
  Live Unload: For unloading operations such as a full trailer entering the yard to deliver materials.
  
  Live Unload and Live Load: For live load/unload operations such as a full trailer arriving to be unloaded before being loaded again.
  
  Other: For other miscellaneous reasons.

- **Appointment**: If applicable, select the scheduled appointment date for the check-in.

- **Appointment Time**: Shows the start time of the appointment selected in the previous field. This is a read-only field and entering an appointment time in this field has no effect.

- **Driver**: Select the driver who is checking-in the equipment. If the driver name does not exist, then click the **Create Driver** icon to add information about the driver.

- **SCAC Code**: Enter the standard carrier alpha code (SCAC) that identifies the carrier. Although this field is optional, it is recommended that you enter this value to distinguish between equipment from different carriers that may randomly have the same equipment number.

- **Equipment Number**: Enter the serial number of the equipment instance to be checked (usually, the asset ID or some visible identifying number assigned by the carrier or owner of the equipment). Enter this information on the desktop UI or mobile application.
Note: The number you enter is different from the internal serial number that Oracle uses to track each unique piece of equipment. The combination of SCAC+Equipment Number is considered unique. After a combination of the SCAC+Equipment Number is checked into any yard, it cannot be checked in again. The first time a unique combination of SCAC+Equipment number checks into a yard, Oracle Yard Management assigns a unique serial number (not displayed to the user). After that equipment checks out of the yard, if it checks in again at a later date (into the same yard, or a different yard), then the previously generated internal serial number is reused.

- **Equipment Type**: Select the type of equipment to be checked in such as a trailer or container.

- **Document Type**: Select the document type that accompanies the check-in transaction based on the shipment type: for example, a related document type could be an ASN, Purchase Order, Intransit Shipment, or RMA.

- **Document Number**: Enter the number that corresponds to the selected document.

- **Area/Spot**: Optionally, select the area where the truck/container is be unloaded or loaded for shipment and specific spot within the yard area.

- **Add Attachment**: Click this button to attach documents at the time of check-in.

4. Click **Check-in** to complete the check-in process or click the **Details** icon to add additional information about the equipment and load.

**What's Next**

Add equipment details about the equipment and load by clicking the **Details** icon. For more information, see Entering Equipment Details, page 3-5.

When a trailer checks in, it needs to be moved to a parking place or to a dock door for unloading or loading of material. A trailer can be moved within the yard by either creating a Yard Move Order or through a user initiated trailer transfer. Yard move order will be a transfer transaction for the equipment instance (serial number). Existing inventory transaction type of "Move Order Transfer" will be used for yard move transactions. Yard manager can query and manage the yard tasks using Yard Workbench (Move Details tab).
Managing Equipment Details

When performing a check-in, you can add additional information about the equipment and load such as the equipment contents, seals, and other equipment details. For existing equipment check-ins, you can manage equipment details using the Yard Workbench. For more information, see To manage equipment for existing check-ins, page 3-6.

To enter equipment details for new check-ins:

On initial check-in, you can enter details information about the equipment contents, equipment seals, and equipment details. For existing equipment, you can use the Yard Workbench to manage the following equipment information:

Equipment Contents

- **Document Type and Number**: Select the document type and the document number for the check-in transaction. A related inbound document type could be based on an ASN, purchase order, trip, or delivery.

Equipment Seals

- **Seal Code**: Enter the seal code listed on the seal. A supplier/carrier typically applies seals to secure their loaded trailers, containers, or similar equipment against tampering or theft.

  - **(Seal) Status**: After you enter the seal code, select the status:
    - Sealed
    - Unsealed
    - Damaged: Select this option if you discover that the seal is damaged.

Equipment Details

- **Load Type**: Identifies the type of material being loaded: Perishable, Dry, and Hazardous.

- **Load Status**: Select the status of the load: Load Initiated, Unloaded Initiated, Full, or Empty.

- **Condition**: Select the condition of the load: Good, Damaged, Leaking, Strong Odor.

- **Owner Type**: Enter the owner of the equipment: Carrier Owned, Leased, Private, or Other.

- **Detention Limit/Detention Limit UOM**: Identifies the detention limit UOM by unit of measure, UOM code, or class.
**Note:** Detention is defined as "The carrier charges and fees applied when rail freight cars and ships are retained beyond a specified loading or unloading time." The detention limit for Oracle Yard Management is "the time allowed for the container before detention charge starts accruing."

**To manage equipment for existing check-ins:**
For existing check-ins, use the Yard Workbench to query the equipment to view or make changes to the equipment details.

1. Navigate to the Yard Workbench window, and do a search to find the desired equipment.

2. Click the **Manage Equipment** icon to display information about the equipment contents, seals, and details.

3. On the Manage Equipment window, review the equipment details, and if required, make any changes.
Notes

- **Add Attachment**: Click this button to add any documents like carrier manifest, packing slip, bill of lading (BOL), master BOL and so on.

- **Print Label**: Click to print equipment labels to provide information like equipment status or contents that can be used for additional reporting. For more information, see Labels for Yards, page 5-4.

Performing Yard Check-Outs

A yard check-out refers to discharging a trailer or container that exits the yard of a warehouse. During a yard check-out transaction, an issue transaction is performed for the internal *serial number*, not the (externally visible) asset ID of the trailer or powering unit exiting the yard. The equipment instance can be loaded or empty; however, the status of the delivery lines associated with a loaded trailer must be *In Yard* or *Interfaced* status before they can be checked out.

- Perform yard check-outs from the desktop UI.

- Sealing of outbound trailers is optional; check-outs can be performed even if a seal code is not entered in the system.
To perform a yard check-out:

1. Navigate to the Check-Out, page 7-1 page.

2. Complete your yard check-out entries as required.

   Notes
   - **Shipment Number**: A (non-validated) numeric or alphanumeric identifier used for grouping one or more trailers that may have checked in together to pick up (or drop off) a shipment.
     
     **Important**: When you select a shipment number, the remaining fields in the Check-Out window are automatically populated with information associated that shipment number (such as the SCAC, Equipment Number, Document Type and Number, Area and so on).

   - **Driver**: Select the driver who is checking-out the equipment. If the driver name does not exist, then click the **Create Driver** icon to add information about the driver.

   - **SCAC**: Enter the standard carrier alpha code (SCAC) that identifies the carrier.

   - **Equipment Number**: Enter the equipment number of the equipment to be checked out such as the trailer number.

   - **Equipment Type**: Select the type of equipment to be checked out such as a trailer or container.

   - **Document Type and Number**: Select the document type and number that
accompanies the check-out transaction. For example, a related outbound document type could be based on a trip or delivery.

- **Area/Spot**: Optionally, select the area and spot in the yard from where the truck/container has checked out.

- **Attachment Add**: Click the Add button to attach documents at the time of check-out.

3. Click the Details icon to view the following details about the equipment being checked out (this information is view-only):

- Equipment contents (such as related documents).

- Equipment seals.

- Equipment details (such as load status, detention limit UOM/detention limit, and other information).

**Viewing and Scheduling Dock Appointments**

An appointment is a single time slot with start and end times that can be scheduled for a shipment or receipt at the dock doors. Users can collaborate with carriers and shippers using the dock scheduling workbench, Dock Scheduling in Oracle Inventory Management/Oracle Warehouse Management, or using Oracle Transportation Management.

**Prerequisites**

☐ Calendars must be set up for your organization.

**To view/schedule a dock appointment:**

1. Navigate to the Schedule Dock Appointments, page 7-1 window.
2. In the Dock column, select the dock where the appointment is required. A Truck icon next to dock shows that the dock is not empty while a green circle icon indicates that the dock is empty.

   **Important:** The icons may appear even if there is no dock appointment; for example, the trailer may have been moved to the dock door for unscheduled loading or unloading.

3. Click the **Create Task** icon to display the Create Appointment dialog box where you can enter the appointment details.
Notes

- **Dock Name**: The dock selected in the previous step defaults. If desired, select a different dock from the Dock Name drop-down list.

- **Repeating Frequency**: Select the start and end times then select the frequency of the repeating appointment such as every day, every weekday, or every week.

- **Appointment Type**: Select whether the appointment is for inbound, outbound, or other.

4. Click **OK**.

The appointment appears as a colored bar in the Dock Appointments window that displays the following information: time, duration, and the status of the appointment. The color indicates the status of the appointment:
### Appointment Status

<table>
<thead>
<tr>
<th>Status (Color)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exception (Red)</td>
<td>One of the following exceptions has occurred:</td>
</tr>
<tr>
<td></td>
<td>• Incorrect Equipment at Dock Door.</td>
</tr>
<tr>
<td></td>
<td>• Equipment not in Yard.</td>
</tr>
<tr>
<td></td>
<td>• Equipment not at Dock Door.</td>
</tr>
<tr>
<td></td>
<td>• Equipment at a Different Dock Door.</td>
</tr>
<tr>
<td></td>
<td>• No Trailer Activity.</td>
</tr>
<tr>
<td></td>
<td>• Appointment Ended but Equipment still at Dock Door.</td>
</tr>
<tr>
<td>Active (Yellow)</td>
<td>The yard check-in transaction is complete and the appointment is assigned to the trailer checking in.</td>
</tr>
<tr>
<td>Completed (Blue)</td>
<td>The trailer is either loaded or unloaded and is moved from the dock door.</td>
</tr>
<tr>
<td>Pending (Green)</td>
<td>The appointment is first created.</td>
</tr>
</tbody>
</table>

**To edit an appointment:**
In the Schedule Dock Appointments window, double-click an existing appointment to edit it. In some cases (such as appointments in **Completed** status), you can only view but not change the appointment.

**To update the dock appointment status for a yard:**
Run the concurrent program **Update Dock Appointment Status** (either manually or scheduled) to update the appointment status for a yard. Alternatively, on the Schedule Appointments tab of the Yard Workbench, click the **Update Appointment Status** icon to run this concurrent program.
Using the Yard Workbench to Perform Yard Tasks

The Yard Workbench provides a centralized UI for viewing and managing the yard areas, parking spots, and equipment instances (such as a container, power unit, or trailer) including their status and contents in the yard. For example, you could view the equipment in a particular yard, or move a trailer from one area of the yard to another.

**Note:** Oracle Inventory users can also use the Material Workbench window to view material sitting in the yard by selecting the Inbound option.

Use the Yard Workbench to perform the following tasks:

- View move/picking slips for manual moves.
- View equipment details and content including current and historical information for equipment.
- View equipment transactions.
- Generate move orders and assign users to pending moves.
- View or cancel pending moves.
- View check-in and check-out dates and times, appointment dates and times, and detention information.

**To view equipment details (Equipment Details tab):**

1. Navigate to the Yard Workbench, page 7-1.

2. Select the yard from the **Yard** drop-down list, and click **Go**.
In the Search Equipment region, enter your search criteria such as the area, spot, carrier, or equipment type.

**Important:** To view all equipment for the selected yard, leave the fields blank in the Search Equipment region and click Go.

**Search Criteria**

- **Pending Moves Only** check box: Restrict your search to only pending moves.

- **Include Archive** check box: View the following historical data: completed moves, equipment that has been checked out, details of that equipment (seal codes, contents), and documents related to the contents of the equipment.

3. Click Go to display the search results. The Equipment Details tab shows equipment details such as the location in the yard, the related appointment, carrier, driver, and purpose of the check-in or check-out.
4. Enter the following equipment details.

**Notes (Equipment Details tab)**

- **SCAC**: Displays the standard carrier alpha code (SCAC) that identifies the carrier.

- **Equipment**: Displays the equipment number of the equipment instance that is checked in or out.

- **Details**: Click an icon in the Details column to perform the corresponding action:
  
  - **Equipment Contents**: Displays details about the equipment contents such as the equipment status, document type, and item details. Select the **Current Contents** check box to view the existing contents of the equipment instance.

  - **Transaction Details**: Displays transaction details such as move orders or yard check-ins for the equipment, and the user who performed the transaction.

  - **Manage Equipment**: Click this icon to manage equipment. For more information, see Managing Equipment Details, page 3-6.
• **Yard Area/Spot:** Displays the area where the truck/container is be unloaded or loaded for shipment and the specific spot within the yard area.

• **Type:** Displays the type of equipment such as a trailer or container that is checked in or out.

• **Appointment:** If applicable, displays the scheduled appointment for the unload/load operation. To view additional details, click the appointment link.

• **Driver:** Displays the driver responsible for checking-in/checking-out the equipment.

• **Purpose:** Displays the reason for the yard visit:
  - **Live Load:** For load operations such as an empty trailer entering the yard to pick up materials.
  - **Live Unload:** For unloading operations such as a full trailer entering the yard to deliver materials.
  - **Live Unload and Live Load:** For live load/unload operations such as a full trailer arriving to be unloaded before being loaded again.
  - **Other:** For other miscellaneous reasons.

• **Detention Limit Value/UOM:** Displays any detention limits and the corresponding UOM for the equipment instance.

**To view/move equipment (Move Details tab):**
1. Click the Move Details tab to view details about equipment and current move requests.
2. In the Actions column, click the **Move Equipment** icon to create a move request for the equipment instance.

   **Additional Information:** If the Number field is blank for the equipment, then you can create a new move request.

3. Enter the move criteria.

   - **To Area:** Enter the destination area where the equipment is to be moved
• To Spot: Enter the destination spot within the area where the equipment is to be moved.

• User: Enter the name of the user assigned to perform the move equipment request.

4. After you have completed your entries, click the Move button to create a move equipment request. The equipment is moved only when the equipment move request transfer is transacted on the mobile application.

To cancel, reassign, or print pick slip for a move equipment request:
You can reassign a pending move equipment request, cancel a move equipment request, or print a pick slip from the Yard Workbench.

   Note: Available for equipment already assigned a move request number in the Number column.

1. Click the Move Equipment icon for the equipment.

2. Click the button that corresponds to the desired action:
   • Assign: Reassign the move equipment transfer to a different user (search for the new user and then click Assign).
   • Print Pick Slip: Print a pick slip for the move equipment transfer.
   • Cancel Move: Cancel the move equipment transfer assigned to the current user.
Using Graphical Workbench

The graphical workbench is a pictorial representation of the yard workbench. It lets you view a yard and its contents by drawing organizations, parking areas, and parking spots on a map. You can associate or disassociate warehouses, parking areas, and parking spots with this drawing. You can also copy a drawing to save time.

**Important:** You must define the yard organizations, parking areas, and parking spots in the setup UI to use them in the graphical workbench.

To use the graphical workbench:
1. Navigate to Yard Manager, Yard Operations, and then Graphical Workbench.
   The Graphical Yard Workbench page is displayed.
2. Select a Yard and click **Go**.
3. Click **Unfreeze**.
4. Click **Draw** and select the option you want to draw.
5. Use the cursor to mark the organization, area, or spot on the map.
6. Select what you have drawn and associate or disassociate it with a warehouse, area, or spot by clicking the Action column in the right panel of the page.
7. Select Equipment or Spot, click **Details**, select Equipment or Appointment to view the equipment or appointment details.
8. Click the View button and select one of the following: Equipment Load Status, Equipment Load Type, Equipment Condition, Equipment Detention, and Equipment Late for Appointments.
9. Click **Apply** to save the information you have selected.

Performing Yard Moves

When a trailer checks in, it needs to be moved to a parking place or to a dock door for unloading or loading material. A trailer can be moved within the yard by either creating a yard move request on the Yard Workbench or from a user-initiated trailer transfer. A yard jockey that is logged into the mobile device can transact current and pending tasks but not the tasks assigned to other users.
To perform an equipment move:

1. Navigate to the Equipment Move, page 7-1 mobile page.

   **Additional Information:** You can use the Yard Workbench to initiate moves. For more information, see Using the Yard Workbench, page 3-13. You can also use the Query/Update Equipment mobile page to manually update the location of the equipment.

2. Enter the move criteria.
   - **To Area:** Enter the destination area where the equipment is to be moved.
   - **To Dock/To Spot:** Enter the destination dock and spot location where the equipment is to be moved.

3. Optionally, click **Exception** to display the Audit Page where you can select an exception for the move.

   **Note:** The list of yard exceptions can be viewed using the lookup.
4. Click **Done** when you have completed your entries.

**Viewing Material with the Material Workbench (Inbound and Outbound Operations)**

The Material Workbench enables you to view material in receiving, on-hand quantities, intrasit material, and if Oracle Yard Management is licensed and installed, material and equipment in the yard.

**To view material using the Material Workbench (Oracle Inventory):**

1. Navigate to the Query Material window.

2. Enter the search criteria.

   **Note:** You can clear the search organization to view item quantity across organizations (you must enter either an organization or an item). You can view only material in organizations to which you have access.

3. Select **Inbound** as the search option on the Query Material window, enter your search criteria, then click **Find**.

   **Note:** Yard related information is available only to organizations with an associated yard organization.

The Material Workbench displays the search results including the yard-specific elements like equipment number and SCAC code.
Performing Yard Transactions Using Mobile Devices (MSCA Transactions)

This chapter covers the following topics:

- Overview of Yard Transactions Using Mobile Devices
- Sealing and Unsealing Equipment (Mobile Seal UI)
- Viewing/Updating Equipment
- Performing Yard Moves

Overview of Yard Transactions Using Mobile Devices

Users of Oracle Yard Management with mobile transaction access can use the mobile devices to perform many yard management tasks.

- Sealing and unsealing equipment.
- Viewing/updating equipment.
- Performing yard moves.

Other mobile pages are enhanced with yard management fields to enable integrations with receiving and shipping. There is no direct integration to Oracle Order Management. RMA receipt is performed from the Receiving mobile pages.

*Note:* The Yard Mobile User responsibility is only required to perform the yard management tasks listed earlier (sealing/unsealing, yard moves and view/update equipment). It is not required for the receiving and shipping mobile pages.
Mobile Personalization

You can personalize the mobile application pages in Oracle Yard Management (without making code changes) by hiding fields and providing default field values. This process improves productivity by reducing the amount of information that users must enter on the mobile pages. (You can also set additional fields if they are required for your business.) You can personalize the following mobile pages:

- View/Update Equipment
- Equipment Move
- Seal Equipment
- Unseal Equipment

For more information on personalization, see Oracle Mobile Supply Chain Applications Implementation Guide.

Authorizing Mobile Users to Move Equipment

A user-level securing attribute YMS_TASK_ELIGIBLE controls whether a user can perform move tasks in the yard. For more information, see Assigning Oracle Yard Management Responsibilities, page 2-18.

Related Topics

Other Product Integrations with Oracle Yard Management, page 2-24

Sealing and Unsealing Equipment (Mobile Seal UI)

When sending or storing material, a supplier/carrier typically applies seals to secure their loaded trailers, containers, or similar equipment to prevent tampering or theft. When a sealed trailer arrives at your yard, it needs to be unsealed before the material is received in the warehouse. Optionally, if upon inspection, the material contents are not in acceptable condition, then during check-in, an alert can be sent to the yard manager.

Similarly, you should seal a loaded trailer before it is checked out of the yard. The seal should be physically intact during check out as well; if the physical inspection identifies that the seal is broken, the unseal and reseal process has to be performed before the checkout can proceed. For your sealing and unsealing operations, Oracle Yard Management provides the Seal Equipment and Unseal Equipment mobile pages. On the desktop UIs, use the Manage Equipment window to add and remove seals and change seal status.

Note: The use of seal codes is determined by your company and
industry’s requirements and procedures.

**To seal equipment:**

1. Navigate to the Seal Equipment, page 7-1 mobile page.

   ![Oracle Mobile](image)

   **Seal Equipment (W1)**
   
   | Dock Door | RD1.2.1 |
   | SCAC Code | DHL     |
   | Equipment Number | TRAILDHL1298 |
   | Seal Code | DHL0113 |
   | Seal Status | Sealed   |

   2. Complete your entries to seal the equipment:

   **Notes**
   
   • **Parking Spot**: Enter the parking spot where the equipment is located.
   
   • **SCAC Code**: Enter the standard carrier alpha code (SCAC) that identifies the carrier.
   
   • **Seal Code**: Enter the seal code listed on the seal.

**To unseal equipment:**

When a trailer arrives in the yard, it usually arrives sealed by the supplier/carrier. A trailer should be unsealed before the material is received in the warehouse.
1. Navigate to the Unseal Equipment, page 7-1 mobile page

![Unseal Equipment Interface](image)

2. Complete your entries to unseal the equipment:

   **Notes**
   - **Parking Spot**: Enter the parking spot where the equipment is located.
   - **SCAC Code**: Enter the standard carrier alpha code (SCAC) that identifies the carrier.
   - **Seal Code**: Enter the seal code listed on the seal.
   - **Current Status**: Displays the current status of the seal such as Sealed.
   - **New Status**: Select the new status. For example, after unsealing the trailer, select a status of Unsealed.

3. Optionally, click the **Exception** button to raise an exception. For example, if you notice that the seal is damaged, raise an exception and select a reason for the exception.

### Viewing/Updating Equipment

Yard users can perform searches to view equipment in a yard and then update the equipment status.
To view /update equipment:
1. Navigate to the View/Update Equipment, page 7-1 page.

2. Enter your search criteria such as SCAC Code, Equipment Number, Area, or Dock/Spot to find the desired equipment, then click **Query**.

   For equipment content queries, the View/Update Equipment page displays the following search results:
   - Doc Type
   - Doc Num
   - Currency Value and Code (such as USD for US dollars)

3. Enter the information to be updated. For example, enter a new area where the equipment should be re-located in the **To Area** field.

   **Note:** This feature allows manual moves of equipment in the yard.

4. Scroll to the bottom of the View/Update Equipment page to click the desired action.
Performing Yard Moves

After a trailer checks in and is emptied (or loaded), it may need to be moved into the yard area until the tractors are available for the onward journey to the customer or carrier location. From the Yard Workbench window, a yard manager can create a yard move order to move an equipment instance (identified by its equipment number) from one yard location to another, and cancel or assign users to the yard move.

The yard move order consists of a move (transfer) transaction of the internal serial number of the equipment instance.

To perform yard moves:
1. Navigate to the Equipment Move, page 7-1 page.
2. Enter the equipment to be moved and the destination location.

   Notes
   • To Area: Select the destination area for the equipment.
   • To Dock/To Spot: Select the destination dock or spot within the selected area.

3. Click Exception to enter a valid exception to the normal transaction, or Done to complete your transaction.

   Restrictions

Users performing mobile yard move transactions cannot transact tasks that are assigned to other users.
Yard Requests (Reports) and Labels

This chapter covers the following topics:

- Yard Requests and Reports
- Labels for Yards

Yard Requests and Reports

Oracle Yard Management provides you with the following documents, reports, and requests for your different business needs:

Label Requests

Every request for label printing creates a history record. You can analyze records of the label requests that have been generated. The history contains the XML data that was generated as part of the label request as well as other information regarding that label request. You can query the history of requests based on any of the relevant attributes of the request. You can also resubmit the label request. You can query, view, and resubmit label requests using the Label Requests History window.

Report Submission

On the Find Label Requests window, enter the search criteria to find the desired label requests. Select from the following search criteria to reduce your search results: request information (such as user, printer, and request status) and/or label information (such as organization, item, and subinventory). Click Find to view your search results.

Shipping Documents

Use the Shipping Reports and Documents, page 7-1 window to find shipping documents that are generated during outbound activities such as loading a trailer or ship confirmation.

Report Submission

On the Shipping Reports and Documents window, select from the following search
criteria to reduce your search results: request information (such as user, printer, and request status) and/or label information (such as organization, item, and subinventory).

Yard Move Document

Use the yard move request YMS Equipment Move Slip (XML) to generate a manual yard move. Complete the desired parameters and click OK to submit your request.

**Note:** This report is automatically submitted when a move is initiated from the Yard Workbench.

Report Submission

On the Submit Request window, enter YMS Equipment Move Slip (XML) in the Name field, enter the desired parameters, then click Submit to submit the request.

**Notes:**
- **Yard:** Select the yard where the move will occur.
- **Source Yard Area/Parking Spot:** Select the originating yard area and parking lot where the equipment is currently located.
- **Destination Yard Area/Parking Spot:** Select the destination where the equipment is to be moved.
- **Assigned user:** Select the user who is assigned the move order.

Yard Moves and Notifications

Use the Yard Moves and Notifications request to automatically move equipment in the yard and generate alerts as required. For example, you can provide the required parameters and use this concurrent request:

- To move equipment to the dock door from a waiting area just before the appointment start time
- To move equipment to a cleaning area when the equipment status is updated to clean

Report Submission

On the Submit Request window, enter Yard Moves and Notifications in the Name field, enter the required parameters, and then click Submit to submit the request. Or navigate to the Yard Manager responsibility, Requests, Other, Requests, Concurrent, click Submit a New Request, select Yard Moves and Notifications in the Name LOV, enter the required parameters, and then click Submit to submit the request.
Notes:
- Yard Organization Code
- Yard Area Name
- Shipping Carrier
- Equipment Load Status
- Equipment Condition
- Equipment Load Type
- Purpose of Visit
- Equipment Number
- Create Yard Moves: The default value is Yes. This value executes yard rules for all equipment selected based on the input criteria and creates yard moves automatically.
- Detention Limit Threshold
- Detention Limit Threshold (UOM)

If the Detention Limit Threshold and Detention Limit Threshold (UOM) parameters values are entered, the request generates a workflow business event for equipment that is approaching the detention limit.

Yard Valuation Report
The following reports provide valuation by cost group or by asset subinventory for the selected date range:
- Inventory Value Report - by Cost Group
- Inventory Value Report - by Subinventory

Note: These reports are only applicable if the yard is enabled for costing.

For more information on cost group reports, see the Oracle Cost Management User’s Guide.

Report Submission
On the Request value reports window, select the report to be run (for either cost group or subinventory), enter the desired parameters, then click Submit to submit the request.
Update Dock Appointment Status

Schedule this concurrent program to run periodically (for example, every 5 minutes) to update the dock appointment status. This is required to detect appointment exceptions which are then displayed on the Dock Scheduling window.

Labels for Yards

Oracle Yard Management provides a default label type called Yard Equipment to support multi-record formats for seals and contents (similar to the LPN Contents or Shipping Content labels). This label includes fields such as Appointment End Time, Checkin Area, Checkin Time, Equipment Status, Load status, Shipment Number, and many other equipment-related fields. Assign this label type to business flows such as check-in or check-out flows using the Assign Label Types to Business Flows window.
This chapter covers the following topics:

- Using Alerts and Notifications

### Using Alerts and Notifications

Oracle Yard Management supports the Oracle Workflow Event Manager to raise business events for alerts and notifications using APIs, emails, text and mobile notifications. Workflow events are raised in the following cases:

- Yard check-in.
- Exceptions while performing equipment moves on the Move Equipment mobile page.
- Changing seal status to anything other than Unsealed on the Unseal Equipment mobile page.
This appendix provides the default navigator paths for the windows and mobile user interface used in Oracle Yard Management. The first table provides the default navigation paths for the standard Oracle Yard Management windows. The second table provides the default navigation paths for the mobile interface. Brackets [ ] indicate a button or icon.

**Oracle Yard Management Windows and Navigation Paths**

<table>
<thead>
<tr>
<th>Window or Page Name</th>
<th>Navigation Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check-In</td>
<td>Yard Manager &gt; Yard Operations &gt; Check-In</td>
</tr>
<tr>
<td>Check-Out</td>
<td>Yard Manager &gt; Yard Operations &gt; Check-Out</td>
</tr>
<tr>
<td>Configure Yard</td>
<td>Yard Manager &gt; Yard Setups &gt; Configure Yard</td>
</tr>
<tr>
<td>Create Yard</td>
<td>Yard Manager &gt; Yard Setups &gt; Define Yard &gt; [B] Define</td>
</tr>
<tr>
<td>Define Label Formats and Sets</td>
<td>Yard Manager &gt; Other Setups &gt; Labels &gt; Define Label Formats</td>
</tr>
<tr>
<td>Define Yard</td>
<td>Yard Manager &gt; Yard Setups &gt; Define Yard</td>
</tr>
<tr>
<td>Drivers</td>
<td>Yard Manager &gt; Yard Setups &gt; Drivers</td>
</tr>
<tr>
<td>Equipment Types</td>
<td>Yard Manager &gt; Yard Setups &gt; Equipment Types</td>
</tr>
<tr>
<td>Window or Page Name</td>
<td>Navigation Path</td>
</tr>
<tr>
<td>--------------------------------------------------------</td>
<td>-------------------------------------------------------</td>
</tr>
<tr>
<td>Flexfields (contains Key, Descriptive, Validation)</td>
<td>Yard Manager &gt; Other Setups &gt; Flexfields</td>
</tr>
<tr>
<td>Graphical Yard Workbench</td>
<td>Yard Manager &gt; Yard Operations &gt; Graphical Workbench</td>
</tr>
<tr>
<td>Inventory (contains Items, Templates, Category Codes, Category Sets, and Open or Close Periods)</td>
<td>Yard Manager &gt; Other Setups &gt; Inventory</td>
</tr>
<tr>
<td>Label Requests History</td>
<td>Yard Manager &gt; Requests &gt; Label Requests</td>
</tr>
<tr>
<td>Labels (contains Define Label Formats, Define Custom SQL Fields, Assign Printers to Documents, Assign Label Types to Business Flows,)</td>
<td>Yard Manager &gt; Other Setups &gt; Labels</td>
</tr>
<tr>
<td>Manage Shipments</td>
<td>Yard Manager &gt; Inbound &gt; Manage Shipments</td>
</tr>
<tr>
<td>Manufacturing Lookups</td>
<td>Yard Manager &gt; Yard Setups &gt; Lookups</td>
</tr>
<tr>
<td>Material Workbench</td>
<td>Yard Manager &gt; Inventory &gt; Material Workbench</td>
</tr>
<tr>
<td>Organization Access</td>
<td>Yard Manager &gt; Other Setups &gt; Access &gt; Organization Access</td>
</tr>
<tr>
<td>Process Yard Documents</td>
<td>Yard Manager &gt; Requests &gt; Process Yard Documents</td>
</tr>
<tr>
<td>Quick Ship-Delivery</td>
<td>Yard Manager &gt; Outbound &gt; Quick Ship</td>
</tr>
<tr>
<td>Receipts</td>
<td>Yard Manager &gt; Inbound &gt; Receipts</td>
</tr>
<tr>
<td>Remote Organization</td>
<td>Yard Manager &gt; Yard Setups &gt; Remote Organization</td>
</tr>
<tr>
<td>Rules</td>
<td>Yard Manager &gt; Yard Setups &gt; Rules</td>
</tr>
<tr>
<td>Sales Orders</td>
<td>Yard Manager &gt; Inbound &gt; Update RMA</td>
</tr>
<tr>
<td>Schedule Dock Appointments</td>
<td>Yard Manager &gt; Yard Operations &gt; Schedule Appointments</td>
</tr>
<tr>
<td>Window or Page Name</td>
<td>Navigation Path</td>
</tr>
<tr>
<td>---------------------------------------------------------</td>
<td>----------------------------------------------------------</td>
</tr>
<tr>
<td>Shipment Message Corrections</td>
<td>Yard Manager &gt; Outbound &gt; Shipment Message Correction</td>
</tr>
<tr>
<td>Shipping (contains Grants, Roles, Shipping Parameters,</td>
<td>Yard Manager &gt; Other Setups &gt; Shipping</td>
</tr>
<tr>
<td>and Carriers)</td>
<td></td>
</tr>
<tr>
<td>Shipping Reports and Documents</td>
<td>Yard Manager &gt; Requests &gt; Shipping Documents</td>
</tr>
<tr>
<td>Shipping Transactions</td>
<td>Yard Manager &gt; Outbound &gt; Shipping Transactions</td>
</tr>
<tr>
<td>Supplier Home</td>
<td>Yard Manager &gt; Inbound &gt; iSupplier Portal</td>
</tr>
<tr>
<td>Synchronize Dock Doors</td>
<td>Yard Manager &gt; Yard Setups &gt; Sync Yard Dock Doors</td>
</tr>
<tr>
<td>Yard Equipment Move Slip</td>
<td>Yard Manager &gt; Requests &gt; Yard Move Document</td>
</tr>
<tr>
<td>Yard Workbench</td>
<td>Yard Manager &gt; Yard Operations &gt; Yard Workbench</td>
</tr>
<tr>
<td>Request value reports</td>
<td>Yard Manager &gt; Requests &gt; Yard Valuation Report</td>
</tr>
<tr>
<td>Update Doc Appointment Status, Yard Moves and Notifications, and Yard Equipment Move Slip (XML)</td>
<td>Yard Manager &gt; Requests &gt; Other &gt; Requests &gt; Concurrent</td>
</tr>
</tbody>
</table>

**Oracle Yard Management Mobile Pages and Navigation Paths**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Navigation Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment Move</td>
<td>Yard Mobile User &gt; Move Equipment</td>
</tr>
<tr>
<td>Seal Equipment</td>
<td>Yard Mobile User &gt; Seal Equipment</td>
</tr>
<tr>
<td>Unseal Equipment</td>
<td>Yard Mobile User &gt; Unseal Equipment</td>
</tr>
</tbody>
</table>
Example Rules

The following tables contain some example rules that you can use to route trailers according to your requirement.

**Equipment damaged - send to inspection area**

<table>
<thead>
<tr>
<th>And/Or</th>
<th>Object</th>
<th>Parameter</th>
<th>Operator</th>
<th>Object</th>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Equipment</td>
<td>Condition</td>
<td>=</td>
<td>Constant</td>
<td>character</td>
<td>Damaged</td>
</tr>
<tr>
<td>And</td>
<td>Destination</td>
<td>Area Name</td>
<td>=</td>
<td>Constant</td>
<td>character</td>
<td>Inspection</td>
</tr>
<tr>
<td></td>
<td>Area</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Seal damaged - send to inspection area**

<table>
<thead>
<tr>
<th>And/Or</th>
<th>Object</th>
<th>Parameter</th>
<th>Operator</th>
<th>Object</th>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Seal</td>
<td>Status</td>
<td>=</td>
<td>Constant</td>
<td>number</td>
<td>3</td>
</tr>
<tr>
<td>And</td>
<td>Destination</td>
<td>Area Name</td>
<td>=</td>
<td>Constant</td>
<td>character</td>
<td>Inspection</td>
</tr>
<tr>
<td></td>
<td>Area</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Carrier has priority, but no appointment - send to any available dock door**
<table>
<thead>
<tr>
<th>And/Or</th>
<th>Object</th>
<th>Parameter</th>
<th>Operator</th>
<th>Object</th>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>And</td>
<td>Equipment Appointment Identifier</td>
<td>IS NULL</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Carrier SCAC Code</td>
<td>=</td>
<td>Constant character</td>
<td>UPS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Destination Area Area Name</td>
<td>=</td>
<td>Constant character</td>
<td>Dock Door</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Equipment is Live Unload, Load type is Perishable and no appointment - use doors between 25-50

<table>
<thead>
<tr>
<th>And/Or</th>
<th>Object</th>
<th>Parameter</th>
<th>Operator</th>
<th>Object</th>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>And</td>
<td>Equipment Live Unload</td>
<td>=</td>
<td>Constant character</td>
<td>Y</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Equipment Load Type</td>
<td>=</td>
<td>Constant character</td>
<td>Perishable</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Equipment Appointment Identifier</td>
<td>IS NULL</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Destination Area Area Name</td>
<td>=</td>
<td>Constant character</td>
<td>Dock Door</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Destination Spot Spot Name</td>
<td>&gt;=</td>
<td>Constant character</td>
<td>D25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Destination Spot Spot Name</td>
<td>&lt;=</td>
<td>Constant character</td>
<td>D50</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Appointment exists and start time < 15 minutes from now - send to appointment dock door
Example Rules

<table>
<thead>
<tr>
<th>And/Or</th>
<th>Object</th>
<th>Parameter</th>
<th>Operator</th>
<th>Object</th>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>And</td>
<td>Appointment</td>
<td>Start Time</td>
<td>&lt;</td>
<td>Expression</td>
<td>SELECT sysdate +</td>
<td>(15/(24*60)) FROM dual</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Dock Door</td>
<td>Dock Door</td>
<td>Spot Name</td>
</tr>
<tr>
<td>And</td>
<td>Appointment</td>
<td>Dock Door Name</td>
<td>=</td>
<td>Destination Spot</td>
<td>Spot Name</td>
<td></td>
</tr>
</tbody>
</table>

This rule will fail if the dock door is occupied.

Appointment exists but previous rule failed (dock not available or appointment start time is more than 15 minutes from now) - send to waiting area

<table>
<thead>
<tr>
<th>And/Or</th>
<th>Object</th>
<th>Parameter</th>
<th>Operator</th>
<th>Object</th>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>And</td>
<td>Equipment</td>
<td>Appointment Identifier</td>
<td>IS NOT NULL</td>
<td>Destination Area</td>
<td>Area Name</td>
<td>Waiting</td>
</tr>
</tbody>
</table>

Equipment Content is an Inbound shipment and Equipment Type is 28 ft high cube trailer

<table>
<thead>
<tr>
<th>And/Or</th>
<th>( Object</th>
<th>Parameter</th>
<th>Operator</th>
<th>Object</th>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Equipment Content Document Type Identifier</td>
<td>=</td>
<td>Constant number</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And/Or</td>
<td>Object</td>
<td>Parameter</td>
<td>Operator</td>
<td>Object</td>
<td>Parameter</td>
<td>Value</td>
</tr>
<tr>
<td>--------</td>
<td>----------</td>
<td>-----------</td>
<td>----------</td>
<td>--------</td>
<td>-----------</td>
<td>-------</td>
</tr>
<tr>
<td>Or</td>
<td>Equipment Content</td>
<td>Document Type =</td>
<td>Constant number</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Or</td>
<td>Equipment Content</td>
<td>Document Type =</td>
<td>Constant number</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Or</td>
<td>Equipment Content</td>
<td>Document Type =</td>
<td>Constant number</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Equipment Type</td>
<td>Type =</td>
<td>Constant character</td>
<td>28 ft high cube trailer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Destination Area</td>
<td>Area =</td>
<td>Constant character</td>
<td>Waiting</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Equipment is empty and not LiveUnload or LiveLoad - send to empty trailer storage

<table>
<thead>
<tr>
<th>And/Or</th>
<th>Object</th>
<th>Parameter</th>
<th>Operator</th>
<th>Object</th>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Equipment Load Status Identifier</td>
<td>Load Status Identifier =</td>
<td>Constant number</td>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>And</td>
<td>Equipment Live Unload</td>
<td>Live Unload IS</td>
<td>NULL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>And/Or</td>
<td>Object</td>
<td>Parameter</td>
<td>Operator</td>
<td>Object</td>
<td>Parameter</td>
<td>Value</td>
</tr>
<tr>
<td>--------</td>
<td>--------</td>
<td>-----------</td>
<td>----------</td>
<td>--------</td>
<td>-----------</td>
<td>-------</td>
</tr>
<tr>
<td>Or</td>
<td>Equipment</td>
<td>Live</td>
<td>Unload</td>
<td>&lt;&gt;</td>
<td>Constant</td>
<td>Y</td>
</tr>
<tr>
<td>And</td>
<td>(</td>
<td>Equipment</td>
<td>Live</td>
<td>IS</td>
<td>NULL</td>
<td>)</td>
</tr>
<tr>
<td>Or</td>
<td>Equipment</td>
<td>Live</td>
<td>Load</td>
<td>&lt;&gt;</td>
<td>Constant</td>
<td>Y</td>
</tr>
<tr>
<td>And</td>
<td>Destination</td>
<td>Area</td>
<td>Name</td>
<td>=</td>
<td>Constant</td>
<td>Storage</td>
</tr>
</tbody>
</table>
Glossary

**carrier**
The transportation company responsible for managing the inbound/outbound shipments.

**carrier SCAC (standard carrier alpha code)**
Industry standard code (2 to 4 digits) to identify carriers.

**check in**
The activity of registering a trailer or container as it enters the yard of a warehouse.

**check out**
The activity of discharging a trailer or container as it exits the yard of a warehouse.

**dock appointment**
A single time slot with a start and end time scheduled in advance for any shipment or receipt for the dock door.

**dock door**
An opening or door in the warehouse for unloading the inbound material receipt and for loading the outbound material shipments.

**driver**
The person who is responsible for driving the power unit with or without the trailer.

**hostlers/switchers**
Users who perform the move transactions on the power units.

**jockey**
Jockeys are usually contract labors who move the trailer around the yard using a powering unit. Data communicated to jockeys should be on terminal-mounted devices.
parking spot
The yard locator that stores the equipment in the yard.

remote organization
A placeholder service organization defined in an external Oracle E-Business Suite instance or in another ERP application.

staging lane
An area in the warehouse close to the dock door where the picked material is placed before final shipment. This area is also generally used for value-added services/final packaging of the material.

switchers
See: hostlers

tractor/powering unit
A powered vehicle designed and used for towing trailers.

trailer
Freight or cargo trailers that are utilized to transport goods and other items from one location to another. A cargo trailer is usually not equipped with a means of locomotion in and of itself. Instead, the trailer is normally attached to some means of conveyance in order to manage the transport from one location to another.

trailer SCAC
Industry standard code to identify trailers. The trailer SCAC may be different from the carrier SCAC because trailers can be owned by separate companies.
See also: carrier SCAC

yard
An external area adjacent to a warehouse where trucks and/or containers wait with material to be unloaded or loaded for shipment.
Index

A
accounting periods, opening, 2-19
alerts and notifications, 6-1

B
benefits and main features, 1-2

C
carrier SCAC, Glossary-2
checking in equipment, 3-1

dock doors, scheduling appointments, 3-9
dock doors, synchronizing, 2-9
drivers, creating, 2-13

equipment
   sealing and unsealing, 4-2
   viewing, 4-4
equipment, creating, 2-11
equipment details, entering, 3-5

E
graphical workbench, 3-19

G
labels, creating, 5-4

M
Material Workbench
   viewing inbound operations, 3-21
   mobile transactions, 4-1
   MSCE transactions, 4-1

N
notifications and alerts, 6-1

O
opening accounting periods, 2-19
Oracle Yard Management, overview, 1-1
overview of Oracle Yard Management, 1-1

P
parking spots, configuring, 2-7
product integrations with Oracle Yard Management, 2-24

R
related setups, 2-18
remote organization, creating, 2-10
reports, YMS Equipment Move Pick Slip, 5-1
responsibilities, setting up, 2-17
rules
   example, A-1
   rules, defining, 2-16

S
scheduling dock appointments, 3-9
sealing equipment, 4-2
setting up, 3-13
synchronizing dock doors, 2-9

T
trailers and powered units, creating, 2-11
transactions
  using mobile devices, 4-1

U
unsealing equipment, 4-2

V
viewing equipment, 4-4
viewing inbound operations on the Material Workbench window., 3-21

Y
yard check-ins, 3-1
yard check-outs, 3-7
yard moves, 4-6
yard moves, performing, 3-19
yards
  configuring yard areas, 2-7
  parking spots, 2-7
yards, defining, 2-2
yards, setting up, 2-1
Yard Workbench, 3-13
YMS Equipment Move Pick Slip (XML), 5-1