

Guide
August 1997



Advanced Warehouse Management

Release
A8.1

JD Edwards®



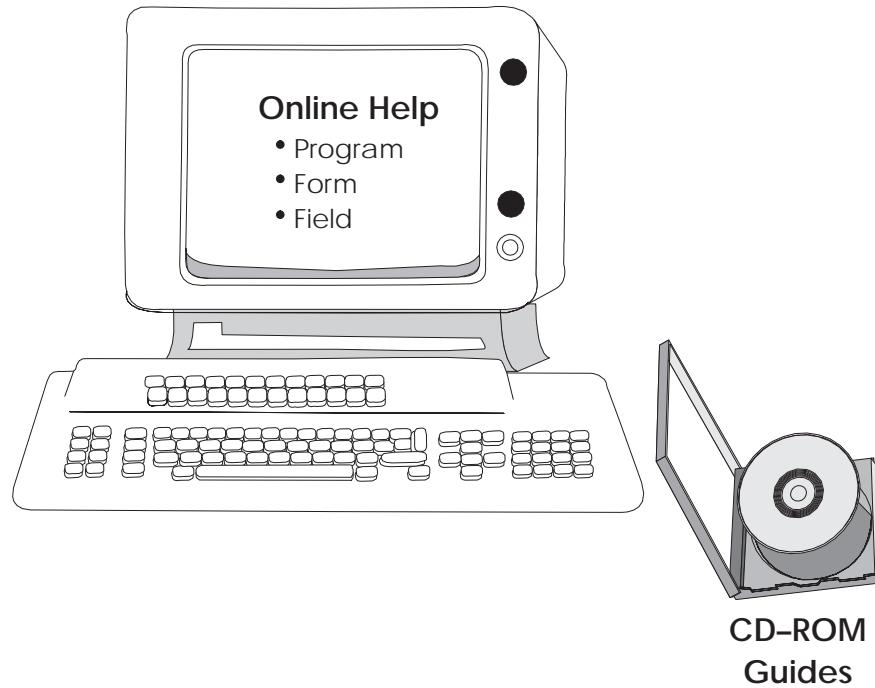
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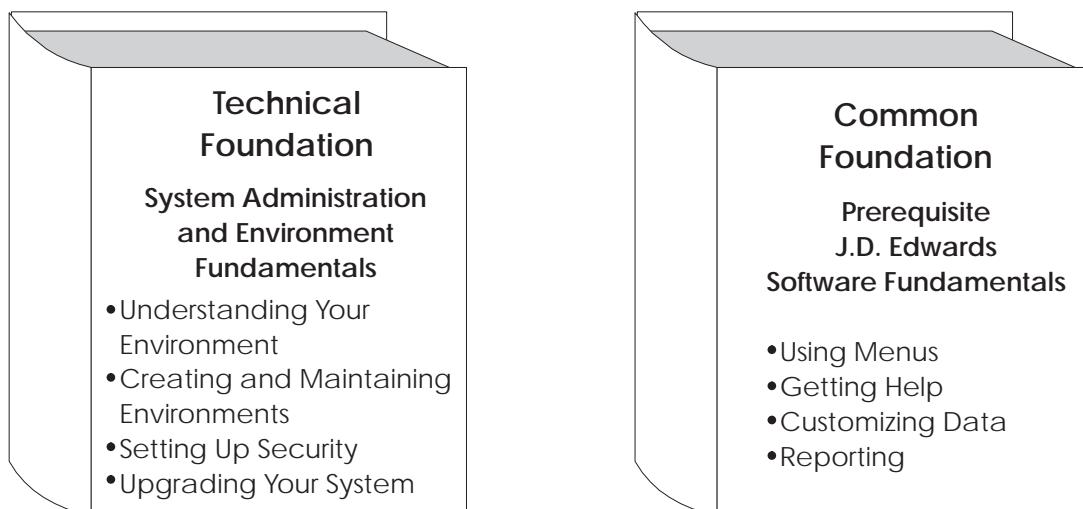
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Where Do I Look?



Guides



Important Note for Students in Training Classes

This guide is a source book for online helps, training classes, and user reference. Training classes may not cover all the topics contained here.

Welcome

About this Guide

This guide provides overviews, illustrations, procedures, and examples for the current release of J.D. Edwards software. Forms (screens and windows) shown are only examples. If your company operates at a different software level, you might find discrepancies between what is shown in this guide and what you see on your screen.

This guide includes examples to help you understand how to use the system. You can access all of the information about a task using either the guide or the online help.

Before using this guide, you should have a fundamental understanding of the system, user defined codes, and category codes. You should also know how to:

- Use the menus
- Enter information in fields
- Add, change, and delete information
- Create and run report versions
- Access online documentation

Audience

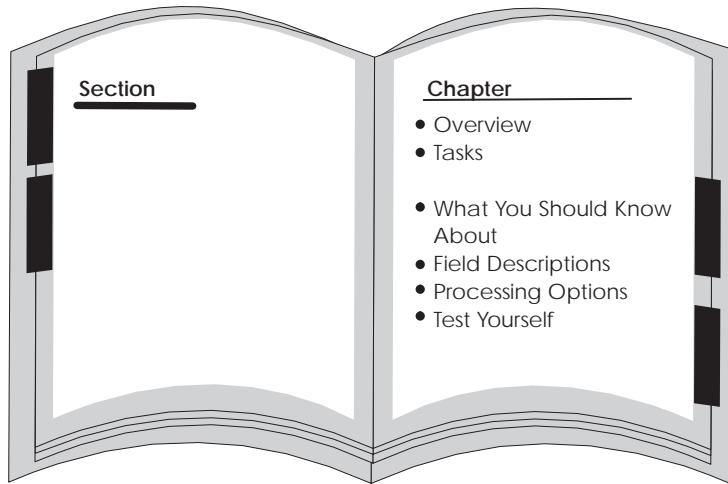
This guide is intended primarily for the following audiences:

- Users
- Classroom instructors
- Client Services personnel
- Consultants and implementation team members

Organization

This guide is divided into sections for each major function. Sections contain chapters for each task or group of related tasks. Each chapter contains the information you need to accomplish the task, run the program, or print the

report. Chapters normally include an overview, form or report samples, and procedures.



When it is appropriate, chapters also might explain automatic accounting instructions, processing options, and warnings or error situations. Some chapters include self-tests for your use outside the classroom.

This guide has a detailed table of contents and an index to help you locate information quickly.

Conventions Used in this Guide

The following terms have specific meanings when used in this guide:

- *Form* refers to a screen or a window.
- *Table* generally means “file.”

We assume an “implied completion” at the end of a series of steps. That is, to complete the procedure described in the series of steps, either press Enter or click OK, except where noted.

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System Overview

System Integration

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

The Advanced Warehouse Management system can exchange data with the following J.D. Edwards systems:

- Sales Order Management
- Inventory Management
- Purchase Management
- Shop Floor Control
- Configuration Management
- Requirements Planning
- Enterprise Facility Planning

Features

The Advanced Warehouse Management system controls many aspects of warehouse operations, from receiving and storing items to retrieving and shipping them. You can design your warehouse to make the most of your available space, your employees' time, and the unique storage requirements of the goods that you stock. You can structure your warehouse in almost limitless detail, so you can know exactly where everything is and the exact quantity you have on hand. This allows you to maintain a continuous flow of goods and gives you the competitive edge in delivering goods to your customers quickly and efficiently.



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

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

With the Advanced Warehouse Management system, you can:

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

The Advanced Warehouse Management system is extremely flexible because it can use more than fifty different parameters of locations, items, and rules to

move your inventory. Some of Advanced Warehouse Management's features follow.

Profiles of locations and items

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

Rule-based storage, picking, and replenishment

The Advanced Warehouse Management system is rule-driven. You can set up movement rules that are based on a variety of factors, including:

- the sequence numbers that you can assign to locations
- each location's purpose and the quantity of items already present in the location
- location characteristics that are matched to item characteristics

You can define as many rules as you need for different business purposes.

Automatic replenishment of locations

The system monitors every location in your warehouse and can trigger stock movements to replenish your picking locations automatically when you deplete stock quantities to a point that you define.

Movement path sequencing

You can design traffic patterns in your warehouse to reduce congestion and structure your stock movements to use each employee's trip through the warehouse most efficiently.

Units of measure

You can choose locations according to the item's unit of measure to ensure the best fit and maximization of your available warehouse space. You can also allow the system to combine or break down units of measure to speed up inventory movement or maximize utilization of locations.

First In First Out picking

You can move your oldest inventory first using date-of-receipt tags and expiration date codes.

Detailed Information

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

Branch/Plant Constants (F41001)	Contains information for day-to-day transactions, including: <ul style="list-style-type: none">• Location number definition• Warehouse control data• Default units of measure• Inclusion rule, which lists the document types and status codes to process through the system
Location Master (F4100)	Contains basic information about each warehouse location.
Location Dimensions (F46022)	Contains the dimensions and maximum weight capacity of location dimension groups.
Item Master (F4101)	Contains basic information about each item, including: <ul style="list-style-type: none">• Item number• Description• Search keys• Category codes• Default units of measure• Process groups• Item dimension group
Item Specific Unit of Measure Conversion (F41002)	Contains the unit of measure conversion equations that are unique to the warehouse item and its unit of measure structure information.
Location Characteristics (F46021)	Contains a list of characteristics that you use in random movement instructions.
Location Capacity (F46024)	Contains the quantity of an item (or an item group) that will fit into each location.
Allowed Containers by Location (F46026)	Contains a list of the containers that you allow to exist in each location.
Standard Unit Of Measure Conversion (F41003)	Contains the unit of measure conversion equations that are common to all warehouse items.

Item Branch (F4102)	Contains default item information, including each item's process and dimension groups, and other parameters that are common to every unit of that item in your warehouse.
Item Location (F41021)	Contains each item's quantity, general ledger class, and lot status in each location.
Item Profile (F46010)	Contains a profile of every item in the warehouse.
Item Unit Of Measure Profile (F46011)	Contains every unit of measure for each item in the warehouse.
Warehouse Requests (F4600)	Contains putaway, pick, and replenishment requests for inventory movement.
Task Header (F4601)	Contains inventory movement requests and the corresponding trips that warehouse employees make to fulfill the requests.
Warehouse Putaway Reservations (F460130)	Contains locations that you reserved for storage of a particular item.
Warehouse Suggestions (F4611)	Contains putaway, pick, and replenishment suggestions for inventory movement.
Location Detail Information (F4602)	Contains the items, quantities, and units of measure that exist in each location.
Item Ledger (F4111)	Contains a history of all inventory movements.
Inclusion Rules (F34004)	Contains the order types (sales, purchase, and so on) and the order statuses that the system processes.
Process Selection Rules (F46093)	Contains information about warehouse process and order groups and the movement instructions that you match to each set of groups.
Movement Instructions (F46095)	Contains information, such as zones and tiebreakers, about how the system chooses locations for putaway, picking, or replenishment.
Order Groups (F46092)	Contains order types that you assign to a group to use in the Process Selection Rules table.

Unit Of Measure Groups (F46096)	Contains units of measure that you assign to a group to use in the Movement Instructions table.
Fixed Locations (F46012)	Contains locations that you use only for putaway, only for picking, or only for replenishment.
Random Tables (F46822)	Contains characteristics that you match to location characteristics to create a table of valid random locations.
Random Locations (F46821)	Contains a list of valid random locations that match the characteristics you defined in a random rule.
Container and Carton Codes (F46091)	Contains a list of containers and cartons and their dimensions and weights.
Carton Recommendation Rules (F46013)	Contains information about the quantity of each item that will fit in each carton, so the system can recommend cartons for shipping.
Maximum Putaway Quantity By Zone (F46025)	Contains the maximum quantity of each item that you allow in each zone.
Fixed Replenishment Zones (F46051)	Contains a list of zones from which you allow the system to replenish fixed picking locations.
Default Location/Printers (F40095)	Contains the default warehouse code (branch/plant) and the default printer output queue for transactions that you process through the subsystem.
Distribution/ Manufacturing Constants (F4009)	Contains information that specifies whether the item unit of measure conversions are unique for each item or applicable to each item in the warehouse.

Menu Overview

These are the most commonly used menus for the J.D. Edwards Advanced Warehouse Management system.

Advanced Warehouse Management
G46

Daily Operations

Inbound Warehousing Operations
G4611

Outbound Warehousing Operations
G4612

Replenishment Operations
G4613

Warehousing Inquiries & Reports
G4614

Setup Operations

Warehouse System Setup
G4641

Warehouse User Defined Codes
G46411

Advanced and Technical Operations

Warehouse Advanced & Technical Operations
G4631

Warehousing Movement Rules
G46311

Setup

Warehouse Setup

Objectives

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

About Warehouse Setup

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

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

You must also determine:

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

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

Defining the warehouse includes the following tasks:

- Setting up locations



- Setting up fixed locations and zones
- Setting up item warehouse information
- Setting up inclusion rules
- Setting up order groups
- Setting up unit of measure groups (optional)
- Setting up storage containers (optional)
- Setting up shipping cartons and recommendation (optional)

Set Up Locations

Setting Up Locations

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

- Length
- Width
- Height
- Weight capacity
- Proximity to other locations
- Temperature
- Humidity
- Lighting

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

Location setup includes:

- Creating the warehouse
- Defining warehouse specifications
- Entering locations
- Defining location dimensions
- Defining location characteristics
- Defining location profile information
- Defining location capacity
- Building the tie-breaker table

Before You Begin

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

Creating the Warehouse



From Advanced Warehouse Management (G46), enter 29

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

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

► To create the warehouse

On Branch/Plant Constants - Pg 1



Complete the following fields:

- Location Control
- Warehouse Control

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

See Also

- *Setting Up Constants* in the *Inventory Management Guide* for more information on branch/plant constants

Defining Warehouse Specifications

You define warehouse specifications to:

- Define the format in which the system displays a location, such as 1.A.1 or C/3/5
- Specify the inclusion rule that defines the orders and statuses that you want the Advanced Warehouse Management system to process
- Define the default units of measure for dimensions, weight, and volume
- Define the default locations for receiving and shipping

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



To define warehouse specifications

On Branch/Plant Constants - Pg 1

1. Access Branch/Plant Constants - Pg 2.



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

- Separator Character
- Length of Aisle
- Justify
- Length of Bin
- Justify
- Length of Code 3
- Justify
- Length of Code 4
- Justify
- Length of Code 5
- Justify
- Length of Code 6
- Justify
- Length of Code 7
- Justify
- Length of Code 8
- Justify
- Length of Code 9
- Justify

- Length of Code 10
 - Justify
3. Complete the following fields:
- Request Inclusion Version
 - Dimension Display Unit of Measure
 - Volume Display Unit of Measure
 - Weight Display Unit of Measure
 - Default Receiving Location
 - Default Shipping Location

Field	Explanation
Separator Character	<p>A character that divides the elements of the location when you display them on forms or reports. For example, you might use a slash (/) as a separator character to divide elements such as aisle, bin, and shelf in a location code.</p> <p>Separators are not stored in the tables, but are used to edit a location on a form or report. If you do not want to use separators, leave this field blank. However, you must enter characters and spaces to equal the correct length of each element in the location code. The system then displays the location as one string of characters.</p> <p>..... <i>Form-specific information</i></p> <p>The system uses the character you enter in this field to separate the combination of tank/owner and aisle/bin as it appears on forms or reports. Companies commonly use a period (.) as the separator character.</p>
Length of Aisle	Identifies the number of characters to represent the tank (or aisle for packaged stock). Valid values are numbers 1 through 8.
Justify – Aisle	A character (L or R) that specifies left or right justification for the Aisle element in the location format.
Number – Characters (Bin)	Identifies the number of characters to represent the owner for commingled bulk stock (or aisle for packaged stock). Valid values are numbers 1 through 8.
Justify – Bin	Left or Right justification for Bin in the location format specification.
Number – Characters (Code 3)	The number of characters to represent Code 3 in the location format specification.
Justify – Code 3	Left or Right justification for Code 3 in the location format specification.

Field	Explanation
Number – Characters (Code 4)	The number of characters to represent Code 4 in the location format specification.
Justify – Code 4	Left or Right justification for Code 4 in the location format specification.
Number – Characters (Code 5)	The number of characters to represent Code 5 in the location format specification.
Request Inclusion Vers	<p>A user defined code (system 40/type RV) that identifies an inclusion rule that you want the system to use for this branch/plant. The Manufacturing and Advanced Warehouse Management systems use inclusion rules as follows:</p> <ul style="list-style-type: none"> • For Manufacturing <p>Allows multiple versions of resource rules for running MPS, MRP, or DRP.</p> • For Advanced Warehouse Management <p>Allows multiple versions of inclusion rules for running putaway and picking. The system processes only those order lines that match the inclusion rule for a specified branch/plant.</p>
Justify – Code 5	Left or Right justification for Code 5 in the location format specification.
Number – Characters (Code 6)	The number of characters to represent Code 6 in the location format specification.
Justify – Code 6	Left or Right justification for Code 6 in the location format specification.
Number – Characters (Code 7)	The number of characters to represent Code 7 in the location format specification.
Justify – Code 7	Left or Right justification for Code 7 in the location format specification.
Number – Characters (Code 8)	The number of characters to represent Code 8 in the location format specification.
Justify – Code 8	Left or Right justification for Code 8 in the location format specification.
Number – Characters (Code 9)	The number of characters to represent Code 9 in the location format specification.
Justify – Code 9	Left or Right justification for Code 09 in the location format specification.
Number – Characters (Code 10)	The number of characters to represent Code 10 in the location format specification.
Justify – Code 10	Left or Right justification for Code 10 in the location format specification.

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

Entering Locations

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

Complete the following tasks:

- Enter locations interactively
- Enter locations by batch
- Enter locations using existing location data
- Define zones
- Define the level of detail for locations

See Also

- *Working with Speed Location Maintenance (P4100A)* in the *Inventory Management Guide* for information on entering locations

Entering Locations Interactively



From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose Location Master

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

► To enter locations interactively

On Location Master

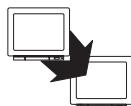


Complete the following field:

- Location

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

Entering Locations by Batch



From Advanced Warehouse Management (G46), enter 29

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

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

► To enter locations by batch

On Speed Location Maintenance



1. To identify the location to use as a model for new locations, complete the following fields:
 - Branch/Plant
 - Copy From Location
2. To enter new locations, complete the following fields:
 - From Aisle
 - To Aisle
 - Step By
 - Limit Method
 - From Bin
 - To Bin
 - Step By
 - Limit Method
3. To specify levels of detail for each location, complete the following fields:
 - From Location Code
 - To Location Code
 - Step By Location Code
 - Limit Method
4. To specify the sequence and proximity information for each location, complete the following fields:
 - Start Putaway Sequence

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

5. Access User Defined Code Revisions.



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

- Description - 2

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

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

Field	Explanation
Copy From Location	A code that identifies inventory locations in a branch/plant. You define the format of the location identifier by branch/plant.
Aisle	A code that identifies a location in a warehouse. This code is used in conjunction with a bin and lot identifier, to indicate a specific, tangible storage area within a warehouse or yard.
Step by	<p>A number (alphabetic or numeric) that the system uses to create locations within a range of locations that you specify in Speed Location Maintenance. When the system creates each new location, it increments the next new location by the step number that you entered. separates locations within a specified range of locations.</p> <p>For example:</p> <p>To create new locations:</p> <p>From Location: 1 To Location: 7 Step by: 2</p> <p>The new locations are: 1, 3, 5, and 7.</p>
Step Limit Method	<p>A code that indicates what limits are used in the stepping process:</p> <ul style="list-style-type: none"> blank Upper & Lower Limit. You create location codes beginning with the From value, ending with the To value, then starting again at the From value. 1 Upper Limit. You create location codes beginning with the From value, ending with the To value, then starting again at the lowest value for that location code. 2 Lower Limit. You create location codes beginning with the From value, ending with the highest value for that location code, then starting again at the From value. 3 No Limit. You create location codes beginning with the From value, ending with the highest value for that location code, then starting again at the lowest value for that location code.
Bin	<p>A specific storage location within a warehouse or store. The system uses the bin with an aisle location to identify a storage area whose width, depth, and height can be readily measured.</p>
Location Code 03	<p>A code that the system uses for one of two purposes:</p> <ul style="list-style-type: none"> • To identify a specific location within a Branch/Plant as part of the location identifier. • To use as a general reporting code for location information.

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

What You Should Know About

Entering steps

A step is a number that the system uses to separate locations within the range of locations you are creating. When the system creates each new location, it increments the name of each location by the step number that you enter. You can enter many locations simultaneously by entering a range of locations along with a step increment.

Entering limits

A limit is a code that tells the system the location names at which you want to start and stop entering locations, such as 1/A/1 to 1/A/9, according to the minimum and maximum values for location elements.

Deleting incorrect locations

If you make a mistake in setting up your locations with Speed Location Maintenance, you can:

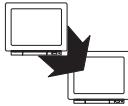
- Delete your mistakes on a location-by-location basis, assuming only a few errors exist.
- Delete an entire range of locations and create them again, if many errors exist.

You cannot delete locations using Speed Location Maintenance. You must use Location Master.

See Also

- *Setting Up Locations Using Speed Location Maintenance* in the *Inventory Management Guide* for more information on entering locations by batch

Entering Locations Using Existing Location Data



From Advanced Warehouse Management (G46), enter 27

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

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

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

Build Location Master is a DREAM Writer program.

Branch/Plant	Location	Item Number	Description	Page No.	4
				Date -	14.05.98
				Error Description	
	1 .A .1	V001	Natureway High Energy Vitamins	Item/UOM Structure Not Defined	
	1 .B .1	P002	Green Bar - Continuous Form	Item/UOM Structure Not Defined	
	1 .B .2	1001	Pen & Pencil Set	Item/UOM Structure Not Defined	
	1 .C .1	TS002	Air-Shaq Children's X-Trainer	Item/UOM Structure Not Defined	

Processing Options for Build Location Master

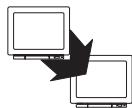
UPDATE OPTION:

1. Enter a '1' to update locations that already exist with data dictionary default values.

WAREHOUSE MANAGEMENT:

2. Enter a '1' to create Location Detail records (file F4602) for item location information.
3. Enter a '1' to apply the item's default unit of measure structure.

Defining Zones



From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose Location Master

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

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

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

► **To define zones**

On Location Master

Complete the following fields:

- Putaway Zone
- Pick Zone
- Replenishment Zone

Field	Explanation
Put Zone	A code (system 46/type ZN) that identifies areas in the warehouse where goods are put away or stored. <i>Form-specific information</i> <ul style="list-style-type: none">• Use the Zone field to indicate a specific zone for which you want to display information.• Use the Putaway Zone field to set up or review the putaway zone associated with the location.
Pick Zone	A code (system 46/type ZN) that identifies an area from which items are picked for shipment.
Replen Zone	A code (system 46/type ZN) that identifies the areas in the warehouse from which items are retrieved to replenish or refill picking locations.

Defining the Level of Detail for Locations

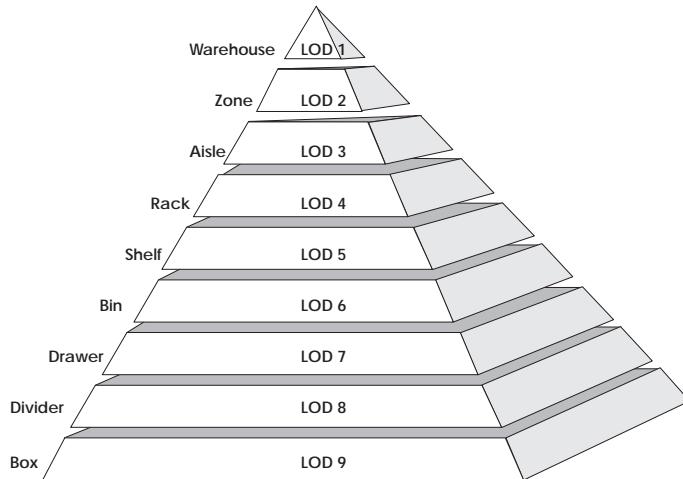


From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose Location Master

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

a level of detail of 4 (rack level), for example, the system displays zones, aisles, and racks, and specifies capacities and available space for each rack.



► To define the level of detail for locations

On Location Master

For each location, complete the following field:

- Level Of Detail

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

What You Should Know About

Using blank locations

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

Defining Location Dimensions



From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose Location Dimensions

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

- Gross and usable dimensions (width, depth, and height)
- Gross and usable volume, which the system calculates from the dimensions
- Maximum weight that a location can hold

Before You Begin

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

► **To define location dimensions**

On Location Dimensions



1. Complete the following fields:

- Branch/Plant
- Location Dimension Group
- Gross Width
- Gross Depth
- Gross Height
- Usable Width
- Usable Depth
- Usable Height

2. Complete the following optional field:

- Maximum Weight

Field	Explanation
Group – Location Dimension	<p>A code (system 46/type LD) that identifies a group of locations that share the same dimensions. A location dimension group defines the dimensions for all locations that belong to the group. After you set up a location dimension group, you can assign locations to the group through Location Profile Detail (P460201).</p> <p>You must define location dimensions if you plan to use volume-based putaway.</p>

Field	Explanation
Gross : Width ()	The gross width of the location(s) defined within the location dimension group, the gross width of an item as defined in the Unit Of Measure Definition (by item or group), or the gross width of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants – Page 2 (P410012).
Gross : Depth ()	The gross depth of the location(s) defined within the location dimension group, the gross depth of an item as defined in the Unit Of Measure Definition (by item or group), or the gross depth of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants – Page 2 (P410012).
Gross : Height ()	The gross height of the location(s) defined within the location dimension group, the gross height of an item as defined in the Unit Of Measure Definition (by item or group), or the gross height of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants – Page 2 (P410012).
Cubic Dimensions – Gross	<p>The gross cubic dimensions of the locations defined within the location dimension group, the gross cubic dimensions of an item as defined in the Unit Of Measure Definition (by item or group), or the gross cubic dimensions of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants – Page 2 (P410012).</p> <p>..... <i>Form-specific information</i></p>
	<p>If you leave this field blank, the system calculates cubic dimensions based on the numbers you entered for the width, depth, and height.</p>
Usable – Width	<p>The available storage width of the location(s) defined within the location dimension group. The system uses this width only if you use one of two capacity methods to select a putaway location for an item:</p> <ul style="list-style-type: none"> • Volume checking (where the system compares the volume of the item to the usable volume of a putaway location) • Layering (where the system compares the length, width, and depth of an item to the usable length, width, and depth of a putaway location) <p>..... <i>Form-specific information</i></p>
	<p>If you leave this field blank, the system uses the number you entered in the Gross Width field.</p>

Field	Explanation
Usable – Depth	<p>The available storage depth of the location(s) defined within the location dimension group. The system uses this depth only if you use one of two capacity methods to select a putaway location for an item:</p> <ul style="list-style-type: none"> Volume checking (where the system compares the volume of the item to the usable volume of a putaway location) Layering (where the system compares the length, width, and depth of an item to the usable length, width, and depth of a putaway location) <p>..... <i>Form-specific information</i></p> <p>If you leave this field blank, the system uses the number you entered in the Gross Depth field.</p>
Usable – Height	<p>The available storage height of the location(s) defined within the location dimension group. The system uses this height only if you use one of two capacity methods to select a putaway location for an item:</p> <ul style="list-style-type: none"> Volume checking (where the system compares the volume of the item to the usable volume of a putaway location) Layering (where the system compares the length, width, and depth of an item to the usable length, width, and depth of a putaway location) <p>..... <i>Form-specific information</i></p> <p>If you leave this field blank, the system uses the number you entered in the Gross Height field.</p>
Cubic Dimensions – Usable	<p>The actual cubic volume that you can use for storage in a location. You define usable location space through Location Dimensions (P46022), and assign it to individual locations using Location Profile Detail (P460201). The unit of measure is defined in Branch/Plant Constants – Page 2 (P410012).</p> <p>..... <i>Form-specific information</i></p> <p>If you leave this field blank, the system calculates cubic dimensions using the numbers you entered for the width, depth, and height.</p>
Maximum Weight	<p>The maximum weight a location can hold. During putaway location selection, the system accumulates item and/or container weights, which it adds to the weight currently available in the location, and compares the total to this maximum allowed weight.</p>

What You Should Know About

Building the tie-breaker table	If you use random locations for putaway, you must rebuild the Tie-breaker table whenever you define or change the dimensions of a random location. See <i>Building the Tie-Breaker Table</i> in this section for more information.
Maximum storage weight	If you do not specify a maximum storage weight, the system assumes the location has an unlimited capacity for weight.
Capacity checking	The system uses location dimensions to verify that the location has enough space for the item to fit. You can use volume checking (capacity method 1) or layering (capacity method 2) for an item's unit of measure definition, as follows: <ul style="list-style-type: none">• In volume checking, the system compares the item's volume to the available volume of space in the location. This might not work well if the item or the available space is not cubical in shape.• In layering, the system compares the item's length, width, and height to the length, width, and height of the available space in the location. This method provides the best match of an item to a location. You define the capacity method on Unit of Measure Definition.

See Also

- *Defining Warehouse Specifications* for more information about processing methods

Defining Location Characteristics



From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose Location Characteristics

A characteristic is anything that makes a location (or a location group) unique. For example, you might stock items that must be kept cold to prevent spoilage, so you can identify locations, such as a refrigerator, whose characteristics include cold. You can assign an unlimited number of characteristics to each location in your warehouse.

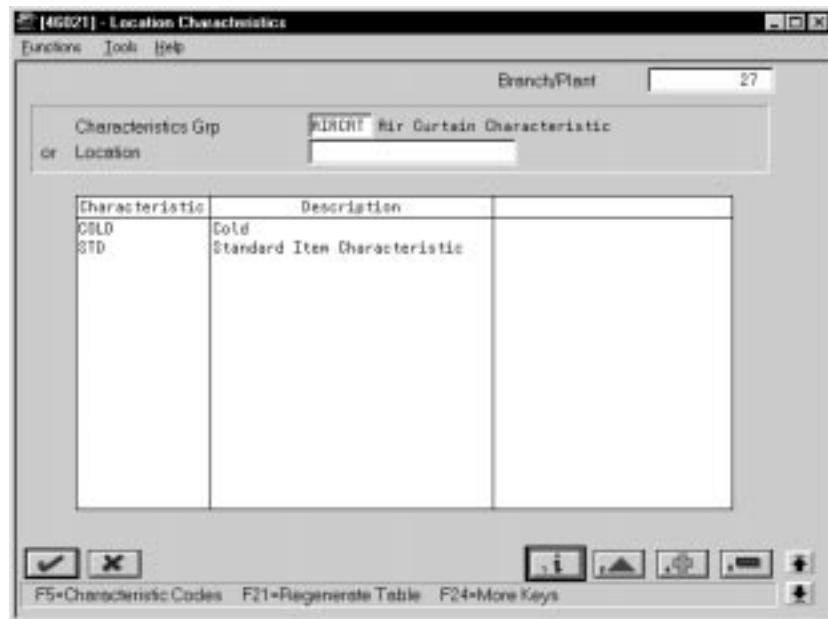
If you want the system to choose locations randomly for putaway, picking, or replenishment (instead of using fixed locations), you must define location characteristics.

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

You can:

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

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



What You Should Know About

Regenerating the Random Locations table

If you use random locations for putaway, picking, or replenishment, and you change characteristics for any of those random locations, you must regenerate the Random Locations table (F46821). This ensures that the system uses a current table when it searches for random locations.

Building the tie-breaker table If you use random locations for putaway, you must rebuild the tie-breaker table whenever you change the characteristics of a random location.

See *Building the Tie-Breaker Table* in this section for more information.

► **To define characteristics for a single location**

On Location Characteristics

Complete the following fields:

- Branch/Plant
- Location
- Characteristic

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

► **To define characteristics for a location group**

On Location Characteristics

Complete the following fields:

- Branch/Plant
- Characteristics Group
- Characteristic

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

Defining Location Profile Information



From Advanced Warehouse Management (G46), enter 29

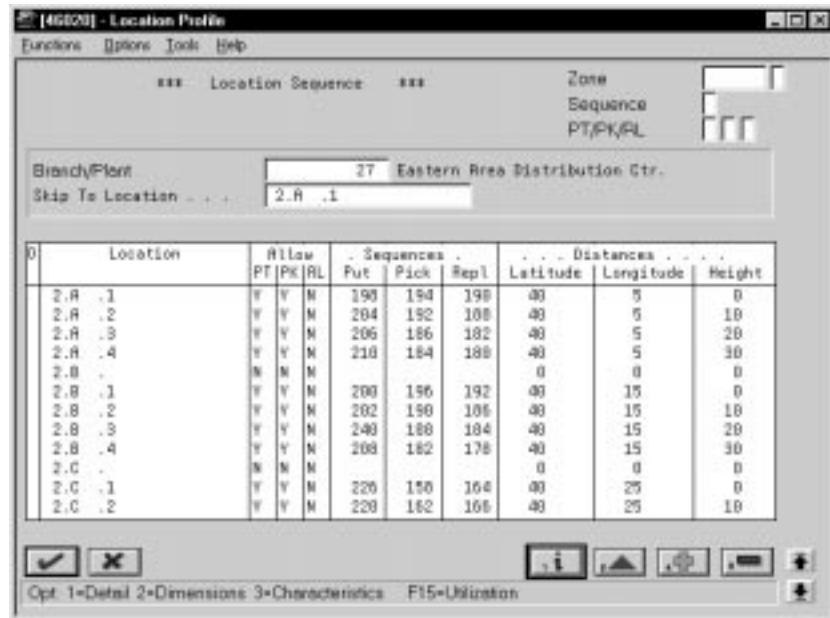
From Warehouse System Setup (G4641), choose Location Profile

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

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

► To define location profile information

On Location Profile



1. For each location in your warehouse, complete the following fields:
 - Allow Putaway
 - Allow Pick
 - Allow Replenishment
 - Putaway Sequence
 - Pick Sequence
 - Replenishment Sequence
 - Latitude
 - Longitude
 - Height
2. Access Location Profile Detail.



3. On Location Profile Detail, complete the following fields:

- Location Dimension Group
- Characteristics Group
- Staging Location
- Mix Containers
- Mix Receipt Dates
- Maximum Number of Items
- Merge Partial Structures
- Merge UM Structures

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

Field	Explanation				
Allow Replen (Y/N)	<p>A code that indicates whether you allow replenishment from a location (Location Profile (P46020) and Location Profile Detail (P460201)) or whether a picking instruction triggers replenishment (Picking Instructions (P46095)).</p> <p>..... <i>Form-specific information</i></p>				
	<p>A code that indicates whether you allow replenishment from a location. The system issues a replenishment while reviewing locations for picking suggestions if it did not find any locations to satisfy the pick request. In this case, the system uses the replenishment to satisfy the pick request.</p>				
	<p>Valid codes are:</p> <table> <tr> <td data-bbox="719 677 747 705">Y</td> <td data-bbox="784 677 1263 705">Yes, use this location for replenishment</td> </tr> <tr> <td data-bbox="719 709 747 737">N</td> <td data-bbox="784 709 1339 737">No, do not use this location for replenishment</td> </tr> </table>	Y	Yes, use this location for replenishment	N	No, do not use this location for replenishment
Y	Yes, use this location for replenishment				
N	No, do not use this location for replenishment				
	<p>The system also issues replenishments to a location that has reached its minimum letdown point if this field is set to Y and if the processing option allowing replenishment during the selection process (P46171) is active. You define minimum letdown points on Fixed Picking Locations (P46012).</p>				
	<p>NOTE: You must have quantity on hand in a location to automatically replenish to that location.</p>				
Putaway Sequence	<p>A number that you assign to a location to determine its place in the putaway sequence. Putaway is the movement of inventory to storage after receipt. A sequence of locations describes the path that warehouse employees follow through the warehouse during movement tasks. You can specify in the Movement Instructions (P46095) whether the system uses the putaway sequence as a tiebreaker when there is more than one location selected for putaway. For example, you can establish sequencing for the most efficient putaway routing.</p>				
Pick Sequence	<p>A number that you assign to a location to determine its place in the picking sequence. Picking is the movement of inventory from storage to satisfy an order. A sequence of locations describes the path that warehouse employees follow through the warehouse during movement tasks. You can specify in the Movement Instructions (P46095) whether the system uses the picking sequence as a tiebreaker when there is more than one location selected to pick from. For example, you can establish sequencing for the most efficient pick routing.</p>				

Field	Explanation
Replen Sequence	A number that you assign to a location to determine its place in the replenishment sequence. Replenishment is the movement of inventory from storage locations to picking locations. A sequence of locations describes the path that warehouse employees follow through the warehouse during movement tasks. You can specify in the Movement Instructions (P46095) whether the system uses the replenishment sequence as a tiebreaker when there is more than one location selected to replenish from. For example, you can establish sequencing for the most efficient replenishment routing.
Latitude	The X or latitude coordinate of a location in the warehouse. The system can use latitude, longitude, and height as a tiebreaker when suggesting locations for putaway and picking.
Longitude	The Y or longitude coordinate of a location in the warehouse. The system can use latitude, longitude, and height as a tiebreaker when suggesting locations for putaway and picking.
Height	The Z or height coordinate of a location in the warehouse. The system can use latitude, longitude, and height as a tiebreaker when suggesting locations for putaway and picking.
Characteristics Grp	A code (system 46/type LC) that identifies a group of locations that share the same characteristics. A location characteristics group defines the characteristics for all locations that belong to the group. After you set up a location characteristics group, you can assign locations to the group through Location Characteristics (P46021).
Mix Containers (Y/N)	A code that indicates whether you want to allow more than one type of storage container for an item to be stored in the location. Valid codes are:
	Y Allow more than one type of container in this location
	N Do not allow more than one type of container in this location
	You use Allowed Containers (P46026) to define which containers are allowed in the location.
	You must also set up the item profile to allow mixing of containers.
Mix Receipt Dt.(Y/N)	A code that indicates how you want the system to assign items to a location.

Field	Explanation
Max No. of Items	<p>A number that specifies the maximum number of different items that can be stored in this location at one time.</p> <p>Enter a number from 1 to 99. If you leave the field blank (or zero), the system does not limit the number of different items in the location.</p>
Merge Partials	<p>A code that indicates whether a partial unit of measure can be added to another partial unit of measure in the Location Detail File (F4602). A partial quantity is a quantity in any UM in a structure that is less than one. For example, an item with a case-each structure, where case = 10 each, would have a partial quantity if there were 5 each of the item.</p> <p>Valid Codes are:</p> <ul style="list-style-type: none"> blank Do not merge two partial units of measure. 1 Merge two partial units of measure. <p>..... <i>Form-specific information</i></p> <p>To merge partials, you must also set this field to one on the Item Profile form.</p>
Merge UM Structures	<p>A code that indicates whether two unit of measure structures can be merged. Valid Codes are:</p> <ul style="list-style-type: none"> blank Do not merge unit of measure structures. 1 Merge unit of measure structures. <p>..... <i>Form-specific information</i></p> <p>To merge UM structures, you must also set this field to one on the Item Profile form.</p>

What You Should Know About

Building the tie-breaker table	<p>If you use random locations for putaway, you must rebuild the tiebreaker table whenever you change the putaway sequence or proximity (latitude, longitude, or height) of a random location.</p> <p>See <i>Building the Tie Breaker Table</i> in this section for more information.</p>
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Merging partial quantities or unit of measure structures

You can merge partial quantities or UM structures in location detail records to minimize the number of records created by the system. To do this, you must set Merge Partials or Merge UM Structures to 1 in both the Item Profile and Location Profile Detail form. Merging partials or UM structures can cause the system to over or understate the available space in a location.

See *Merging Location Detail Records* in Appendix A for more information.

Defining Location Capacity



From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose an option

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

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

- Volume, where the system compares the item's cubic dimensions with the available cubic dimensions in the location.
- Layering, where the system compares the item's length, width, and height to the length, width, and height of the available space in the location. You must also specify whether the item's unit of measure definition allows the system to rotate the item during putaway.
- Quantity, where the system compares the quantity of the item to store to the quantity that you can still fit into the location.

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

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

You can:

- Define location capacity by item

- Define location capacity by item dimension group

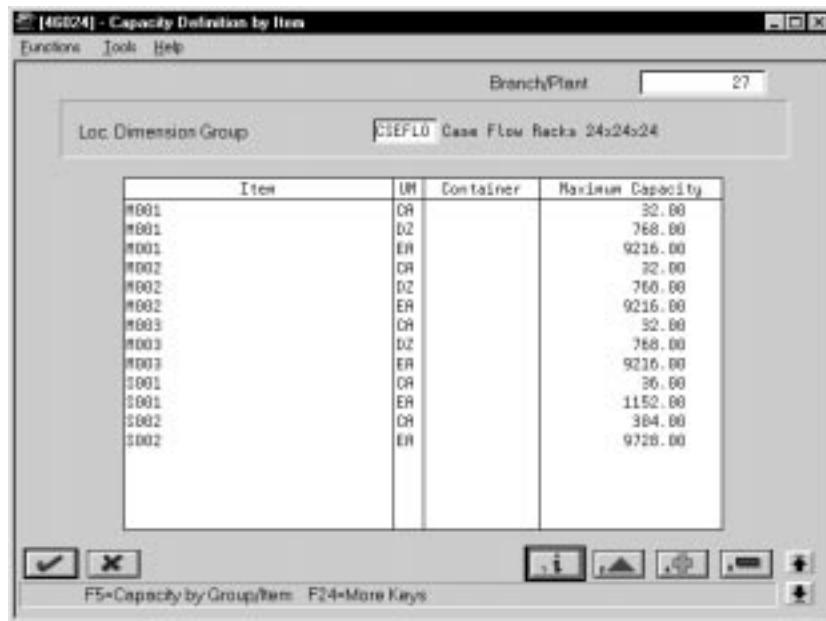
What You Should Know About

Setting the type of capacity checking

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

► To define location capacity by item

On Capacity Definition by Item



Complete the following fields:

- Branch/Plant
- Location Dimension Group
- Item
- Unit of Measure
- Container Code
- Maximum Capacity

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

► **To define location capacity by item dimension group**

On Capacity Definition by Group



Complete the following fields

- Branch/Plant
- Location Dimension Group
- Item Dimension Group
- Unit of Measure
- Container Code
- Maximum Capacity

Building the Tie-breaker Table



From Advanced Warehouse Management (G46), enter 27

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

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

- Sequence number
- Available space

- Proximity to a base location

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

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

- Putaway, Picking, or Replenishment Sequence Code
- Location characteristics
- Location dimensions
- Location proximity (latitude, longitude, or height)

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

Processing Options for Build Tiebreaker Files

1. If using proximity tiebreakers, enter one of the following:
 - '1' - Build proximity from base putaway location.
 - '2' - Build proximity from base picking location.
 - '3' - Build proximity from both base putaway and picking locations.

Leave the option blank if you do not want proximitiies built.

Set Up Fixed Locations and Zones

Setting Up Fixed Locations and Zones

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

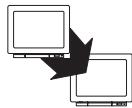
Setting up fixed locations and zones includes:

- Setting up fixed putaway locations
- Setting up fixed picking locations
- Setting up fixed replenishment zones

Before You Begin

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

Setting Up Fixed Putaway Locations



From Advanced Warehouse Management (G46), enter 27

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

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

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

► To set up fixed putaway locations

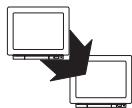
On Fixed Putaway Locations



Complete the following fields:

- Branch/Plant
- Item Number
- Unit of Measure
- Putaway Locations

Setting Up Fixed Picking Locations



From Advanced Warehouse Management (G46), enter 27

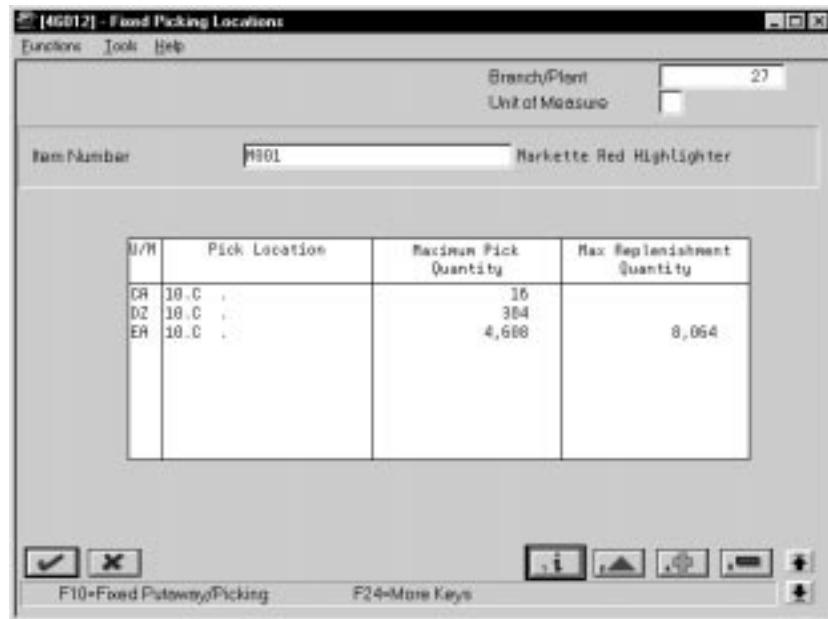
From Warehouse Advanced and Technical Operations (G4631), choose Warehouse Movement Rules

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

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

► **To set up fixed picking locations**

On Fixed Picking Locations



1. Complete the following fields:
 - Branch/Plant
 - Item Number
 - Unit of Measure
 - Pick Location
 - Maximum Pick Quantity
 - Maximum Replenishment Quantity
2. Access the fold area.
3. Complete the following fields:
 - Normal Replenishment Point
 - Minimum Replenishment Point

Field	Explanation
Maximum Pick Quantity	The number you enter here indicates the maximum quantity to be picked for an item in a specific unit of measure at a location. The system will not suggest this location if the quantity to be picked exceeds the maximum pick quantity you define in this field.

Field	Explanation
Max Replenishment Quantity	The number you enter here specifies the maximum quantity to be replenished to a fixed picking location. You must enter a quantity in this field if you will be doing economic replenishment. You specify in the processing options for the Location Selection Driver program (P46171) for automatic, or online, replenishment and in the processing options for the Batch Replenishment program (P461601) that you want to perform economic replenishment.
Normal Replenishment Point	A number that indicates the normal level of inventory at a fixed picking location that the system uses during batch replenishments to generate replenishment requests. You can have the system perform replenishment when the quantity in a fixed picking location reaches either the normal replenishment point or the minimum replenishment point. During automatic, or online, replenishment, the system uses the minimum replenishment point. For batch replenishment, you specify in the processing options of the Batch Replenishment program (P461601) which replenishment point you want the system to use.
Min Replenishment Point	A number that indicates the minimum quantity of inventory at a fixed picking location that the system uses to generate an online replenishment request. You can have the system perform replenishment when the quantity in a fixed picking location reaches either the normal replenishment point or the minimum replenishment point. During automatic, or online, replenishment, the system uses the minimum replenishment point. For batch replenishment, you specify in the processing options of the Batch Replenishment program (P461601) which replenishment point you want the system to use.

What You Should Know About

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



From Advanced Warehouse Management (G46), enter 27

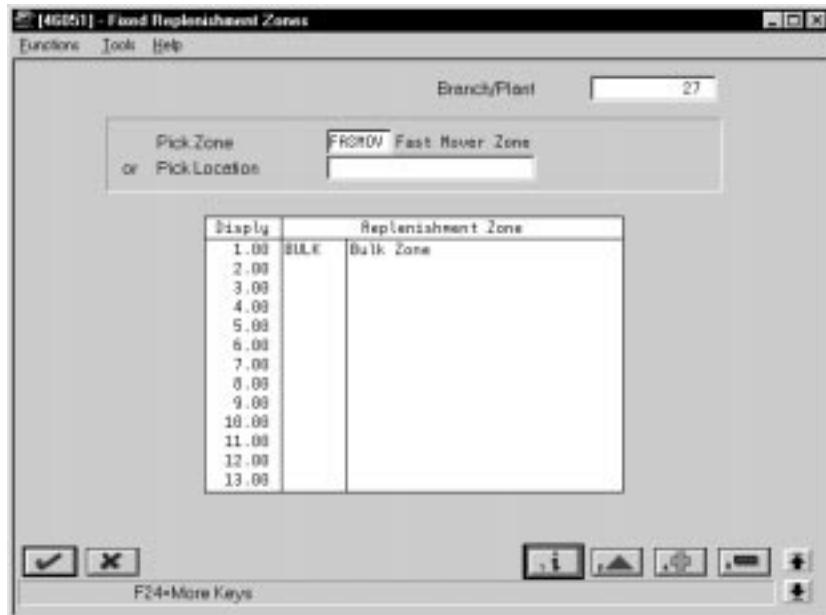
From Warehouse Advanced and Technical Operations (G4631), choose Warehouse Movement Rules

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

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

► To set up fixed replenishment zones

On Fixed Replenishment Zones



Complete the following fields:

- Branch/Plant
- Pick Zone
- Pick Location
- Replenishment Zone

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

What You Should Know About

Defining replenishment zones by picking location versus picking zone	During replenishment of a picking location, the system searches for a replenishment zone attached to the picking location. If you have not set up a replenishment zone for the picking location, the system searches for a replenishment zone attached to a picking zone. If you have not set up a picking zone, the system displays an error.
Restricting replenishment zones	You can limit replenishment of a picking location to a single replenishment zone by entering that zone in the location's replenishment instruction.

Set Up Item Warehouse Information

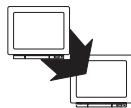
Setting Up Item Warehouse Information

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

Setting up item warehouse information includes:

- Defining unit of measure structures
- Defining item classification codes
- Setting up item unit of measure definitions
- Setting up item profiles

Defining Unit of Measure Structures



From Advanced Warehouse Management (G46), enter 29

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

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

You can define an unlimited number of unit of measure conversions for an item. For example, you can define conversions such as 24 items per case, 16 cases per

pallet, and so on. However, the system limits the unit of measure structure to 5 units of measure. You assign a code (1 through 5) to each unit of measure in the structure. Each item must have a primary unit of measure, which is the smallest unit of measure that the system can track. You should assign a structure code of 1 to the largest unit of measure, such as a pallet. The system assigns the largest numerical structure code (up to the number 5) to the primary (smallest) unit of measure automatically.

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

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

► To define unit of measure structures

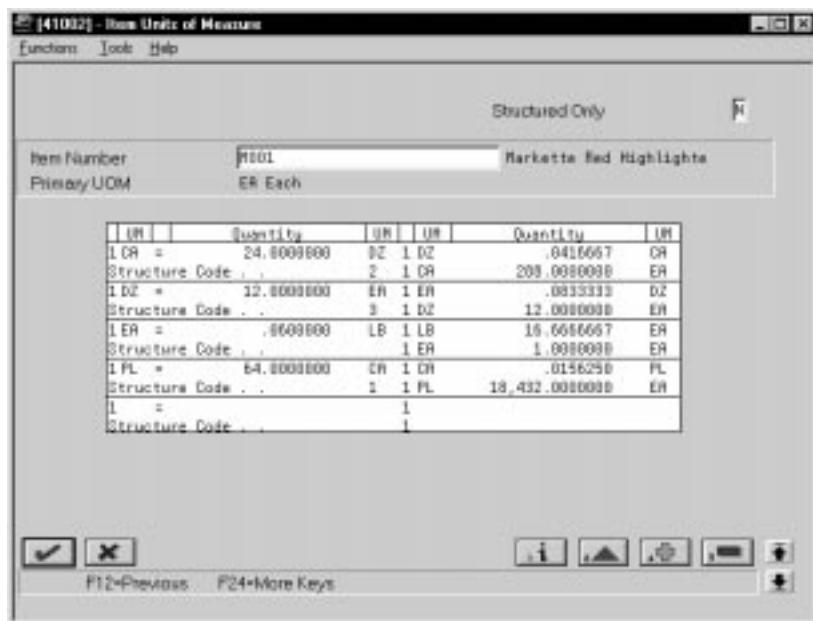
On Basic Item Master Data



1. Locate the item for which you want to define a unit of measure structure.
2. Access Default Units of Measure.



3. On Default Units of Measure, access Item Units of Measure.



4. On Item Units of Measure, complete the following fields:

- Item Number
- Unit of Measure
- Quantity
- Unit of Measure

5. Access the fold area.

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

- Structure Code

Field	Explanation
Item Number	A number that the system assigns to an item. It can be in short, long, or 3rd item number format.
UM	<p>A user defined code (system 00/type UM) that identifies the unit of measurement for an amount or quantity. For example, it can represent a barrel, box, cubic yard, gallon, an hour, and so on.</p> <p>..... <i>Form-specific information</i></p> <p>This unit of measure to which you are converting.</p>
Quantity	<p>The factor that the system uses to convert one unit of measure to another unit of measure.</p> <p>..... <i>Form-specific information</i></p> <p>The quantity and the unit of measure from which you are converting must equal the unit of measure to which you are converting.</p>
Structure Code	<p>A code that determines the hierarchy of items in containers or pallets.</p> <p>For example:</p> <p>Unit of Measure</p> <p>1 Pallet = 24 Cases — structure code 1</p> <p>1 Case = 12 Interpacks — structure code 2</p> <p>1 Interpack = 3 Boxes — structure code 3</p> <p>1 Box = 6 Eaches — structure code 4</p> <p>Assign structure code 1 to the largest unit of measure, with smaller units assigned to codes 2, 3, and 4.</p> <p>Given the above structure example, when one item is stored in the warehouse the location detail (F4602) would have a structure of:</p> <p>1 Pallet/ with 24 Cases on the Pallet/ with 12 Interpacks in each Case/ with 3 Boxes in each Interpack/ with 6 Eaches in each Box</p> <p>NOTE: It is not necessary to define your primary unit of measure within a structure. It always defaults in as the lowest level. Or, if you are changing the structure in a program, the system verifies that the primary is present in the structure and is the lowest level.</p>

Defining Item Classification Codes



From Advanced Warehouse Management (G46), enter 29

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

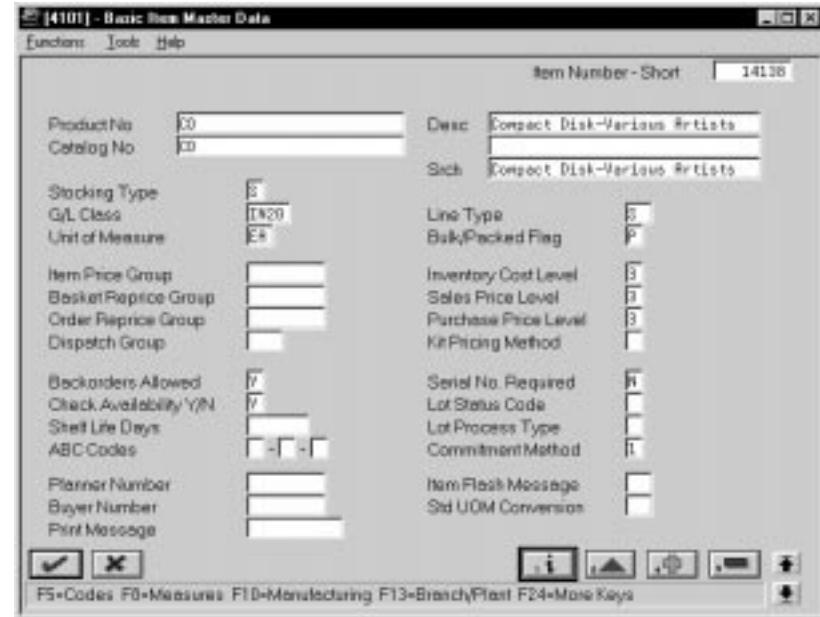
An item classification code is a group to which you assign an item. During inventory movement (putaway, picking, and replenishment), the system uses these codes to choose the movement tables that determine location selection. You use two types of item classification codes for the warehouse:

- Item dimension group
- Warehouse process groups

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

► To define item classification codes

On Basic Item Master Data



1. Locate the item.
2. Access Classification Codes.



3. On Classification Codes, complete the following optional field:
 - Item Dimension Group
4. To define warehouse process groups for the item, complete the following fields:
 - Warehouse Process Group 1
 - Warehouse Process Group 2
 - Warehouse Process Group 3

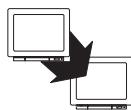
Field	Explanation
Item Dimension Group	<p>A code (system 41/type 01) that identifies a group of items that share the same size specifications, such as height and width. An item dimension group defines the size specifications for all items that belong to the group. After you set up an item dimension group,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

Field	Explanation
Warehouse Process Grp 2	<p>A code (system 41/type 02) that identifies a group of items that you want to move the same way. An item's process group determines the movement instructions the system uses to put away, pick, and replenish the item. You assign items to process groups using Classification Codes (P41011).</p> <p>..... <i>Form-specific information</i></p>
Warehouse Process Grp 3	<p>You must define at least one process group for each item to have warehouse processes take place.</p> <p>You use Process Selection to define put away, picking, and replenishment instructions for warehouse process groups.</p>
Warehouse Process Grp 3	<p>A code (system 41/type 02) that identifies a group of items that you want to move the same way. An item's process group determines the movement instructions the system uses to put away, pick, and replenish the item. You assign items to process groups using Classification Codes (P41011).</p> <p>..... <i>Form-specific information</i></p>
Warehouse Process Grp 3	<p>You must define at least one process group for each item to have warehouse processes take place.</p> <p>You use Process Selection to define put away, picking, and replenishment instructions for warehouse process groups.</p>

See Also

- *Defining Process Selection* for information about how warehouse process groups control which movement instructions the system uses

Setting Up Item Unit of Measure Definitions



From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose an option

You define information about each item's units of measure, such as eaches, boxes, cases, and so on, to allow the system to perform putaway, picking, and replenishment of that item. You define the item's units of measure when you create the Item Master record for the item.

Each item's unit of measure definition includes:

- The default storage container

- A switch that controls license plate tracking for that unit of measure
- The dimensions that the system uses to calculate volume

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

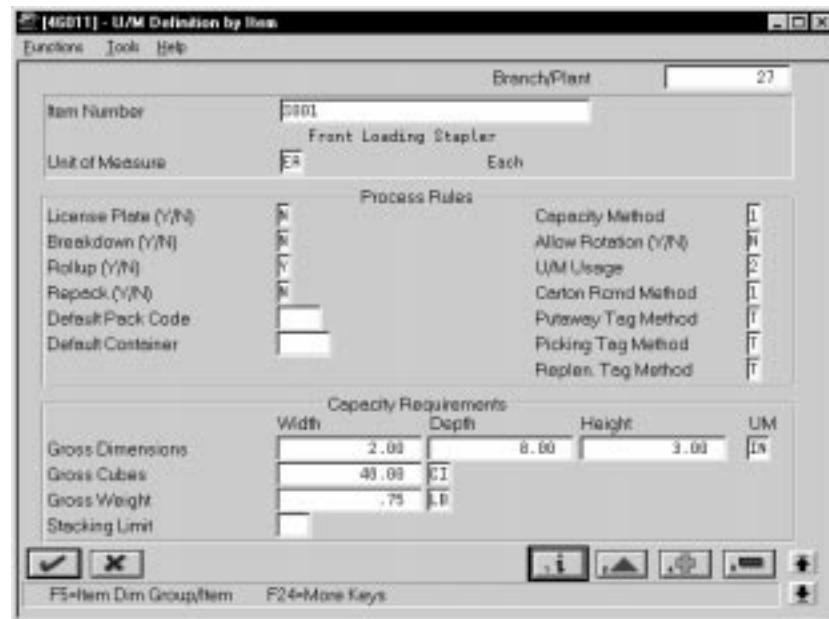
You use Unit of Measure Definition to define the unit of measure's dimensions and how the system processes the unit of measure. You can:

- Define units of measure by item
- Define units of measure by group

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

► **To define units of measure by item**

On Unit of Measure Definition by Item



1. Complete the following fields:

- Branch/Plant

- Item Number
 - Unit of Measure
 - Capacity Method
 - Allow Rotation
 - Unit of Measure Usage
2. If you measure volume using one of the two capacity methods, complete the following fields:
- Gross Width
 - Gross Depth
 - Gross Height
 - Gross Weight
3. Complete the following optional fields:
- Carton Recommendation Method
 - Default Pack Code
 - Default Container

Field	Explanation
Capacity Method	<p>A code that indicates the capacity method the system uses to calculate whether the quantity to be put away will fit in a location.</p> <p>Valid methods are:</p> <ul style="list-style-type: none"> 1 Volume checking. The system compares the available cubic dimensions of a location to the cubic dimensions of the item to be put away. 2 Layering. The system compares the item's dimensions to the usable dimensions of the location. This method lets you layer goods in a location. If you specify this capacity method, you must also specify whether the item can be rotated. If there is enough available volume, and the item's dimensions fit in the location, the system suggests the location for putaway. 3 Quantity checking. The system examines the quantity of the item that should fit in the location, as you defined it through Location Capacity Definition (P46024).

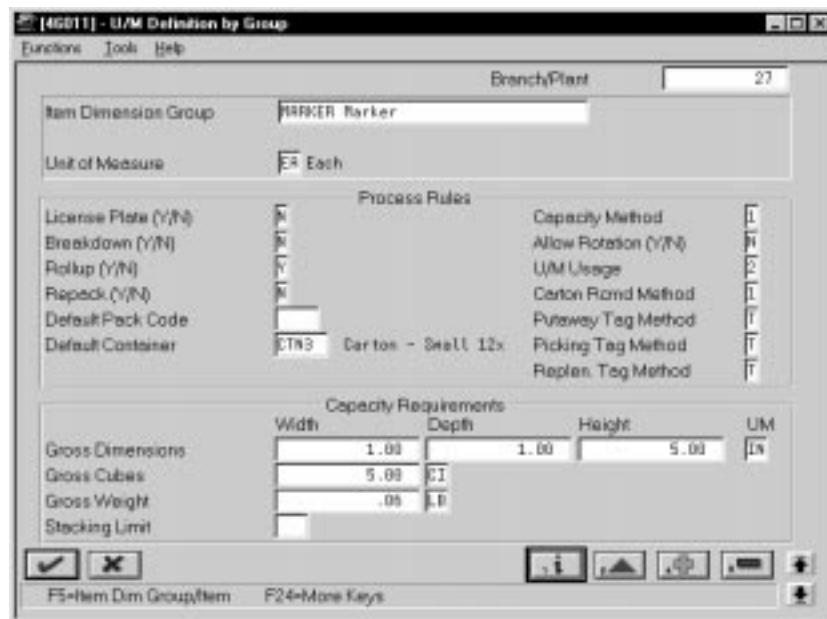
Field	Explanation
Allow Rotation (Y/N)	<p>A code that indicates whether you allow the system to rotate an item 90 degrees to determine whether the item fits into a location.</p>
	<p>Valid codes are:</p>
	<p>Y Yes, rotate the item 90 degrees during putaway</p>
	<p>N No, do not rotate the item 90 degrees during putaway</p>
	<p>NOTE: You must enter a code in this field if you use capacity method 2 (layering).</p>
U/M Usage	<p>A code that indicates whether the default storage container assigned to the specified item in this unit of measure is an open, pallet-type container or a closed, box-type container. The system calculates the item's volume and weight based on container type.</p>
	<p>Valid codes are:</p>
	<p>1 The container is an open, pallet-type container. The system calculates its volume and weight as follows:</p>
	<p>Height = the height of the container plus the height of the items on the container</p>
	<p>Weight = the weight of the container plus the weight of the items on the container</p>
	<p>Width = the larger of the width of the container or the items on the container</p>
	<p>Depth = the larger of the depth of the container or the items on the container</p>
	<p>2 The container is a closed, box-type container. The system calculates its volume and weight as follows:</p>
	<p>Weight = The weight of the container plus the weight of the goods in the container</p>
	<p>Height, width, and depth are pulled from Container and Carton Code (P46091) information, where you also define the container's weight.</p>
	<p>NOTE: If you do not specify a default container for the specified item in this unit of measure, the system uses the height, width, depth, and weight you define on this form.</p>
Gross Width	<p>The gross width of the location(s) defined within the location dimension group, the gross width of an item as defined in the Unit Of Measure Definition (by item or group), or the gross width of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants – Page 2 (P410012).</p>

Field	Explanation
Gross Depth	The gross depth of the location(s) defined within the location dimension group, the gross depth of an item as defined in the Unit Of Measure Definition (by item or group), or the gross depth of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants – Page 2 (P410012).
Gross Height	The gross height of the location(s) defined within the location dimension group, the gross height of an item as defined in the Unit Of Measure Definition (by item or group), or the gross height of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants – Page 2 (P410012).
Gross Weight	The gross weight of one unit of the item in this unit of measure, or the weight of an empty storage container or shipping carton. These values default to the location detail (F4602) and the system uses the values in maximum weight calculations for specified locations during putaway.
Carton Rcmd Method	<p>A code that indicates the method the system uses to recommend a carton for the specified item in this unit of measure.</p> <p>Valid codes are:</p> <ul style="list-style-type: none"> blank Do not recommend cartons for the specified item in this unit of measure 1 Recommend shipping cartons for the specified item in this unit of measure based on the volume of the item and the volume of the shipping carton 2 Recommend shipping cartons for the specified item in this unit of measure based on the percentage of the shipping carton that the item and unit of measure occupy <p>You define the dimensions of the carton through Container and Carton Codes (P46091). You define an item's dimensions through Item/Unit of Measure Profile (P46011).</p>
Default Pack Code	A code (system 46/type PK) that identifies the packing materials to use (such as opaque shrink wrap, or foam nuggets) if repacking is required before putaway. If you set the Repack (Y/N) field to Y, you must enter a code in this field. You define the packing codes on User Defined Code Revisions.

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

► To define units of measure by group

On Unit of Measure Definition by Group



1. Complete the following fields:
 - Branch/Plant
 - Item Dimension Group
 - Unit of Measure
 - Capacity Method
 - Allow Rotation
 - Unit of Measure Usage
2. If you measure volume by the capacity method, complete the following fields:
 - Gross Width

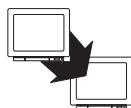
- Gross Depth
 - Gross Height
 - Gross Weight
3. Complete the following optional fields:
- Carton Recommendation Method
 - Default Pack Code
 - Default Container

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

What You Should Know About

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



From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose Item Profile

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

- Whether you can store items of different types or ages in the same location
- Whether to use one or two-phase confirmation for putaway, picking, and replenishment
- The item's various default locations

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

- Allow mixing with other items
- Use two-phase putaway, picking, and replenishment
- Use location R/ / as its default receiving location

► **To set up item profiles**

On Item Profile



1. Complete the following fields:

- Branch/Plant
- Item Number
- Mix Items
- Mix Receipt Date
- Split Lines
- 1 or 2 Phase Putaway
- 1 or 2 Phase Picking
- 1 or 2 Phase Replenishment
- Overflow Location
- Variance Location
- Holding Location

- Base Putaway Location
 - Base Picking Location
2. Complete the following optional fields:
- Default Tax Code
 - Merge Partials
 - Merge UM Structures
 - FIFO Receipt Date

Field	Explanation
Mix Items (Y/N)	<p>A code that indicates whether you want the system to store different items in the same location.</p> <p>Valid codes are:</p> <p>Y Yes, allow different items to be stored in the same location</p> <p>N No, do not allow different items to be stored in the same location</p>
Mix Receipt Dt.(Y/N)	<p>A code that indicates how you want the system to assign items to a location.</p>
Split Lines (Y/N)	<p>A code that indicates whether the system can split a purchase order line when you create a putaway suggestion for the order line.</p> <p>Valid codes are:</p> <p>Y Yes, split purchase order lines when making putaway suggestions</p> <p>N No, do not split purchase order lines when making putaway suggestions</p>

Field	Explanation						
1 or 2 Phase Putaway	<p>A code that indicates whether you use 1- or 2-phase confirmation during putaway.</p> <ul style="list-style-type: none"> • 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location. • 2-phase confirmation means the process is confirmed in two steps: the first when the goods have moved from the starting location to the staging location, and the second when the goods have moved from the staging location to the destination location. <p>If you use 2-phase confirmation, you can specify whether the confirmation is logical or physical.</p> <ul style="list-style-type: none"> • Logical 2-phase confirmation generates one document and does not indicate physical movement to the staging location. • Physical 2-phase confirmation generates two documents: the first indicates movement from the starting location to the staging location, and the second indicates movement from the staging location to the destination location. <p>Valid codes are:</p> <table> <tr> <td>I</td> <td>Use 1-phase confirmation</td> </tr> <tr> <td>L</td> <td>Use logical 2-phase confirmation</td> </tr> <tr> <td>P</td> <td>Use physical 2-phase confirmation</td> </tr> </table>	I	Use 1-phase confirmation	L	Use logical 2-phase confirmation	P	Use physical 2-phase confirmation
I	Use 1-phase confirmation						
L	Use logical 2-phase confirmation						
P	Use physical 2-phase confirmation						

Field	Explanation
1 or 2 Phase Picking	<p>A code that indicates whether you use 1- or 2-phase confirmation during picking.</p> <ul style="list-style-type: none"> • 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location. • 2-phase confirmation means the process is confirmed in two steps: the first when the goods have moved from the starting location to the staging location, and the second when the goods have moved from the staging location to the destination location.

If you use 2-phase confirmation, you can specify whether the confirmation is logical or physical.

- Logical 2-phase confirmation generates one document and does not indicate physical movement to the staging location.
- Physical 2-phase confirmation generates two documents: the first indicates movement from the starting location to the staging location, and the second indicates movement from the staging location to the destination location.

Valid codes are:

I	Use 1-phase confirmation
L	Use logical 2-phase confirmation
P	Use physical 2-phase confirmation

Field	Explanation						
1 or 2 Phase Replen	<p>A code that indicates whether you use 1- or 2-phase confirmation during replenishment.</p> <ul style="list-style-type: none"> • 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location. • 2-phase confirmation means the process is confirmed in two steps: the first when the goods have moved from the starting location to the staging location, and the second when the goods have moved from the staging location to the destination location. 						
	<p>If you use 2-phase confirmation, you can specify whether the confirmation is logical or physical.</p> <ul style="list-style-type: none"> • Logical 2-phase confirmation generates one document and does not indicate physical movement to the staging location. • Physical 2-phase confirmation generates two documents: the first indicates movement from the starting location to the staging location, and the second indicates movement from the staging location to the destination location. 						
	<p>Valid codes are:</p>						
	<table> <tr> <td>I</td><td>Use 1-phase confirmation</td></tr> <tr> <td>L</td><td>Use logical 2-phase confirmation</td></tr> <tr> <td>P</td><td>Use physical 2-phase confirmation</td></tr> </table>	I	Use 1-phase confirmation	L	Use logical 2-phase confirmation	P	Use physical 2-phase confirmation
I	Use 1-phase confirmation						
L	Use logical 2-phase confirmation						
P	Use physical 2-phase confirmation						
Overflow Location	<p>A code that identifies the location that the system uses when an item cannot fit into the suggested putaway locations. You can monitor movement suggestions for the overflow location by accessing the audit report (P46175) or by inquiring on the location detail (F4602).</p>						
Variance Location	<p>A code that identifies the location that the system uses when you confirm a smaller quantity than the suggested quantity during putaway confirmation. You do this through Change/Split Suggestion during putaway confirmation, where you enter a quantity that is smaller than the suggested quantity, and confirm with a variance to the suggested quantity. The system places the variance (remaining) quantity in the variance location.</p>						
Holding Location	<p>A code that identifies the location that the system uses when you confirm a larger quantity than the suggested pick quantity during pick confirmation. You do this through Change/Split Suggestion during pick confirmation, where you enter a quantity that is greater than the suggested quantity, and confirm with a variance to the suggested quantity. The system places the variance (extra) quantity in the holding location.</p>						

Field	Explanation
Base Putaway Location	A code that identifies the base putaway location that the system uses to calculate proximity when you specify proximity as the tiebreaker in a putaway instruction. If you use a tiebreaker that sequences locations according to proximity, the system ranks the locations based on their distance from this base putaway location. The system calculates distance based on the coordinates (longitude, latitude, and height) you defined in the location profile (P46020).
Base Picking Location	A code that identifies the base picking location that the system uses to calculate proximity when you specify proximity as the tiebreaker in a picking instruction. If you use a tiebreaker that sequences locations according to proximity, the system ranks the locations based on their distance from this base picking location. The system calculates distance based on the coordinates (longitude, latitude, and height) you defined in the location profile (P46020).
Default Tax Code	A code (system 46/type LT) that indicates whether the location contains tax-paid inventory (in-bond vs. duty paid). If an item has an assigned tax code, the system puts the item away only in locations with the same tax code.
	You assign tax codes to items through Item Profile (P46010).
Merge Partials	<p>A code that indicates whether a partial unit of measure can be added to another partial unit of measure in the Location Detail File (F4602). A partial quantity is a quantity in any UM in a structure that is less than one. For example, an item with a case-each structure, where case = 10 each, would have a partial quantity if there were 5 each of the item.</p> <p>Valid Codes are:</p> <ul style="list-style-type: none"> blank Do not merge two partial units of measure. 1 Merge two partial units of measure. <p style="text-align: center;">..... <i>Form-specific information</i></p>
	To merge partials, you must also set this field to one on the Location Profile Detail form.
Merge UM Structures	<p>A code that indicates whether two unit of measure structures can be merged. Valid Codes are:</p> <ul style="list-style-type: none"> blank Do not merge unit of measure structures. 1 Merge unit of measure structures. <p style="text-align: center;">..... <i>Form-specific information</i></p>
	To merge UM structures, you must also set this field to one on the Location Profile Detail form.

Field	Explanation
FIFO Receipt Date	<p>A code that indicates if the receipt date is required for FIFO when you select locations for picking and replenishment. If the receipt date is not required, records with different dates will be merged. The Location Detail record will retain the last receipt date (which may not be the latest date).</p> <p>Valid Codes are:</p> <ul style="list-style-type: none">blank Receipt Date is not required for FIFO.1 Receipt date is required for FIFO. <p>To merge records with different FIFO receipt dates, you must set the Mix Dates/Lots field to Y on both the Item Profile form and the Location Profile Detail form.</p>

What You Should Know About

Merging partial quantities, unit of measure structures, or FIFO receipt dates	<p>You can merge partial quantities, UM structures, and FIFO receipt dates to minimize the number of location detail records created by the system.</p> <p>If you merge FIFO receipt dates, the system retains the last receipt date.</p> <p>To merge partial quantities or UM structures, you must set the Merge Partials or Merge UM Structures field to 1 in both the Item Profile and Location Profile Detail form. Merging partials or UM structures can cause the system to over or understate the available space in a location.</p> <p>See <i>Merging Location Detail Records</i> in Appendix A for more information.</p>
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Set Up Inclusion Rules



From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose Inclusion Rules

Setting Up Inclusion Rules

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

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

► To set up inclusion rules

On Inclusion Rules



1. Locate the inclusion rule for Warehouse Management by completing the following field:
 - Inclusion Code
2. To limit the information that displays, complete the following field:
 - Skip to Order Type
3. To add or delete an order type, complete the following field and press Enter:
 - Option
4. Exit Inclusion Rules.
5. Access the Warehouse System Setup menu.
6. From the Warehouse System Setup menu, choose *Branch/Plant Constants*.
7. Access Branch/Plant Constants - Pg 2.



8. On Branch/Plant Constants - Pg 2, complete the following field:
 - Request Inclusion Version

Field	Explanation
Selection Code	A code used to select All or a Selected part of a list of items.

Field	Explanation														
Request Inclusion Vers	<p>A user defined code (system 40/type RV) that identifies an inclusion rule that you want the system to use for this branch/plant. The Manufacturing and Advanced Warehouse Management systems use inclusion rules as follows:</p> <ul style="list-style-type: none"> • For Manufacturing <p>Allows multiple versions of resource rules for running MPS, MRP, or DRP.</p> • For Advanced Warehouse Management <p>Allows multiple versions of inclusion rules for running putaway and picking. The system processes only those order lines that match the inclusion rule for a specified branch/plant.</p> 														
Order Type	<p>A user defined code (00/DT) that identifies the type of document. This code also indicates the origin of the transaction. J.D. Edwards has reserved document type codes for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program. (These entries are not self-balancing when you originally enter them.)</p> <p>The following document types are defined by J.D. Edwards and should not be changed:</p> <table style="margin-left: 20px;"> <tr><td>P</td><td>Accounts Payable documents</td></tr> <tr><td>R</td><td>Accounts Receivable documents</td></tr> <tr><td>T</td><td>Payroll documents</td></tr> <tr><td>I</td><td>Inventory documents</td></tr> <tr><td>O</td><td>Purchase Order Processing documents</td></tr> <tr><td>J</td><td>General Accounting/Joint Interest Billing documents</td></tr> <tr><td>S</td><td>Sales Order Processing documents</td></tr> </table>	P	Accounts Payable documents	R	Accounts Receivable documents	T	Payroll documents	I	Inventory documents	O	Purchase Order Processing documents	J	General Accounting/Joint Interest Billing documents	S	Sales Order Processing documents
P	Accounts Payable documents														
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Selection Exits	<p>Selection exit codes are options and function keys that are used to perform a specific function for a selected line or form of data. The most commonly used selection exits for each program are displayed in highlighted text at the bottom of the form. To display all available selection exits, press F24. Press F1 in the Option field to display all available Options for the program.</p>														

Set Up Order Groups



From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose Order Groups

Setting Up Order Groups

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

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

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



To set up order groups

On Order Groups



Complete the following fields:

- Branch/Plant
- Order Group
- Include Order Types

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

Field	Explanation														
Order Type	<p>A user defined code (00/DT) that identifies the type of document. This code also indicates the origin of the transaction. J.D. Edwards has reserved document type codes for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program. (These entries are not self-balancing when you originally enter them.)</p> <p>The following document types are defined by J.D. Edwards and should not be changed:</p> <table> <tbody> <tr><td>P</td><td>Accounts Payable documents</td></tr> <tr><td>R</td><td>Accounts Receivable documents</td></tr> <tr><td>T</td><td>Payroll documents</td></tr> <tr><td>I</td><td>Inventory documents</td></tr> <tr><td>O</td><td>Purchase Order Processing documents</td></tr> <tr><td>J</td><td>General Accounting/Joint Interest Billing documents</td></tr> <tr><td>S</td><td>Sales Order Processing documents</td></tr> </tbody> </table>	P	Accounts Payable documents	R	Accounts Receivable documents	T	Payroll documents	I	Inventory documents	O	Purchase Order Processing documents	J	General Accounting/Joint Interest Billing documents	S	Sales Order Processing documents
P	Accounts Payable documents														
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T	Payroll documents														
I	Inventory documents														
O	Purchase Order Processing documents														
J	General Accounting/Joint Interest Billing documents														
S	Sales Order Processing documents														

What You Should Know About

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

Set Up Unit of Measure Groups



From Advanced Warehouse Management (G46), enter 29

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

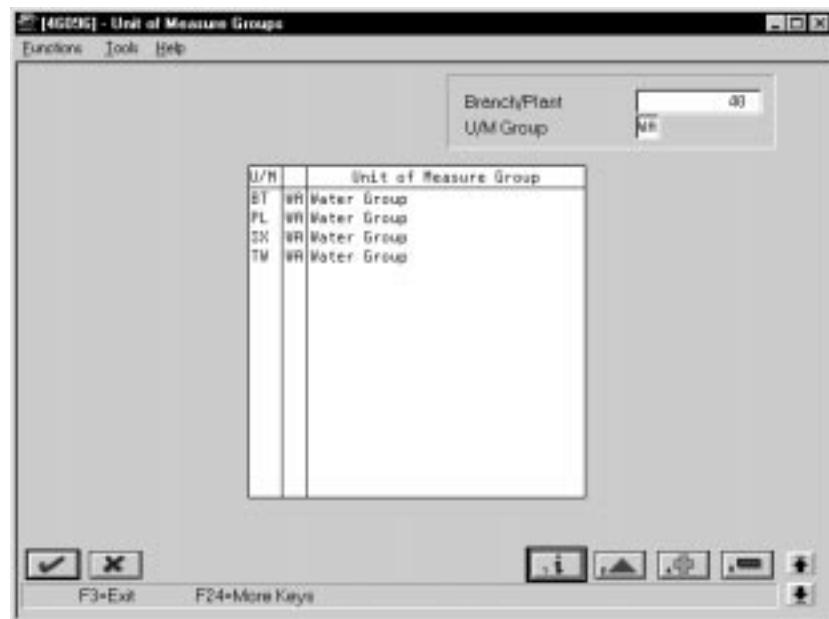
Setting Up Unit of Measure Groups

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

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

► **To set up unit of measure groups**

On Unit of Measure Groups



Complete the following fields:

- Branch/Plant
- Unit Of Measure
- Unit of Measure Group

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

Set Up Storage Containers

Setting Up Storage Containers

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

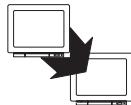
Two types of storage containers are available:

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

To set up storage containers, complete the following tasks:

- Define storage containers
- Set up allowed containers for each location

Defining Storage Containers



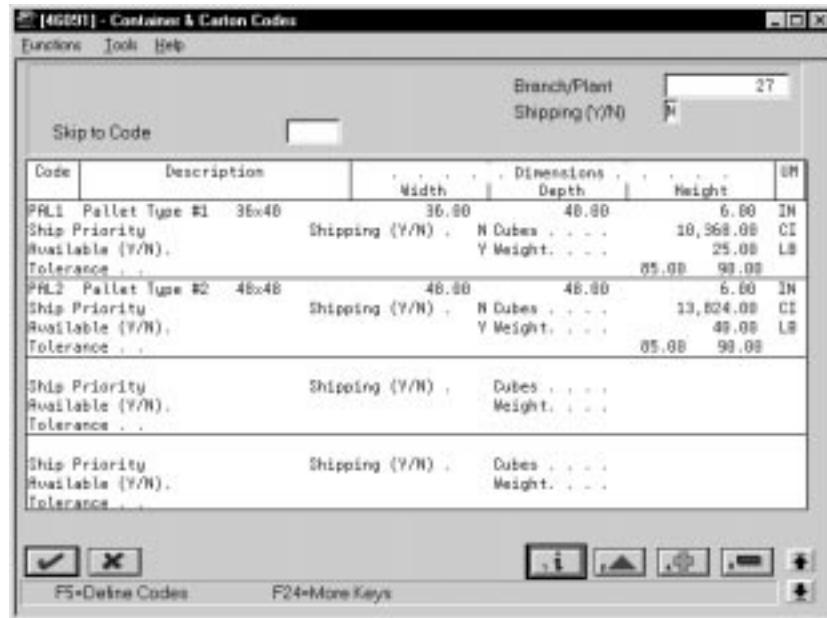
From Advanced Warehouse Management (G46), enter 29

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

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

► **To define storage containers**

On Container and Carton Codes



1. Complete the following fields:

- Branch/Plant
- Shipping Container
- Container Code
- Width
- Depth
- Height
- Unit of Measure

2. Access the fold area.

3. Complete the following fields:

- Shipping Container
- Cubes
- Unit Of Measure
- Available
- Weight
- Unit Of Measure
- Beginning Tolerance
- Ending Tolerance

Field	Explanation
Shipping (Y/N)	<p>A code that indicates whether the container can be used as a shipping carton. The system uses only items that can be used as shipping cartons when it makes carton recommendations.</p>
	<p>Valid codes are:</p>
	<p>Y Yes, use this container as a shipping carton N No, do not use this container as a shipping carton</p>
	<p>..... <i>Form-specific information</i></p>
	<ul style="list-style-type: none"> • Enter Y in the Shipping Y/N field in the upper-right corner to specify that you want to review only containers that can be shipped. Blank displays all containers, both shippable and non-shippable. • The Shipping Y/N field in the fold allows you to define whether the container is shippable. A Y in this field indicates that the system will consider this container when making carton recommendations.
Container Code	<p>A code (system 46/type EQ) that identifies a storage container or a shipping carton. A storage container can be an open container where items are stored on the container (for example, a pallet), or a closed container where items are stored in the container (for example, a box). You use Container and Carton Codes (P46091) to define storage containers.</p>
	<p>..... <i>Form-specific information</i></p>
	<ul style="list-style-type: none"> • Skip to Code field: Enter a container code in this field if you want to display a specific code at the top of the list. • Code field: The code in this field identifies the container whose dimensions display on the line.
Gross Width	<p>The gross width of the location(s) defined within the location dimension group, the gross width of an item as defined in the Unit Of Measure Definition (by item or group), or the gross width of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants – Page 2 (P410012).</p>
Gross Depth	<p>The gross depth of the location(s) defined within the location dimension group, the gross depth of an item as defined in the Unit Of Measure Definition (by item or group), or the gross depth of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants – Page 2 (P410012).</p>

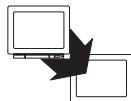
Field	Explanation
Gross Height	The gross height of the location(s) defined within the location dimension group, the gross height of an item as defined in the Unit Of Measure Definition (by item or group), or the gross height of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants – Page 2 (P410012).
UM	A user defined code (system 00/type UM) that identifies the unit of measure that the system uses to display dimensions for the warehouse. The system provides the ability to establish inches, centimeters, meters, and so forth, as a measuring standard.
Cubic Dimensions – Gross	The gross cubic dimensions of the locations defined within the location dimension group, the gross cubic dimensions of an item as defined in the Unit Of Measure Definition (by item or group), or the gross cubic dimensions of a storage or shipping container. The unit of measure is defined in Branch/Plant Constants – Page 2 (P410012).
..... <i>Form-specific information</i>	
The system calculates the cubic dimension of the container after you enter the container's dimensions (height multiplied by depth multiplied by width).	
Available (Y/N)	A code that indicates whether this container is available as a shipping carton for packing picked items. The system uses available containers during carton recommendation.
Valid codes are:	
Y Yes, this container is available as a shipping carton	
N No, this container is not available as a shipping carton	
Weight – Gross Weight	The gross weight of one unit of the item in this unit of measure, or the weight of an empty storage container or shipping carton. These values default to the location detail (F4602) and the system uses the values in maximum weight calculations for specified locations during putaway.
Tolerance	The minimum percentage of a shipping carton that must be filled before it can be shipped. If the content of the carton does not reach this percentage, the system recommends a smaller carton. The default minimum percentage is 85%.
Percentage – Maximum Fill	The maximum percentage of a shipping carton that can be filled before the system recommends a larger carton. The default maximum percentage is 90%.

What You Should Know About

Predefined container codes

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

Setting Up Allowed Containers for Each Location



From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose Location Profile Detail

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

► To set up allowed containers for each location

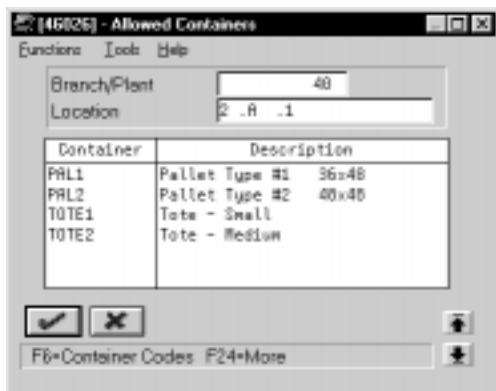
On Location Profile Detail



1. Locate the location for which you want to set up allowed containers.
2. Complete the following field:
 - Allowed Containers

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

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



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

- Container

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

What You Should Know About

Pallets (open containers) versus boxes (closed containers)

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

Set Up Shipping Cartons and Recommendation

Setting Up Shipping Cartons and Recommendation

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

Setting up shipping cartons and carton recommendation includes:

- Setting up shipping cartons
- Setting up carton recommendation

Setting Up Shipping Cartons



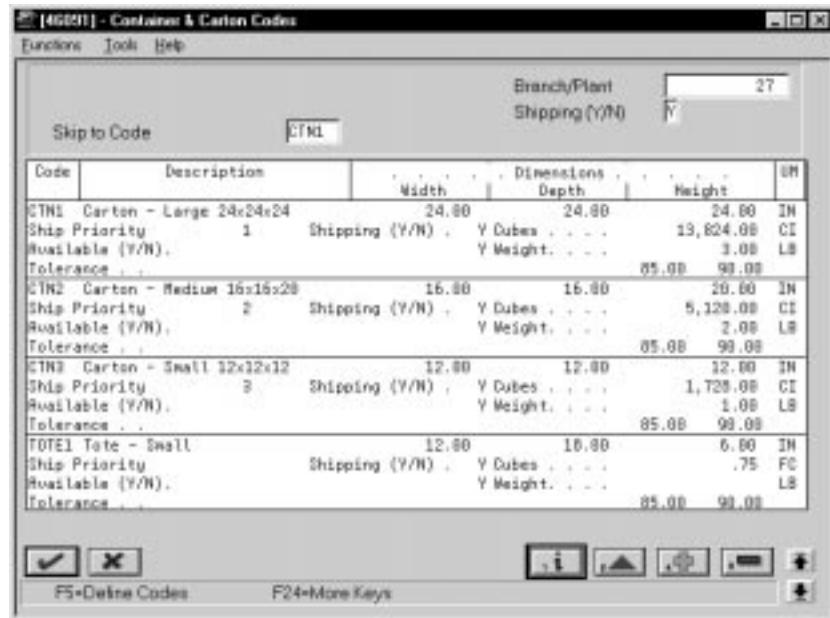
From Advanced Warehouse Management (G46), enter 29

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

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

To set up shipping cartons

On Container and Carton Codes



1. Complete the following fields:

- Branch/Plant
- Shipping Container
- Container Code
- Width
- Depth
- Height
- Unit Of Measure

2. Access the fold area.

3. Complete the following fields:

- Ship Priority
- Shipping Container
- Cubes
- Unit Of Measure
- Available Carton
- Weight
- Unit Of Measure
- Beginning Tolerance
- Ending Tolerance

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

Setting Up Carton Recommendation

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

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

Setting up carton recommendation includes the following tasks:

- Setting up locations for carton recommendation
- Setting up carton recommendation methods for items
- Setting up carton fill percentages for items

What You Should Know About

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

Setting Up Locations for Carton Recommendation



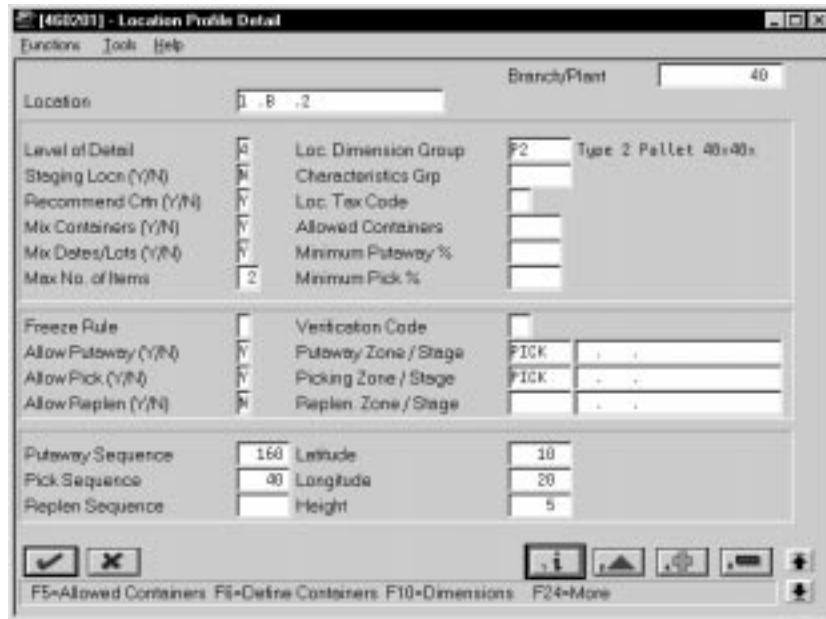
From Advanced Warehouse Management (G46), enter 29

From Warehouse System Setup (G4641), choose Location Profile Detail

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

► To set up locations for carton recommendation

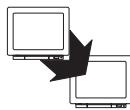
On Location Profile Detail



1. Locate the location for which you want to recommend cartons during picking.
2. Complete the following field:
 - Recommend Carton

Field	Explanation
Recommend Crtn (Y/N)	<p>A code that indicates whether the system recommends shipping cartons when it picks from this location.</p> <p>Valid codes are:</p> <ul style="list-style-type: none"> Y Yes, recommend cartons when picking from this location. The system recommends a carton only if you have set up the Carton Recommendation Method for the item. N No, do not make carton recommendations when picking from this location.

Setting Up Carton Recommendation Methods for Items



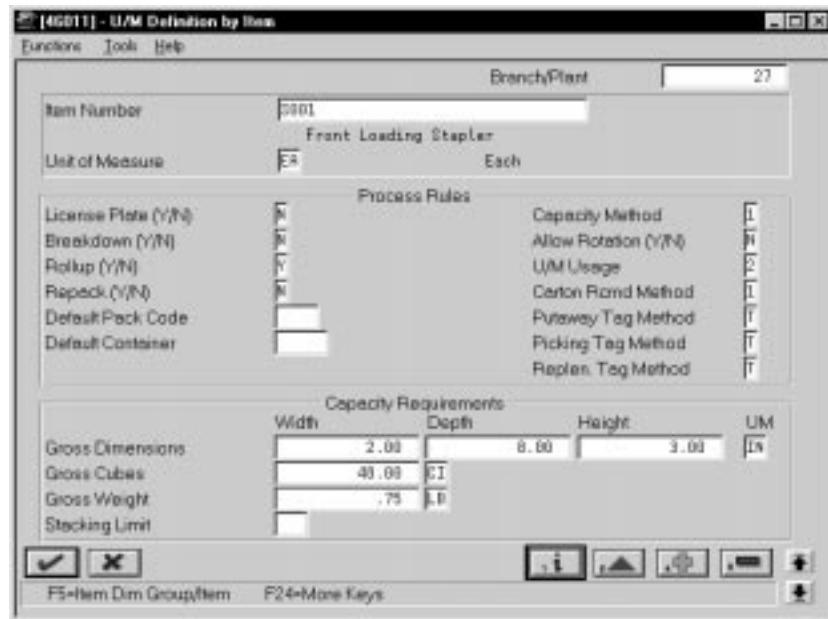
From Advanced Warehouse Management (G46), enter 29

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

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

► To set up carton recommendation methods for items

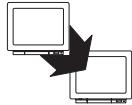
On Unit Of Measure Definition by Item



1. Locate the item for which you want to set up carton recommendation.
2. Complete the following field:
 - Carton Recommendation Method

Field	Explanation
Carton Rcmd Method	<p>A code that indicates the method the system uses to recommend a carton for the specified item in this unit of measure.</p> <p>Valid codes are:</p> <ul style="list-style-type: none">blank Do not recommend cartons for the specified item in this unit of measure1 Recommend shipping cartons for the specified item in this unit of measure based on the volume of the item and the volume of the shipping carton2 Recommend shipping cartons for the specified item in this unit of measure based on the percentage of the shipping carton that the item and unit of measure occupy <p>You define the dimensions of the carton through Container and Carton Codes (P46091). You define an item's dimensions through Item/Unit of Measure Profile (P46011).</p>

Setting Up Carton Fill Percentages for Items



From Advanced Warehouse Management (G46), enter 27

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

From Warehouse Movement Rules (G46311), choose an option

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

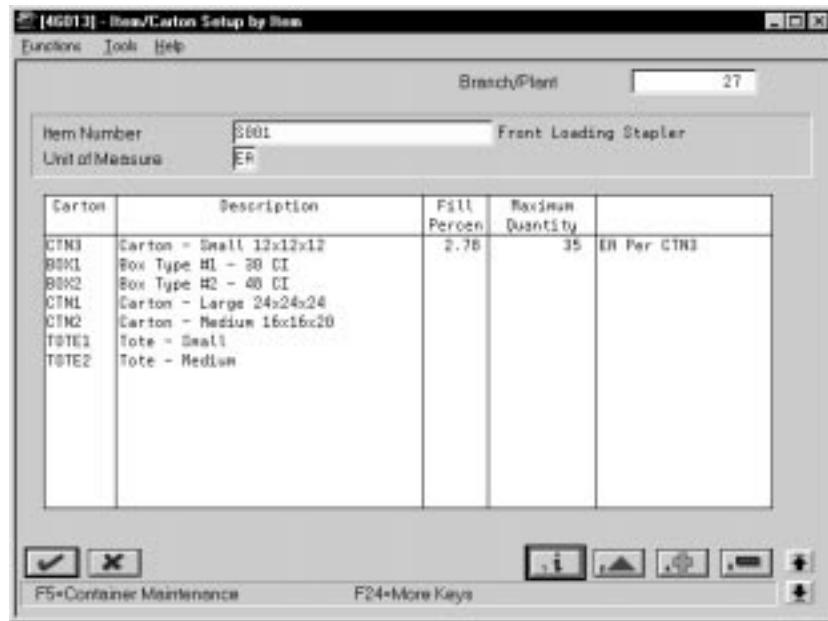
You can:

- Define fill percentages for individual items
- Define fill percentages for item dimension groups

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

► **To define fill percentages for individual items**

On Item/Carton Setup by Item



1. Complete the following fields:

- Branch/Plant
- Item Number
- Unit of Measure
- Carton Code
- Fill Percentage

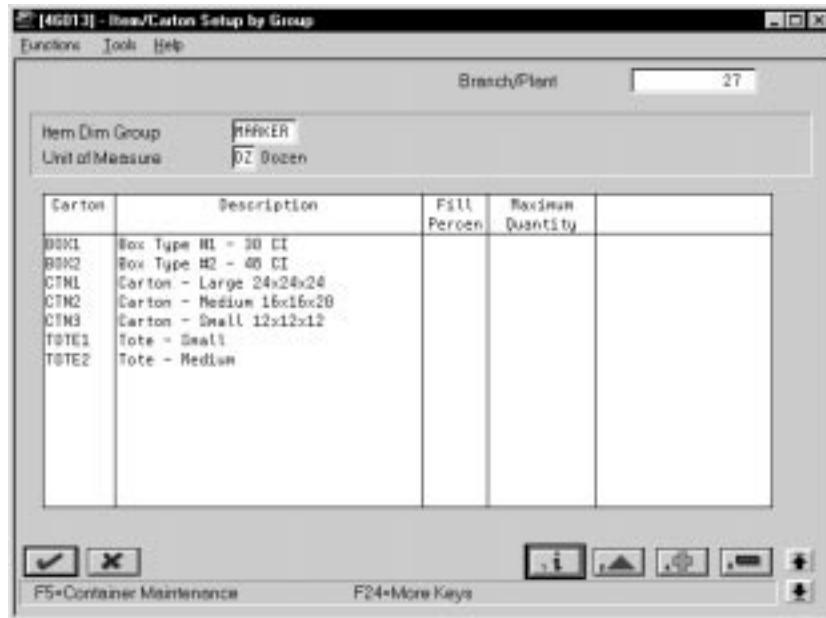
2. If you store the item in a container, access the fold area.

3. Complete the following field:

- Container Code

► **To define fill percentages for item dimension groups**

On Item/Carton Setup by Group



1. Complete the following fields:

- Branch/Plant
- Item Dimension Group
- Unit of Measure
- Carton
- Fill Percentage
- Maximum Quantity

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

3. Complete the following field:

- Container Code

Field	Explanation
Item Dim Group	A code (system 41/type 01) that identifies a group of items that share the same size specifications, such as height and width. An item dimension group defines the size specifications for all items that belong to the group. After you set up an item dimension group, you can assign items to the group through Classification Codes.
Item Number	A number that the system assigns to an item. It can be in short, long, or 3rd item number format.
Unit of Measure	A user defined code (00/UM) that indicates the quantity in which to express an inventory item, for example, CS (case) or BX (box).

Field	Explanation
Carton	A code (system 46/type EQ) that identifies a storage container or a shipping carton. A storage container can be an open container where items are stored on the container (for example, a pallet), or a closed container where items are stored in the container (for example, a box). You use Container and Carton Codes (P46091) to define storage containers.
Description	A user defined name or remark.
Fill Percent	<p>The percentage of space in a carton that a single quantity of the unit of measure will occupy. If the item is in a container when you pick it, this percentage indicates how much space the container will take up in the carton.</p> <p>The system uses the fill percentage if you use fill percentage as the carton recommendation method for the item's unit of measure. You define an item's carton recommendation method through Unit of Measure Definition by Item/Item Group (P46011).</p>
Maximum Quantity	The maximum quantity of an item that will fit in the selected shipping carton type.
Container Code	A code that identifies the container the item is stored on or in when in a location in the warehouse. If an item is stored on or in a container when it is picked, you must update this field for the system to be able to make recommendations for shipping cartons.

Process Selection

Objectives

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

About Process Selection

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

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

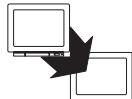
Process selection takes place after you create a movement request, but before you create location suggestions.

See Also

- *Setting Up Order Groups*
- *Setting Up Item Warehouse Information* for information about setting up warehouse process groups
- *Defining Movement Instructions*



Define Process Selection



From Advanced Warehouse Management (G46), enter 27

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

From Warehouse Movement Rules (G46311), choose Process Selection

Defining Process Selection

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

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

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

- Maximize space, by filling locations to their maximum capacity and emptying partially filled locations as quickly as possible
- Maximize productivity, by minimizing the number of trips that your employees make through the warehouse
- Use other criteria that you define

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



To define process selection

On Process Selection

[40050] - Process Selection

Functions: Tools: Help

Branch/Plant: 21

Process Group 1 Process Group 2 Process Group 3

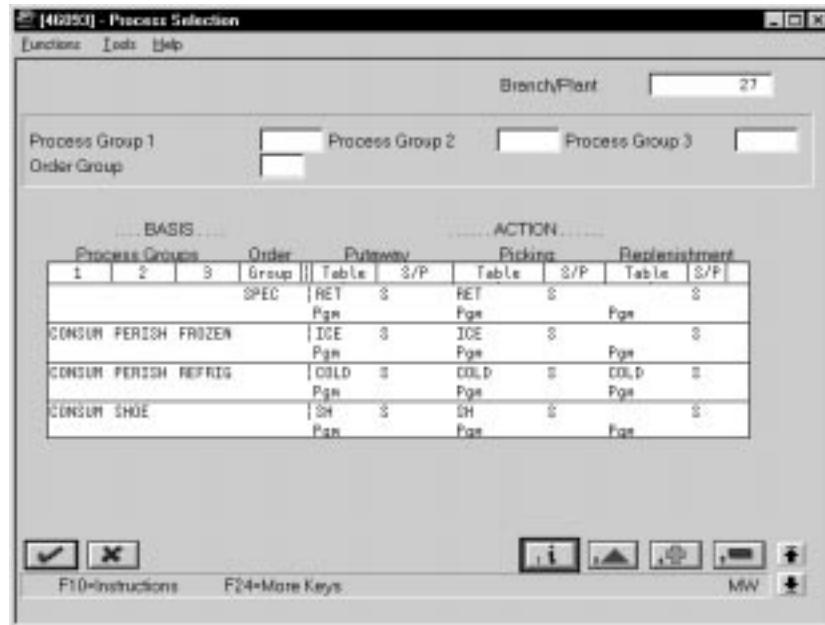
Order Group

BASIS			ACTION						
Process Groups	Order	Putaway	Picking	Replenishment					
1	2	3	Group	Table	S/P	Table	S/P	Table	S/P
CONSUM	PERISH	FRZEN	SPEC	RET	S	RET	S		S
CONSUM	PERISH	REFRIG		ICE	S	ICE	S		S
CONSUM	SHOE			COLD	S	COLD	S	COLD	S
EXPLD	BOOMER			SH	S	SH	S		S
HAZMAT	BOOMER			BR1	S	BR1	S		S
HEALTH	ETHICL			BR1	S	BR1	S		S
HEALTH	OTC	VIT		SC2	S	SC2	S		S
HEALTH	WATER			V1	S	V2	S	V3	S
NONINV				M1	S	M2	S	M1	S
OFC				NON	S	NON	S		S
OFC		TOPSEL		OF01	S	OF01	S	OF01	S
				E1	S	E1	S	E1	S

F10=Instructions F24=More Keys: MW

1. Complete the following field:
 - Branch/Plant
2. To view an existing process selection rule, you can limit the information that displays by completing the following fields in the upper portion of the form:
 - Process Group 1
 - Process Group 2
 - Process Group 3
 - Order Group
3. In the lower portion of the form, complete the following fields:
 - Process Group 1
 - Process Group 2
 - Process Group 3
 - Order Group
4. Complete one of the following fields for the process selection rule that you are defining:
 - Putaway Table
 - Picking Table
 - Replenishment Table
5. To modify the movement instruction table, complete the following field:
 - Process Mode

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



7. Complete the following field:

- User Defined Program

Field	Explanation
Group – Warehouse Process 1	A code (system 41/type 02) that identifies a group of items that you want to move the same way. An item's process group determines the movement instructions the system uses to put away, pick, and replenish the item. You assign items to process groups using Classification Codes.
Group – Warehouse Process 2	A code (system 41/type 02) that identifies a group of items that you want to move the same way. An item's process group determines the movement instructions the system uses to put away, pick, and replenish the item. You assign items to process groups using Classification Codes (P41011).
Group – Warehouse Process 3	A code (system 41/type 02) that identifies a group of items that you want to move the same way. An item's process group determines the movement instructions the system uses to put away, pick, and replenish the item. You assign items to process groups using Classification Codes (P41011).

Field	Explanation
Order Group	<p>A code (system 46/type DT) that identifies a group of order types that you want to process as one for putaway, picking, and replenishment transactions.</p>
	<p>You set up order group codes on User Defined Codes, then add order types to the code on Order Groups (P46092). You specify an order group on Picking Instructions (P46095) to limit the order types that trigger replenishment after picking.</p>
Putaway Table	<p>A code (system 46/type IT) that identifies a putaway table. The putaway table defines how the system selects locations for putaway. You create putaway tables using Putaway Instructions (P46095).</p>
Putaway Process Mode	<p>A code (system 46/type PC) that identifies a putaway processing method.</p>
	<p>Valid codes are:</p>
	<p>P Productivity mode. The system suggests the fewest locations possible to minimize the number of putaway and picking trips. The system minimizes the number of replenishment trips by replenishing from the fewest locations possible.</p>
	<p>S Space maximization mode. The system maximizes space use by trying to top off partially filled locations to minimize inventory fragmentation.</p>
Picking Table	<p>A code (system 46/type IT) that identifies a picking table. The picking table defines how the system selects locations for picking. You create picking tables using Picking Instructions (P46095).</p>
Picking Process S/P	<p>A code (system 46/type PC) that identifies a picking processing method.</p>
	<p>Valid codes are:</p>
	<p>P Productivity mode. The system suggests the fewest locations possible to minimize the number of putaway and picking trips. The system minimizes the number of replenishment trips by replenishing from the fewest locations possible.</p>
	<p>S Space maximization mode. The system maximizes space use by trying to top off partially filled locations to minimize inventory fragmentation.</p>
Replenishment Table	<p>A code (system 46/type IT) that identifies a replenishment table. The replenishment table defines how the system selects locations for replenishment. You create replenishment tables using Replenishment Instructions (P46095).</p>

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

Movement Instructions

Objectives

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

About Movement Instructions

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

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

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

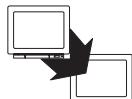
- Whether to choose fixed locations or random locations
- Whether to limit the search for locations to a specific zone
- Which tiebreaker method to use to rank otherwise equally suitable locations

See Also

- *Appendix A - Advanced Topics* for information about random locations



Define Movement Instructions



From Advanced Warehouse Management (G46), enter 27

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

From Warehouse Movement Rules (G46311), choose an option

Defining Movement Instructions

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

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

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

You can also define specific movement instructions.

For putaway, you can define:

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

For picking and replenishment movements, you can define:

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

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

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

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

- Maximize warehouse space
- Maximize employee productivity
- Use other criteria that you define

Defining movement instructions includes:

- Setting the process mode
- Defining common movement instruction criteria
- Defining specific movement instruction criteria

See Also

- *Setting Up Fixed Locations and Zones*
- *Appendix A - Advanced Topics* for information about random locations

Setting the Process Mode

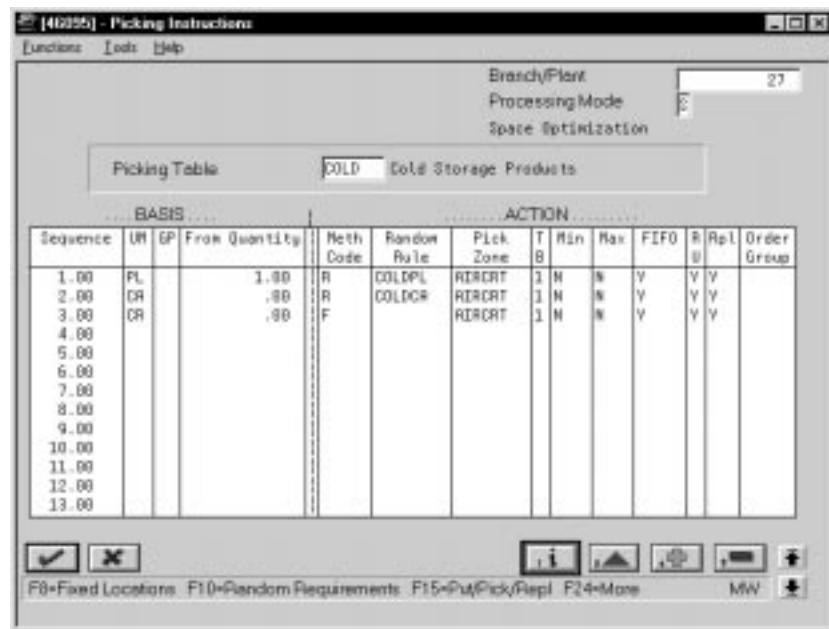
Typically, warehouses have limited space, so you might use the available space as efficiently as possible. If you do not have enough employees, you might use each employee's trips through the warehouse as efficiently as possible, to move as many items as you can per trip.

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

- Maximizes space, by filling locations to their maximum capacity and emptying partially filled locations as quickly as possible
- Maximizes productivity, by minimizing the number of putaway, picking, and replenishment trips in the warehouse
- Uses other criteria that you define

► To set the process mode

On Putaway Instructions, Picking Instructions, or Replenishment Instructions



Complete the following field:

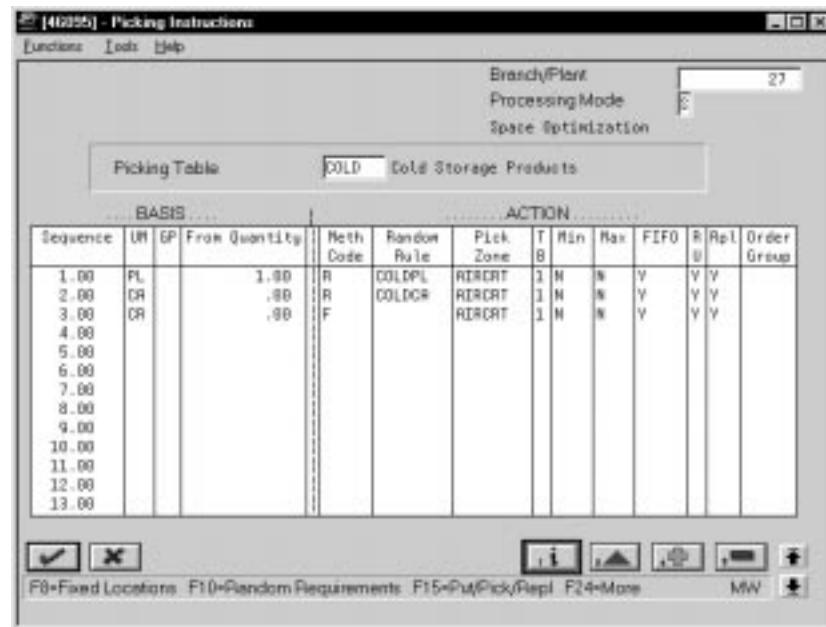
- Processing Mode

Defining Common Movement Instruction Criteria

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

► **To define common movement instruction criteria**

On Putaway Instructions, Picking Instructions, or Replenishment Instructions



Complete the following fields:

- Unit of Measure
- Unit of Measure Group
- From Quantity
- Method Code
- Random Rule

Field	Explanation
Unit of Measure	<p>A user defined code (system 00/type UM) that identifies the unit of measurement for an amount or quantity. For example, it can represent a barrel, box, cubic yard, gallon, an hour, and so on.</p> <p>..... <i>Form-specific information</i></p>
Group – Unit of Measure	<p>When the system tries to carry out a movement instruction, it compares the unit of measure from the transaction to the unit of measure in the instruction. If the unit of measure is valid for the item, the instruction is valid for the item.</p> <ul style="list-style-type: none"> • For putaway, the system uses the instruction for the level 1 unit of measure. • For picking and replenishment, the system compares the unit of measure in the first instruction to the item's unit of measure structure. If the unit of measure is in the structure, the system uses that instruction. If not, the system continues to compare until it finds a match.
From Quantity	<p>A code (system 46/type UG) that identifies a group of units of measure that you want to process as one for putaway, picking, and replenishment transactions.</p> <p>You use unit of measure groups to set up movement instructions for putaway, picking, or replenishment.</p> <p>..... <i>Form-specific information</i></p> <p>If different units of measure follow the same instruction, you can group the units of measure so that you only need to define one instruction for all of them.</p> <p>If any valid unit of measure for an item on a transaction belongs to the specified unit of measure group, the instruction is valid for the item.</p>

Field	Explanation
Method Code – Movement Instructions	<p>A code that identifies the method of putaway, picking, or replenishment the system uses for this instruction.</p> <p>Valid codes are:</p> <ul style="list-style-type: none"> F Use only fixed locations. This code is valid for putaway, picking and replenishment. R Use only random locations. You assign characteristics to random rules and to locations. The system compares rules to locations and builds a table of locations based on the number of matching characteristics. During random processing, the system chooses locations from the random location table. This code is valid for putaway, picking and replenishment. E Use only empty locations. This code is valid for putaway only. X Use only existing locations that already have the same item stored there. This code is valid for putaway only.
Random Rule	<p>A code (system 46/type SR) that identifies a random requirements table. If you use Random, Empty or Existing locations for the movement method, you must enter a random rule code to consider only locations whose characteristics match the random rule.</p>

What You Should Know About

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

Defining Specific Movement Instruction Criteria

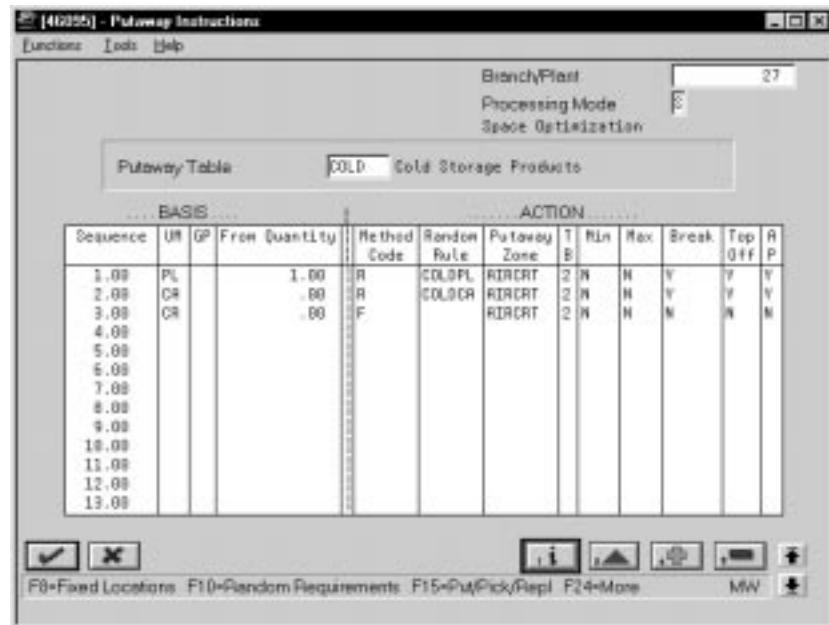
Putaway, picking, and replenishment each have parameters that are specific to each movement type. These parameters further refine the list of potential locations.

Complete the following tasks:

- Define specific movement instruction criteria for putaway
- Define specific movement instruction criteria for picking
- Define specific movement instruction criteria for replenishment

► **To define specific movement instruction criteria for putaway**

On Putaway Instructions



Complete the following fields:

- Putaway Zone
- Putaway Tiebreaker Rules
- Minimum Utilization Percentage
- Maximum Putaway Quantity
- Breakdown
- Top Off
- Allow Partial Units

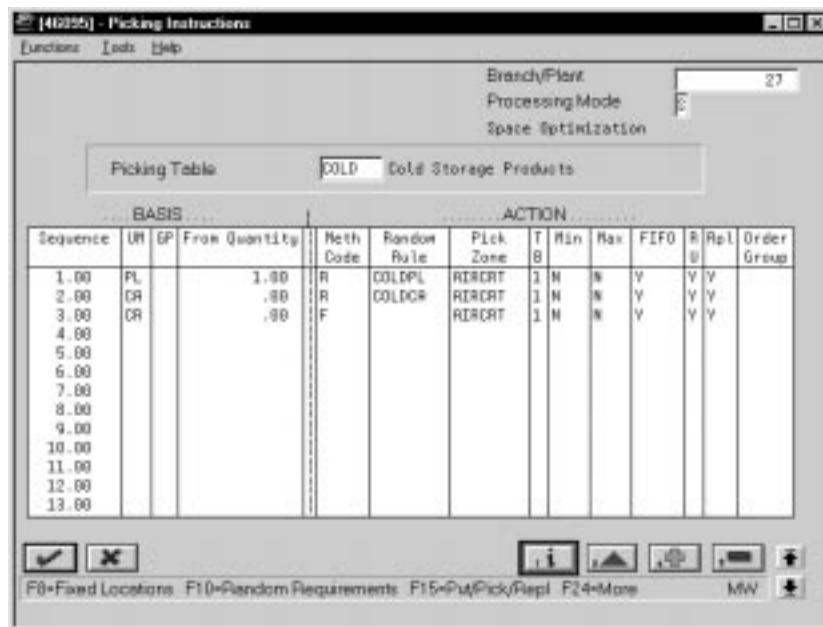
Field	Explanation
Putaway Zone	<p>A code (system 46/type ZN) that identifies areas in the warehouse where goods are put away or stored.</p> <p>..... <i>Form-specific information</i></p>
Putaway Tie Breaker Rules	<p>Enter a code in this field if you want the system to select only locations in the specified putaway zone when it uses this rule.</p> <p>A number that identifies the tiebreaker you want to use for this putaway rule when multiple locations satisfy the criteria. The system uses the tiebreaker to rank the tied locations. Tiebreakers are (hard coded) as follows:</p>
	<p>1 Sequence locations by the putaway sequence number. If you do not assign sequence numbers, and you use this tiebreaker, the system chooses between equal locations based on their alphanumeric sequence. You define sequences using Location Profile (P46020).</p>
	<p>2 Sequence locations by greatest available space. The system uses locations that can hold the greatest quantity of the item in the specified unit of measure and container first.</p>
	<p>3 Sequence locations by least available space. The system uses locations that can hold the least quantity of the item in the specified unit of measure and container first.</p>
	<p>4 Sequence locations by least available space, but minimize the number of locations used. This code is the same as tiebreaker 3, except the system tries to use the least number of locations.</p>
	<p>5 Sequence locations by proximity from the sending location (usually the receiving dock), using the closest locations first.</p>
	<p>6 Sequence locations by proximity to the base putaway location, using the closest locations first.</p>
	<p>7 Sequence locations by proximity to the base picking location, using the closest locations first.</p>
Use Minimum Utilization % (Y/N)	<p>A code that indicates whether the system suggests a location if putaway will not fill that location to at least the minimum percentage capacity defined through Location Profile Detail (P460201).</p>
	<p>Valid codes are:</p>
	<p>Y Use the minimum utilization percentage when searching for putaway locations</p>
	<p>N Do not use the minimum utilization percentage when searching for putaway locations</p>

Field	Explanation
Use Maximum Quantity (Y/N)	<p>A code that indicates whether you want the system to suggest locations according to the maximum quantity of an item in the specified unit of measure that you can put away in a zone. You define maximum quantities for items in a specified unit of measure using Maximum Quantity by Zone (P46025).</p>
	<p>Valid codes are:</p>
	<p>Y Yes, use the maximum quantity allowed in a zone to suggest locations, and if the quantity in a zone exceeds the maximum, suggest another location for the remaining quantity</p>
	<p>N No, do not use maximum quantity when suggesting locations</p>
Breakdown (Y/N)	<p>A code that indicates whether you allow the system to break a unit of measure (such as a pallet) down into smaller units of measure (such as cases).</p>
	<p>Valid codes are:</p>
	<p>Y Yes, allow breakdown into smaller units of measure</p>
	<p>N No, do not allow breakdown into smaller units of measure</p>
<p>..... <i>Form-specific information</i></p>	<p>Enter Y in this field to specify that the system should attempt to break down units of measure when putting away goods. For example, if a quantity remains to be put away after processing all locations selected by an instruction, the system will check whether breakdown is allowed. If this field is set to Y, it tries to put away the remaining goods by breaking down the unit of measure to a smaller unit of measure using the same set of locations. The system can do this only if it is allowed for the item/unit of measure, which you define in through Item Unit of Measure Definition (P46011), and only if you use a unit of measure structure.</p>
Top Off	<p>A code that indicates whether you want the system to attempt to complete an incomplete unit of measure (such as a half-filled pallet) in an existing location during putaway.</p>
	<p>Valid codes are:</p>
	<p>Y Yes, search for locations with incomplete units of measure to top them off</p>
	<p>N No, do not search for locations with incomplete units of measure</p>

Field	Explanation
Yes or No – Allow Partial Units	<p>A code that indicates whether you want the system put away partial units of measure. You must also specify on Unit of Measure Definition by Item (P46011) that you allow breakdown. If you set Allow Partial Units to N, you must also set Breakdown to N.</p> <p>Valid codes are:</p> <p>Y Yes, put away partial units of measure N No, do not put away partial units of measure</p>

► To define specific movement instruction criteria for picking

On Picking Instructions



Complete the following fields:

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

Field	Explanation
Picking Tie Breaker Rules	<p>A number that identifies the tiebreaker you want to use for this picking rule when multiple locations satisfy the criteria. The system uses the tiebreaker to rank the tied locations. Tiebreakers are (hard coded) as follows:</p> <ul style="list-style-type: none"> 1 Sequence locations using “pick to clear” logic. The system uses the locations containing the smallest available quantity first. 2 Sequence locations using “pick from fewest with best fit” logic. The system uses the locations that will contain the least residual quantity when the pick is complete. 3 Sequence locations using “pick from fewest” logic. The system uses the location containing the greatest available quantity first. If there is not enough quantity to fill the request, the system suggests additional locations, but only the least number of locations that are necessary to complete the request. 4 Sequence locations according to the picking sequence number. If you do not assign sequence numbers, and you use this tiebreaker, the system chooses between equal locations based on their alphanumeric sequence. You define sequences on Location Profile (P46020). 5 Sequence locations according to proximity to the shipping location, using the closest locations first.
Use Minimum Pick % (Y/N)	<p>A code that indicates whether the system suggests a location if picking will not deplete that location to at least the minimum percentage capacity defined through Location Profile Detail (P460201).</p>
Use Maximum Picking Quantity (Y/N)	<p>A code that indicates whether you want the system to suggest locations according to the maximum quantity of an item that you can pick from a location. You use maximum picking quantity only for fixed locations, which you define through Fixed Locations (P46012).</p>

Field	Explanation
FIFO Picking (Y/N)	<p>A code that indicates whether the system considers an item's receipt date when it searches for pick locations.</p> <p>Valid codes are:</p> <ul style="list-style-type: none"> Y Yes, use the oldest receipt date (First In First Out method) when searching for pick locations N No, do not use the oldest receipt date when searching for pick locations
Rollup (Y/N)	<p>A code that indicates whether you allow rollup during picking. Valid codes are:</p> <ul style="list-style-type: none"> Y Allow rollup N Do not allow rollup <p>..... <i>Form-specific information</i></p>
Allow Replenishment (Y/N)	<p>Enter Y to have the system convert the pick quantity to the highest unit of measure available at the location, provided the quantity justifies the rollup.</p> <p>..... <i>Form-specific information</i></p>
Order Group	<p>A code (system 46/type DT) that identifies a group of order types that you want to process as one for putaway, picking, and replenishment transactions.</p> <p>You set up order group codes on User Defined Codes, then add order types to the code on Order Groups (P46092). You specify an order group on Picking Instructions (P46095) to limit the order types that trigger replenishment after picking.</p>

What You Should Know About

Cross docking

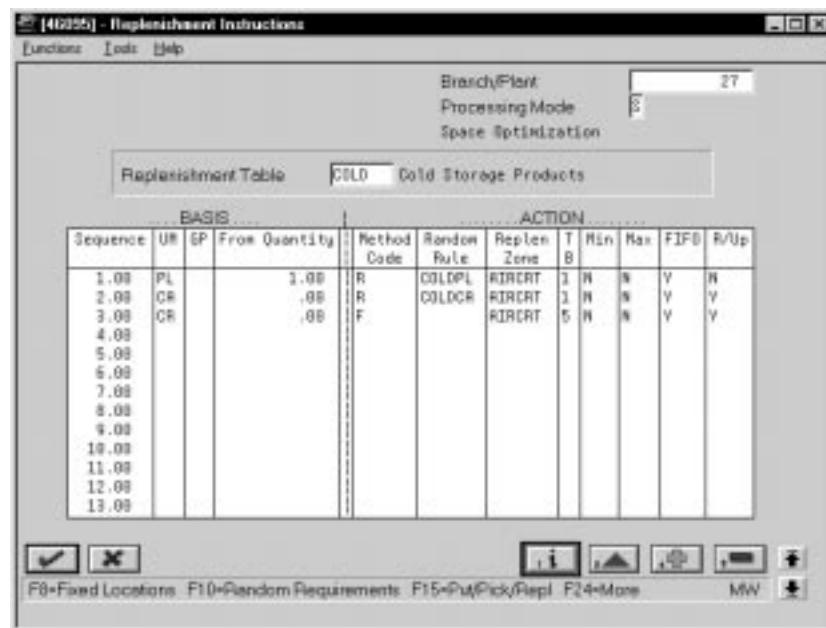
For all items you want to cross dock, you must set up your Picking Instructions to pick from the default receiving location first.

Selecting locations for picking

While processing movement criteria for picking, the system excludes locations that do not have adequate on-hand or inbound inventory.

► **To define specific movement instruction criteria for replenishment**

On Replenishment Instructions



Complete the following fields:

- Replenishment Zone
- Replenishment Tiebreaker
- Minimum Utilization Percentage
- Maximum Replenishment Quantity
- First In First Out Picking
- Rollup

Field	Explanation
Replenishment Zone	<p>A code (system 46/type ZN) that identifies the areas in the warehouse from which items are retrieved to replenish or refill picking locations.</p> <p>..... <i>Form-specific information</i></p>
Replenishment Tie Breaker Rules	<p>Enter a zone in this field to restrict the list of replenishment zones to this one zone. You define replenishment zones on Fixed Replenishment Zones (P46051).</p> <p>A number that identifies the tiebreaker you want to use for this replenishment rule when multiple locations satisfy the criteria. The system uses the tiebreaker to rank the tied locations. Tiebreakers are (hard coded) as follows:</p> <ul style="list-style-type: none"> 1 Sequence locations using “pick to clear” logic. The system uses the locations containing the smallest available quantity first. 2 Sequence locations using “pick from fewest with best fit” logic. The system uses the locations that will contain the least residual quantity when the replenishment is complete. 3 Sequence locations using “pick from fewest” logic. The system uses the location containing the smallest available quantity first. If there is not enough quantity to fill the request, the system suggests additional locations, but only the least number of locations that are necessary to complete the request. 4 Sequence locations according to the replenishment sequence number. If you do not assign sequence numbers, and you use this tiebreaker, the system chooses between equal locations based on their alphanumeric sequence. You define sequences on Location Profile (P46020). 5 Sequence locations according to proximity to the shipping location, using the closest locations first.
Use Minimum Pick % (Y/N)	<p>A code that indicates whether the system suggests a location if picking will not deplete that location to at least the minimum percentage capacity defined through Location Profile Detail (P46020).</p> <p>Valid codes are:</p> <ul style="list-style-type: none"> Y Yes, use the minimum utilization percentage when searching for pick locations N No, do not use the minimum utilization percentage when searching for pick locations

Field	Explanation
Use Maximum Picking Quantity (Y/N)	<p>A code that indicates whether you want the system to suggest locations according to the maximum quantity of an item that you can pick from a location. You use maximum picking quantity only for fixed locations, which you define through Fixed Locations (P46012).</p>
Valid codes are:	<p>Y Yes, use the maximum quantity that you can pick from a location to suggest locations, and if the quantity requested exceeds the maximum pick quantity for the location, search for another location</p> <p>N No, do not use the maximum picking quantity when suggesting picking locations</p>
FIFO Picking (Y/N)	<p>A code that indicates whether the system considers an item's receipt date when it searches for pick locations.</p>
Valid codes are:	<p>Y Yes, use the oldest receipt date (First In First Out method) when searching for pick locations</p> <p>N No, do not use the oldest receipt date when searching for pick locations</p>
Rollup (Y/N)	<p>A code that indicates whether you allow rollup during picking. Valid codes are:</p>
	<p>Y Allow rollup</p> <p>N Do not allow rollup</p>
..... <i>Form-specific information</i>	<p>Enter Y to have the system convert the pick quantity to the highest unit of measure available at the location, provided the quantity justifies the rollup.</p>

What You Should Know About

Selecting locations for Replenishment

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

Daily

Putaway

Objectives

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

About Putaway

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

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

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

The putaway process includes:

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

See Also

- *Appendix B - Manufacturing Information* for information on creating putaway requests through manufacturing systems



Work with Putaway Requests

Working with Putaway Requests

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

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

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

Complete the following tasks:

- Create putaway requests
- Locate existing putaway requests

See Also

- *Appendix B - Manufacturing Information* for information about creating putaway requests through manufacturing processes

Creating Putaway Requests

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

- Create putaway requests interactively
- Create putaway requests manually

Creating Putaway Requests Interactively



From Advanced Warehouse Management (G46), choose Inbound Operations

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

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

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

- Create requests only
- Create and process requests using the subsystem
- Receive items directly into reserved locations
- Do not create any requests

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

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

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

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

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

Complete the following tasks:

- Create putaway requests interactively
- Override the unit of measure structure

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

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

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

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

Cross Docking

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

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

To use cross docking, you must set up Picking Instructions (P46095) to select the default receiving location first. You must also set processing options in the following programs;

On Receipts by PO or Item (P4312), set the following processing options to 1:

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

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

- Option 5 on Summary Document (P46472)
- Option 11 on Pick Confirmation (P4617)

- Option 5 on Batch Putaway Reservations (P461301)



► To create putaway requests interactively

On Enter Receipts by PO or Item

1. Complete the following fields:
 - Branch/Plant
 - Order Number
 - Document Type
2. Choose Receive for each purchase order line that you want to receive.

Field	Explanation
Document (Order No, Invoice, etc.)	The number that identifies an original document. This can be a voucher, an order number, an invoice, unapplied cash, a journal entry number, and so on.

Field	Explanation														
Order Type	<p>A user defined code (00/DT) that identifies the type of document. This code also indicates the origin of the transaction. J.D. Edwards has reserved document type codes for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program. (These entries are not self-balancing when you originally enter them.)</p> <p>The following document types are defined by J.D. Edwards and should not be changed:</p> <table> <tbody> <tr><td>P</td><td>Accounts Payable documents</td></tr> <tr><td>R</td><td>Accounts Receivable documents</td></tr> <tr><td>T</td><td>Payroll documents</td></tr> <tr><td>I</td><td>Inventory documents</td></tr> <tr><td>O</td><td>Purchase Order Processing documents</td></tr> <tr><td>J</td><td>General Accounting/Joint Interest Billing documents</td></tr> <tr><td>S</td><td>Sales Order Processing documents</td></tr> </tbody> </table>	P	Accounts Payable documents	R	Accounts Receivable documents	T	Payroll documents	I	Inventory documents	O	Purchase Order Processing documents	J	General Accounting/Joint Interest Billing documents	S	Sales Order Processing documents
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S	Sales Order Processing documents														

What You Should Know About

Purchase order detail location	After you activate warehouse control, the system inputs the receipt location when you enter a purchase order. You specify this location in Default Receiving Location on Branch/Plant Constants – Pg 2.
Receipt routing	Receipt routing in the Purchase Management system allows you to divert items between receipt and putaway, so you can perform quality analysis on the items. If you use receipt routing, the system creates a putaway request when you move the items to the on-hand step, which creates a receipt.

Processing Options for Receipts by PO or Item

DEFAULT VALUES:	
1. Order Type	_____
2. Receipt Document Type	_____
Incoming Acceptable Next Status Codes:	
3. Status Code 1	_____
4. Status Code 2	_____
5. Status Code 3	_____
Outgoing Next Status Codes:	
6. Partial receipt	_____
7. Close balance of line	_____
8. Cancel balance of line	_____
PROMPTING CONTROL:	

Enter a '1' to:

9. Select all lines for receipt.
 10. Be prompted to accept the receipt.
 11. Display lot/layer information.
 12. Display Sales Order Backorders.
 13. Record serial number information for inventory items.
 14. Protect lot number, lot expiration date, and lot status.
 15. Enter a '1' to protect prices, or a '2' to make prices non-display. If left blank, the update of prices is allowed. More...
 16. Enter a '1' to require manual entry of the quantity. If left blank, the quantity field will be loaded.
 17. Enter a '1' to display description. If left blank, the item/account number will be displayed.
 18. Enter the format to be displayed.
 - 1 = Receipts by Purchase Order
 - 2 = Receipts by Item
 - 3 = Receipts by G/L Account

(If left blank, format 1 is used.)

LANDED COST PROCESSING:

19. Enter a '1' to display the landed cost video, or a '2' to perform blind landed cost processing. If left blank, no landed cost processing is performed.

TO TOLERANCE CHECKING:

Enter a '1' for a warning message, or a '2' to prohibit entry. If left blank, no tolerance checking is performed.

20. Quantity, Unit Cost, Amount
21. Receipt Date

ITEM BRANCH/LOCATION PROCESSING:

22. Enter a '1' to update the supplier when an item is purchased the first time, or a '2' to update the supplier every time the item is purchased. If left blank, no supplier update is performed.
 23. Enter a '1' to default the Location and Lot Number from the primary item balance location, if the Location and Lot Number are both blank.

DREAM WRITER VERSIONS:

Enter the version for each program:
If left blank, ZJDE0001 will be used.

- 24. Open Order Inquiry (P430301)
 - 25. G/L Functional Server (XT0911Z1)
 - 26. SO Backorder Release (P42117)
 - 27. Receipt Traveler (P43512)
 - 28. Receipt Routing (P43250)

DOCUMENT PROCESSING:

29. Enter a '1' to automatically print a Receipt Traveler Document following each receipt. _____

KIT PROCESSING:

30. Enter a '1' to display the kit parent item, or a '2' to display the kit component items. If left blank, no kit information is displayed.

NOTE: Stock items must be received at the component level.

SUPPLIER ANALYSIS:

31. Enter a '1' to capture supplier analysis information. If left blank, no supplier analysis information is captured.

ASSOCIATED TEXT PROCESSING:

32. Enter a '1' to purge the associated text when the line is fully received. If left blank, the text is retained.

RECEIPT ACKNOWLEDGMENT:

33. Enter a '1' to send a PPAT message to the purchase order originator regarding the receipt.

34. Enter the next status code that the Sales Order should be updated to upon full receipt of a direct ship purchase order line.

RECEIPT ROUTING:

35. Enter a '1' to initiate the receipt routing process. If left blank, all items will be received directly into stock.

36. Enter the default route type to be used to search for a receipt route. If left blank, the program will search for route type equivalent to blank.

SUMMARIZATION:

37. Enter a '1' to summarize journal entries. If left blank, journal entries are written in detail.

NOTE: If tracking commitments in the PA/PU ledgers, this option may NOT be used.

WAREHOUSE PROCESSING:

38. Enter the Directed Putaway mode:
' ' : No Directed Putaway Requests
'1' : Request Putaway only
'2' : Request Putaway and process using the subsystem
'3' : Receive directly to reserved locations (No requests).

39. If processing putaway requests _____

through the subsystem, enter the DREAM Writer version to be used. If blank, XJDE0001 is used. (See Form ID P46171).

40. Enter the DREAM Writer version of On-Line Reservations to be used. If blank, ZJDE0001 is used. (See Form ID P46130) _____
41. Enter a '1' to perform warehouse Cross-Docking. This is only valid with processing option 12 to perform sales backorder processing set on. _____

CURRENCY PROCESSING:

42. Enter the date to be used when retrieving the currency exchange rate. If left blank, the purchase order exchange rate will be used.
1 = G/L Date
2 = Current Date _____
43. Enter a '1' to protect the exchange rate field. _____

BULK ITEM PROCESSING:

44. Enter '1' to record the difference between ambient and standard quantities received as a temperature gain/loss.
Enter '2' to update the unit cost as the extended cost divided by the standard quantity.
Leave blank if quantities are purchased and received in standard. _____
45. Enter a '1' if you want Receipts Routing integration with the Four Point Analysis file. _____

DIRECT SHIP ORDER PROCESSING:

(LOAD & DELIVERY MANAGEMENT ONLY)

46. Enter a '1' if related sales order lines should be automatically load and deliver confirmed. _____
47. Enter the sales order next status code beyond which sales orders will not be automatically load and deliver confirmed. _____
48. Enter the version of the transportation transaction server to be used to automatically load and deliver confirm orders. _____

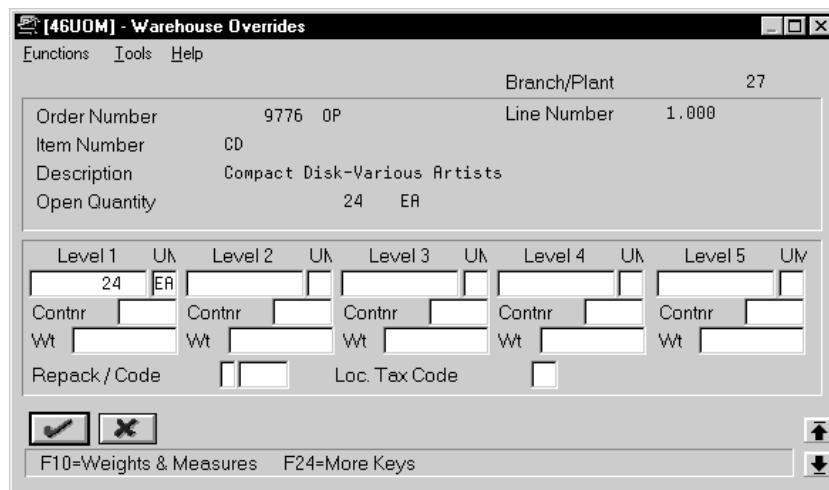
QUALITY MANAGEMENT:

49. Enter the version of Test Results Revisions (P3711) to call. If left blank, version ZJDE0002 will be used. _____

► **To override the unit of measure structure**

On Enter Receipts by PO or Item

1. Complete the following fields:
 - Branch/Plant
 - Order Number
 - Document Type
2. Choose Warehouse Overrides for the line whose unit of measure structure you want to change.



3. On Warehouse Overrides, complete the following fields:
 - Level 1
 - Unit Of Measure
 - Level 2
 - Unit Of Measure
 - Level 3
 - Unit Of Measure
 - Level 4
 - Unit Of Measure
 - Level 5
 - Unit Of Measure
4. Access the fold area.
5. Complete the following optional fields:

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

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

Field	Explanation												
UM	<p>The item's level 2 unit of measure. You use Unit of Measure Conversion Information (P41002) to define an item's unit of measure structure. You define the largest unit of measure in the structure as the level 1 unit of measure. The smallest unit of measure, which is also the primary unit of measure, is the highest level in the structure.</p> <p>For example, a unit of measure structure could be as follows:</p> <table> <thead> <tr> <th data-bbox="780 566 845 593">Level</th> <th data-bbox="850 566 1046 593">Unit of Measure</th> </tr> </thead> <tbody> <tr> <td data-bbox="780 599 801 627">1</td> <td data-bbox="850 599 926 627">Pallet</td> </tr> <tr> <td data-bbox="780 631 801 658">2</td> <td data-bbox="850 631 1274 658">Box, where 10 boxes equal 1 pallet</td> </tr> <tr> <td data-bbox="780 663 801 690">3</td> <td data-bbox="850 663 1241 690">Case, where 5 cases equal 1 box</td> </tr> <tr> <td data-bbox="780 694 801 722">4</td> <td data-bbox="850 694 1356 722">Interpack, where 8 interpacks equal 1 case</td> </tr> <tr> <td data-bbox="780 726 801 753">5</td> <td data-bbox="850 726 1339 753">Each, where 10 eaches equal 1 interpack</td> </tr> </tbody> </table> <p>In this example, the level 1 unit of measure is a pallet, and the level 5 unit of measure is an each, which is the primary unit of measure.</p> <p>You can have five levels in an item's unit of measure structure.</p>	Level	Unit of Measure	1	Pallet	2	Box, where 10 boxes equal 1 pallet	3	Case, where 5 cases equal 1 box	4	Interpack, where 8 interpacks equal 1 case	5	Each, where 10 eaches equal 1 interpack
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3	Case, where 5 cases equal 1 box												
4	Interpack, where 8 interpacks equal 1 case												
5	Each, where 10 eaches equal 1 interpack												
Level 3	<p>The total quantity of the item in the item's level 3 unit of measure. You use Unit of Measure Conversion Information (P41002) to define unit of measure levels. When you define a unit of measure structure, define your largest unit of measure as level 1, and your smallest, or primary, unit of measure as the last level. The system supplies an item's unit of measure structure to a location's detail information (F4602) during inventory movement, but you can override the structure, if necessary.</p>												

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

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

Field	Explanation												
UM	<p>The item's level 5 unit of measure. You use Unit of Measure Conversion Information (P41002) to define an item's unit of measure structure. You define the largest unit of measure in the structure as the level 1 unit of measure. The smallest unit of measure, which is also the primary unit of measure, is the highest level in the structure.</p>												
	<p>For example, a unit of measure structure could be as follows:</p>												
	<table> <thead> <tr> <th data-bbox="719 561 784 589">Level</th> <th data-bbox="719 561 988 589">Unit of Measure</th> </tr> </thead> <tbody> <tr> <td data-bbox="719 593 744 620">1</td> <td data-bbox="719 593 866 620">Pallet</td> </tr> <tr> <td data-bbox="719 625 744 652">2</td> <td data-bbox="719 625 1217 652">Box, where 10 boxes equal 1 pallet</td> </tr> <tr> <td data-bbox="719 656 744 684">3</td> <td data-bbox="719 656 1176 684">Case, where 5 cases equal 1 box</td> </tr> <tr> <td data-bbox="719 688 744 715">4</td> <td data-bbox="719 688 1299 715">Interpack, where 8 interpacks equal 1 case</td> </tr> <tr> <td data-bbox="719 720 744 747">5</td> <td data-bbox="719 720 1274 747">Each, where 10 eaches equal 1 interpack</td> </tr> </tbody> </table>	Level	Unit of Measure	1	Pallet	2	Box, where 10 boxes equal 1 pallet	3	Case, where 5 cases equal 1 box	4	Interpack, where 8 interpacks equal 1 case	5	Each, where 10 eaches equal 1 interpack
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	<p>You can have five levels in an item's unit of measure structure.</p>												
Wt	<p>The weight of one item per unit of measure, or the weight of the item and container in the level 1 unit of measure. You define weights for an item through Unit of Measure Definition by Item (P46011) and for the container through Container Codes (P46091).</p>												
Contnr	<p>A code (table 46/EQ) that identifies the storage container for this item in its level 1 unit of measure. A storage container can be:</p> <ul style="list-style-type: none"> <li data-bbox="736 1237 1356 1294">• An open container, where items are stored on the container (for example, a pallet) <li data-bbox="736 1298 1348 1355">• A closed container, where items are stored in the container (for example, a box) 												
	<p>You use Container Codes (P46091) to define storage containers. You use Unit of Measure Definition by Item or Group (P46011) to assign a storage container to an item in a specific unit of measure.</p>												
Repack / Code	<p>A code that determines whether the specified item in this unit of measure should be repacked before putaway.</p>												
	<p>Valid codes are:</p>												
	<p>Y Yes, repack the item</p>												
	<p>N No, do not repack the item</p>												
	<p>You must also specify a packing method by entering a code in the Default Pack Code field.</p>												

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

What You Should Know About

Changing units of measure	You can use Warehouse Overrides to delete a unit of measure so that the system uses a smaller unit of measure during putaway. You cannot use Warehouse Overrides to specify a larger unit of measure if you have not defined it on Item Units of Measure.
Changing a unit of measure structure	After you change a unit of measure structure, the system verifies the following: <ul style="list-style-type: none"> • The last level you specified in the structure is the primary unit of measure. • The units of measure are listed in order from largest to smallest. • The structure uses whole number conversions between units of measure. • Each unit of measure contains only one partial quantity for that unit.
Serial number overrides of unit of measure structures	The system automatically overrides unit of measure structures for items with assigned serial numbers. These items are listed individually (quantity of 1) in Level 1 as the primary unit of measure.

Creating Putaway Requests Manually



From Advanced Warehouse Management (G46), choose Replenishment Operations

From Replenishment Operations (G4613), choose Manual Replenishment

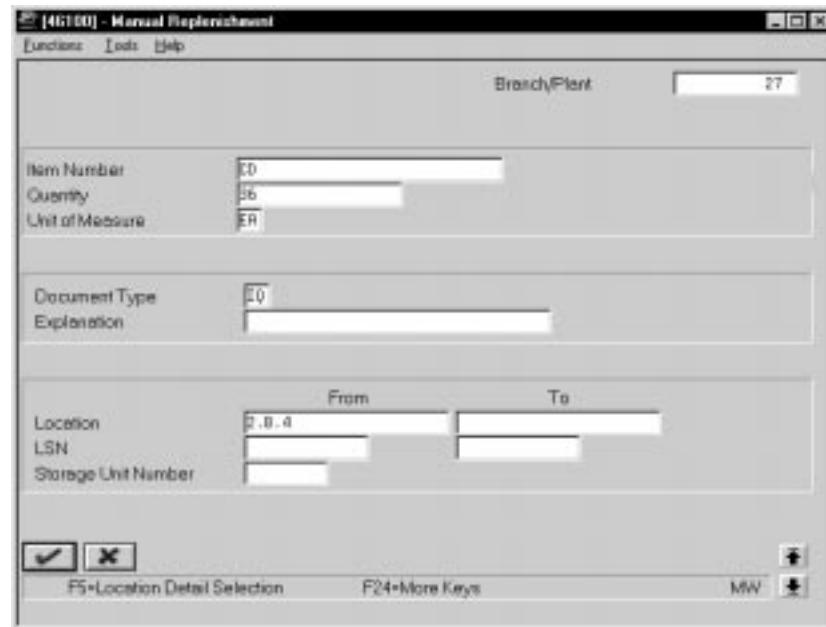
You can create manual putaway requests to create suggestions for putaway locations. You create manual putaway requests to:

- Store incoming items in the warehouse if the system did not automatically create a putaway request through purchase order receipts or manufacturing completions
- Store incoming items that have a document type that the system normally would not consider for putaway during receipts

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

► **To create putaway requests manually**

On Manual Replenishment



Complete the following fields:

- Branch/Plant
- Item Number
- Quantity
- Unit of Measure
- From Location

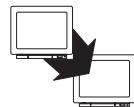
Field	Explanation
Item Number	A number that the system assigns to an item. It can be in short, long, or 3rd item number format.
Location – From	<p>The storage location from which goods will be moved.</p> <p>..... <i>Form-specific information</i></p>
	<p>The system creates either a putaway or a replenishment request based on how you complete the From Location and the To Location fields:</p> <ul style="list-style-type: none"> Putaway Requests — To create a putaway request, enter a location in the From Location field. Replenishment Requests — To create a replenishment request, enter a location in both the From Location and the To Location fields, or enter a location in only the To Location field.

What You Should Know About

Using manual replenishment to create putaway requests

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

Locating Existing Putaway Requests



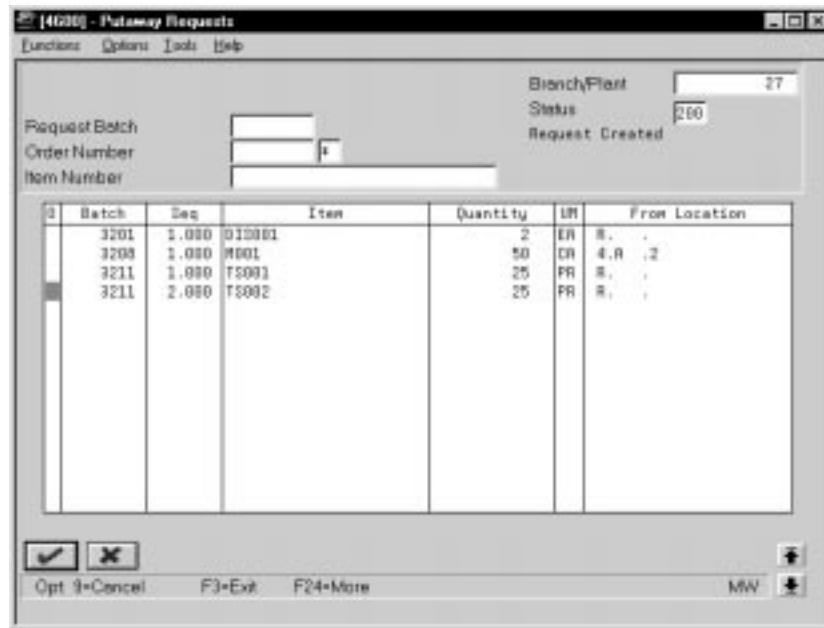
From Advanced Warehouse Management (G46), choose Inbound Operations

From Inbound Warehousing Operations (G4611), choose Putaway Requests

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

► To locate existing putaway requests

On Putaway Requests



1. Complete the following field:
 - Branch/Plant
2. Complete one or more of the following optional fields:
 - Status
 - Request Batch
 - Order Number
 - Document Type
 - Item Number

Field	Explanation
Status – Task / Trip	A code (system 46/type PS) that identifies the current status of a putaway, picking, or replenishment request (F4600) or trip (F4611) within the Advanced Warehouse Management system.
Batch Number – Requests	The batch number assigned to one set of putaway, picking, or replenishment requests. This number comes from next numbers for system 46.
Order Number	The number that identifies an original document. This can be a voucher, an order number, an invoice, unapplied cash, a journal entry number, and so on.

Field	Explanation
Order Type	<p>A user defined code (00/DT) that identifies the type of document. This code also indicates the origin of the transaction. J.D. Edwards has reserved document type codes for vouchers, invoices, receipts, and time sheets, which create automatic offset entries during the post program. (These entries are not self-balancing when you originally enter them.)</p> <p>The following document types are defined by J.D. Edwards and should not be changed:</p> <ul style="list-style-type: none"> P Accounts Payable documents R Accounts Receivable documents T Payroll documents I Inventory documents O Purchase Order Processing documents J General Accounting/Joint Interest Billing documents S Sales Order Processing documents

What You Should Know About

Cancelling putaway requests

You can use Putaway Requests to cancel putaway requests. You cancel requests to stop further processing and putaway. For example, if the items you received are damaged, you would cancel the putaway request.

You must first cancel any existing putaway suggestions for the request before you cancel the putaway request.

You can also cancel putaway requests by reversing receipt of a purchase order.

Processing Options for Request Inquiry

DISPLAY OPTION:

1. Enter the type of requests to view:
1 = Putaway Requests
2 = Pick Requests
3 = Replenishment Requests
(If blank, putaway requests will display.)

DEFAULT VALUE:

2. Enter the default Request Status to use. If blank, the "Ready to Suggest" status (200) is used.

PICKING OPTION:

3. Enter the override next status for sales order lines when requests are canceled.

Work with Putaway Reservations

Working with Putaway Reservations

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

Working with reservations is an optional task during putaway. Working with reservations includes the following tasks:

- Creating putaway reservations
- Changing existing putaway reservations

What You Should Know About

Processing reservations using the Level 1 unit of measure

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

Creating Putaway Reservations

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

Complete the following tasks:

- Create putaway reservations interactively
- Create putaway reservations by batch

- Create alternate putaway reservations

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

See Also

- *Cross Docking* earlier in this chapter for information about automatic putaway requests

Creating Putaway Reservations Interactively



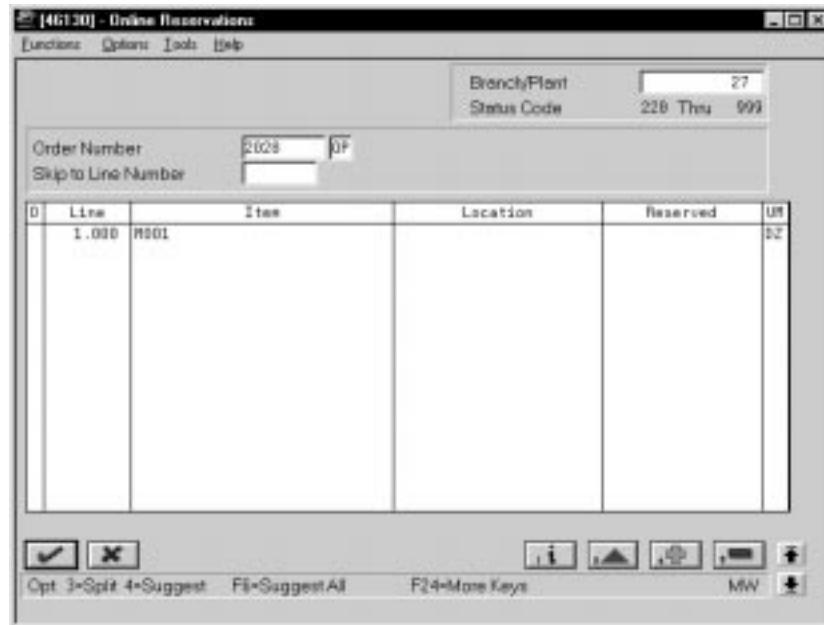
From Advanced Warehouse Management (G46), choose Inbound Operations

From Inbound Warehousing Operations (G4611), choose Online Reservations

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

Complete the following tasks:

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



What You Should Know About

Canceling putaway reservations

You can use Online Reservations to cancel reservations. You cancel reservations to make reserved locations available again.

Creating online reservations

When you create putaway reservations online:

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

► **To create putaway reservations for all order lines**

On Online Reservations

1. Complete the following fields:
 - Branch/Plant
 - Order Number
 - Order Type
2. Choose Suggest All to create reservations.

► **To create putaway reservations for individual order lines**

On Online Reservations

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

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

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



3. On Split/Suggest, modify the system's information with the appropriate information in the following fields:
 - Location
 - Quantity

Creating Putaway Reservations by Batch



From Advanced Warehouse Management (G46), choose Inbound Operations

From Inbound Warehousing Operations (G4611), choose Batch Reservations

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

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

- Create putaway reservations
- Create putaway location suggestions
- Print movement tags and slips
- Print audit reports

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

Batch Reservations is a DREAM Writer program.

Work with Putaway Reservations

46475	J.D. Edwards & Company Putaway Audit Report										Page No. . . . 2
											Date - 5/13/96
. . . . Request				Location	. . . Quantity . . .			Pr	L1	Usg	
Type	Number	Sequence	Item Number		Attempted	Suggested	UM	UM	Code		Description
Putaway	1001			.	.		10	EA	EA	3591	Excluded inactive locations
				1	.B	.2	10	10	EA	EA	3215 Used - Fixed Location

Processing Options for Batch Putaway Reservations

UPDATE OPTION:

1. Enter a '1' to re-suggest location reservations for selected purchase order lines. If blank, only lines without open reservations will be suggested.

MOVE TAG OPTIONS:

Enter a '1' to:

2. Print move tags.
3. Print bar coded information.
4. Print the U/M structure.
5. Print Mark For address.

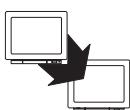
6. Enter the item/location quantity to be printed on the tags:
' ' = Do not print a quantity.
'1' = On-hand quantity.
'2' = On-hand + inbound - outbound - committed.

7. Enter the number of duplicate copies to print for each tag.
8. Enter the DREAM Writer version to be used for the desired printer overrides. If blank, XJDE0001 is used (See Form ID P46473).

AUDIT CONTROL:

9. Enter a '1' to generate the audit Report, a '2' to generate the Audit along with a glossary for any messages, or a '3' to generate the report with a complete glossary at the end. If blank, no report will be generated.
10. Enter the DREAM Writer version of the Selection Audit report to use. If blank, XJDE0001 is used. (See form ID P46475.)

Creating Alternate Putaway Reservations



From Advanced Warehouse Management (G46), choose Inbound Operations

From Inbound Warehousing Operations (G4611), choose Online Reservations

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

► **To create alternate putaway reservations**

On Online Reservations

1. Complete the following fields:
 - Branch/Plant
 - Order Number
 - Order Type
 - Location
 - Quantity Reserved
2. Choose Suggest for the purchase order line for which to suggest reservation locations.

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

3. To accept the new reservation, press Enter.

What You Should Know About

Excluding locations

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

Changing Existing Putaway Reservations



From Advanced Warehouse Management (G46), choose Inbound Operations

From Inbound Warehousing Operations (G4611), choose Online Reservations

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

You can:

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

► **To change existing reservations by splitting order lines**

On Online Reservations

1. Complete the following fields:
 - Branch/Plant
 - Order Number
 - Order Type
 - Location
 - Quantity Reserved
2. Choose Split for each purchase order line that you want to split into multiple location reservations.
3. Complete the following fields for each location into which you want to split the purchase order line:
 - Location
 - Quantity

► **To change existing reservations manually**

On Online Reservations

1. Complete the following fields:
 - Branch/Plant
 - Order Number
 - Order Type
 - Location
 - Quantity Reserved
2. Replace the existing information with your own information in the following fields:
 - Location
 - Quantity

What You Should Know About

Quantity checking

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

Work with Putaway Suggestions

Working with Putaway Suggestions

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

Complete the following tasks:

- Create putaway suggestions
- Confirm putaway suggestions

Before You Begin

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

Creating Putaway Suggestions

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

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

Complete the following tasks:

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

Creating Putaway Suggestions by Batch



From Advanced Warehouse Management (G46), choose Inbound Operations

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

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

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

- Select all outstanding putaway requests
- Update each request's status in the Warehouse Requests table (F4600)
- Create putaway location suggestions
- Assign tasks and trips
- Print movement tags and slips
- Print audit reports
- Confirm putaway suggestions

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

Process Putaway Requests is a DREAM Writer program.

J.D. Edwards & Company Putaway Audit Report							Page No. . . . 19 Date - . . . 14.05.96	
Type	Request Number	Sequence	Item Number	Location	Attempted	Quantity . . . Suggested	Pr L1 Usg UM UM Code	Description
3216	1,000	M002		3.E .2		3600		EA CA 3544 Zone does not match
				3.E .3		3600		EA CA 3544 Zone does not match
				5.A .2		3600		EA CA 3226 Cannot mix this item
				5.A .3		3600		EA CA 3226 Cannot mix this item
				5.A .4		3600		EA CA 3226 Cannot mix this item
				5.A .5		3600		EA CA 3226 Cannot mix this item
				4.A .5		3600		EA CA 3226 Cannot mix this item
				4.A .4		3600		EA CA 3226 Cannot mix this item
				4.A .3		3600		EA CA 3226 Cannot mix this item
				4.A .2		3600		EA CA 3226 Cannot mix this item
				4.A .1		3600		EA CA 3226 Cannot mix this item
				4.B .1		3600		EA CA 3226 Cannot mix this item
				4.B .2		3600		EA CA 3226 Cannot mix this item
				4.B .3		3600	720	EA CA 3213 Used - Random Location
				4.B .4		2880	576	EA CA 3213 Used - Random Location

Processing Options for Process Putaway Requests

TASK AND TRIP ASSIGNMENT:

1. Enter a '1' to do immediate task and trip assignment. If blank, no tasks/trips will be assigned.
2. Enter the DREAM Writer version of the Task and Trip Assignment program to use. If blank, XJDE0001 is used. (See Form ID P46471).

AUDIT CONTROL:

3. Enter a '1' to generate the audit report, a '2' to generate the audit along with a glossary for any messages, or a '3' to generate the report with a complete glossary at the end. If blank, no report will be generated
4. Enter the DREAM Writer version of the Selection Audit report to use for the desired printer overrides. If blank, XJDE0001 is used. (See Form ID P46475.)

CONFIRMATION CONTROL:

5. Enter a '1' to automatically confirm suggestions.
6. Enter the override next status for the confirmed sales order lines.

(Pick Processing Only).

RESUGGESTIONS:

7. Enter a '1' to resuggest movement requests. If blank, only new requests will be processed. _____

REPLENISHMENT CONTROL:

8. Enter the method to use for replenishment quantities. If blank, method '2' is used. _____

'1' = Economic Replenishment.
The quantity to replenish is retrieved from the fixed location definition.

'2' = Maximum Replenishment.
The quantity to replenish is the quantity which would fill the location.

REPLENISHMENT CONTROL: (Cont)

9. Enter the DREAM writer version of the Task and Trip Assignment program to run for replenishments. If blank XJDE0003 is used.
(See form ID P46471) _____

Creating Putaway Suggestions Interactively

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

- Create putaway suggestions
- Assign tasks and trips
- Print movement tags and slips
- Print audit reports
- Confirm putaway suggestions

Before You Begin

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

Creating Alternate Putaway Suggestions



From Advanced Warehouse Management (G46), choose Inbound Operations

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

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

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

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

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

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

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

Resuggest Putaway Requests is a DREAM Writer program.

J.D. Edwards & Company Putaway Audit Report							Page No. . . . 20 Date - . . . 14.05.96 .
. . . Request			Location	Quantity . . .	Pr L1 Usg	UM UM Code	Description
Type	Number	Sequence Item Number	Attempted	Suggested			
Putaway	3215	1,000 M001	4.B .4	6000	EA CA 3226	Cannot mix this item	
			4.B .5	6000	EA CA 3226	Cannot mix this item	
			5.B .1	6000	EA CA 3226	Cannot mix this item	
			5.B .2	6000	EA CA 3226	Cannot mix this item	
			5.B .3	6000	EA CA 3226	Cannot mix this item	
			5.B .4	6000	EA CA 3226	Cannot mix this item	
			5.B .5	6000	EA CA 3226	Cannot mix this item	
			5.C .4	6000	EA CA 3226	Cannot mix this item	
			5.C .3	6000	EA CA 3226	Cannot mix this item	
			5.C .2	6000	EA CA 3226	Cannot mix this item	
			5.C .1	6000	EA CA 3226	Cannot mix this item	
			4.C .5	6000	EA CA 3226	Cannot mix this item	
			4.C .4	6000	EA CA 3226	Cannot mix this item	
			4.C .3	6000	EA CA 3226	Cannot mix this item	
			4.C .2	6000	EA CA 3226	Cannot mix this item	
			4.C .1	6000	EA CA 3226	Cannot mix this item	
			4.D .1	6000	EA CA 3226	Cannot mix this item	
			4.D .2	6000	EA CA 3226	Cannot mix this item	
			4.D .3	6000	EA CA 3226	Cannot mix this item	
			4.D .4	6000	EA CA 3226	Cannot mix this item	
			4.D .5	6000	EA CA 3226	Cannot mix this item	

Processing Options for Resuggest Putaway Requests

TASK AND TRIP ASSIGNMENT:

1. Enter a '1' to do immediate task and trip assignment. If blank, no tasks/trips will be assigned. _____
2. Enter the DREAM Writer version of the Task and Trip Assignment program to use. If blank, XJDE0001 is used. (See Form ID P46471). _____

AUDIT CONTROL:

3. Enter a '1' to generate the audit report, a '2' to generate the audit along with a glossary for any messages, or a '3' to generate the report with a complete glossary at the end. If blank, no report will be generated _____
4. Enter the DREAM Writer version of the Selection Audit report to use for the desired printer overrides. If blank, XJDE0001 is used. (See Form ID P46475.) _____

CONFIRMATION CONTROL:

5. Enter a '1' to automatically confirm suggestions. _____
6. Enter the override next status for the confirmed sales order lines. _____

(Pick Processing Only).

RESUGGESTIONS:

7. Enter a '1' to resuggest movement requests. If blank, only new requests will be processed. _____

REPLENISHMENT CONTROL:

8. Enter the method to use for replenishment quantities. If blank, method '2' is used. _____

'1' = Economic Replenishment.
The quantity to replenish is retrieved from the fixed location definition.

'2' = Maximum Replenishment.
The quantity to replenish is the quantity which would fill the location.

REPLENISHMENT CONTROL: (Cont)

9. Enter the DREAM writer version of the Task and Trip Assignment program to run for replenishments. If blank XJDE0003 is used.
(See form ID P46471) _____

Confirming Putaway Suggestions



From Advanced Warehouse Management (G46), choose Inbound Operations

From Inbound Warehousing Operations (G4611), choose Putaway Confirmation

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

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

When you confirm suggestions for putaway, you:

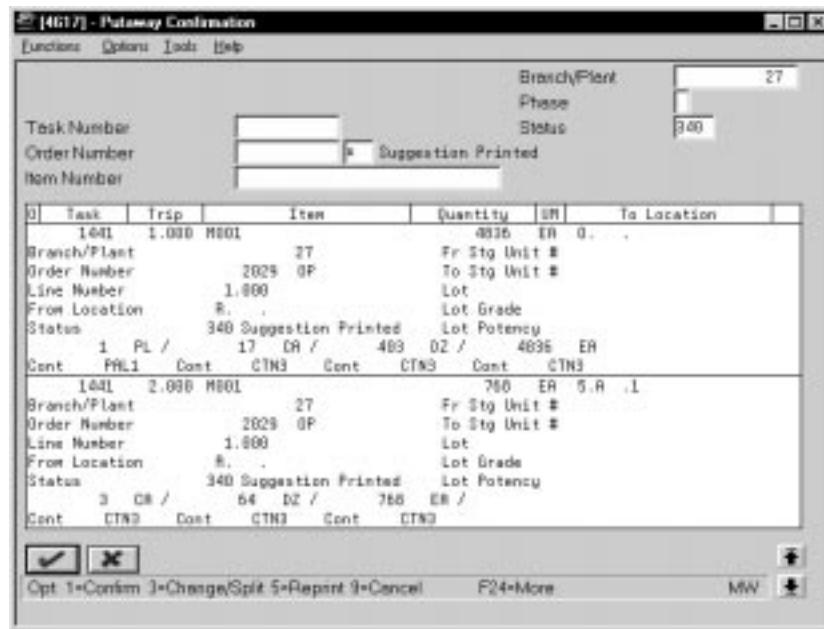
- Reduce on-hand inventory in the receiving location
- Increase on-hand inventory in the putaway location

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

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

Complete the following tasks:

- Confirm putaway suggestions
- Change or split putaway suggestions



► To confirm putaway suggestions

On Putaway Confirmation

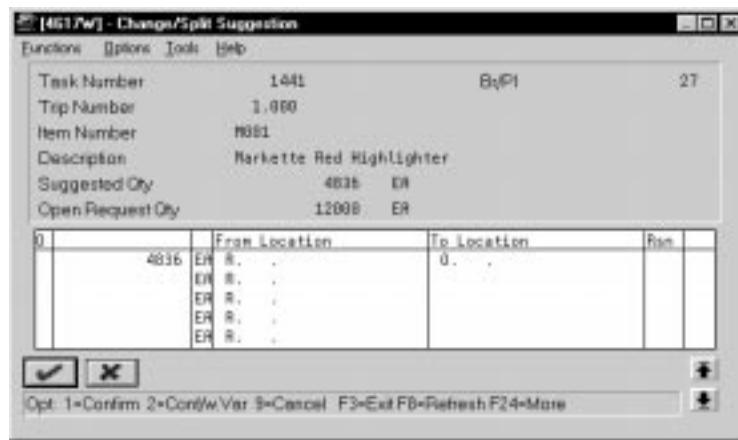
1. Complete the following fields:
 - Branch/Plant
 - Task Number
 - Order Number

- Document Type
 - Item Number
2. To confirm the suggested locations and quantities, choose Confirm.

► To change or split putaway suggestions

On Putaway Confirmation

1. Complete the following fields:
 - Branch/Plant
 - Task Number
 - Order Number
 - Document Type
 - Item Number
2. To split or change a putaway suggestion, access Change/Split Suggestion.



3. On Change/Split Suggestion, complete the following fields for each location into which you want to split or change the suggestion:
 - Quantity
 - To Location
 - Reason
4. To confirm a smaller quantity than the suggested quantity and move the remainder to the designated variance location, choose Confirm with Variance.
5. To confirm the suggested locations and quantities, choose Confirm.

Field	Explanation
Phase	<p>A number that identifies which phase of 2-phase movement suggestions that the system displays.</p> <p>Valid numbers are:</p> <ul style="list-style-type: none"> 1 Display phase 1 of the movement suggestions 2 Display phase 2 of the movement suggestions blank Do not display 2-phase movement suggestions
Task Number	A unique number assigned to every putaway request that is created by a receipt.
Reason Code	Reason representing the change or override of a warehouse management suggestion.

What You Should Know About

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

Picking

Objectives

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

About Picking

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

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

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

The picking process includes:

- Working with pick requests
- Working with pick suggestions

See Also

- *Appendix B - Manufacturing Information* for information on creating pick requests through manufacturing systems



Work with Pick Requests

Working with Pick Requests

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

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

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

Complete the following tasks:

- Create pick requests
- Locate existing pick requests

Before You Begin

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

See Also

- *Appendix B - Manufacturing Information* for information about creating pick requests through manufacturing processes

Creating Pick Requests

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

- Create pick requests interactively
- Create pick requests by batch

Creating Pick Requests Interactively



From Advanced Warehouse Management (G46), choose Outbound Operations

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

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

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

- Create requests only
- Create requests and process them using the subsystem
- Do not create requests

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

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

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

► **To create pick requests interactively**

On Sales Order Entry



1. Complete the following fields:

- Sold To
- Ship To
- Quantity
- Item
- Unit Of Measure
- Unit Price

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

2. Complete the following field:

- Update

Field	Explanation
Address Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other Address Book members.

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

What You Should Know About

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

Processing Options for Sales Order Entry

SALES ORDER DEFAULT VALUES:

- | | | |
|--------------------------|------------|-------|
| 1. Document Type | (Required) | _____ |
| 2. Line Type | (Optional) | _____ |
| 3. Beginning Status | (Optional) | _____ |
| 4. Override Next Status | (Optional) | _____ |
| 5. Unit of Measure | (Optional) | _____ |
| 6. Line Number Increment | (Optional) | _____ |
| 7. Reason Code | (Optional) | _____ |

UNIT OF MEASURE DEFAULT VALUES:

- | | |
|--|-------|
| 8. Enter '1' to use the Pricing UOM as the default Transaction UOM. If left blank, the Primary UOM will be used instead. | _____ |
|--|-------|

WORK ORDER DREAM WRITER VERSIONS:

Enter the version for each program.

If left blank, ZJDE0001 will be used:

- | | |
|--|-------|
| 9. Work Order Entry (P48013) | _____ |
| 10. WO Server for Sale Order (X4201WO) | _____ |

ORDER DUPLICATION DEFAULT VALUES:

- 11. Document Type _____
- 12. Beginning Status _____
- 13. Enter text duplication selection
 '1' to copy line text _____
 '2' to copy line and order text _____
 '3' to copy order text _____

ADDRESS BOOK DEFAULT VALUES:

- 14. Enter a '1' to default the branch
 from the Address Book. If left
 Blank, it will default from the
 user default location. _____

DOWNLOAD HEADER INFORMATION:

- 15. Enter '1' to automatically load
 header values to the detail lines
 after a change. If left blank,
 it must be done manually. _____

PROMPTING CONTROL:

- 16. Enter the Screen Format:
 1 = Quantity, Item, Price
 2 = Quantity, Item, Description
 3 = Item, Quantity, Price
 4 = ECS format
 5 = Aggregates format
 (If left blank, format 1 is used.) _____

Enter a '1' to:

- 17. Display Headings first. _____
- 18. Be prompted to accept the order. _____

NOTE: Two-cycle order entry is not
recommended for configured items.

- 19. Allow the addition of a Customer
 Master record, if not set up. _____
- 20. Load Online Invoice information
 before the order is accepted. _____
- 21. Enter which Item Search screen
 is to be used to return items: _____

- 1 = Item Search window allowing
 the return of multiple items
2 = Full Item Search screen with
 Query capabilities

(If left blank, the Item Search
window allowing the return of a
single item will be used.)

ORDER HOLD CODES:

- 22. Customer Credit Checking _____
- 23. Order Margin Checking _____
- 24. Order Line Margin Checking _____
- 25. Order Minimum Value Checking _____
- 26. Order Maximum Value Checking _____
- 27. Partial Order Hold _____
- 28. Product Allocation Hold _____

LINE CONTROL STATUS:

- 29. Enter the next status code beyond
 which a detail line cannot be
 changed. If left blank, no
 restriction will be put on the
 changing of a line. _____

FIELD DISPLAY CONTROL:

Enter '1' to protect or '2' to suppress:

- 30. Cost Fields
- 31. Price Fields

Enter '1' to protect the following:

- 32. Status Codes
- 33. Price adjustment driver fields
- 34. Sold To field on the header

Enter a '1' to suppress the following:

- 35. Closed Detail Lines
- 36. Credit Card Information
- 37. Freight and Carrier Information
- 38. Commission Information

CREDIT ORDER PROCESSING:

- 39. Enter the status code to select when retrieving credit orders.
- 40. Enter '1' if the previous status is the last status. If left blank it will be the Next Status.

CROSS REFERENCE INFORMATION:

- 41. Enter the Cross Reference Type for:
 - Substitute Items
 - Associated Items
 - Replacement Items
- 42. Enter '1' to use the substitute item's Unit Price. If left blank, the original item's price will be used to order the substitutes.

KIT PROCESSING:

- 43. Enter '1' to suppress Kit Component lines.
- 44. Enter the version of Kit Inquiry to call. If left blank, version ZJDE0001 will be called.
- 45. Enter '1' to suppress availability information in the Kit Window.

AVAILABILITY CHECKING:

- 46. Enter '1' to be notified of an automatic backorder or cancel. Enter '2' to be notified but not create the backorder or cancel. Enter '3' to create the backorder or cancel automatically and update the order without issuing the warning.

If left blank, no availability checking will be done.

COMMITMENT CONTROL

- 47. Enter '1' for commitment to Other Quantity 1 or '2' for commitment to Other Quantity 2. This option is typically used in conjunction with a Blanket or Quote Order. If this option is used, the commitment preference will be ignored.

AUTOMATIC PROCESSING:

48. Enter '1' to automatically display the Supply and Demand screen when a new sales detail line is backordered. _____
49. Enter '1' to print pick slips or a '2' to print invoices through the subsystem. Enter '3' for on-line commitment or a '4' for subsystem commitment. _____
50. Enter '1' for auto order repricing. _____

DREAM WRITER VERSIONS:

Enter the version for each program.
If left blank, ZJDE0001 will be used:

51. Pick Slip Print (P42520) _____
52. Supply and Demand (P4021) _____
53. Std Order/Basket Reprice (P421301) _____
or Adv Order/Basket Reprice (P42750) _____
54. Customer Service (P42045) _____
55. Online Invoice (P42230) _____
56. Preference Profile (P40400) _____
57. Check Price (Advanced) (P40721) _____
58. Customer Master (P01053) _____
59. TM Rate & Route server PSMR9100 _____

CONFIGURATOR PROCESSING:

60. Enter one of the following for the mode of Specification Entry.
If left blank, '2' will be used:
'1' = Text Mode
'2' = Assisted Mode
'3' = Assisted Prompt Mode _____

TRANSFER PRICE UPDATE:

61. Enter the order type(s) that the system will use to invoke inter-branch updates. To specify more than one order type, type them one after the other along this field. _____
62. Enter the transfer pricing method to be used. Default method is 1.
1 = Branch cost mark-up
2 = Transfer pricing _____
63. Enter '1' to allow inter-branch invoicing. If left blank, no inter-branch invoice can be run. _____

WAREHOUSE PROCESSING:

64. Enter the request processing mode:
' ' = No pick requests
'1' = Generate requests only
'2' = Generate requests and process using the subsystem _____
65. If processing pick requests using the subsystem, enter the DREAM Writer version to use. If blank, XJDE0002 is used.
(See Form ID P46171.) _____

66. Enter an override next status for sales order lines for which requests have been generated. _____

ORDER TEMPLATE PROCESSING:

67. Enter a '1' to use the Sold-to address number for order templates, or a '2' to use the Ship-to address number. If left blank, no automatic order template processing will be performed. _____

68. Enter the order template name. _____

BLANKET/QUOTE PROCESSING:

69. Enter '1' for automatic access to the blanket/quote release processing by Sold To address. Enter '2' for automatic access to the blanket/quote release processing by Ship To address. If left blank, no automatic access to the blanket/quote release processing will be performed. _____

PREFERENCE PROFILE PROCESSING:

70. Enter a '1' to use preference profile defaults. If left blank, no preference profile information will be defaulted. _____
71. Enter a '1' to use the Inventory Commitment Preference to source from multiple branches or to view grade or potent items in the commitment window. _____

CURRENCY PROCESSING:

72. Enter the tolerance limit percentage to warn you of currency rate changes. A 15.0 indicates a warning if the rate is 15 percent greater or less than the current rate. _____

LOAD CONFIRM PROCESSING: (ECS)

73. Enter '1' to automatically branch to load confirm when order are added. _____
74. Enter the version of Bulk Load Confirm (P49510) to be used. _____
75. Enter the version of Packaged Load Confirm (P49530) to be used. _____

AVIATION/MARINE PROCESSING: (ECS)

76. Enter the version of the Additional Parameters program (P49510A) to be used. _____

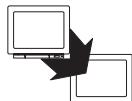
TRIP ASSIGNMENT WINDOW: (ECS)

77. Enter the version of the Trip Assignment window (P49200) to be _____

used.

MARK-FOR ADDRESS PROCESSING:
78. Enter '1' to display Mark-for
Address. _____

Creating Pick Requests by Batch



From Advanced Warehouse Management (G46), choose Outbound Operations

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

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

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

- Select all sales orders at a status that you define through the Data Selection processing options
- Create pick requests
- Update each request's status in the Warehouse Requests table (F4600)

Batch Pick Requests is a DREAM Writer program.

What You Should Know About

Changing sales order information

You cannot make changes to the order after you begin processing it using the Advanced Warehouse Management system.

Processing Options for Batch Pick Requests

DEFAULT PROCESSING:
1. Enter the override next status to use. _____

Locating Existing Pick Requests



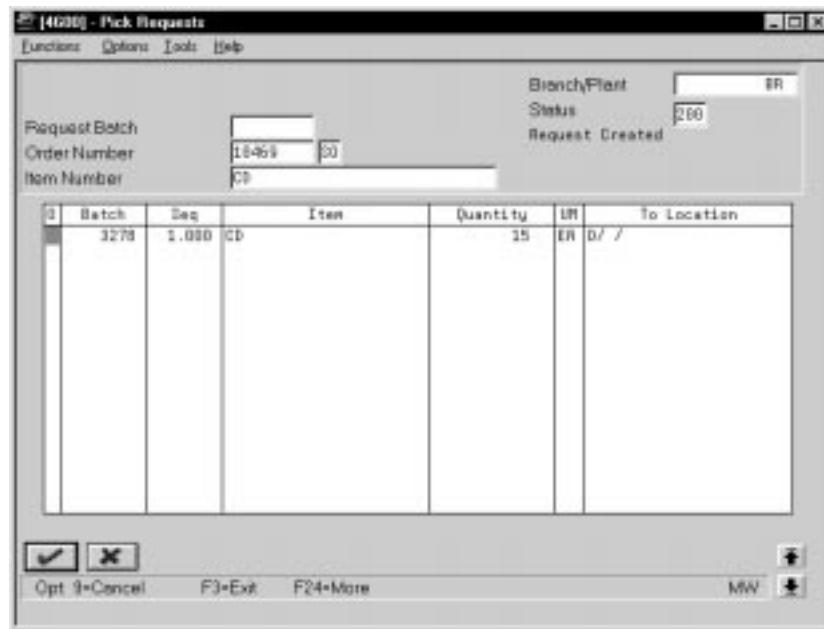
From Advanced Warehouse Management (G46), choose Outbound Operations

From Outbound Warehousing Operations (G4612), choose Pick Requests

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

► **To locate existing pick requests**

On Pick Requests



1. Complete the following field:
 - Branch/Plant
2. Complete one or more of the following optional fields:
 - Status
 - Request Batch
 - Order Number
 - Document Type
 - Item Number

What You Should Know About

Cancelling pick requests

You can use Pick Requests to cancel pick requests. You cancel requests to stop further processing and picking. For example, if the customer cancels the sales order, or the items are damaged, you would cancel the pick request.

You must first cancel any existing pick suggestions for the request before you cancel the pick request.

Work with Pick Suggestions

Working with Pick Suggestions

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

Complete the following tasks:

- Create pick suggestions
- Confirm pick suggestions
- Confirm shipment

Before You Begin

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

Creating Pick Suggestions

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

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

Complete the following tasks:

- Create pick suggestions by batch
- Create pick suggestions interactively
- Create alternate pick suggestions

Creating Pick Suggestions by Batch



From Advanced Warehouse Management (G46), choose Outbound Operations

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

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

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

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

- Select all outstanding pick requests
- Update each request's status in the Warehouse Requests table (F4600)
- Create picking location suggestions
- Assign tasks and trips
- Print movement tags and slips
- Print audit reports
- Confirm pick suggestions

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

Process Pick Requests is a DREAM Writer program.

J.D. Edwards & Company Picking Audit Report							Page No. 2
. . . Request							Date - . . . 14.05.96 .
Type	Number	Sequence	Item Number	Location	Attempted	Quantity . . . Pr L1 Usg	Description
.							UM UM Code
Picking	3217	1,000	M001	.	.	600	EA PL 3586 Insufficient qty for UOM.
				.	.	600	EA PL 3583 Qty insufficient for instr.
				4.B	.2	600	EA CA 3595 Used as random location.
				10.C	.	24	EA DZ 3594 Used as fixed location.

What You Should Know About

Using automatic replenishment

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

Processing Options for Process Pick Requests

TASK AND TRIP ASSIGNMENT:

1. Enter a '1' to do immediate task and trip assignment. If blank, no tasks/trips will be assigned. _____
2. Enter the DREAM Writer version of the Task and Trip Assignment program to use. If blank, XJDE0001 is used. (See Form ID P46471). _____

AUDIT CONTROL:

3. Enter a '1' to generate the audit report, a '2' to generate the audit along with a glossary for any messages, or a '3' to generate the report with a complete glossary at the end. If blank, no report will be generated _____

4. Enter the DREAM Writer version of the Selection Audit report to use for the desired printer overrides. If blank, XJDE0001 is used. (See Form ID P46475.)

CONFIRMATION CONTROL:

5. Enter a '1' to automatically confirm suggestions.
6. Enter the override next status for the confirmed sales order lines. (Pick Processing Only).

RESUGGESTIONS:

7. Enter a '1' to resuggest movement requests. If blank, only new requests will be processed.

REPLENISHMENT CONTROL:

8. Enter the method to use for replenishment quantities. If blank, method '2' is used.

'1' = Economic Replenishment.
The quantity to replenish is retrieved from the fixed location definition.

'2' = Maximum Replenishment.
The quantity to replenish is the quantity which would fill the location.

REPLENISHMENT CONTROL: (Cont)

9. Enter the DREAM writer version of the Task and Trip Assignment program to run for replenishments. If blank XJDE0003 is used. (See form ID P46471)

Creating Pick Suggestions Interactively

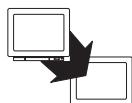
You create pick suggestions interactively to process pick requests as you create them. You do this by setting a processing option in the Sales Order Entry program to create a pick request and process it using the subsystem. As soon as you create a pick request, the subsystem can process it immediately.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

- Create pick suggestions
- Assign tasks and trips
- Print movement tags and slips
- Print audit reports
- Confirm pick suggestions

Before You Begin

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

Creating Alternate Pick Suggestions



From Advanced Warehouse Management (G46), choose Outbound Operations

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

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

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

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

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

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

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

Resuggest Pick Requests is a DREAM Writer program.

J.D. Edwards & Company Picking Audit Report								Page No.	2	
. . . Request				Quantity	Pr	L1	Usg	Date -		
Type	Number	Sequence	Item Number	Location	Attempted	Suggested	UM	UM	Code	Description
Picking	3217	1,000	M001	.	600		EA	PL	3586	Insufficient qty for UOM.
				.	600		EA	PL	3583	Qty insufficient for instr.
				4.B .2	600	576	EA	CA	3595	Used as random location.
				10.C .	24	24	EA	DZ	3594	Used as fixed location.

Processing Options for Resuggest Pick Requests

TASK AND TRIP ASSIGNMENT:

1. Enter a '1' to do immediate task and trip assignment. If blank, no tasks/trips will be assigned. _____
2. Enter the DREAM Writer version of the Task and Trip Assignment program to use. If blank, XJDE0001 is used. (See Form ID P46471). _____

AUDIT CONTROL:

3. Enter a '1' to generate the audit report, a '2' to generate the audit along with a glossary for any messages, or a '3' to generate the report with a complete glossary at the end. If blank, no report will be generated. _____
4. Enter the DREAM Writer version of the Selection Audit report to use for the desired printer overrides. If blank, XJDE0001 is used. (See Form ID P46475.) _____

CONFIRMATION CONTROL:

5. Enter a '1' to automatically confirm suggestions. _____

6. Enter the override next status for the confirmed sales order lines. _____
 (Pick Processing Only).

RESUGGESTIONS:

7. Enter a '1' to resuggest movement requests. If blank, only new requests will be processed. _____

REPLENISHMENT CONTROL:

8. Enter the method to use for replenishment quantities. If blank, method '2' is used. _____

'1' = Economic Replenishment.
 The quantity to replenish is retrieved from the fixed location definition.

'2' = Maximum Replenishment.
 The quantity to replenish is the quantity which would fill the location.

REPLENISHMENT CONTROL: (Cont)

9. Enter the DREAM writer version of the Task and Trip Assignment program to run for replenishments. If blank XJDE0003 is used.
 (See form ID P46471) _____

Confirming Pick Suggestions



From Advanced Warehouse Management (G46), choose Outbound Operations

From Outbound Warehousing Operations (G4612), choose Pick Confirmation

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

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

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

24 items and send 4 of them to the overflow location than it is to pick 20 eaches.

When you confirm suggestions for picking, you:

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

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

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

Complete the following tasks:

- Confirm pick suggestions
- Change or split pick suggestions

The screenshot shows a Windows application window titled 'F4611 - Picking Confirmation'. The window has a menu bar with 'File', 'Options', 'Tools', and 'Help'. The main area contains a table with the following data:

ID	Task	Trip	Item	Quantity	UoM	From Location
1444	1.000	1001		200	EA	5.E .5
1444	2.000	DISPLAY		2	EA	2.0 .2
1444	3.000	F001		80	EA	2.0 .4
1444	4.000	S001		192	EA	10.0 .
1444	5.000	M001		96	EA	10.0 .
1444	6.000	M002		96	EA	10.0 .
1444	7.000	M003		96	EA	10.0 .
1444	8.000	0002		192	EA	10.0 .
1445	1.000	CD		144	EA	9.0 .1
1445	2.000	CD		16	EA	9.0 .1

At the bottom of the window, there are buttons for 'Opt. 1=Confirm', '3=Change/Split', '5=Report', '9=Cancel', 'F24=More', and a 'MW' button.

► **To confirm pick suggestions**

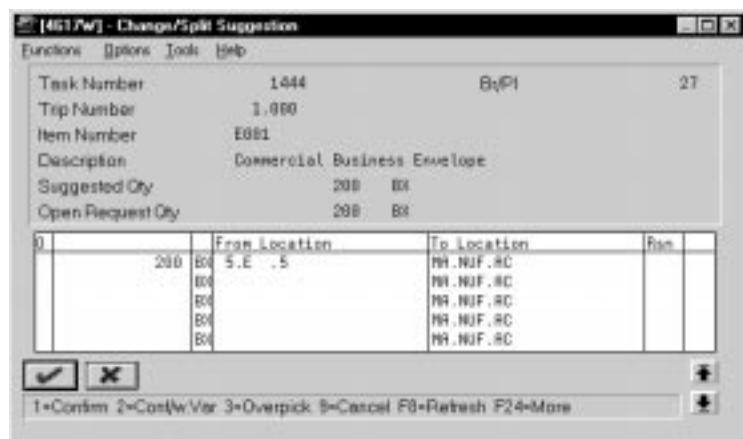
On Picking Confirmation

1. Complete the following fields:
 - Branch/Plant
 - Task Number
 - Order Number
 - Document Type
 - Item Number
2. To confirm the suggested locations and quantities, choose Confirm.

► **To change or split pick suggestions**

On Picking Confirmation

1. Complete the following fields:
 - Branch/Plant
 - Phase
 - Task Number
 - Order Number
 - Document Type
 - Item Number
2. To split or change a pick suggestion, access Change/Split Suggestion.



3. On Change/Split Suggestion, complete the following fields for each location into which you want to split or change the suggestion:
 - Quantity
 - From Location
 - Reason
4. To confirm a smaller quantity than the suggested quantity and move the remainder to the designated holding location, choose Confirm with Variance.
5. To confirm a greater quantity than the suggested quantity and move the excess to the designated overflow location, choose Overpick.
6. To confirm the suggested locations and quantities, choose Confirm.

What You Should Know About

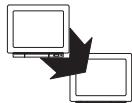
Creating new suggestions for different quantities

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

Canceling pick suggestions

You can use Pick Confirmation to cancel pick suggestions. You cancel suggestions to stop further processing and picking.

Confirming Shipment



From Advanced Warehouse Management (G46), choose Outbound Operations

From Outbound Warehousing Operations (G4612), choose Ship Confirm

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



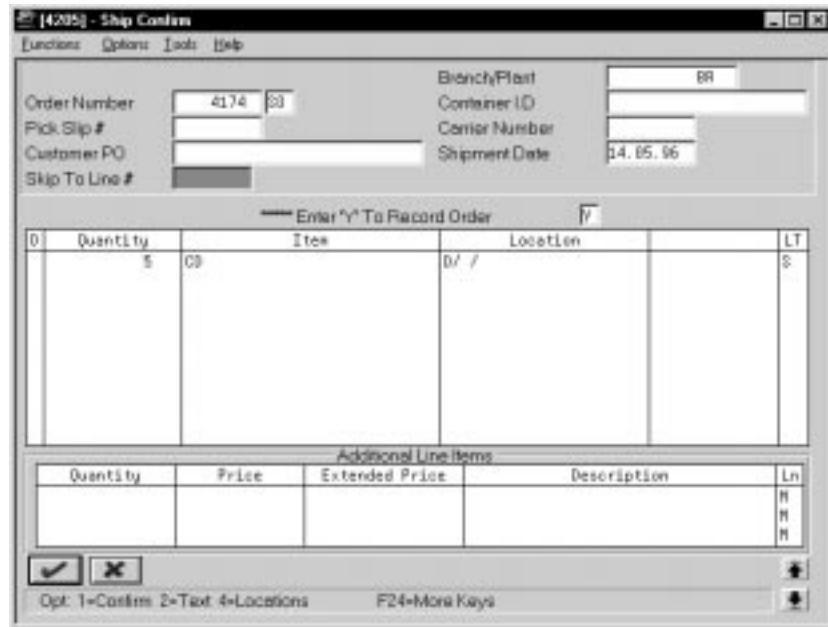
You must actually ship the item when you confirm shipment to avoid balance discrepancies between system inventory records and actual inventory.

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

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

► **To confirm shipment**

On Ship Confirm



1. Complete the following field:
 - Order Number
2. Choose Confirm for the order lines for which you want to confirm shipment.

The system prompts you to confirm shipment.

3. Complete the following field:
 - Update

What You Should Know About

Defining document types for shipment confirmation

You must list the sales order document type (SO) in the user defined codes table 40/IU to permit the system to update the inventory records when you confirm shipment.

Replenishment

Objectives

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

About Replenishment

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

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

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

The replenishment process includes:

- Working with replenishment requests
- Working with replenishment suggestions



Work with Replenishment Requests

Working with Replenishment Requests

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

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

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

Complete the following tasks:

- Create replenishment requests
- Locate existing replenishment requests

Creating Replenishment Requests

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

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

Creating Replenishment Requests Interactively



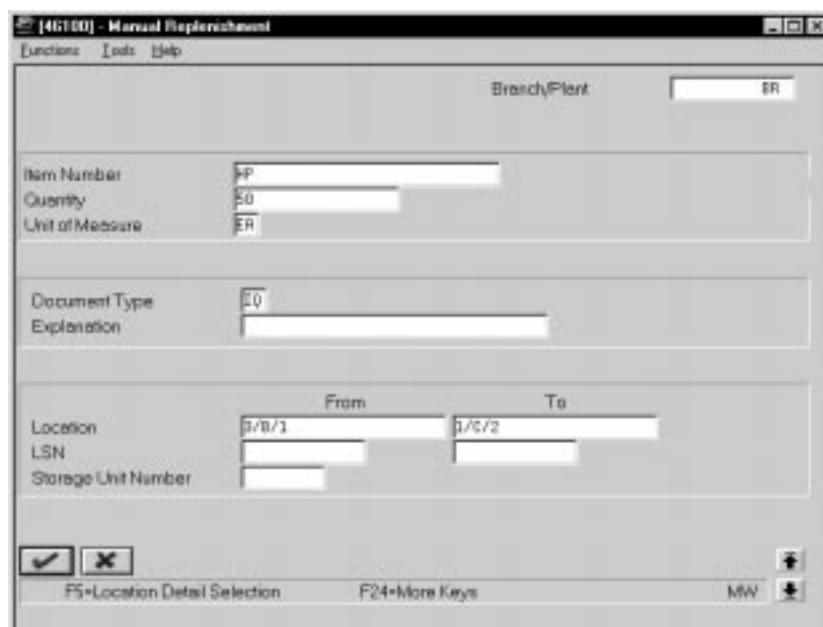
From Advanced Warehouse Management (G46), choose Replenishment Operations

From Replenishment Operations (G4613), choose Manual Replenishment

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

► **To create replenishment requests interactively**

On Manual Replenishment



1. Complete the following fields:
 - Branch/Plant
 - Item Number
 - Quantity
 - Unit of Measure
 - To Location
2. To specify the location from which to replenish items, complete the following field:
 - From Location
3. Complete the following optional fields:
 - From Lot Number
 - To Lot Number

- From Storage Unit Number

Field	Explanation
Location – To	<p>The storage location to which goods will be moved.</p> <p>..... <i>Form-specific information</i></p> <p>The system creates either a putaway or a replenishment request based on how you complete the From Location and the To Location fields:</p> <ul style="list-style-type: none"> Putaway Requests — To create a putaway request, enter a location in the From Location field. Replenishment Requests — To create a replenishment request, enter a location in both the From Location and the To Location fields, or enter a location in only the To Location field.
Lot – From	The lot number of the goods being putaway, picked or replenished.
Lot – To	The lot number to which you are adding goods. In most cases, this will be the same as the From Lot number.
Storage Unit Number – From	<p>A number that uniquely identifies goods in a specific location. Each location detail record contains a storage unit number if you turn on license plate tracking (P46011) for that item's level one unit of measure in the Item Unit of Measure.</p> <p>..... <i>Form-specific information</i></p> <p>The storage unit number being put away to or replenished from.</p>

What You Should Know About

Using inappropriate locations during manual replenishment	Verify that the location to which you manually replenish is included in the picking instruction table. If it is not, the replenished items will remain in that location until you change the pick or replenishment instruction tables, or until you manually pick from the location.
Replenishment requests for items with serial numbers	Items with assigned serial numbers are tracked individually in the primary unit of measure, and you cannot group them into greater units of measure. The system creates one replenishment request for each item with a serial number.

Creating Replenishment Requests by Batch



From Advanced Warehouse Management (G46), choose Replenishment Operations

From Replenishment Operations (G4613), choose Batch Replenishment

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

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

- Normal replenishment (for example, 25 percent capacity)
- Minimum replenishment (for example, 10 percent capacity)

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

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

- Economic (a specific quantity that you determine)
- Maximum (the quantity required to completely refill the location)

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

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

- Select the picking locations that are below the normal or minimum replenishment point
- Create replenishment requests
- Create replenishment suggestions
- Update each request status in the Warehouse Requests table (F4600)
- Assign tasks and trips
- Print movement tags and slips

- Print audit reports

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

Batch Replenishment is a DREAM Writer program.

J.D. Edwards & Company Putaway Audit Report							Page No.
. Request			Location	Quantity . . .	Pr L1 Usg	Date -	
Type	Number	Sequence Item Number	Attempted	Suggested	UM UM Code	Description	
Replenish	3221	1,000 E001	.	.	20	BX PL 3583 Qty insufficient for instr.	
			.	.	20	BX PL 3586 Insufficient qty for UOM.	
			5.E .5	20	20	BX BX 3595 Used as random location.	
		2,000 E001	.	.	20	BX PL 3583 Qty insufficient for instr.	
			.	.	20	BX PL 3586 Insufficient qty for UOM.	
			5.E .4	20	20	BX BX 3595 Used as random location.	
		3,000 E001	.	.	20	BX PL 3583 Qty insufficient for instr.	
			.	.	20	BX PL 3586 Insufficient qty for UOM.	
			5.E .4	20	20	BX BX 3595 Used as random location.	

What You Should Know About

Performing economic replenishments by batch

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

Processing Options for Batch Replenishments

DEFAULT PROCESSING:

1. Enter the order group to use. _____

REPLENISHMENT CONTROL:

2. Enter the letdown point to use.
If blank, the normal replenishment point is used. _____

'1' = Normal Replenishment Point.
'2' = Minimum Replenishment Point.

3. Enter the method to use for replenishment quantities. If blank, method '2' is used. _____

'1' = Economic Replenishment.
The quantity to replenish is retrieved from the fixed location definition.

'2' = Maximum Replenishment.
The quantity to replenish is the quantity which would fill the location.

AUDIT CONTROL:

4. Enter a '1' to generate the audit report, a '2' to generate the audit along with the glossary for any messages, or a '3' to generate the report with a complete glossary at the end. If blank, no report will be generated. _____

5. Enter the DREAM Writer version of the Selection Audit report to use for the desired printer overrides.
If blank, XJDE0001 is used.
(See Form ID P46475) _____

TASK AND TRIP ASSIGNMENT:

6. Enter a '1' to do immediate task and trip assignment. If blank, no tasks/trips will be assigned. _____
7. Enter the DREAM Writer version of the Task and Trip Assignment program to use. If blank, XJDE0003 is used.
(See Form ID P46471). _____

Creating Replenishment Requests Automatically

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

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

- Create replenishment requests for depleted picking locations
- Create replenishment location suggestions
- Assign tasks and trips
- Print movement tags and slips
- Print audit reports
- Confirm replenishment suggestions

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

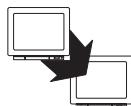
Before You Begin

- Verify that you have set up picking instructions for replenishment
- Verify that you have set up location profiles for replenishment
- Verify that you have set up replenishment instructions for replenishment
- Verify that you have set up fixed picking locations for replenishment
- Verify that you have set up fixed replenishment zones for replenishment
- Verify that you have set a processing option in the Process Replenishment Requests program to create replenishment requests automatically

See Also

- *Defining Movement Instructions*
- *Defining Location Profile Information*
- *Setting Up Fixed Locations and Zones*
- *Creating Replenishment Suggestions*

Locating Existing Replenishment Requests



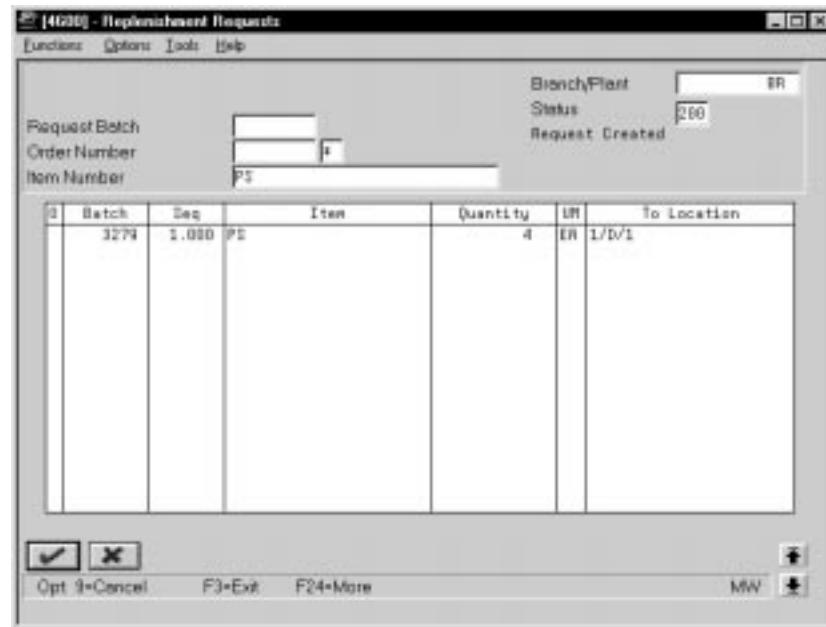
From Advanced Warehouse Management (G46), choose Replenishment Operations

From Replenishment Operations (G4613), choose Replenishment Requests

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

► **To locate existing replenishment requests**

On Replenishment Requests



1. Complete the following field:
 - Branch/Plant
2. Complete one or more of the following optional fields:
 - Status
 - Request Batch
 - Order Number
 - Document Type
 - Item Number

What You Should Know About

Canceling replenishment requests

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

You must first cancel any existing replenishment suggestions for the request before you cancel the replenishment request.

Work with Replenishment Suggestions

Working with Replenishment Suggestions

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

Complete the following tasks:

- Create replenishment suggestions
- Confirm replenishment suggestions

Before You Begin

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

Creating Replenishment Suggestions

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

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

Complete the following tasks:

- Create replenishment suggestions by batch
- Create replenishment suggestions automatically
- Create alternate replenishment suggestions

Creating Replenishment Suggestions by Batch

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

Complete the following tasks:

- Run Process Replenishment Requests
- Run Batch Replenishment

Running Process Replenishment Requests



From Advanced Warehouse Management (G46), choose Replenishment Operations

From Replenishment Operations (G4613), choose Process Replenishment Requests

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

- Select all outstanding replenishment requests
- Update each request's status in the Warehouse Requests table (F4600)
- Create replenishment location suggestions
- Assign tasks and trips
- Print movement tags and slips
- Print audit reports
- Confirm replenishment suggestions

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

Process Replenishment Requests is a DREAM Writer program.

				J.D. Edwards & Company Replenishment Audit Report				Page No. . . . 2 Date - . . . 14.05.96 .	
. . . Request Quantity . . . Pr L1 Usg					
Type	Number	Sequence	Item Number	Location	Attempted	Suggested	UM	UM Code	Description
Replenish	3220	1,000	P002	R.	.	10	10	CR CR	3596 Request overrode location.

What You Should Know About

Selecting locations for replenishment

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

Processing Options for Process Replenishment Requests

TASK AND TRIP ASSIGNMENT:

1. Enter a '1' to do immediate task and trip assignment. If blank, no tasks/trips will be assigned. _____
2. Enter the DREAM Writer version of the Task and Trip Assignment program to use. If blank, XJDE0001 is used. (See Form ID P46471). _____

AUDIT CONTROL:

3. Enter a '1' to generate the audit report, a '2' to generate the audit along with a glossary for any messages, or a '3' to generate the report with a complete glossary at the end. If blank, no report will be generated. _____
4. Enter the DREAM Writer version of _____

the Selection Audit report to use for the desired printer overrides. If blank, XJDE0001 is used. (See Form ID P46475.)

CONFIRMATION CONTROL:

5. Enter a '1' to automatically confirm suggestions. _____
6. Enter the override next status for the confirmed sales order lines. _____
(Pick Processing Only).

RESUGGESTIONS:

7. Enter a '1' to resuggest movement requests. If blank, only new requests will be processed. _____

REPLENISHMENT CONTROL:

8. Enter the method to use for replenishment quantities. If blank, method '2' is used. _____

'1' = Economic Replenishment.
The quantity to replenish is retrieved from the fixed location definition.

'2' = Maximum Replenishment.
The quantity to replenish is the quantity which would fill the location.

REPLENISHMENT CONTROL: (Cont)

9. Enter the DREAM writer version of the Task and Trip Assignment program to run for replenishments. If blank XJDE0003 is used.
(See form ID P46471) _____

Running Batch Replenishment



From Advanced Warehouse Management (G46), choose Replenishment Operations

From Replenishment Operations (G4613), choose Batch Replenishment

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

- Select all fixed picking locations at or below the normal or minimum replenishment point
- Create replenishment requests
- Create suggestions for locations to replenish from
- Update each request's status in the Warehouse Requests table (F4600)
- Assign tasks and trips

- Print movement tags and slips
- Print audit reports
- Confirm replenishment suggestions

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

Batch Replenishment is a DREAM Writer program.

J.D. Edwards & Company Putaway Audit Report							Page No.	
. . . Request				Quantity	Pr	L1 Usg	Date -	
Type	Number	Sequence	Item Number	Location	Attempted	Suggested	UM UM Code	Description
Replenish	3221	1,000	E001	.	.	20		BX PL 3583 Qty insufficient for instr.
				.	.	20		BX PL 3586 Insufficient qty for UOM.
		5, E	.5		20	20	BX BX 3595 Used as random location.	
		2,000	E001	.	.	20		BX PL 3583 Qty insufficient for instr.
				.	20	20		BX PL 3586 Insufficient qty for UOM.
		5, E	.4		20	20	BX BX 3595 Used as random location.	
		3,000	E001	.	.	20		BX PL 3583 Qty insufficient for instr.
				.	20	20		BX PL 3586 Insufficient qty for UOM.
		5, E	.4		20	20	BX BX 3595 Used as random location.y	

What You Should Know About

**Performing economic
replenishments by
batch**

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

See Also

- *Creating Replenishment Requests by Batch* for information about how the batch program selects locations for replenishment

Processing Options for Batch Replenishments

DEFAULT PROCESSING:

1. Enter the order group to use. _____

REPLENISHMENT CONTROL:

2. Enter the letdown point to use.
If blank, the normal replenishment point is used.

'1' = Normal Replenishment Point.
'2' = Minimum Replenishment Point.

3. Enter the method to use for replenishment quantities. If blank, method '2' is used.

'1' = Economic Replenishment.
The quantity to replenish is retrieved from the fixed location definition.

'2' = Maximum Replenishment.
The quantity to replenish is the quantity which would fill the location.

AUDIT CONTROL:

4. Enter a '1' to generate the audit report, a '2' to generate the audit along with the glossary for any messages, or a '3' to generate the report with a complete glossary at the end. If blank, no report will be generated.

5. Enter the DREAM Writer version of the Selection Audit report to use for the desired printer overrides.
If blank, XJDE0001 is used.
(See Form ID P46475)

TASK AND TRIP ASSIGNMENT:

6. Enter a '1' to do immediate task and trip assignment. If blank, no tasks/trips will be assigned.
7. Enter the DREAM Writer version of the Task and Trip Assignment program to use. If blank, XJDE0003 is used.
(See Form ID P46471).

Creating Replenishment Suggestions Automatically

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

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

- Select all outstanding replenishment requests
- Update each request's status in the Warehouse Requests table (F4600)
- Create replenishment location suggestions
- Assign tasks and trips
- Print movement tags and slips
- Print audit reports
- Confirm replenishment suggestions

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

- Process Replenishment Requests
- Create Replenishment Tasks
- Replenishment Document and Tags

Before You Begin

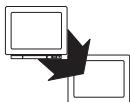
- Verify that you have set up picking instructions for replenishment
- Verify that you have set up location profiles for replenishment
- Verify that you have set up replenishment instructions for replenishment
- Verify that you have set up fixed picking locations for replenishment
- Verify that you have set up fixed replenishment zones for replenishment
- Verify that you have set a processing option in the Process Replenishment Requests program to create replenishment requests automatically

See Also

- *Defining Movement Instructions*

- *Defining Location Profile Information*
- *Setting Up Fixed Locations and Zones*
- *Creating Replenishment Suggestions*

Creating Alternate Replenishment Suggestions



From Advanced Warehouse Operations (G46), choose Replenishment Operations

From Replenishment Operations Choose Process (G4613), choose Process Replenishment Requests

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

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



To create alternate replenishment suggestions, you must cancel the original replenishment suggestions manually. The Resuggest Replenishment Requests program does not cancel existing suggestions.

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

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

- Create alternate replenishment location suggestions
- Assign tasks and trips
- Print movement tags and slips
- Print audit reports
- Confirm replenishment suggestions

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

Resuggest Replenishment Requests is a DREAM Writer program.

J.D. Edwards & Company Replenishment Audit Report							Page No. . . . 4 Date - . . . 14.05.96 .
. . . Request			Location	Quantity . . .	Pr L1 Usg	Attempted Suggested UM UM Code	Description
Type	Number	Sequence Item Number					
Replenish	19,000	CREAM CHEESE		480		CR PL 3583	Qty insufficient for instr.
					480	CR PL 3586	Insufficient qty for UOM.
			12.A .	480		CR CA 3457	Location is not picking loc.
			12.B .	480		CR CA 3457	Location is not picking loc.
			12.C .	480		CR CA 3457	Location is not picking loc.
			12.D .	480		CR CA 3457	Location is not picking loc.
			12.E .	480		CR CA 3457	Location is not picking loc.
			12.F .	480		CR CA 3457	Location is not picking loc.
			12.G .	480		CR CA 3457	Location is not picking loc.
			12.H .	480		CR CA 3636	Same From and To Location
			14.C .3	480	480	CR CR 3595	Used as random location.
3220	1,000	P002	R. .	10	10	CR CR 3594	Used as fixed location.

Processing Options for Resuggest Replenishment Requests

TASK AND TRIP ASSIGNMENT:

1. Enter a '1' to do immediate task and trip assignment. If blank, no tasks/trips will be assigned. _____
2. Enter the DREAM Writer version of the Task and Trip Assignment program to use. If blank, XJDE0001 is used. (See Form ID P46471). _____

AUDIT CONTROL:

3. Enter a '1' to generate the audit report, a '2' to generate the audit along with a glossary for any messages, or a '3' to generate the report with a complete glossary at the end. If blank, no report will be generated. _____
4. Enter the DREAM Writer version of the Selection Audit report to use for the desired printer overrides. If blank, XJDE0001 is used. (See Form ID P46475.) _____

CONFIRMATION CONTROL:

5. Enter a '1' to automatically confirm suggestions. _____
6. Enter the override next status for the confirmed sales order lines. _____

(Pick Processing Only).

RESUGGESTIONS:

7. Enter a '1' to resuggest movement requests. If blank, only new requests will be processed. _____

REPLENISHMENT CONTROL:

8. Enter the method to use for replenishment quantities. If blank, method '2' is used. _____

'1' = Economic Replenishment.
The quantity to replenish is retrieved from the fixed location definition.

'2' = Maximum Replenishment.
The quantity to replenish is the quantity which would fill the location.

REPLENISHMENT CONTROL: (Cont)

9. Enter the DREAM writer version of the Task and Trip Assignment program to run for replenishments. If blank XJDE0003 is used.
(See form ID P46471) _____

Confirming Replenishment Suggestions



From Advanced Warehouse Management (G46), choose Replenishment Operations

From Replenishment Operations (G4613), choose Replenishment Confirmation

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

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

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

easier to pick a case of 24 items and send 4 of them to the overflow location than it is to replenish 20 eaches.

When you confirm suggestions for replenishment, you:

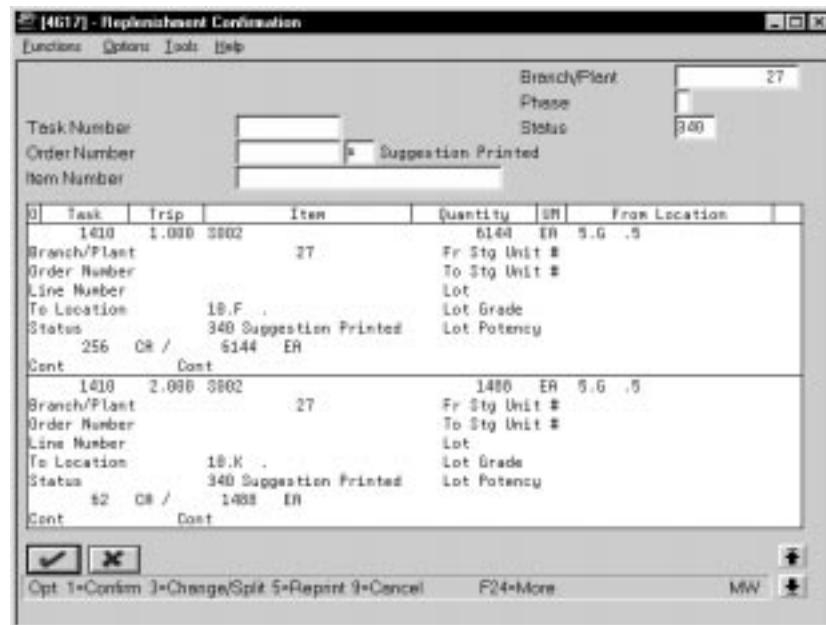
- Reduce on-hand inventory in the replenishment location
- Reverse the commitment of inventory in the replenishment location
- Increase on-hand inventory in the picking location
- Reverse the commitment of inbound inventory in the picking location

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

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

Complete the following tasks:

- Confirm replenishment suggestions
- Change or split replenishment suggestions



► **To confirm replenishment suggestions**

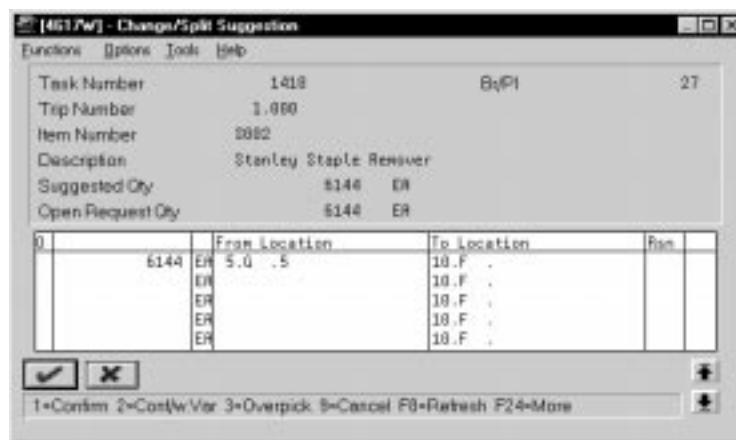
On Replenishment Confirmation

1. Complete the following fields:
 - Branch/Plant
 - Task Number
 - Order Number
 - Document Type
 - Item Number
2. To confirm the suggested locations and quantities, choose Confirm.

► **To change or split replenishment suggestions**

On Replenishment Confirmation

1. Complete the following fields:
 - Branch/Plant
 - Task Number
 - Order Number
 - Document Type
 - Item Number
2. To split or change a replenishment suggestion, access Change/Split Suggestion.



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

- Quantity
 - From Location
 - Reason
4. To confirm a smaller quantity than the suggested quantity and move the remainder to the designated variance location, choose Confirm with Variance.
 5. To confirm a greater quantity than the suggested quantity and move the excess to the designated overflow location, choose Overpick.
 6. To confirm the suggested locations and quantities, choose Confirm.

What You Should Know About

Creating new suggestions for different quantities

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

Canceling replenishment suggestions

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

Appendices

Appendix A - Advanced Topics

About Advanced Topics

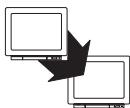
The procedures in Advanced Topics are not required to operate your warehouse. However, they provide more flexibility in inventory movement, record keeping, and so on. You can:

- Generate detailed movement records by confirming movement out of one location and into another in two separate steps
- Segregate tax-paid inventory in special locations according to tax codes that you assign
- Reduce putaway trips to a location by placing a hold on putaway until you deplete the inventory in the location
- Track large units of measure of an item by assigning special tracking numbers
- Reduce the number of picking trips by combining (or rolling up) small units of measure into larger units during picking
- Protect your inventory by packing items in suitable storage containers during putaway
- Reduce warehouse traffic congestion and the effects of pick equipment failure by setting the maximum quantity for an item in a zone
- Change the effect of movement instructions by changing an item's warehouse process groups
- Use warehouse space more efficiently by setting up rules to randomly select locations
- Prevent errors in system records by updating the Warehouse Suggestions, Item Location, and Location Detail Information tables with identical information
- Merge location detail records to minimize system and user resources when processing these records
- Generate reports of location detail information (in unusual circumstances, such as system failure, where you need to reconstruct information)
- Generate reports of discrepancies between Inventory Location Information (F41021) and Warehouse Location Detail Information (F4602)
- Purge files of closed or canceled requests, suggestions, and tasks

Complete the following tasks:

- Set up two-phase movement confirmation
- Assign tax codes
- Set up freeze rules
- Set up tracking numbers
- Set up rollup
- Set up repack
- Define maximum quantity by zone
- Work with item dimension and warehouse process groups
- Set up random rules
- Create the Random Location table
- Repost open location suggestions
- Merge location detail records
- Manage location detail information
- Compare inventory and warehouse item balance
- Purge closed or cancelled requests, suggestions and tasks

Setting Up Two-Phase Movement Confirmation



From Advanced Warehouse Management (G46), enter 29

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

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

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

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

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

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

► To set up two-phase confirmation

On Item Profile



1. To use two-phase confirmation, complete the following fields for each item:
 - Branch/Plant
 - Item Number
 - 1 or 2 Phase Putaway
 - 1 or 2 Phase Picking
 - 1 or 2 Phase Replenishment
2. Access Location Profile Detail.

[460201] - Location Profile Detail		Functions	Tools	Help
Location	01.F..1	Branch/Plant:	27	
Level of Detail	<input checked="" type="checkbox"/>	Loc Dimension Group	S1PA-S Single Deep Pallet R	
Staging Locn (Y/N)	<input type="checkbox"/>	Characteristics Grp	COOLER Cooler Characteristi	
Recommend Crtn (Y/N)	<input type="checkbox"/>	Loc. Tax Code	<input type="checkbox"/>	
Mix Containers (Y/N)	<input type="checkbox"/>	Allowed Containers	<input type="checkbox"/>	
Mix Dates/Lots (Y/N)	<input type="checkbox"/>	Minimum Putaway %	<input type="checkbox"/>	
Max No. of Items	<input type="checkbox"/>	Minimum Pick %	<input type="checkbox"/>	
Freeze Rule	<input type="checkbox"/>	Verification Code	<input type="checkbox"/>	
Allow Putaway (Y/N)	<input type="checkbox"/>	Putaway Zone / Stage	COOLER	<input type="checkbox"/>
Allow Pick (Y/N)	<input type="checkbox"/>	Picking Zone / Stage	COOLER	<input type="checkbox"/>
Allow Replen (Y/N)	<input type="checkbox"/>	Replen. Zone / Stage	COOLER	<input type="checkbox"/>
Putaway Sequence	100	Latitude	30	
Pick Sequence	294	Longitude	210	
Replen Sequence		Height	0	

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

- Branch/Plant
 - Location
 - Putaway Stage
 - Picking Stage
 - Replenishment Stage

Field	Explanation
1 or 2 Phase Putaway	<p>A code that indicates whether you use 1- or 2-phase confirmation during putaway.</p> <ul style="list-style-type: none"> • 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location. • 2-phase confirmation means the process is confirmed in two steps: the first when the goods have moved from the starting location to the staging location, and the second when the goods have moved from the staging location to the destination location.

If you use 2-phase confirmation, you can specify whether the confirmation is logical or physical.

- Logical 2-phase confirmation generates one document and does not indicate physical movement to the staging location.
- Physical 2-phase confirmation generates two documents: the first indicates movement from the starting location to the staging location, and the second indicates movement from the staging location to the destination location.

Valid codes are:

I	Use 1-phase confirmation
L	Use logical 2-phase confirmation
P	Use physical 2-phase confirmation

Field	Explanation						
1 or 2 Phase Picking	<p>A code that indicates whether you use 1- or 2-phase confirmation during picking.</p> <ul style="list-style-type: none">• 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location.• 2-phase confirmation means the process is confirmed in two steps: the first when the goods have moved from the starting location to the staging location, and the second when the goods have moved from the staging location to the destination location. <p>If you use 2-phase confirmation, you can specify whether the confirmation is logical or physical.</p> <ul style="list-style-type: none">• Logical 2-phase confirmation generates one document and does not indicate physical movement to the staging location.• Physical 2-phase confirmation generates two documents: the first indicates movement from the starting location to the staging location, and the second indicates movement from the staging location to the destination location. <p>Valid codes are:</p> <table><tbody><tr><td>I</td><td>Use 1-phase confirmation</td></tr><tr><td>L</td><td>Use logical 2-phase confirmation</td></tr><tr><td>P</td><td>Use physical 2-phase confirmation</td></tr></tbody></table>	I	Use 1-phase confirmation	L	Use logical 2-phase confirmation	P	Use physical 2-phase confirmation
I	Use 1-phase confirmation						
L	Use logical 2-phase confirmation						
P	Use physical 2-phase confirmation						

Field	Explanation						
1 or 2 Phase Replenishment	<p>A code that indicates whether you use 1- or 2-phase confirmation during replenishment.</p> <ul style="list-style-type: none"> • 1-phase confirmation means the process is confirmed as one step after goods have moved from the starting location to the destination location. • 2-phase confirmation means the process is confirmed in two steps: the first when the goods have moved from the starting location to the staging location, and the second when the goods have moved from the staging location to the destination location. 						
	<p>If you use 2-phase confirmation, you can specify whether the confirmation is logical or physical.</p> <ul style="list-style-type: none"> • Logical 2-phase confirmation generates one document and does not indicate physical movement to the staging location. • Physical 2-phase confirmation generates two documents: the first indicates movement from the starting location to the staging location, and the second indicates movement from the staging location to the destination location. 						
	<p>Valid codes are:</p> <table> <tr> <td>I</td> <td>Use 1-phase confirmation</td> </tr> <tr> <td>L</td> <td>Use logical 2-phase confirmation</td> </tr> <tr> <td>P</td> <td>Use physical 2-phase confirmation</td> </tr> </table>	I	Use 1-phase confirmation	L	Use logical 2-phase confirmation	P	Use physical 2-phase confirmation
I	Use 1-phase confirmation						
L	Use logical 2-phase confirmation						
P	Use physical 2-phase confirmation						
Staging Location – Putaway	<p>A code that specifies a warehouse location where you hold items temporarily (either physically or logically) before moving them somewhere else. You use the putaway staging location when the system suggests movement from one location to another while using two-phase confirmation. In two-phase confirmation, you confirm the movement from the first location to the staging location, and then confirm the movement from the staging location to the final location.</p>						
Staging Location – Picking	<p>A code that specifies a warehouse location where you hold items temporarily (either physically or logically) before moving them somewhere else. You use the picking staging location when the system suggests movement from one location to another while using two-phase confirmation. In two-phase confirmation, you confirm the movement from the first location to the staging location, and then confirm the movement from the staging location to the final location.</p>						

Field	Explanation
Staging Location – Replenishment	A code that specifies a warehouse location where you hold items temporarily (either physically or logically) before moving them somewhere else. You use the replenishment staging location when the system suggests movement from one location to another while using two-phase confirmation. In two-phase confirmation, you confirm the movement from the first location to the staging location, and then confirm the movement from the staging location to the final location.

Assigning Tax Codes

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



To assign tax codes

On Item Profile

1. To assign a tax code to an item, complete the following fields:
 - Branch/Plant
 - Item Number
 - Default Tax Code
2. Access Location Profile Detail.
3. On Location Profile Detail, complete the following field for each location to which you want to assign a tax code:
 - Location Tax Code

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

Setting Up Freeze Rules



From Advanced Warehouse Management (G46), enter 29

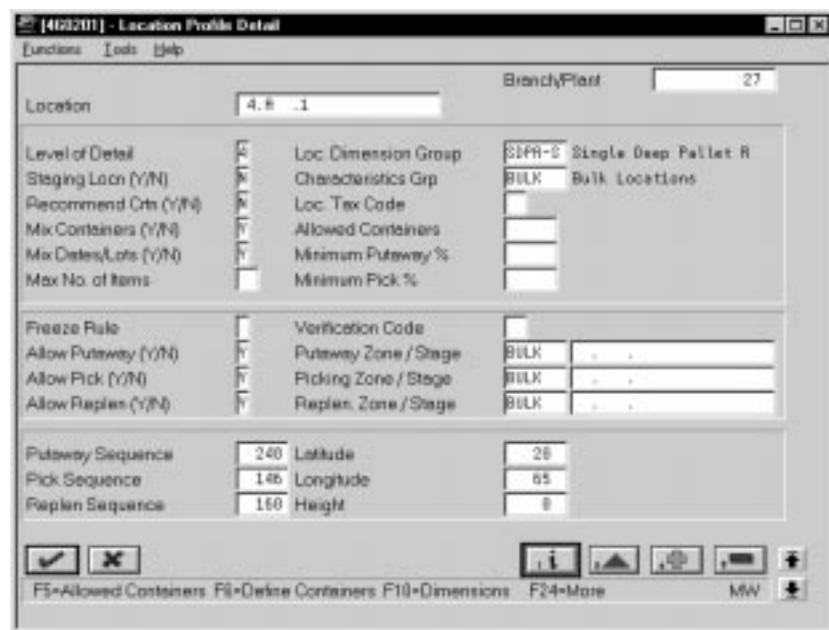
From Warehouse Management General Setup (G4641), choose Location Profile Detail

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

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

► To set up freeze rules

On Location Profile Detail

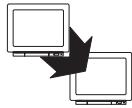


Complete the following fields:

- Branch/Plant
- Location
- Freeze Rule

Field	Explanation
Freeze Rule	<p>A code that indicates what putaway restrictions you want to place on a location during the pick process.</p> <p>Valid codes are:</p> <ul style="list-style-type: none">Blank No freeze. The system does not perform any automatic restrictions.1 Freeze when empty. Do not put away to this location after you pick the location empty.2 Freeze when picked (auto reset). Do not put away to this location after picking. When you pick the location empty, the system automatically resets the putaway flag to allow putaway to this location.3 Freeze when picked (manual reset). Do not put away to this location after picking. When you pick the location empty, you must manually reset the putaway flag to allow putaway to this location.

Setting Up Tracking Numbers



From Advanced Warehouse Management (G46), enter 29

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

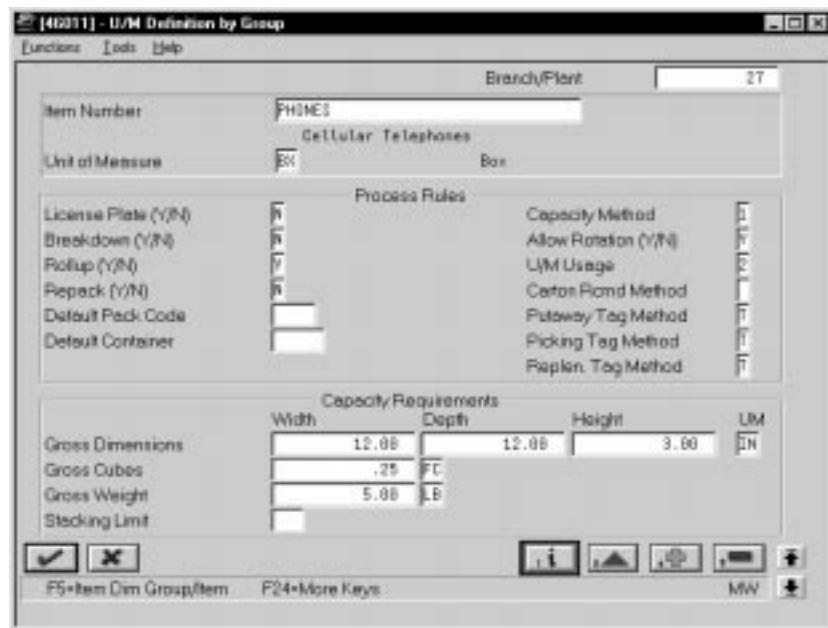
You can track large units of measure, such as a pallet, by assigning a tracking number when you create a movement request. For example, you can assign a “license plate” tracking number to a pallet of expensive stereo equipment to locate it easily.

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



To set up tracking numbers

On Unit of Measure Definition by Item or Group



Complete the following fields:

- Branch/Plant
- Item Number or Item Dimension Group
- Unit of Measure
- License Plate

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

What You Should Know About

Limitations of license plate tracking

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

Setting Up Rollup

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

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

► To set up rollup

On Unit of Measure Definition by Item or Group



1. Complete the following fields:
 - Branch/Plant
 - Item Number or Item Dimension Group
 - Unit of Measure
 - Rollup
2. Access Picking Instructions.
3. On Picking Instructions, select the appropriate picking instruction table and complete the following field for each unit of measure to use rollup:
 - Rollup

Setting Up Repack

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

► To set up repack

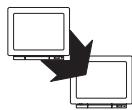
On Unit of Measure Definition by Item or Group

Complete the following fields:

- Branch/Plant
- Item Number or Item Dimension Group
- Unit of Measure
- Repack

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

Defining Maximum Quantity by Zone



From Advanced Warehouse Management (G46), enter 27

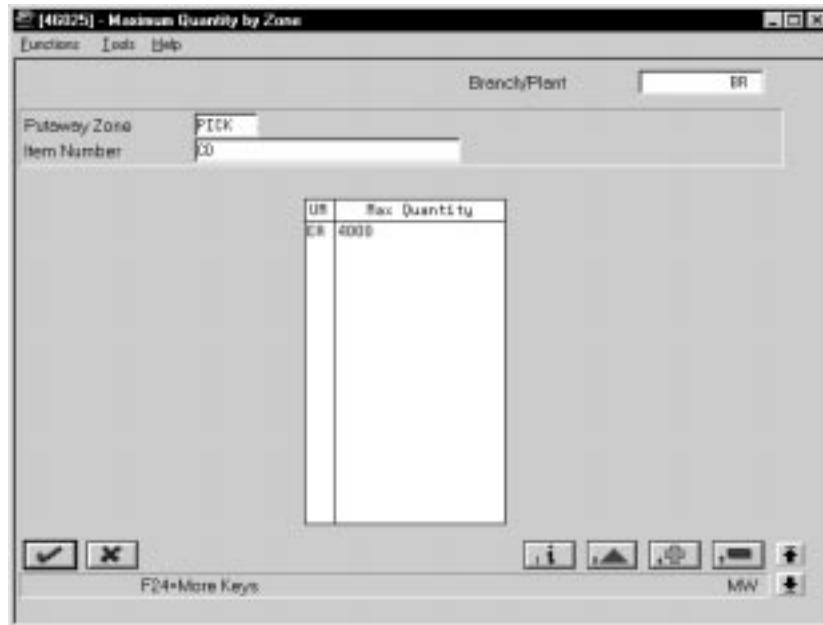
From Warehouse Advanced and Technical Operations (G4631), choose Warehouse Movement Rules

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

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

► **To define maximum quantity by zone**

On Maximum Quantity by Zone



Complete the following fields:

- Branch/Plant
- Putaway Zone
- Item Number
- Unit of Measure
- Maximum Putaway Quantity

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

Working with Item Dimension and Warehouse Process Groups



From Advanced Warehouse Management (G46), enter 29

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

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

► To work with item dimension and warehouse process groups

On Speed Group Maintenance

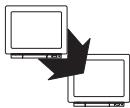
Item	Dimension	Groups		
		Process 1	Process 2	Process 3
H901	MARKER	EPC		
H902	MARKER	EPC		
H903	MARKER	EPC		

1. To limit the information that displays, complete the following fields in the upper part of the form:
 - Process Group 1
 - Process Group 2
 - Process Group 3
 - Item Dimension Group
 - Skip to Item
2. To change groups for a particular item, complete the following fields in the lower part of the form:

- Item Dimension Group
- Process Group 1
- Process Group 2
- Process Group 3

Field	Explanation
Item Dimension Group	A code (system 41/type 01) that identifies a group of items that share the same size specifications, such as height and width. An item dimension group defines the size specifications for all items that belong to the group. After you set up an item dimension group, you can assign items to the group through Classification Codes.
Process Group 1	A code (system 41/type 02) that identifies a group of items that you want to move the same way. An item's process group determines the movement instructions the system uses to put away, pick, and replenish the item. You assign items to process groups using Classification Codes.
Process Group 2	A code (system 41/type 02) that identifies a group of items that you want to move the same way. An item's process group determines the movement instructions the system uses to put away, pick, and replenish the item. You assign items to process groups using Classification Codes (P41011).
Process Group 3	A code (system 41/type 02) that identifies a group of items that you want to move the same way. An item's process group determines the movement instructions the system uses to put away, pick, and replenish the item. You assign items to process groups using Classification Codes (P41011).

Setting Up Random Rules



From Advanced Warehouse Management (G46), enter 27

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

From Warehousing Movement Rules (G46311), choose Random Requirements

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

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

► To set up random rules

On Random Requirements



Complete the following fields:

- Branch/Plant
- Random Rule
- Sequence
- Relationship
- Required/Optional
- Characteristic

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

Field	Explanation
Required/Optional	<p>A code that indicates whether a location characteristic is required or optional for a random rule to select the location. The random rule selects locations that have characteristics matching the random rule's required characteristics. The random rule does not necessarily select locations matching the random rule's optional characteristics.</p>
	<p>Valid codes are:</p> <ul style="list-style-type: none"> R Use only locations that have this required characteristic O Use locations that have this optional characteristic, if possible
Characteristic	<p>A code (system 46/type DF) defines a characteristic for a location or location group. You can define unlimited characteristics (such as Cold, Dark, Dry, Heavy, and Secure) for any location or location group.</p>

What You Should Know About

Rebuilding the Random Location table

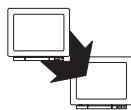
After you add or change a random rule or a location characteristic, you must rebuild the Random Location table using the Build Random Location Table program (P46821). This updates the table with the changes you made.

Run the Build Random Location Table program in batch mode from the Warehouse Advanced and Technical Operations menu, instead of running it interactively from Random Requirements. This ensures that your terminal remains free for other processing.

Automatically rebuilding the Random Location table during putaway

If you do not run the Build Random Location Table program, the next putaway request that uses the random rule will cause the system to automatically rebuild the Random Location table. This might result in slower processing of the movement request.

Creating the Random Location Table



From Advanced Warehouse Management (G46), enter 27

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

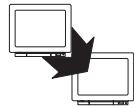
The Random Locations table contains a list of all the random locations and their characteristics. You run the Build Random Location Table after you change your

random rule requirements or after you change the characteristics of random locations.

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

Build Random Location Table is a DREAM Writer program.

Reposting Open Location Suggestions



From Advanced Warehouse Management (G46), enter 27

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

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

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

- Examines the suggestions in Warehouse Suggestions (F4611)
- Updates the suggestion information in Item Location (F41021)
- Updates the inbound quantity, outbound quantity, reserved cubes, and reserved weight in Location Detail Information (F4602)

Repost Open Suggestions is a DREAM Writer program.

Merging Location Detail Records

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

- Item number
- Location
- Unit of measure structure
- Used space
- On-hand quantity

- Volume
- Weight of the item

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

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

- Unit of measure (UM) code
- Quantity per UM (in the primary unit of measure)
- Container code
- UM dimensions and weight
- Container dimensions
- Quantity required to fill the next greatest UM in the structure
- UM group
- UM usage

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

- Different FIFO receipt dates
- Items with partial quantities in both the FROM and TO locations. A partial quantity is a quantity in any UM in a structure that is less than one. (For example, an item with a case-each structure, where case = 10 each, would have a partial quantity if there were 5 each of the item.)
- Items with different UM structures. (For example, the system does not merge a case-each structure with a pallet-case-each structure.)

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

- FIFO Receipt Date
- Merge Partials
- Merge UM Structures

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

What You Should Know About

Merging FIFO receipt dates When merging FIFO receipt dates, the system retains the last receipt date.

To merge records with different FIFO receipt dates during picking or replenishment, you must set the Mix Dates field to Y on both the Item Profile form and the Location Profile Detail form.

You must not merge FIFO receipt dates if the Commitment Method field on the Item Master Information form (4101) is:

- 2, and the item does not have a lot number
- 3, and the item does not have an expiration date

Merging Partial quantities When you merge partial quantities, the system converts the merged quantity to the primary UM and calculates the combined volume based on this UM. This calculation can cause the combined volume to be over or understated. The system uses the combined volume to calculate the available space in a location and determine suitable locations for putaway. When you merge partial quantities, the system might overfill a location or overlook an available location. To prevent this error, you need to know the characteristics of your inventory and determine how it is stored in a location.

The system assumes that partial quantities are physically combined at the location. If you do not combine the inventory, you will have less space than the system calculates.

Merging UM Structures

When you merge UM structures, the system converts the merged quantity to the primary UM and calculates the combined volume, based on this UM. This calculation can cause the combined volume to be over or understated. The system uses the combined volume to calculate the available space in a location and determine suitable locations for putaway. When you merge partial quantities, the system might overfill a location or overlook an available location. To prevent this error, you need to know the characteristics of your inventory and determine how it is stored in a location.

When you merge UM structures, the system creates a new structure, using the highest level 1. For example, merging a pallet-case-box-each structure with a box-each structure creates a pallet-case-box-each structure. If you never store pallets at that location, the volume will be overstated.

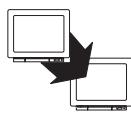
You cannot merge structures in which one structure is missing an intermediate UM. For example, you can not merge a case-each structure with a pallet-case-box-each structure, because the first structure does not contain the box unit of measure.

If you perform a Cycle Count on an item and you need to adjust the quantity, the system attempts to update an existing location detail record. If there is no record, the system creates a new record with a default UM structure. If you do not use the largest UM in the default UM structure, the system overstates the used volume.

Merging items with assigned serial numbers

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

Managing Location Detail Information



From Advanced Warehouse Management (G46), enter 27

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

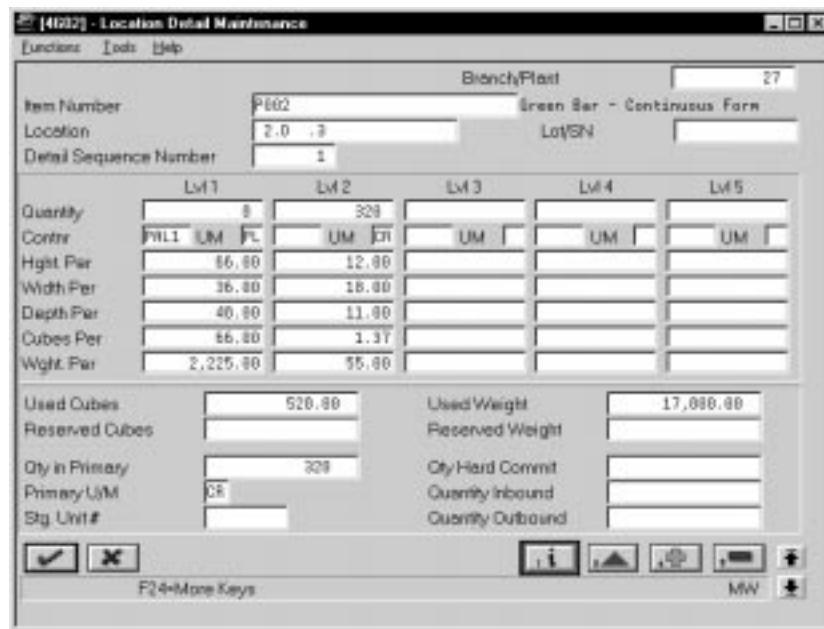
You can review and change information in the Location Detail Information table. You might do this after a system failure and you need to reconstruct information about locations.



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

► To manage location detail information

On Location Detail Maintenance



	Lvl 1	Lvl 2	Lvl 3	Lvl 4	Lvl 5
Quantity	8	328			
Container	PULL UM PL	UM JCI	UM	UM	UM
Hght Per	66.00	12.00			
Width Per	36.00	18.00			
Depth Per	40.00	11.00			
Cubes Per	66.00	1.37			
Wght Per	2,225.00	55.00			

1. Complete the following fields:
 - Branch/Plant
 - Item Number
 - Location
 - Lot Serial Number
 - Detail Sequence Number
2. Complete the following fields for item unit of measure level (1 through 5):
 - Quantity
 - Container
 - Unit of Measure

- Height Per Unit of Measure
- Width Per Unit of Measure
- Depth Per Unit of Measure
- Cubes Per Unit of Measure
- Weight Per Unit of Measure

3. Complete the following fields:

- Used Cubes
- Reserved Cubes
- Used Weight
- Reserved Weight
- Quantity in Primary
- Primary Unit of Measure
- Storage Unit Number
- Quantity Hard Committed
- Quantity Inbound
- Quantity Outbound

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

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

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

Field	Explanation
Height per – Level 3	The height of the item as defined in the item/unit of measure profile for level 3 of your unit of measure structure, or the height of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that height when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system adds the height of the container and the height of the item.
Width per – Level 3	The width of the item as defined in the item/unit of measure profile for level 3 of your unit of measure structure, or the width of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses this width when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system uses the width of the container or the width of the item, whichever is greater.
Depth per – Level 3	The depth of the item as defined in the item/unit of measure profile for level 3 of your unit of measure structure, or the depth of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that depth when it assigns a storage container. If you set the U/M Usage field to 1 for a pallet type, the system uses the depth of the container or the depth of the carton, whichever is greater.
Cubic Dimensions per – Level 3	The gross cubic dimensions of 1 item/unit of measure, or the cubic dimensions of the container for the item's level 3 unit of measure. If you set the U/M Usage field in the item's unit of measure profile to 2 for a box type container, the system uses only the gross cubic dimensions of that container. If you set the U/M Usage field to 2 for a pallet type container, the system adds the gross cubic dimensions of the item and the container.
Weight per – Level 3	The weight of one item per unit of measure, or the weight of the item and container in the level 3 unit of measure. You define weights for an item through Unit of Measure Definition by Item (P46011) and for the container through Container Codes (P46091).
Quantity – Total Level 4	The total quantity of the item in the item's level 4 unit of measure. You use Unit of Measure Conversion Information (P41002) to define unit of measure levels. When you define a unit of measure structure, define your largest unit of measure as level 1, and your smallest, or primary, unit of measure as the last level. The system supplies an item's unit of measure structure to a location's detail information (F4602) during inventory movement, but you can override the structure, if necessary.

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

Field	Explanation
Height per – Level 5	The height of the item as defined in the item/unit of measure profile for level 5 of your unit of measure structure, or the height of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that height when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system adds the height of the container and the height of the item.
Width per – Level 5	The width of the item as defined in the item/unit of measure profile for level 5 of your unit of measure structure, or the width of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses this width when it assigns a storage container. If you set the U/M Usage field to 1 for pallet type, the system uses the width of the container or the width of the item, whichever is greater.
Depth per – Level 5	The depth of the item as defined in the item/unit of measure profile for level 5 of your unit of measure structure, or the depth of the container. If you set the U/M Usage field in the item/unit of measure profile to 2 for box type, the system uses that depth when it assigns a storage container. If you set the U/M Usage field to 1 for a pallet type, the system uses the depth of the container or the depth of the carton, whichever is greater.
Cubic Dimensions per – Level 5	The gross cubic dimensions of 1 item/unit of measure, or the cubic dimensions of the container for the item's level 5 unit of measure. If you set the U/M Usage field in the item's unit of measure profile to 2 for a box type container, the system uses only the gross cubic dimensions of that container. If you set the U/M Usage field to 2 for a pallet type container, the system adds the gross cubic dimensions of the item and the container.
Weight per – Level 5	The weight of one item per unit of measure, or the weight of the item and container in the level 5 unit of measure. You define weights for an item through Unit of Measure Definition by Item (P46011) and for the container through Container Codes (P46091).
Reserved Cubes	The cubic space (volume) that has been reserved for items. You use the Reservations program (P46130) to create reservations. The system suggests reserved locations when you create suggestions. The amount comes from the item/unit of measure profile and the cubic dimensions of the storage container if the level 1 unit of measure in the location detail has a container.

Field	Explanation
Reserved Weight	The weight that has been reserved for items in this location. The system creates reserved weight when you use the Reservations program (P46130) to reserve space in the warehouse for items you expect to receive. The amount comes from the item/unit of measure profile and the weight for the storage container if the level 1 unit of measure in the location detail has a container.
Qty in Primary	The total quantity of an item to be reworked or scrapped as the result of a disposition on an ECO.
Storage Unit Number	<p>A number that uniquely identifies goods in specific location detail information. Location detail contains a storage unit number if you turn on license plate tracking in the Item/UOM Profile (P46011) for the item's level 1 unit of measure.</p> <p>The system assigns a storage unit number to a storage unit when it creates a request or suggestion.</p>
Qty Hard Commit	<p>The number of units committed to a specific location and lot.</p> <p>..... <i>Form-specific information</i></p> <p>When the system creates a suggestion for picking from a specific location, it also updates the committed quantity for that location. When you confirm the suggestion, the system removes the committed quantity from the location you picked from and adds the quantity to the quantity in the destination location, which is usually your shipping location.</p>
Quantity Inbound	A quantity in the primary unit of measure that you expect to add to the location detail after you confirm a putaway or replenishment suggestion.
Quantity Outbound	A quantity in the primary unit of measure that you expect to remove from the location after you confirm a picking or replenishment suggestion.

Comparing Inventory and Warehouse Item Balance



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

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

When you perform a cycle or tag count of items in selected locations in your inventory, the system records the variance between the expected on-hand quantity and the quantity determined from a physical count of the inventory. The system uses this information to update Inventory Item Branch records (F41021) and Warehouse Location Detail records (F4602). If you record a

negative variance (missing inventory), the system subtracts this variance from existing records and can make both sets of records negative. In the cycle or tag process, the system can also create discrepancies between these records.

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

Item Number	Description	Branch/ Plant	Location	Lot	Data Item	Description	Page - . . .	1
537756	Jeff's Warehouse Item	JEFF01	VAR.	.	008F	Location Detail/Item Branch ou	Date - . . .	4/07/97
46990		JDEdwards					Page - . . .	2
		Warehouse	Integrity	Report			Date - . . .	4/07/97
	Usage Code Glossaries							
Usage Code		Glossary						
008F	Location Detail/Item Branch out of sync							
	CAUSE . . .	The Location Detail balance does not match the Item Branch						
		balance.						
	RESOLUTION. .	The resolution depends on the type of transaction processed.						
		Use the Item Ledger inquiry to further research the cause of						
		the error.						
PRTVDW/F99DWNSPLF(T5712411) downloaded successfully								

Processing Options for Warehouse Location Integrity Report

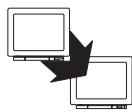
1. Enter the type of comparison to process. A blank will process all.
 - '1' = Both the Location Detail and Item Branch have a negative quantity.
 - '2' = The Location Detail has a negative quantity and the Item Branch has a zero balance or does not exist.
 - '3' = The Location Detail has a negative quantity and the Item Branch has a positive balance.
 - '4' = The balance of the Location Detail records do not match the Item Branch.

NOTE: If you want to compare the balance for a location regardless of whether it has a negative quantity, then use the DREAM Writer version for Location Detail/Item Branch balances. Otherwise, only locations with a negative quantity will be compared.
2. Enter a '1' to generate the report along with a glossary for any messages, or a '2' to generate the report with a complete glossary at the end. If blank, a glossary will not be printed.

See Also

- *Processing a Cycle Count* and *Processing a Tag Count* in the *Inventory Management Guide* for more information about cycle and tag counts.

Purging Closed Requests, Suggestions, and Tasks



From Advanced Warehouse Management (G46), enter 27

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

When you create requests, suggestions, and tasks, the system stores this information in files that take up storage space and increase processing time for any job that references them. To solve this problem, you can use the Purge Movement Information program to purge unnecessary records. The purge

program searches through requested files, finds the related suggestions and tasks, and purges those in which all associated processing has been completed. A request and its associated suggestions and tasks must meet all of the following criteria before you can purge them:

- You must close or cancel the request
- You must confirm or cancel the associated suggestions
- You must complete or cancel the warehouse processing of all associated tasks
- You cannot purge any request, associated suggestion, or associated task until all are eligible for purge

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

- All requests and suggestions associated with the task are either closed, complete, or cancelled
- Any single work order or sales order line associated with the task meets the status requirement

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

JDEdwards Request Purge Eligibility													Page - . . .	1
Ineligible for Purge:													Date - . . .	4/07/97
Warehouse Type	Request Batch	Request Seq.	Req Sts	Suggest Batch	Suggest Sequence	Sug Sts	Task Number	Tsk Sts	Order Number	Line Number	SO Sts	Order Number	WO St	Cause of Ineligibility
Putaway	3915	2.000 220												Open Request
Putaway	4015	1.000 220												Open Request
Putaway	4035	1.000 220												Open Request
Putaway	4119	2.000 200												Open Request
Picking	3688	1.000 250												Open Request
Picking	3689	1.000 250												Open Request
Picking	3744	1.000 220												Open Request
Picking	3744	2.000 220												Open Request
Picking	3745	1.000 220												Open Request
Picking	3745	2.000 220												Open Request
Picking	3748	1.000 299	3321	1.000 399		1965 499		2702	1.000 560					SO line status
Picking	3749	1.000 250												Open Request
Picking	3750	1.000 250												Open Request
Picking	3751	1.000 291	3324	1.000 391		1968 499		2704	1.000 600					SO line status
Picking	3751	1.000 291	3324	2.000 391		1968 499		2704	1.000 600					SO line status
Picking	3752	1.000 291	3325	1.000 391		1969 499		2707	1.000 600					SO line status
Picking	3752	1.000 291	3325	2.000 391		1969 499		2707	1.000 600					SO line status
Picking	3753	1.000 299	3326	1.000 399		1970 499		2709	1.000 540					SO line status
Picking	3753	1.000 299	3326	2.000 399		1970 499		2709	1.000 540					SO line status
Picking	3754	1.000 299	3327	1.000 399		1971 499		2710	1.000 560					SO line status
Picking	3755	1.000 250												Open Request
Picking	3758	1.000 299	3333	1.000 399		1977 499		112360	1.000 560					SO line status
Picking	3760	1.000 299	3334	1.000 399		1978 499		2717	1.000 560					SO line status
Picking	3761	1.000 299	3335	1.000 399		1979 499		2718	1.000 540					SO line status
Picking	3761	1.000 299	3335	2.000 399		1979 499		2718	1.000 540					SO line status
Picking	3762	1.000 299	3336	1.000 399		1980 499		112361	1.000 560					SO line status
Picking	3763	1.000 299	3338	1.000 399		1982 499		112362	1.000 560					SO line status

Processing Options for Warehouse Request Purge

PROGRAM MODE:

1. Enter '1' to run this program in final mode. If left blank, this program will produce only the report and will perform no file updates.

SAVE PURGED RECORDS:

2. Enter a '1' to save the purged records to a special purge library. If left blank, purged records will NOT be saved. (NOTE: This option is valid only for final mode.)

DEFINE ELIGIBILITY FOR PURGE:

3. Enter a work order status at or above which any related putaway requests may be purged. If left blank, only putaway requests related to purged work orders will be purged.

Appendix B - Manufacturing Information

About Manufacturing Information

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

Creating Pick Requests through Manufacturing Systems

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

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

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

Complete the following tasks:

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

What You Should Know About

Origin code

The system identifies manufacturing pick requests as originating from a work order instead of the usual sales order.

In warehouse and out of warehouse status After you create a pick request, the material status in the parts list changes to In Warehouse. After you create and confirm a pick suggestion, the Material Status changes to Out of Warehouse to indicate that the parts have moved from the warehouse into the manufacturing environment.

Creating the Parts List

To create a pick request through manufacturing systems, you must create a parts list that identifies the items to pick. You can create a parts list:

- Interactively, through work order entry
- By batch, with an order processing program

Complete the following tasks:

- Create the parts list interactively
- Create the parts list by batch

Creating the Parts Lists Interactively



From Shop Floor Control (G31), choose Daily Order Preparation – Discrete

From Daily Order Preparation – Discrete (G3111), choose Enter/Change Order

As you enter a work order, you can also identify the parts to include in the work order parts list. You use this method if you have not already defined the product's component parts, or if the product must contain non-standard items.

► To create the parts list interactively

On Enter/Change Order

140013] - Enter/Change Order

Functions Tools Help

Item Number	Order Number	16411 #0
	Requested	03/29/96
	Qty Ordered	2 ER
	Qty Completed	
	Qty Scrapped	
Bill Type	Standard Manufacturing B1	
Routing Type	Standard Manufacturing R0	Branch/Plant
Type		12-20
Status	10 Released (Firm) Not Start	Charge to CC
Priority		12-20
Category Code 1		Cost Code
Category Code 2		Start Date 03/28/96
Category Code 3		W.O. Date 03/28/96
Reference		Completed
Planner	9100 Wilson, Bob	Parent W.O. No
Supervisor		Revision Level
Customer		Freeze Code
Remarks		Associated SO

Buttons: ✓ ✕

Function Keys: F5=Detail F6=Parts List F7=Routing F15=Address F24=More

1. Access Work Order Parts List.

13111] - Work Order Parts List

Functions Options Tools Help

Branch/Plant	12-20																																				
Requested	03/29/96																																				
Order Number	16411 #0																																				
Item Number	hasen																																				
<table border="1"> <thead> <tr> <th>0</th> <th>Item</th> <th>Description</th> <th>Qty Ordered</th> <th>U.M</th> <th>L1</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>ACE</td> <td></td> <td>3</td> <td>ER</td> <td></td> </tr> <tr> <td>2</td> <td>012881</td> <td></td> <td>4</td> <td>ER</td> <td></td> </tr> <tr> <td>3</td> <td>00001</td> <td></td> <td>1</td> <td>ER</td> <td></td> </tr> <tr> <td>4</td> <td>P13880ST01</td> <td></td> <td>5</td> <td>ER</td> <td></td> </tr> <tr> <td>5</td> <td>BC</td> <td></td> <td>3</td> <td>ER</td> <td></td> </tr> </tbody> </table>		0	Item	Description	Qty Ordered	U.M	L1	1	ACE		3	ER		2	012881		4	ER		3	00001		1	ER		4	P13880ST01		5	ER		5	BC		3	ER	
0	Item	Description	Qty Ordered	U.M	L1																																
1	ACE		3	ER																																	
2	012881		4	ER																																	
3	00001		1	ER																																	
4	P13880ST01		5	ER																																	
5	BC		3	ER																																	

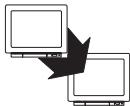
Buttons: ✓ ✕

Function Keys: Opt 1=Ins 2=Del 3=Text 4=Multi-Location 5=Text F5=Inv Ins F10=Copy BOM F24=More

2. On Work Order Parts List, complete the following fields:

- Item Number
- Transaction Quantity
- Unit of Measure

Creating the Parts List by Batch



From Shop Floor Control (G31), choose Daily Order Preparation – Discrete

From Daily Order Preparation – Discrete (G3111), choose Order Processing

You create a parts list by batch with the Generate and Print Work Orders program. You typically run the batch program during off-peak hours, when more system resources are available.

See Also

- *Entering Kit Information* in the *Inventory Management Guide* for more information about assigning parts to manufacturing products
- *Setting Processing Options in Manufacturing Programs* for more information about creating a parts list by batch

Identifying Ineligible Items

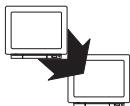
You can skip certain items, such as items that are out of stock temporarily, when you create pick requests from a manufacturing parts list. You can choose to identify the items that are not eligible for picking to avoid creating a pick request for them. The system still prints the ineligible item on the parts list. However, you do not process the item in the Advanced Warehouse Management system for this particular order.

Complete the following tasks:

- Identify ineligible items through item master information
- Identify ineligible items through the work order parts list



To identify ineligible items through item master information



From Advanced Warehouse Management (G46), enter 29

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

On Basic Item Master Data

[4101] - Basic Item Master Data

Functions Tools Help

		ItemNumber - Short	523046
Product No	015001	Desc	End Ristle Display
Catalog No	011001		Office Products
Stocking Type	<input checked="" type="checkbox"/>	Srch	Display, End Ristle
G/L Class	ENDS	Line Type	<input type="checkbox"/>
Unit of Measure	ER	Bulky/Packed Flag	<input type="checkbox"/>
Item Price Group	<input type="checkbox"/>	Inventory Cost Level	<input type="checkbox"/>
Basket Reprice Group	<input type="checkbox"/>	Sales Price Level	<input type="checkbox"/>
Order Reprice Group	<input type="checkbox"/>	Purchase Price Level	<input type="checkbox"/>
Dispatch Group	<input type="checkbox"/>	KitPricing Method	<input type="checkbox"/>
Backorders Allowed	<input type="checkbox"/>	Serial No. Required	<input type="checkbox"/>
Check Availability Y/N	<input type="checkbox"/>	Lot Status Code	<input type="checkbox"/>
Shelf Life Days	<input type="checkbox"/>	Lot Process Type	<input type="checkbox"/>
ABC Codes	<input type="checkbox"/>	Commitment Method	<input type="checkbox"/>
Planner Number	<input type="checkbox"/>	Item Flash Message	<input type="checkbox"/>
Buyer Number	<input type="checkbox"/>	Std UOM Conversion	<input type="checkbox"/>
Print Message	<input type="checkbox"/>		
<input checked="" type="checkbox"/> <input type="checkbox"/> i u d l h m n MW +			
F5=Codes F8=Measures F10=Manufacturing F13=Branch/Plant F24=More Keys			

1. Access Manufacturing Values Entry.

[41013] - Manufacturing Values Entry

Functions Tools Help

Item Number	015001	End Ristle Display	
Order Policy Code	<input type="checkbox"/>	Issue Type Code	<input type="checkbox"/>
Value Order policy	<input type="checkbox"/>	Planning Code	<input type="checkbox"/>
MFG Leadtime Qty/ty	<input type="checkbox"/>	Planning Fence Rule	<input type="checkbox"/>
Accounting Cost Qty	<input type="checkbox"/>	Fixed/Variable	<input type="checkbox"/>
Planning Fence	<input type="checkbox"/>	Round to Whole Number	<input type="checkbox"/>
Freeze Fence	<input type="checkbox"/>	Material Status	<input type="checkbox"/>
Message Display Fence	<input type="checkbox"/>	Leadtime Level	<input type="checkbox"/>
Drawing Size	<input type="checkbox"/>	Leadtime Manufacturing	<input type="checkbox"/>
Last Revision No	<input type="checkbox"/>	Leadtime Cumulative	<input type="checkbox"/>
Drawing Number	<input type="checkbox"/>	Leadtime Per Unit	<input type="checkbox"/>
Grade/Potency Pricing	<input type="checkbox"/>	Grade Control	<input type="checkbox"/>
Potency Control	<input type="checkbox"/>	Standard Grade	<input type="checkbox"/>
Standard Potency	<input type="checkbox"/>	From - Thru Grade	<input type="checkbox"/>
From - Thru Potency	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/> <input type="checkbox"/> i u d l h m n MW +			
F12=Previous F24=More Keys			

2. On Manufacturing Values Entry, complete the following fields:

- Item Number
- Material Status

Field	Explanation
Material Status	A code (table 31/MS) that designates the status of an item. <i>Form-specific information</i>
	The system pulls the value from this field to the Material Status field of the Parts List table.

► **To identify ineligible items through the work order parts list**

On Enter/Change Order

1. Access Work Order Parts List.
2. On Work Order Parts List, complete the following field:
 - Order Number
3. Do one of the following:
 - In WorldSoftware, access the fold area
 - In WorldVision, access Item Master and then Manufacturing Values Entry

The screenshot shows the 'Manufacturing Values Entry' window (41013) with the following details:

- Item Number:** 010001
- Order Policy Code:** 1
- Value Order policy:**
- MFG Leadtime Quantity:**
- Accounting Cost Qty:** 1
- Planning Fence:** 15
- Freeze Fence:**
- Message Display Fence:**
- Drawing Size:**
- Last Revision No:**
- Drawing Number:**
- Issue Type Code:**
- Planning Code:**
- Planning Fence Rule:**
- Fixed/Variable:**
- Round to Whole Number:**
- Material Status:** 86
- Leadtime Level:** 2
- Leadtime Manufacturing:**
- Leadtime Cumulative:**
- Leadtime Per Unit:**
- Grade/Potency/Pricing:**
- Potency Control:** N
- Standard Potency:**
- From - Thru Potency:** -
- Grade Control:** N
- Standard Grade:**
- From - Thru Grade:** -

At the bottom, there are buttons for **OK**, **Cancel**, **Help**, and **Print**, along with keyboard shortcuts: F12=Previous, F24=More Keys, and MW.

4. Complete the following field for each item that is ineligible for picking:
 - Material Status

Field	Explanation
Material Status Code W.O	A code (table 31/MS) that identifies the current status of a particular component on the work order.

Setting Processing Options in Manufacturing Programs

To create picking requests through manufacturing programs, set the processing options for one or both of these programs:

- Work Order Processing (P31410)
- Work Order Entry (P48013)

What You Should Know About

Availability checking

You can check for item availability when you create a pick request.

If the item is attached to a work center:

- The system does not create a pick request if enough quantity of the item is in the work center to complete the work order.
- The system creates a pick request if there is not enough quantity of the item in the work center to complete the work order. The system splits the parts list line into a commitment for the amount that is available in the work center and a soft commitment for the unavailable quantity. You specify in Manufacturing Constants whether the commitment for the work center quantity is hard (committed to a specific location) or soft (committed to the item's primary location).

If the item is not attached to a work center, and if you have set the manufacturing order entry program's processing options to check the staging location for item availability:

- The system does not create a pick request if enough quantity of the item is in the staging location to complete the work order.
- The system creates a pick request if there is not enough quantity of the item in the staging location to complete the work order. The system creates a hard or soft commitment to the default staging location that you specified in the processing options. If you did not specify a default staging location, the system creates a soft commitment to the item's primary location.

If you use lot processing, the system also searches through lots to find items on the parts list.

Processing Options for Enter/Change Orders

BACKSCHEDULING INFORMATION:

1. Enter the Unit of Measure Code _____

RECALCULATION OPTIONS:

2. Enter a '1' to automatically recalculate Parts List and Routing dates, hours and quantities. _____

ITEM LOCATION VALIDATION:

3. Enter a '1' to validate for existing Branch/Item record. _____

4. Enter a '1' to protect the lot _____

number on the parts list.
If left blank, the lot number
will remain input capable.

CHARGE TO BUSINESS UNIT DEFAULT:

5. Enter a '1' to default the Charge to Business Unit from the Job number in the Business Unit Master file (F0006). If left blank, the Branch/Plant will be used.

BILL AVAILABILITY:

6. Enter the version of Bill Availability to be called.
Default is ZJDE0001.

DEFAULT PROCESSING:

7. Enter defaults for the following:
 - a. Document Type (Default is 'WO')
 - b. Type (Optional)
 - c. Priority (Optional)
 - d. Beginning Status (Optional)

 - e. Category Code 1 (Optional)
 - f. Category Code 2 (Optional)
 - g. Category Code 3 (Optional)
- Or enter Item Branch Class Code fields to retrieve default values.
- h. Category Code 1 (Optional)
 - i. Category Code 2 (Optional)
 - j. Category Code 3 (Optional)

SALES ORDER HOLD CODE:

8. Enter the Hold Code for the related sales order if the work order quantity or date changes. Blanks will not update the sales order.

PURCHASE ORDER HOLD CODE:

9. Enter the Hold Code for the related purchase order if the work order quantity or date changes. Blanks will not update the purchase order.
Note- The purchase order will be updated only if the work order routings are recalculated.

FIELD DISPLAY:

10. Enter a '1' by the following fields to activate them:
 - a. Bill Type
 - b. Routing Type

PROCESS MANUFACTURING PROCESSING:

11. Enter a '1' to create the Resource List records for Co-/By-Products when a process work order is entered. If left blank, the Co-/By-Product resource list records will be created when the ingredients list is created.

INTERACTIVE BILL/ROUTING ATTACHMENT:

12. Enter a '1' to automatically create the WO Routing Instructions when

creating the WO Parts List on-line.

13. Enter a '1' to automatically create the WO Parts List when creating the WO Routing Instructions on-line. _____

COMMITMENT AND SUBSTITUTE PROCESSING:

14. Enter commitment option for creating the WO Parts List on-line.
Blank Commit to primary location
1 - Commit per Commitment Control in Mfg Constants (P3009)
2 - Same as '1', but use substitutes for shortages
3 - Same as '1', but display substitute availability window when substitute qty available can cover shortage

ECO PROCESSING:

15. Enter the version of the ECO header to call from Revisions Window (P30BREV). If left blank, version ZJDE0001 will be used.

SERIAL NUMBER PROCESSING:

16. Enter the version of Assign Serial Numbers to call. If left blank, version ZJDE0001 will be used.

PRIOR REVISIONS:

17. Enter a '1' to permit attaching parts lists at prior revision levels. If left blank, prior revision levels will not be used.

WAREHOUSE PROCESSING:

18. Enter the request processing mode
' ' = No pick requests
'1' = Generate requests only
'2' = Generate requests and process using the subsystem

19. If processing pick requests using the subsystem, enter the DREAM Writer version to use. If blank, XJDE0002 is used.
(See Form ID P46171)

20. Enter the default staging location for moving goods out of the warehouse. The parts picked from the warehouse are staged at this location prior to use within manufacturing. (F1=Location Window)

21. Enter a '1' if the default staging location should be checked for availability. If the part is available at the staging location a request will NOT be generated. This option only applies to parts without work center locations.

GENERIC TEXT COPY OPTIONS:

22. Enter a '1' to copy component generic text to the parts list. _____
23. Enter a '1' to copy the operation's generic text to the work order routing. _____

OBSOLETE ITEMS:

24. Enter the cross reference code for retrieving item replacements for obsolete items. _____

ECS PROCESSING:

25. Enter the program ID of the Formula Optimization routine to be called when the function key to Optimize the formula is selected from the Ingredients List Program (P3111). _____

Processing Options for Order Processing

GENERATION INFORMATION:

1. Enter one of the following:
 - 1 - Parts List only
 - 2 - Routing only
 - 3 - Both Parts List and RoutingIf left blank, neither Parts List nor Routing will be generated.
2. Enter a '1' to use the W.O. Date for Effectivity checking. (Default is the W.O. Start Date.) _____

UPDATE INFORMATION:

3. Enter the new Status Code for the Work Order Header. If left blank, status will not be changed. _____

WORK ORDER PRINT INFORMATION:

4. Enter a '1' to print Work Orders. _____
If printing Work Orders:

PARTS LIST PRINT INFORMATION:

5. Enter a '1' to print Parts List _____
6. Enter a '1' to print the 2nd line of information, which is scrap and related work center. _____
7. Enter a '1' to print Parts List on a new page. _____
8. Enter the DREAM Writer Version of the Parts List to print. If left blank, XJDE0001 is used.
(See Form ID P31415.) _____
9. Enter a '1' to print a consolidated Parts List. _____

ROUTING INSTRUCTIONS PRINT INFO:

10. Enter a '1' to print Routing _____
11. Enter a '1' to print Routing on a new page. _____
12. Enter the DREAM Writer Version to be executed for the desired sequencing of the Routing. If left blank, the operation sequence is used.
(See Form ID P314151.) _____

BACKSCHEDULING INFORMATION:

13. Enter the Unit of Measure for backscheduling. _____

SHOP PACKET SUMMARY INFORMATION:

14. Enter a '1' to print the Shop Packet Summary. _____

SHORTAGE REPORT INFORMATION:

15. Enter the DREAM Writer Version of the Shortage Report to execute. If left blank, no shortage report will be printed. (See Form ID P31418.) _____

BAR CODE INFORMATION:

16. Enter the DREAM Writer Version to be executed for the desired print overrides for Bar Coding. (See Form ID P31413.) _____

INVENTORY ISSUE INFORMATION:

17. Enter the DREAM Writer Version of Batch Inventory Issues to execute. If left blank, the Inventory Issues program will not be called. (See Form ID P31420) _____

PURCHASE ORDER INFORMATION:

(Used for Sub-Contract Routings)

18. Enter the Document Type _____
19. Enter the Line Type _____
20. Enter the Beginning Status _____
21. Enter a '1' to default the tax area from the 'Ship-To' address book number. If left blank, the tax area will default from the Supplier address book number. _____

SALES ORDER INFORMATION:

22. Enter the new Line Type for kit and configured components. This is used to avoid issuing inventory from Sales Order processing. The Line Type used should be inventory interface 'N'. If left blank, Line Type will not be changed. _____
23. Enter the Next Status for Sales Order kit and configured component lines. (This is used to bypass the normal flow of the order, i.e., Pick Slip.) If left blank, status will not be changed. _____
24. Enter a '1' to print Sales Order Text lines. _____

CONFIGURED ITEM COSTS:

25. Enter one of the following options for calculating the standard cost for configured items in the WO Variance file (F3102).
1 - Always calculate the standard cost.
2 - Only calculate the standard _____

cost if it has not already been done (no variance records exist.)

If left blank, standard cost will not be calculated.

BOM SUBSTITUTES:

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

PURCHASING JOURNAL ENTRIES:

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

BLANKET/QUOTE PROCESSING:

28. Enter a '1' for automatic blanket order release processing. _____

BUILD AGAINST PRIOR REVISIONS:

29. Enter a '1' to permit building work orders against prior revision levels. The revision level in the work order header (F4801) will be used to select the parts list to attach to the work order. If left blank, prior revision level bills will not be selected. _____

WAREHOUSE PROCESSING:

30. Enter the request processing mode:
1 - Generate requests only
2 - Generate requests and process using the subsystem.
If left blank, requests will not be generated. _____
31. If processing pick requests using the subsystem, enter the DREAM Writer version to use. If left blank, XJDE0002 will be used. (see Form ID P46171) _____
32. Enter the default staging location for moving goods out of the warehouse. The parts picked from the warehouse are staged at this location prior to use within manufacturing. (F1=Location Window) _____
33. Enter a '1' if the default staging location should be checked for availability. If the part is available at the staging location a request will NOT be generated. This option only applies to parts without work center locations. _____

GENERIC TEXT PRINT OPTIONS:

35. Enter a '1' to print component generic text on the Parts List. _____
36. Enter a '1' to print operation generic text on the Routing. _____

- | | |
|---|-------|
| 37. Enter a '1' to update parts list
and routing if order quantity or
dates have changed | _____ |
| 38. Enter which symbology to use when
using bar codes.
'1'= Code 3 of 9 (Code 39)
'2'= Code 128
' ' = Not print bar codes | _____ |
| 39. Enter a '1' to prevent commitments
for rates. | _____ |

Creating Putaway Requests through Manufacturing Systems

You can set up your manufacturing systems so that the completion of a work order triggers the creation of a putaway request for the manufactured product.

After you create a putaway request through your manufacturing systems, you process the putaway request normally through the Advanced Warehouse Management system. After you create and confirm location suggestions, you reduce the on-hand quantity in the manufacturing location and increase the on-hand quantity in the putaway location, where you will store the item.

Setting Processing Options in Manufacturing Programs

To control the creation of putaway requests through manufacturing completions, set the processing options for one or more of these programs:

- Work Order Inventory Completion (P31112)
- Super Backflush (P31123)
- Rate Schedule Workbench (P3114)

Processing Options for Work Order Inventory Completion

INVENTORY INTERFACE:

1. Enter the Document Type associated with an Inventory Completion. _____

WORK ORDER ISSUES:

2. Enter a '1' to call the Work Order Issues program after a successful Completion program execution. _____
3. Enter the DREAM Writer version of Work Order Issues to be called. If left blank, version 'ZJDE0001' will be used. _____

WORK ORDER HEADER:

4. Enter the Status Code for update to the Work Order Header. (Optional) _____
5. Enter a '1' to default the Work Order Number into the Subledger Field. (Blanks will not default.) _____

SALES ORDER OPTIONS:

6. Enter a '1' to default the Sales Order number into the Lot Number for the location record. _____

ITEM LOCATION PROCESSING:

7. Enter a '1' to allow Work Order Completions into held lots. _____

ITEM LOT PROCESSING:

8. Enter a '1' to allow overriding the lot number upon completion. _____

WAREHOUSE PROCESSING:

9. Enter the Directed Putaway mode:
' ' : No Directed Putaway Requests
'1' : Request Putaway only
'2' : Request Putaway and process using the subsystem
10. If processing putaway requests through the subsystem, enter the DREAM Writer version to be used. If blank, ZJDE0001 is used. (See Form ID P46171) _____

Processing Options for Super Backflush

STATUS CODES DEFAULTS:

NOTE - Blanks will not update the Status Code.

1. Enter the default Operation Status Code for Partial Completions. _____
2. Enter the default Operation Status Code for Full Completions. _____
3. Enter the Status Code for update _____

to the Work Order Header.

4. Enter the default Material Status Code for Issues. _____

SHOP FLOOR ACTIVITY INFORMATION:

5. Enter the Version of the Hours and Quantity Program to call.
If left blank, a blind Hours and Quantities execution will be performed.

BLIND HOURS AND QUANTITIES ENTRY:

6. Enter the Document Type associated with Shop Floor Activity. _____

WORK ORDER ISSUES INFORMATION:

7. Enter the Version of the Material Issues Program to call.
If left blank, a blind execution of Work Order Inventory Issues will be performed.

BLIND WORK ORDER ISSUES:

8. Enter the Document Type associated with a Work Order Issue. _____
9. Enter the acceptable lot hold codes (up to 5) for inventory issues, or enter '*' for issues to all held lots. Blanks will not allow issues. _____

WORK ORDER COMPLETION INFORMATION:

10. Enter the Version of the Work Order Completions Program to call.
If left blank, a blind Work Order Completions execution will be performed.

BLIND WORK ORDER COMPLETIONS:

11. Enter the Document Type associated with an Inventory Completion. _____
12. Enter the Document Type associated with an Inventory Scrap. _____

EDIT INFORMATION:

13. Enter the Status Code beyond which Backflushing cannot be performed. _____

ITEM SALES HISTORY INFORMATION:

14. Enter a '1' if you wish blind issues to effect Item Sales History (F4115). _____

WAREHOUSE PROCESSING:

15. Enter the Directed Putaway mode.
' ' - No Directed Putaway requests
'1' - Request Putaway only.
'2' - Request Putaway and process using the subsystem.
16. If processing putaway requests through the subsystem, enter the DREAM Writer version to be used.
If blank, ZJDE0001 is used. _____

(See Form ID P46171)

QUANTITY COMPLETION CONTROL:

17. Enter a '1' to verify that, for a given operation, the total of the quantity completed plus scrapped does not exceed the 'Quantity At Operation.' If left blank, the verification is not performed.
-

QUALITY MANAGEMENT:

18. Enter the version of Test Results Revisions (P3711) to call. If left blank, version ZJDE0002 will be used.
-

Processing Options for Rate Schedule Workbench

INTERACTIVE/BLIND EXECUTION:

1. Enter the version of Inventory Issues to call. If left blank, a blind execution of Inventory Issues will be performed.
 2. Enter a '1' to call the Hours & Qty Entry window. If left blank, a blind execution of Hours & Qty entry will be performed.
-

DOCUMENT TYPES:

3. Enter the Document Type associated with Inventory Completions.
 4. Enter the Document Type associated with Inventory Scrap.
 5. Enter the Document Type associated with Inventory Issues.
-

VERSIONS TO EXECUTE:

Enter the Dream Writer version to use for each program listed. If left blank, version ZJDE0001 will be used.

6. Rate Schedule Revisions (P3104)
 7. Schedule Load Review (P31224)
-

BLIND ISSUES:

8. Enter a '1' to process only Inventory Interface items. (Blanks will process all items).
 9. Enter the acceptable lot hold codes (up to 5) for inventory issues, or enter '**' for issues to all held lots. Blanks will not allow issues.
-

ITEM SALES HISTORY INFORMATION:

10. Enter a '1' if you wish blind issues to effect Item Sales History (F4115).
-

PRIMARY LOCATION DEFAULT:

11. Enter a '1' to default the item's primary location information for completions. If left blank, no default location will be loaded.

SCREEN DEFAULTS:

Enter the values to preload to the screen at initial inquiry. If left blank, no value will be preloaded.

12. Schedule Type
13. Employee Number

OPTIONAL TRANSACTION HISTORY:

14. Enter a '1' to write transaction details to the Hours and Quantities file (F31122). If left blank, only summary information is retained.

PROCESS MANUFACTURING OPTIONS:

15. Enter a '1' to allow unplanned Co- and By-product completions.

16. Enter a '1' to issue ingredients for each co-/by-product separately. Blanks will consolidate issues.

WAREHOUSE PROCESSING:

17. Enter the Directed Putaway mode:
' ' : No Directed Putaway Requests
'1' : Request Putaway only
'2' : Request Putaway and process
 using the subsystem

18. If processing putaway requests through the subsystem, enter the DREAM Writer version to be used. If blank, ZJDE0001 is used. (See Form ID P46171).

GENERIC TEXT PROCESSING:

19. Enter a '1' to copy generic text to components in Inventory Issues.

20. Enter a '1' to copy generic text to operations in Hours and Quantity Entry.

QUALITY MANAGEMENT OPTIONS:

21. Enter the Status Code for update to the Lot if the Test fails.

Appendix C - Technical Information

About Technical Information

The following information describes the function of the Location Selection Driver program, which exists in six predefined versions in the Advanced Warehouse Management system:

- Process Putaway Requests
- Resuggest Putaway Requests
- Process Pick Requests
- Resuggest Pick Requests
- Process Replenishment Requests
- Resuggest Replenishment Requests

Running the Process Putaway Requests Program

You run the Location Selection Driver program to process all movement requests at a particular status and create location suggestions. The same program processes putaway, picking, and replenishment requests. If you create your own version of the Location Selection Driver, you can define the type of request to process on Data Selection in the program's processing options.

Process Putaway Requests and Resuggest Putaway Requests are DREAM Writer programs.

When you run the Process Putaway Requests program, the program performs the following functions:

Locates outstanding putaway requests

The system searches for outstanding requests (requests for which you have not yet created suggestions) in the Warehouse Requests table (F4600). The system selects the requests that have a warehouse code of 1 (putaway). The Data Selection function of the program controls this process.

Creates error messages	<p>The system creates an error message, which it displays during putaway confirmation, in the following instances:</p> <ul style="list-style-type: none">• The putaway request's status is not 200 (Request Created) or 220 (Suggestion Created).• Putaway suggestions already exist, and you have not set the program's processing options to create alternate suggestions.• You tried to create alternate putaway suggestions after you confirmed the original suggestions.• The warehouse (branch/plant) is not a valid warehouse in the address book.• The system cannot convert the transaction's unit of measure into the item's primary unit of measure.• The item's primary branch/plant record does not exist.• The item's warehouse process groups and order group do not reference a valid putaway instruction table.
Chooses an instruction table	<p>During process selection, the system selects a putaway instruction table for an item by comparing the item's warehouse process groups and order group to the groups specified in the process selection table. The system uses the following priorities:</p> <ul style="list-style-type: none">• Match all three warehouse process groups and the order group• Match all three warehouse process groups• Match the order group <p>After the system locates the most accurate match, it uses the putaway instruction table that you specified for that combination of groups. The putaway instruction table must include a unit of measure that also exists in the item's unit of measure structure, or the system cannot create putaway suggestions.</p>
Chooses location types	<p>After the system selects a putaway instruction table, the method code attached to the table determines which location type the system suggests. You can set the method code to select:</p> <ul style="list-style-type: none">• Fixed locations• Random locations• Existing locations, which already contain the same item that you are moving• Empty locations <p>If you specified a zone in the putaway instructions, the system searches for locations only within that putaway zone.</p>

Chooses locations using location requirements	From the eligible locations, the system selects the locations that: <ul style="list-style-type: none">• You can use for putaway• Have the same tax code as the item (optional)• Are not the location from which you are moving the item (usually the receiving dock)
Chooses locations using putaway instructions	The system ranks the remaining eligible locations according to the tiebreaker that you specified in the putaway instruction table. If you use the following criteria, the system selects the locations for which you: <ul style="list-style-type: none">• Avoid exceeding the maximum putaway quantity for the location• Meet the minimum utilization percentage• Convert large units of measure into smaller units of measure, if necessary• Complete partial units of measure, such as half-filled pallets
Chooses locations using the item profile	If you use the following criteria, the system selects locations where the item's profile allows you to: <ul style="list-style-type: none">• Mix different items in a location• Mix items with different dates or lot numbers in a location• Split an order line into more than one location suggestion• Move the items to a default location that you specify, if there is not enough space in the eligible locations

Chooses locations using the item unit of measure profile

If you use the following criteria, the system selects locations based on whether the item's unit of measure definition allows you to:

- Convert large units of measure to smaller units of measure
- Put the item in the location, according to the capacity method that you specified for the item

You can use one of three capacity methods to decide if the item will fit:

- Divide the usable cubic capacity of the locations by the dimensions of the item you want to store in the location. The result must be less than or equal to 1.
- Compare the item's dimensions to the location's usable dimensions. You must also have specified whether you allow the system to rotate the item, and defined the stacking limit for the item unit of measure.
- Verify that the quantity of the item to store is equal to or less than the quantity that you defined for the location on Location Capacity Definition.

Chooses locations using the location profile

If you use the following criteria, the system selects locations based on whether the location profile detail allows you to:

- Use the location for putaway
- Include the location in the putaway zone, if you specified one in the movement instructions
- Use the location for staging (unlimited capacity)
- Mix different containers in the location
- Mix items with different dates or lot numbers in the location
- Store the item without exceeding the location's maximum number of items
- Store the item based on the item's tax code
- Store the item based on whether you allow the item's container to exist in the location
- Store the item if it exceeds the location's minimum putaway percentage
- Use the location's putaway sequence number as a tiebreaker to rank locations that are otherwise equally suitable
- Use the location's proximity (latitude, longitude, and height) to the receiving location as a tiebreaker to rank locations that are otherwise equally suitable

Running the Process Pick Requests Program

You run the Location Selection Driver program to process all movement requests at a particular status and create location suggestions. The same program processes putaway, picking, and replenishment requests. If you create your own version of the Location Selection Driver, you can define the type of request to process on Data Selection in the program's processing options.

Process Pick Requests and Resuggest Pick Requests are DREAM Writer programs.

When you run the Process Pick Requests program, the program performs the following functions:

Locates outstanding pick requests	The system searches for outstanding requests (requests for which you have not yet created suggestions) in the Warehouse Requests table. The system selects the requests that have a warehouse code of 2 (picking). The Data Selection function of the program controls this process.
Creates error messages	<p>The system creates an error message, which it displays during pick confirmation, in the following instances:</p> <ul style="list-style-type: none">• The pick request's status is not 200 (Request Created) or 220 (Suggestion Created).• Pick suggestions already exist, and you have not set the program's processing options to create alternate suggestions.• You tried to create alternate pick suggestions after you confirmed the original suggestions.• The warehouse (branch/plant) is not a valid warehouse in the branch/plant constants.• The system cannot convert the transaction's unit of measure into the item's primary unit of measure.• The item's primary branch/plant record does not exist.• The item's warehouse process groups and order group do not reference a valid picking instruction table.

Chooses an instruction table During process selection, the system selects a picking instruction table for an item by comparing the item's warehouse process groups and order group to the groups specified in the process selection table. The system uses the following priorities:

- Match all three warehouse process groups and the order group
- Match all three warehouse process groups
- Match the order group

After the system locates the most accurate match, it uses the picking instruction table that you specified for that combination of groups. The picking instruction table must include a unit of measure that also exists in the item's unit of measure structure, or the system cannot create picking suggestions.

Chooses location types After the system selects a picking instruction table, the method code attached to the table determines which location type the system suggests;

- Fixed locations
- Random locations

If you specified a zone in the picking instructions, the system searches for locations only within that pick zone.

Chooses locations using location requirements From the remaining eligible locations, the system selects the locations that:

- You can use for picking
- Are not the location to which you are moving the item (usually the shipping dock)

Chooses locations using the pick instructions The system ranks the eligible locations according to the tiebreaker that you specified in the picking instruction table.

If you use the following criteria, the system selects the locations for which you can:

- Meet or exceed the minimum pick percentage for the location
- Avoid exceeding the maximum pick quantity for the location
- Combine smaller units of measure into larger units of measure, if necessary
- Require automatic replenishment after you deplete the items in the location (for fixed picking locations only)
- Use the First In First Out (FIFO) picking method based on the commitment method you specify on Branch/Plant Constants

You can set the picking method to:

- Avoid using FIFO. Instead, rank locations according to the tiebreaker.
- Rank locations from the lowest lot number to the highest lot number.
- Rank locations from the earliest expiration date to the latest expiration date for the date you stored the item.
- Rank locations from the oldest date to the newest date you received the item.

Chooses locations using the location profile If you use the following criteria, the system selects locations based on whether the location profile detail allows you to:

- Use the location for picking
- Include the location in the pick zone, if you specified one in the movement instructions
- Use the location's picking sequence number as a tiebreaker to rank locations that are otherwise equally suitable
- Use the location's proximity (latitude, longitude, and height) to the shipping location as a tiebreaker to rank locations that are otherwise equally suitable

Picks from locations according to item availability

From the eligible locations, the system picks items according to the following priority:

- Pick from locations with available quantity, ignoring inbound quantities (incoming purchase orders)
- Pick from locations using any available inbound quantities
- Pick from locations that you replenished as a result of automatic replenishment

The system displays an error message if it cannot satisfy the pick request using available, incoming, or replenished quantities. If the customer does not allow the partial shipment of an order, the system automatically deletes any pick suggestions for the order, and you do not fill the order.

Running the Process Replenishment Requests Program

You run the Location Selection Driver DREAM Writer program to process all movement requests at a particular status and create location suggestions. The same program processes putaway, picking, and replenishment requests. If you create your own version of the Location Selection Driver, you can define the type of request to process on Data Selection in the program's processing options.

Process Replenishment Requests and Resuggest Replenishment Requests are DREAM Writer programs.

When you run the Replenishment Location Selection Driver program, the program performs the following functions:

Locates outstanding replenishment requests

The system searches for outstanding requests (requests for which you have not yet created suggestions) in the Warehouse Requests table. The system selects the requests that have a warehouse code of 3 (replenishment). The Data Selection function of the program controls this process.

Creates error messages	<p>The system creates an error message, which it displays during replenishment confirmation, in the following instances:</p> <ul style="list-style-type: none">• The replenishment request's status is not 200 (Request Created) or 220 (Suggestion Created).• Replenishment suggestions already exist, and you did not delete the existing suggestions to create alternate suggestions.• You tried to create alternate replenishment suggestions after you confirmed the original suggestions.• The warehouse (branch/plant) is not a valid warehouse in the branch/plant constants.• The system cannot convert the transaction's unit of measure into the item's primary unit of measure.• The item's primary branch/plant record does not exist.• The item's warehouse process groups and order group do not reference a valid replenishment instruction table.
Chooses an instruction table	<p>During process selection, the system selects a replenishment instruction table for an item by comparing the item's warehouse process groups and order group to the groups specified in the process selection table. The system uses the following priorities:</p> <ul style="list-style-type: none">• Match all three warehouse process groups and the order group• Match all three warehouse process groups• Match the order group <p>After the system locates the most accurate match, it uses the replenishment instruction table that you specified for that combination of groups. The replenishment instruction table must include a unit of measure that also exists in the item's unit of measure structure, or the system cannot create replenishment suggestions.</p>
Chooses location types	<p>After the system selects a replenishment instruction table, the method code attached to the table determines which location type the system suggests. You can set the method code to select:</p> <ul style="list-style-type: none">• Fixed locations• Random locations

Chooses locations using location requirements	From the eligible locations, the system selects the locations that: <ul style="list-style-type: none">• You can use for replenishment• Are not the location to which you are moving the item (usually a pick location)
Chooses locations using replenishment instructions	The system ranks the remaining eligible locations according to the tiebreaker that you specified in the replenishment instruction table. <p>If you use the following criteria, the system selects the locations for which you can:</p> <ul style="list-style-type: none">• Meet the minimum utilization percentage• Avoid exceeding the maximum replenishment quantity• Combine smaller units of measure into larger units of measure, if necessary• Use the First In First Out (FIFO) picking method based on the commitment method you specify on Branch/Plant Constants <p>You can set the picking method to:</p> <ul style="list-style-type: none">• Avoid using FIFO. Instead, rank locations according to the tiebreaker.• Rank locations from the lowest lot number to the highest lot number.• Rank locations from the earliest expiration date to the latest expiration date for the date you stored the item.• Rank locations from the oldest date to the newest date you received the item.
Chooses locations using the location profile	If you use the following criteria, the system selects locations based on whether the location profile detail allows you to: <ul style="list-style-type: none">• Use the location for replenishment• Include the location in the replenishment zone, if you specified one in the replenishment instructions• Use the location's replenishment sequence number as a tiebreaker to rank locations that are otherwise equally suitable• Use the location's proximity (latitude, longitude, and height) to the To location as a tiebreaker to rank locations that are otherwise equally suitable

Replenishes from locations according to item availability

From the eligible locations, you replenish items according to the following priority:

- Replenish from locations with available quantity, ignoring inbound quantities (incoming purchase orders)
- Replenish from locations with inbound quantities

Working with Request and Suggestion Statuses

The system uses status codes to track movement requests and suggestions. The following status codes are hard coded in a user defined codes table (system 46/type PS):

- 200 Request created
- 220 Request suggested
- 250 Request in confirmation
- 291 Request canceled
- 299 Request closed
- 300 Location suggested
- 320 Suggestion assigned to tasks
- 340 Suggestion printed
- 391 Suggestion canceled
- 399 Suggestion confirmed

Working with Putaway Reservation Statuses

The system uses status codes to track putaway reservations. The following status codes are hard coded in a user defined codes table (system 46/type PS):

- 100 Reservation created
- 191 Reservation canceled
- 199 Reservation closed

Appendix D - Dimension and Weight Calculations

Calculating Dimensions and Weights for Putaway

The Advanced Warehouse Management system calculates each item's volume and weight to select a location during putaway. The system bases all volume and weight calculations on the Level 1 (largest) unit of measure and stores the resulting values in the Item Unit of Measure Profile table (F46011).

The system calculates item dimensions and weight for:

- Complete units of measure
- Partial units of measure

The system also performs calculations for:

- Items with storage containers
- Items without storage containers

Calculating Weight for a Complete Level 1 Unit of Measure

Items with Storage Containers:

Total Weight = (Gross Weight + Container Weight) x Quantity

Items without Storage Containers:

Total Weight = Gross Weight x Quantity

Calculating Volume for a Complete Level 1 Unit of Measure

Items with Open Storage Containers:

Total Volume = Width x Depth x Height of the container or the items' collective dimensions, whichever is greater

Items with Closed Storage Containers:

Total Volume = Width x Depth x Height of the container

Items without Storage Containers:

Total Volume = Gross Volume x Quantity

Calculating Weight for a Partial Level 1 Unit of Measure

Percentage Filled = Number of primary units of measure present ÷ number of primary units of measure required to complete a Level 1 unit of measure

Total Weight = Weight of a Level 1 unit of measure x Percentage Filled

Calculating Volume for a Partial Level 1 Unit of Measure

Percentage Filled = Number of Level 2 units of measure present ÷ number of Level 2 units of measure required to complete a Level 1 unit of measure

Total Volume = Volume of a Level 1 unit of measure x Percentage Filled

Appendix E - Functional Servers

Several J.D. Edwards programs access functional servers. The purpose of functional servers is to provide a central location for standard business rules about entering documents, such as vouchers, invoices, and journal entries. These business rules establish the following:

- Data dictionary default values
- Field edits and valid values
- Error processing
- Relationships between fields or applications

The advantages of a functional server are:

- It reduces maintenance of entry programs because edit rules reside in one central location.
- You can standardize documents across all applications because you create them using the same business rules.
- Generally, the user interface (appearance and interaction) of a form is now separate from how a program works.

The steps for setting up business rules for an entry program are:

1. Create a DREAM Writer version for a specific functional server program (for example, XT0411Z1 for voucher entry).
2. Set the processing options within the version according to your company requirements.
3. Specify the version you want the entry program to use in the processing options for that entry program.

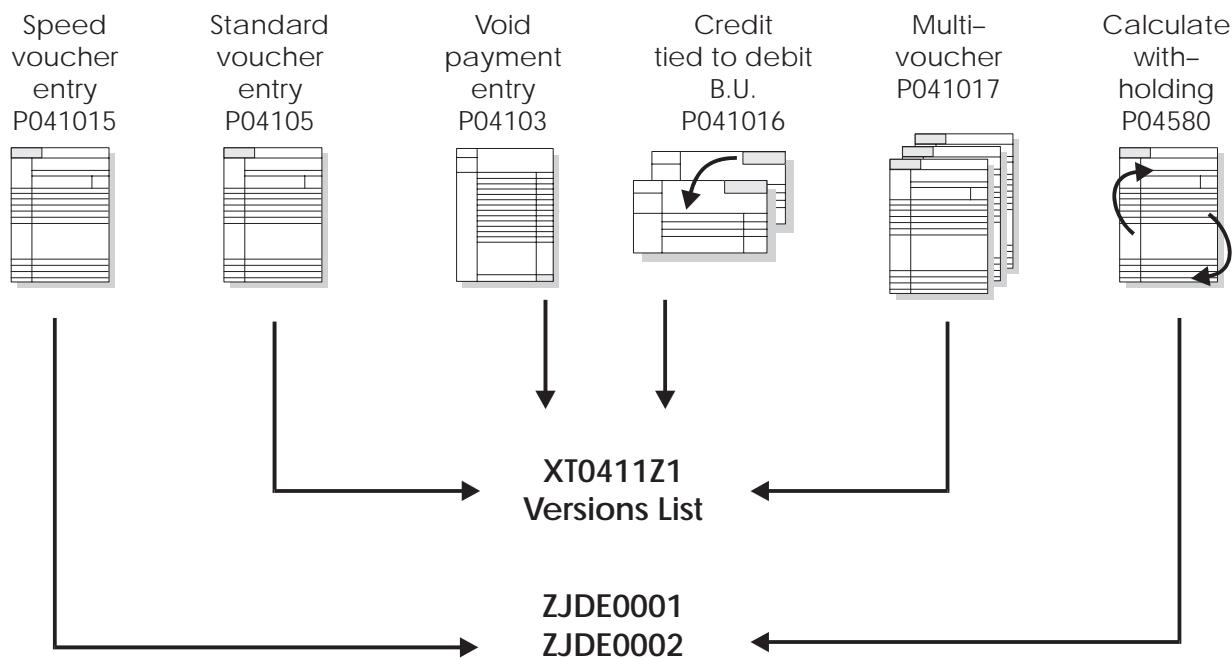
You can have all your entry programs use the same DREAM Writer version (and thus, use the same rules) or you can set up different DREAM Writer versions. J.D. Edwards provides DREAM Writer version ZJDE0001 as the default functional server version for your entry programs.



Only the person responsible for system-wide setup should make changes to the functional server version. For more information about how to set up DREAM Writer versions, see the *Technical Foundation Guide*.

Example: Voucher Processing Functional Server

The following graphic shows the programs that use the voucher processing functional server. J.D. Edwards provides two demo versions of the functional server, ZJDE0001 and ZJDE0002.



Glossary

Glossary

This glossary defines terms in the context of your use of JDE systems and the accompanying user guide.

access. To get to the information or functions provided by the system through menus, screens, and reports.

alphabetic character. Represents data by using letters and other symbols from the keyboard (such as *#). Contrast with *numeric character*.

alphanumeric character. Represents data in a combination of letters, numbers, and other symbols (such as *#).

audit trail. The detailed, verifiable history of a processed transaction. The history consists of the original documents, transaction entries, and posting of records, and usually concludes with a report.

automatic accounting instruction (AAI).

A code that points to an account in the chart of accounts. AAIs define rules for programs that automatically generate journal entries. This includes interfaces between Accounts Payable, Accounts Receivable, and Financial Reporting and the General Accounting system. Each system that interfaces with the General Accounting system has AAIs. For example, AAIs can direct the Post to General Ledger program to post a debit to a certain expense account and an automatic credit to a certain accounts payable account.

backup copy. A copy of original data preserved on a magnetic tape or diskette as protection against destruction or loss.

batch. A group of like records or transactions that the computer treats as a single unit during processing. For identification purposes, the system usually assigns each batch a unique identifier, known as a “batch number.”

batch header. Information the computer uses as identification and control for a group of transactions or records in a batch.

batch job. A task or group of tasks you submit for processing that the system treats as a single unit during processing, for example, printing reports and purging files. The computer performs these tasks with little or no user interaction.

batch processing. A method by which the computer selects jobs from the job queue, processes them, and writes output to the outqueue. Contrast with *interactive processing*.

batch type. A code that designates which JDE system the associated transactions pertain to, thus controlling what records are selected for processing. For example, in the Post General Journal process, only unposted transaction batches with a batch type of G for General Accounting are selected for posting.

Boolean logic operand. In JDE’s DREAM Writer, the parameter of the Relationship field. The Boolean logic operand tells the system to perform a comparison between certain records or parameters. Available operands are:

EQ	= Equal To
LT	= Less Than
LE	= Less Than or Equal To
GT	= Greater Than
GE	= Greater Than or Equal To
NE	= Not Equal To
NL	= Not Less Than
NG	= Not Greater Than

CAD/CAP. Computer Assisted Design/Computer Assisted Programming. A set of automated programming tools for designing and developing systems. These tools automate system design, generate source

code and documentation, enforce design standards, and help to ensure consistency throughout all JDE systems.

category code. In user defined codes, a temporary title for an undefined category. For example, if you are adding a code that designates different sales regions, you could change *category code 4* to *Sales Region*, and define E (East), W (West), N (North), and S (South) as the valid codes. Category codes were formerly known as *reporting codes*.

character. Any letter, number, or other symbol that a computer can read, write, and store.

command. A character, word, phrase, or combination of keys you use to tell the computer to perform a defined activity.

constants. Parameters or codes that rarely change. The computer uses constants to standardize information processing by an associated system. Some examples of constants are allowing or disallowing out-of-balance postings and having the system perform currency conversions on all amounts. Once you set constants such as these, the system follows these rules until you change the constants.

Core. The central and foundational systems of JDE software, including General Accounting, Accounts Payable, Accounts Receivable, Address Book, Financial Reporting, Financial Modeling and Allocations, and Back Office.

cursor. The blinking underscore or rectangle on your screen that indicates where the next keystroke will appear.

cursor sensitive help. JDE's online help function, which allows you to view a description of a field, an explanation of its purpose, and, when applicable, a list of the valid codes you can enter. To access this information, move the cursor to the field and press F1.

data. Numbers, letters, or symbols that represent facts, definitions, conditions, and situations, that a computer can read, write, and store.

database. A continuously updated collection of all information a system uses and stores. Databases make it possible to create, store, index, and cross-reference information online.

data dictionary. A database file consisting of the definitions, structures, and guidelines for the usage of fields, messages, and help text. The data dictionary file does not contain the actual data itself.

default. A code, number, or parameter the system supplies when you do not enter one. For example, if an input field's default is N and the you do not enter something in that field, the system supplies an N.

descriptive title. See *user defined code*.

detail. The individual pieces of information and data that make up a record or transaction. Contrast with *summary*.

display. (1) To cause the computer to show information on a terminal's screen. (2) A specific set of fields and information that a JDE system might show on a screen. Some screens can show more than one display when you press a specified function key.

display field. A field of information on a screen that contains a system-provided code or parameter that you cannot change. Contrast with *input field*.

DREAM Writer. Data Record Extraction And Management Writer. A flexible data manipulator and cataloging tool. You use this tool to select and sequence the data that is to appear on a programmed report.

edit. (1) To make changes to a file by adding, changing, or removing information. (2) The program function of highlighting fields into which you have entered inadequate or incorrect data.

execute. See *run*.

exit. (1) To interrupt or leave a computer program by pressing a specific key or a sequence of keys.

(2) An option or function key displayed on a screen that allows you to access another screen.

facility. A collection of computer language statements or programs that provides a specialized function throughout a system or throughout all integrated systems. Some examples DREAM Writer and FASTR.

FASTR. Financial Analysis Spreadsheet Tool and Report Writer. A report writer that allows you to design your own report specifications using the general ledger database.

field. (1) An area on a screen that represents a particular type of information, such as name, document type, or amount. Fields that you can enter data into are designated with underscores. See *input field* and *display field*. (2) A defined area within a record that contains a specific piece of information. For example, a vendor record consists of the fields Vendor Name, Address, and Telephone Number. The Vendor Name field contains just the name of the vendor.

file. A collection of related data records organized for a specific use and electronically stored by the computer.

fold area. An area of a screen, accessed by pressing F4, that displays additional information associated with the records or data items displayed on the screen.

function. A separate feature within a facility that allows you to perform a specific task, for example, the field help function.

function key. A key you press to perform a system operation or action. For example, you press F4 to have the system display the fold area of a screen.

hard copy. A presentation of computer information printed on paper. Synonymous with *printout*.

header. Information at the beginning of a file. This information is used to identify or provide control information for the group of records that follows.

help instructions. Online documentation or explanations of fields that you access by pressing the Help key or by pressing F1 with your cursor in a particular field.

helps. See *help instructions*.

hidden selections. Menu selections you cannot see until you enter HS in a menu's Selection field. Although you cannot see these selections, they are available from any menu. They include such items as Display Submitted Jobs (33), Display User Job Queue (42), and Display User Print Queue (43). The Hidden Selections window displays three categories of selections: user tools, operator tools, and programmer tools.

input. Information you enter in the input fields on a screen or that the computer enters from other programs, then edits and stores in files.

input field. An area on a screen, distinguished by underscores (__), where you type data, values, or characters. A field represents a specific type of information such as name, document type, or amount. Contrast with *display field*.

install system code. The code that identifies a JDE system. Examples are 01 for the Address Book system, 04 for the Accounts Payable system, and 09 for the General Accounting system.

interactive processing. A job the computer performs in response to commands you enter from a terminal. During interactive processing, you are in direct communication with the computer, and it might prompt you for additional information during the processing of your request. See *online*. Contrast with *batch processing*.

interface. A link between two or more JDE systems that allows these systems to send information to and receive information from one another.

jargon. A JDE term for system specific help text. You base your help text on a specific reporting code you designate in the Data Dictionary Glossary. You can display this text as part of online help.

job. A single identifiable set of processing actions you tell the computer to perform. You start jobs by choosing menu selections, entering commands, or pressing designated function keys. An example of a computer job is check printing in the Accounts Payable system.

job queue. A screen that lists the batch jobs you and others have told the computer to process. When the computer completes a job, the system removes the job's identifier from the list.

justify. To shift information you enter in an input field to the right or left side of the field. Many of the facilities within JDE systems justify information. The system does this only after you press Enter.

key field. A field common to each record in a file. The system uses the key field designated by the program to organize and retrieve information from the file.

Key General Ledger Account (Key G/L). See *automatic accounting instructions*.

leading zeros. A series of zeros that certain facilities in JDE systems place in front of a value you enter. This normally occurs when you enter a value that is smaller than the specified length of the field. For example, if you enter 4567 in a field that accommodates eight numbers, the facility places four zeros in front of the four numbers you enter. The result would look like this: 00004567.

level of detail. (1) The degree of difficulty of a menu in JDE software. The levels of detail for menus are as follows:

A=Major Product Directories

B=Product Groups

1=Basic Operations

2=Intermediate Operations

3=Advanced Operations

4=Computer Operations

5=Programmers

6=Advanced Programmers

Also known as *menu levels*.

(2) The degree to which account information in the General Accounting system is summarized. The highest level of detail is 1 (least detailed) and the lowest level of detail is 9 (most detailed).

master file. A computer file that a system uses to store data and information which is permanent and necessary to the system's operation. Master files might contain data or information such as paid tax amounts and vendor names and addresses.

menu. A screen that displays numbered selections. Each of these selections represents a program. To access a selection from a menu, type the selection number and then press Enter.

menu levels. See *level of detail*.

menu masking. A security feature of JDE systems that lets you prevent individual users from accessing specified menus or menu selections. The system does not display the menus or menu selections to unauthorized users.

menu message. Text that appears on a screen after you make a menu selection. It displays a warning, caution, or information about the requested selection.

next number facility. A JDE software facility you use to control the automatic numbering of such items as new G/L accounts, vouchers, and addresses. It lets you specify your desired numbering system

and provides a method to increment numbers to reduce transposition and typing errors.

numeric character. Represents data using the numbers 0 through 9. Contrast with *alphabetic character* and *alphanumeric character*.

offline. Computer functions that are not under the continuous control of the system. For example, if you were to run a certain job on a personal computer and then transfer the results to a host computer, that job would be considered an offline function. Contrast with *online*.

online. Computer functions over which the system has continuous control. Each time you work with a JDE system-provided screen, you are online with the system. Contrast with *offline*. See *interactive processing*.

online information. Information the system retrieves, usually at your request, and immediately displays on the screen. This information includes items such as database information, documentation, and messages.

operand. See *Boolean logic operand*.

option. A numbered selection from a JDE screen that performs a particular function or task. To select an option, you enter its number in the Option field next to the item you want the function performed on. When available, for example, option 4 allows you to return to a prior screen with a value from the current screen.

output. Information the computer transfers from internal storage to an external device, such as a printer or a computer screen.

output queue. A screen that lists the spooled files (reports) you have told the computer to write to an output device, such as a printer. After the computer writes a file, the system removes that file's identifier from the online list.

override. The process of entering a code or parameter other than the one provided by the system. Many JDE systems offer screens that provide default field values when they appear. By typing a new value over the default code, you can *override* the default. See *default*.

parameter. A number, code, or character string you specify in association with a command or program. The computer uses parameters as additional input or to control the actions of the command or program.

password. A unique group of characters that you enter when you sign on to the system that the computer uses to identify you as a valid user.

printout. A presentation of computer information printed on paper. Synonymous with *hard copy*.

print queue. An online list (screen) of written files that you have told the computer to print. Once the computer prints the file, the system removes the file's identifier from the online list. See *output queue*.

processing options. A feature of the JDE DREAM Writer that allows you to supply parameters to direct the functions of a program. For example, processing options allow you to specify defaults for certain screen displays, control the format in which information gets printed on reports, change the way a screen displays information, and enter "as of" dates.

program. A collection of computer statements that tells the computer to perform a specific task or group of tasks.

program specific help text. Glossary text that describes the function of a field within the context of the program.

prompt. (1) A reminder or request for information displayed by the system. When a prompt appears, you must respond in order to proceed. (2) A list of codes or parameters or a request for information

provided by the system as a reminder of the type of information you should enter or action you should take.

PTF. Program Temporary Fix. A representation of changes to JDE software, which your organization receives on magnetic tapes or diskettes.

purge. The process of removing records or data from a system file.

record. A collection of related, consecutive fields of data the system treats as a single unit of information. For example, a vendor record consists of information such as the vendor's name, address, and telephone number.

reporting code. See *category code*.

reverse image. Screen text that displays in the opposite color combination of characters and background from what the screen typically displays (for example, black on green instead of green on black).

run. To cause the computer to perform a routine, process a batch of transactions, or carry out computer program instructions.

scroll. To use the roll keys to move screen information up or down a screen at a time. When you press the Rollup key, for instance, the system replaces the currently displayed text with the next screen of text if more text is available.

selection. Found on JDE menus, selections represent functions that you can access from a given menu. To make a selection, you type its associated number in the Selection field and press Enter.

softcoding. A JDE term that describes an entire family of features that allows you to customize and adapt JDE software to your business environment. These features lessen the need for you to use computer programmers when your data processing needs change.

software. The operating system and application programs that tell the computer how and what tasks to perform.

special character. Representation of data in symbols that are neither letters nor numbers. Some examples are * & # /.

spool. The function by which the system puts generated output into a storage area to await printing and processing.

spooled file. A holding file for output data waiting to be printed or input data waiting to be processed.

subfile. An area on the screen where the system displays detailed information related to the header information at the top of the screen. Subfiles might contain more information than the screen can display in the subfile area. If so, use the roll keys to display the next screen of information. See *scroll*.

submit. See *run*.

summary. The presentation of data or information in a cumulative or totaled manner in which most of the details have been removed. Many of the JDE systems offer screens and reports that are summaries of the information stored in certain files.

system. A collection of computer programs that allows you to perform specific business tasks. Some examples of applications are Accounts Payable, Inventory, and Order Processing. Synonymous with *application*.

user defined code. The individual codes you create and define within a user defined code type. Code types are used by programs to edit data and allow only defined codes. These codes might consist of a single character or a set of characters that represents a word, phrase, or definition. These characters can be alphabetic, alphanumeric, or numeric. For example, in the user defined code type table ST (Search Type), a few codes are C for Customers, E for Employees, and V for Vendors.

user defined code (type). The identifier for a table of codes with a meaning you define for the system (for example, ST for the Search Type codes table in Address

Book). JDE systems provide a number of these tables and allow you to create and define tables of your own. User defined codes were formerly known as *descriptive titles*.

user identification (user ID). The unique name you enter when you sign on to a JDE system to identify yourself to the system. This ID can be up to 10 characters long and can consist of alphabetic, alphanumeric, and numeric characters.

valid codes. The allowed codes, amounts, or types of data that you can enter in a specific input field. The system checks, or edits, user defined code fields for accuracy against the list of valid codes.

video. The display of information on your monitor screen. Normally referred to as the *screen*.

vocabulary overrides. A JDE facility that allows you to override field, row, or column title text on a screen-by-screen or report-by-report basis.

window. A software feature that allows a part of your screen to function as if it were a screen in itself. Windows serve a dedicated purpose within a facility, such as searching for a specific valid code for a field.

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