

Oracle® Shipping Execution

User's Guide

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Shipping Execution User's Guide*.

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

Documentation Accessibility

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

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Structure

- 1 Shipping
- 2 Searching with Query Manager
- 3 Managing Trips
- 4 Managing Deliveries
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12 Reports and Processes
A Flexfields
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Related Information Sources

Oracle Advanced Pricing User's Guide

Oracle Bills of Material User's Guide

Oracle Inventory User's Guide

Oracle Order Management User's Guide

Oracle Order Management Implementation Manual

Oracle Warehouse Management User's Guide

Oracle Release Management User's Guide

Integration Repository

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

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

You can navigate to the Oracle Integration Repository through Oracle E-Business Suite Integrated SOA Gateway.

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

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

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

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, you may change a row in one table without making corresponding changes in related tables.

If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle E-Business Suite.

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

Shipping

This chapter covers the following topics:

- Overview of Shipping
- Shipping Transactions Form
- Quick Ship Window

Overview of Shipping

You can manage shipping information such as trips, trip stops, deliveries, delivery lines, containers, and freight costs in the Shipping Transactions form. In addition, you can complete the following shipping tasks:

Trip and Delivery Planning:

- Create a trip or delivery.
- Assign delivery lines to a delivery or a container.
- Schedule pick-ups and drop-offs.

Pick Release:

- Release eligible delivery lines based on defined picking criteria.
- Select the Release Sequence Rule to control the order in which picking lines are allocated to inventory.
- Enter or validate shipped quantities, back ordered quantities, staged quantities, and inventory control information for delivery lines (after pick release).

Ship Confirm:

- Assign delivery lines to trips and deliveries.

- Auto-create a trip and close stops.
- Ship confirm or back order a delivery.

Shipping Transactions Form

The Shipping Transactions form provides a consolidated workbench. It enables you to plan and manage trips, stops, deliveries, delivery lines, and LPNs (containers).

Note: The entity fields in the Shipping Transaction form are keyboard navigable even if they are display-only. You can use the folder functionality to rearrange the fields to optimize the data entry and update.

Shipping Transactions Form

When you navigate to the Shipping Transactions form, the Query Manager window opens on top of the Shipping Transactions form automatically, enabling you to search for trips, deliveries, delivery lines, LPNs, and stops. You can either move the Query Manager window to view the Shipping Transactions form that is behind it, or close the Query Manager window to view the Shipping Transactions form.

With the Shipping Transactions form, you manage information about shipping entities, and complete the following tasks:

- Plan trips, stops, deliveries, and delivery lines/containers
- Ship confirm a delivery or trip
- Track shipments
- Track shipping containers

- Handle over and under shipments
- Initiate intrastate (European) transactions
- Pick release trip, stop, delivery, delivery lines, and container
- Run reports
- Enter details about a shipment, such as, weights, waybill numbers, tracking numbers, serial numbers and freight costs
- View delivery and trip workflows

The Shipping Transactions form is right-click enabled. You can perform actions by right-clicking on the window and selecting the desired action.

Although buttons are active when no data exists on the Shipping Transactions form, if you attempt to use the buttons no action will be performed and a warning message will be displayed. This is also the case when buttons are active when the action of that button is not possible. For example, when a delivery line is assigned to a delivery, the Autocreate Deliveries button is active, and if you click that button a warning message will be displayed stating that the delivery line is already assigned to a delivery.

Note: The Shipping Transactions form does not refresh the main tabbed region after an action is performed within a detailed tabbed region.

Folders

Using folder options, you can define your own prompt (name) for specific buttons on the window and you can hide or display any field except for the first column in each window. You can select up to three items from the action menu to appear as buttons in each window.

To enable folder options:

1. From the Folder menu, select New.
2. Within the Create New Folder window, enter a unique folder Name.
3. Select the options for this folder.
 Select Open as Default Folder if you want this folder to be your default folder.
 Select Public if you want to enable anyone to be able to use this folder. Accept or define your own prompt name for the buttons and Enable or disable the Display of the buttons (you can display a maximum of three buttons at a time).
4. Click OK.

5. Select the Folder pull down menu.
6. Click Save.

Note: The options in the folders change depending on the window from which you are designating them.

Note: You can customize the fields displayed in the Shipping Transactions form by adding or hiding fields to suit your business requirements.

To show additional fields or hide existing fields, place the cursor in any column and either select Folder (from the Tools menu) > Show Field to display additional fields or Folder > Hide Field to hide selected fields, or you can right-click in any field, select Folder, then the folder option, such as Show Field. To change the prompt name of any column heading, right click on the prompt name and enter a new name.

You can save the updated Shipping Transactions form layout and use it as the new default (or you can select the original default).

To save the changes to the Shipping Transactions form layout as updates to the existing folder, select Folder > Save. To save the changes as a new folder, select Folder > Save As.

To open a saved folder, click the Open Folder icon located in the Shipping Transactions form.

Note: The Shipping Transactions form includes the following Oracle Process Manufacturing fields: Grade, Secondary Requested Quantity, Secondary Picked Quantity, Secondary Shipped Quantity, Secondary Backordered Quantity, Secondary Stage Quantity, Secondary Delivered Quantity, Secondary Requested Quantity UOM, Secondary Cancelled Quantity, Secondary Source Requested Quantity, and Secondary Source Requested Quantity UOM.

To view these fields, choose Folder > Show Fields. Select the fields from the list of values. If the Oracle Process Manufacturing (OPM) item is dual UOM controlled or lot controlled, and has a grade, then you will see values in these fields. Otherwise, these fields will be blank. Refer to *Using Oracle Order Management with Process Inventory* for description of process fields.

Quick Ship Window

The Quick Ship window enables you to process shipments quickly, using the minimum shipping requirements with the benefit of form layout configurability. You can access deliveries, trips, and delivery lines/LPNs within the Quick Ship window.

Note: The entity fields in the Quick Ship window are keyboard navigable even if they are display-only. You can use the folder functionality to rearrange the fields to optimize the data entry and update.

Note: Oracle Warehouse Management provides a feature named Quick Ship. The Quick Ship window in Oracle Shipping Execution is in no way related to the Quick Ship feature of Oracle Warehouse Management.

Quick Ship does not require that you enter the amount of detailed information typical of the Shipping Transactions form, rather the bare minimum requirements are used to process a shipment.

The following tasks are performed using the Quick Ship window:

- Ship confirm deliveries
- Enter ship quantities
- Ship confirm trips
- Print shipping documents
- Enter delivery freight costs
- View and resolve shipping exceptions
- View delivery and trip workflows
- Access to the Shipping Transactions form

Note: All Roles and Grants that are applicable in the Shipping Transactions form are also applicable in the Quick Ship window.

The Quick Ship window is configurable. Using the Folders feature, you can hide fields, show fields, and add tabs to the window.

Although buttons are active when no data exists on the Quick Ship window, you cannot

perform the selected action without the required data, and a warning message is displayed with this information if you attempt to execute an active button without information.

Note: The Quick Ship window is right-click enabled. You can perform actions by right-clicking on the window and selecting the desired action. You can also access folder options by right-clicking. All available actions, as well as all available Folder options, are available by right-clicking within the window.

You have a choice of the default view of the Quick Ship window by defining the shipping parameter WSH: Quick_Ship_Default_View_Mode. The available default views to choose from include:

- Delivery Confirm view: Delivery Confirm view displays one delivery record in the delivery region
- Trip Confirm view: Trip Confirm view displays multiple deliveries in the delivery region

The Delivery Confirm view displays three regions with multiple fields. Additional fields can be displayed by right-clicking, choosing Folder, then Show Field.

Within the Quick Ship window, you can display all the same field prompt names that are available in the Shipping Transactions form.

The Trip Confirm view displays the same three regions, however the Deliveries region lists the fields in a horizontal table view.

You can navigate to the Shipping Transactions form from the Quick Ship window by selecting Shipping Transactions Form from the Tools menu. Depending on where your cursor is located within the Quick Ship window will determine which window opens in the Shipping Transactions form. For example, if your cursor is in the Delivery Name field when you select Shipping Transactions Form, the Delivery window will open. If your cursor is in the Trip Name, then the Trip window opens when you select Shipping Transactions Form. If your cursor is in the Detail field, then the Detail window opens when you select Shipping Transactions Form.

Changing the Quick Ship Window View:

You can change the current view of the Quick Ship window from the Delivery Confirm view (default) to Trip Confirm view, to suit your business needs. If you typically ship confirm deliveries, then you will want to default the Delivery Confirm View. However, if you typically ship confirm trips, then you might prefer to set the default to the Trip Confirm View.

You can change the default view by defining the profile option WSH: Quick_Ship_Default_View_Mode.

To change the Quick Ship window view:

1. Navigate to the Quick Ship window.

Quick Ship - Delivery Confirm View - Delivery Window

Quick Ship-Delivery Confirm View - Delivery

Name

Initial Ship from

Initial Pick-Up Date

Consignee

Ultimate Ship to

Freight Terms

Bill of Lading

Ship Confirm Rule

Status

Open

Firm Status

Not Firm

☐ Exceptions

Ship Method

Num of LPNs

Net Weight

Tare Weight

Gross Weight

Trip icon

Name

Status

Open

Firm Status

Not Firm

☐ Exceptions

Vehicle Org Code

Vehicle Item Name

Vehicle Num Prefix

Vehicle Number

Delivery Lines/LPNs

Detail	LPN	Item Name	Delivery	Line Status	Next Step	Exceptions	Order	Requested Qty	Shipped
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Not Applicable	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Freight Cost

Serial Numbers

Reset Wt Vol

Print Pack Slip

Print BOL

Print Document Set

Ship Confirm

2. From the Tools menu, select Change View.

Quick Ship-Trip Confirm View - Trip

Trip

Name

...

Status

Open

Firm Status

Not Firm

Exceptions

Vehicle Org Code

Vehicle Item Name

Vehicle Num Prefix

Vehicle Number

Deliveries

Name	Consignee	Ultimate Ship to	Status	Consolidation Delivery

Delivery Lines/LPNs

Detail	LPN	Item Name	Delivery	Line Status	Next Step	Exceptions	Order	Requested Qty	Shipper
	<input checked="" type="checkbox"/>					<input type="checkbox"/>			
	<input type="checkbox"/>					<input type="checkbox"/>			
	<input type="checkbox"/>					<input type="checkbox"/>			
	<input type="checkbox"/>					<input type="checkbox"/>			
	<input type="checkbox"/>					<input type="checkbox"/>			
	<input type="checkbox"/>					<input type="checkbox"/>			
	<input type="checkbox"/>					<input type="checkbox"/>			
	<input type="checkbox"/>					<input type="checkbox"/>			

Freight Cost

Serial Numbers

Reset Wt Vol

Print Pack Slip

Print BOL

Print Document Set

Ship Confirm

3. Done.

Related Topics

Using Quick Ship for Deliveries, page 4-31

Using Quick Ship for Trips, page 3-14

Searching with Query Manager

This chapter covers the following topics:

- Query Manager
- Creating a Query
- Finding Trips
- Finding Stops
- Finding Deliveries
- Finding Delivery Lines and LPNs
- Finding Containers/LPNs
- Finding Delivery Lines

Query Manager

In the Query Manager window, you can define and save queries to search for and manage the following shipping entities:

- Trips, page 2-4
- Stops, page 2-6
- Deliveries, page 2-7
- Lines and LPNs (containers), page 2-9
- LPNs, page 2-11
- Lines (B), page 2-14

You create customized queries (searches) by entering your search criteria and saving the query. Once the query is saved, you can re-use it for future searches. For example, if you create a query named Airline Container to find airline containers of a certain

dimension, you can use this query again to repeat the search rather than re-enter the search criteria.

Queries can be saved and shared with other authorized users as Public Queries. This is useful, for example, if you want to centrally manage the queries.

Queries are grouped into the following categories and display in the left pane of the Shipping Transactions form:

- Personal Query: Queries you save for your personal use.
- Public Query: Queries you save and share with other users.
- Temporary Query: For infrequently used queries such as those you use for one session only.

Note: If you want to save a query for future searches you must save it as a Personal or Public Query. Otherwise the query is saved only temporarily for the session. You can use a temporary query to search for all shipping entities.

Within the Query Manager windows, you can use Folder functionality to show/hide fields and change the position of prompt fields within the window.

Within the Query Manager windows for Lines, LPNs, and Lines and LPNs, you can also include an Additional tab when creating a new folder.

Creating a Query

If you frequently query the same item, you can save the query and re-use it again for future queries. For example, if you frequently query open deliveries to be shipped from a particular warehouse, you can create and save a query to find open deliveries. Once the query is saved, you can re-use it again for future queries.

To create a query:

1. Navigate to the Query Manager window.

Query Manager Window

Query Manager

Search for

- ☒ Trips
- ☐ Stops
- ☐ Deliveries
- ☐ Lines and LPNs
- ☐ LPNs
- ☐ Lines (B)

☐ Saved Query

Name

Description

Owner

☐ Share Query?

Trips

From Trip Name

To Trip Name

From Delivery Name

To Delivery Name

Status

Firm Status

Ship Method

Vehicle Org

Vehicle Org Name

Vehicle Item Name

Vehicle Description

Vehicle Number Prefix

From Vehicle Number

To Vehicle Number

Open... Save Copy Delete... Clear Find...

2. In the Search For region, choose an entity to query such as Trips.
3. Enter your search criteria in the Trips tabbed region.
4. In the Saved Query region, enter a name and description for the query.
5. Optionally, to share a query with other users, enable the Share Query box.

Note: A Public Query displays in the Personal Queries folder if you are the query owner, but displays in the Public Queries folder for other authorized users.

Note: You cannot edit a Public Query if you are not the owner. However, you can copy an existing query by selecting the Copy button, and rename.

6. Click Save.
A checkmark displays in the Saved Query box to indicate that the query is saved. Saved queries are displayed in the left pane of the Shipping Transactions form.
7. Click Find to start your search.

To open an existing query:

1. Navigate to the Query Manager window.

2. Click Open.
3. Select the existing query from the list in the Queries window.
4. Click Ok.
5. Click Find to start your search.

The query results display in the Shipping Transactions form.

Note: Using this same process, you can create queries for all entity levels: Trips, Trip Stops, Deliveries, Lines and LPNs, LPNs, and Lines. You must first select the entity in the Search For region.

Finding Trips

You can find an existing trip using the Query Manager.

Prerequisites

A trip must be created.

To find a trip:

1. Navigate to the Query Manager window.

Query Manager - Trips Window

Search for

- ☒ Trips
- ☐ Stops
- ☐ Deliveries
- ☐ Lines and LPNs
- ☐ LPNs
- ☐ Lines (B)

☐ Saved Query

Name

Description

Owner

☐ Share Query?

Trips

From Trip Name

From Delivery Name

Status

Ship Method

To Trip Name

To Delivery Name

Firm Status

Vehicle Org

Vehicle Item Name

Vehicle Description

Vehicle Number Prefix

From Vehicle Number

Vehicle Org Name

To Vehicle Number

Open... Save Copy Delete... Clear Find...

2. In the Search For region, choose Trips.
3. In the Trips tab, select one or more of the following criteria for your query:
 - To and From Trip Names
 - To and From Delivery Names
 - Status
 - Firm Status
 - Ship Method
 - Vehicle Organization
 - Vehicle Number Prefix
 - From and To Vehicle Numbers
4. When you have completed your entries, click Find to display the search results in the Shipping Transactions form.

Note: Alternatively, in the Query Manager window, you can click Open, select an existing query, click OK, then click Find. Searching by using an existing query can also be performed in the Shipping Transactions form.

Finding Stops

You can find an existing stop using the Query Manager.

Prerequisites

A stop must be created.

To find a stop:

1. Navigate to the Query Manager window.

Query Manager - Stops Window

Search for

- ☐ Trips
- ☒ Stops
- ☐ Deliveries
- ☐ Lines and LPNs
- ☐ LPNs
- ☐ Lines (B)

☐ Saved Query

Name

Description

Owner

☐ Share Query?

Stop Location

Stop Status

Departure Fill

From Seal Code

To Seal Code

From Trip Name

To Trip Name

From Arrival Date

To Arrival Date

From Departure Date

To Departure Date

Open... Save Copy Delete... Clear Find...

2. In the Search For region, choose Stops.
3. In the Stops tab, select one or more of the following criteria for your query:
 - Stop Location
 - Stop Status
 - Departure Fill
 - From and To Seal Codes
 - From and To Trip Name
 - From and To Arrival and Departure Dates

4. When you have completed your entries, click Find to display the search results in the Shipping Transactions form.

Note: Alternatively, in the Query Manager window, you can click Open, select an existing query, click OK, then click Find. Searching by using an existing query can also be performed in the Shipping Transactions form.

Finding Deliveries

You can find an existing delivery using the Query Manager.

Prerequisites

A delivery must be created.

To find a delivery:

1. Navigate to the Query Manager window.

Query Manager - Deliveries Window

Search for

- ☐ Trips
- ☐ Stops
- ☒ Deliveries
- ☐ Lines and LPNs
- ☐ LPNs
- ☐ Lines (E)

☐ Saved Query

Name

Description

Owner

☐ Share Query?

Open... Save Copy Delete...

Deliveries

From Delivery Name	<input type="text"/>	To Delivery Name	<input type="text"/>
From Bills of Lading	<input type="text"/>	To Bills of Lading	<input type="text"/>
Status	<input type="text"/>	Firm Status	<input type="text"/>
Ship From	<input type="text"/>	Org Code	<input type="text"/>
Consignee	<input type="text"/>	Ship Method	<input type="text"/>
Ship To	<input type="text"/>	Freight Terms	<input type="text"/>
FOB	<input type="text"/>	Exceptions Only	<input type="text"/>
From Pick-Up Date	<input type="text"/>	To Pick-Up Date	<input type="text"/>
From Drop-off Date	<input type="text"/>	To Drop-off Date	<input type="text"/>
Pick Release Batch	<input type="text"/>	Ship Confirm Batch	<input type="text"/>

Clear Find...

2. In the Search For region, choose Deliveries.
3. In the Deliveries tab, select one or more of the following criteria for your query:
 - From and To Delivery Name
 - From and To Bills of Lading

- Delivery Status: The choices include: Open, Confirmed, In-Transit, Closed, Outbound, Outbound Request, Outbound Cancel, and Inbound Received.

Note: Querying for Outbound finds Shipment Requested and Shipment Cancel Requested deliveries.

Note: The following Delivery Status values search for deliveries with these statuses:

- Querying for Outbound Request finds Shipment Requested deliveries.
 - Querying for Outbound Cancel finds Shipment Cancel Requested deliveries.
 - Querying for Inbound Received finds Shipment Advice Received deliveries.
- Firm Status: The choices include: Contents Firm, Not Firm, and Routing and Contents Firm
 - Ship From
 - Organization Code
 - Consignee, Ship Method, Ship To, Freight Terms
 - FOB
 - Exceptions Only
 - From and To Pick-Up Dates
 - From and To Drop-off Dates
 - Pick Release Batch
 - Ship Confirm Batch

4. When you have completed your entries, click Find to display the search results in the Shipping Transactions form.

Note: Alternatively, in the Query Manager window, you can click Open, select an existing query, click OK, then click Find. Searching

by using an existing query can also be performed in the Shipping Transactions form.

Finding Delivery Lines and LPNs

You can find delivery lines and LPNs (containers) by selecting the query criteria for the lines and LPNs you want. You can find the lines associated with a LPN or find LPNs assigned to delivery lines. You can also enter shared criteria to find delivery lines and LPNs assigned to a particular organization.

Prerequisites

Lines and LPNs must be created

To find delivery lines and LPNs:

1. Navigate to the Query Manager window.

Query Manager - Lines and LPNs Window

Search for

- ☐ Trips
- ☐ Stops
- ☐ Deliveries
- ☒ Lines and LPNs
- ☐ LPNs
- ☐ Lines (B)

☐ Saved Query

Name

Description

Owner

☐ Share Query?

Source System

Consignee

Ship From

From Schedule Date

From Order Number

Order Type

Assigned Lines

Item

From LPN

Shipment Priority

From Pick-Up Date

From Tracking Num

Org Code

Ship Method

Ship To

To Schedule Date

To Order Number

Line Status

Assigned LPNs

Container Item

To LPN

Freight Terms

To Pick-Up Date

To Tracking Num

Open... Save Copy Delete... Clear Find...

2. In the Search For region, choose Lines and LPNs.
3. In the Lines/LPNs tab, select one or more of the following criteria for your query:
 - Source System
 - Organization Code
 - Consignee

- Ship Method
- Ship From and Ship To
- From and To Scheduled Dates
- From and To Order Numbers
- Order Type
- Line Status
- Planned for Crossdocking
- Assigned Lines
- Assigned LPNs
- Item
- Container Item
- From LPN and To LPN
- Shipment Priority
- Freight Terms
- From Date Shipped and To Date Shipped
- From and To Tracking Number Assigned and Packed status (for LPNs)

4. When you have completed your entries, click the Additional tab.

Note: The Additional tab is used to display more search criteria. If the Additional tab is not displayed and you want an Additional tab, use the Folder feature to display the tab.

In the Additional tab, you can select additional criteria for your query:

- Deliver to and Intermediate Ship to
- LPN Fill status
- Choose either Use Shared Criteria, Include Immediate Contents, or Include Containers for Selected Orders Only

- Include Immediate Contents: Select this option to find containers and immediate contents for those container records.
- Use shared criteria: Select this option to apply the search criteria defined for lines to the containers. If deselected, other LPNs will appear regardless of the criteria selected for the lines. Some of the criteria that can be shared include Customer, Ship method , Ship from location , and Ship to location.
- Include Containers for Selected Orders Only: This option is selected by default when the Line and LPNs option is selected. Select this option to display all the container records for the selected details of the orders returned by the search.

Note: When searching for batches, select Use Shared Criteria to return only the specific single batch data.

- From Production Lines and To Production Lines
 - From and To Production Sequence
 - From and To Job Numbers
 - From and To Dock Code
 - From Model Serial Number and To Model Serial Number
 - FOB, Freight Terms, and Shipment Priority
5. When you have completed your entries, click Find to display the search results in the Shipping Transactions form.

Note: Alternatively, in the Query Manager window, you can click Open, select an existing query, click OK, then click Find. Searching by using an existing query can also be performed in the Shipping Transactions form.

Finding Containers/LPNs

You can find existing containers/LPNs using the Query Manager.

Prerequisites

A container/LPN must be created.

To find containers/LPNs:

1. Navigate to the Query Manager window.

Query Manager - LPNs Window

Search for

- ☐ Trips
- ☐ Stops
- ☐ Deliveries
- ☐ Lines and LPNs
- ☒ LPNs
- ☐ Lines (B)

☐ Saved Query

Name

Description

Owner

☐ Share Query?

Source System

Consignee

Ship From

From Schedule Date

From Order Number

Order Type

Assigned Lines

Item

From LPN

Shipment Priority

From Pick-Up Date

From Tracking Num

Org Code

Ship Method

Ship To

To Schedule Date

To Order Number

Line Status

Assigned LPNs

Container Item

To LPN

Freight Terms

To Pick-Up Date

To Tracking Num

Open... Save Copy Delete... Clear Find...

2. In the Search For region, choose LPNs
3. In the LPNs tab, select one or more of the following criteria for your query:
 - Source System
 - Organization Code
 - Consignee
 - Ship Method
 - Ship From and Ship To
 - From Scheduled Date and To Scheduled Date
 - From and To Order Number
 - Order Type
 - Line Status
 - Assigned Lines
 - Assigned LPNs

- Item
 - Container Item
 - From and To LPN
 - Shipment Priority
 - Freight Terms
 - From and To Date Shipped
 - From and To Tracking Number
4. When you have completed your entries, click the Additional tab.

Note: The Additional tab is used to display more search criteria. If the Additional tab is not displayed and you want an Additional tab, use the Folder feature to display the tab. See: Shipping Transactions Form.

In the Additional tab, you can select from the following additional criteria:

- Deliver To, and Intermediate Ship To
 - LPN Fill status
 - Include Immediate Contents (if applicable): Select this option to find containers and immediate contents for those container records. The *Use Shared Criteria* and *Include Containers for Selected Orders Only* options are unavailable when querying LPNs.
 - From and To Production Lines
 - From and To Production Sequence
 - From and To Job Numbers
 - From and To Dock Code
 - From and To Model Serial Number
5. When you have completed your entries, click Find to display the search results in the Shipping Transactions form.

Note: Alternatively, in the Query Manager window, you can click

Open, select an existing query, click OK, then click Find. Searching by using an existing query can also be performed in the Shipping Transactions form.

Finding Delivery Lines

You can find existing delivery lines by using the Query Manager.

Prerequisites

A delivery line must be created (for example, an order containing lines must be booked).

To find delivery lines:

1. Navigate to the Query Manager window.

Query Manager - Lines (B) Window

Search for

- ☐ Trips
- ☐ Stops
- ☐ Deliveries
- ☐ Lines and LPNs
- ☐ LPNs
- ☒ Lines (B)

☐ Saved Query

Name

Description

Owner

☐ Share Query?

Source System

Consignee

Ship From

From Schedule Date

From Order Number

Order Type

Assigned Lines

Item

From LPN

Shipment Priority

From Pick-Up Date

From Tracking Num

Org Code

Ship Method

Ship To

To Schedule Date

To Order Number

Line Status

Assigned LPNs

Container Item

To LPN

Freight Terms

To Pick-Up Date

To Tracking Num

Open... Save Copy Delete... Clear Find...

2. In the Search For region, choose Lines.
3. In the Lines tab, select one or more of the following criteria for your query:
 - Source System
 - Organization Code
 - Consignee

- Ship Method
 - Ship From and Ship To
 - From Scheduled Date and To Scheduled Date
 - From and To Order Number
 - Order Type
 - Line Status
 - Assigned Lines
 - Assigned LPNs
 - Item
 - Container Item
 - From and To LPN
 - Shipment Priority
 - Freight Terms
 - From and To Date Shipped
 - From and To Tracking Number
4. When you have completed your entries, click the Additional tab.

Note: The Additional tab is used to display more search criteria. If the Additional tab is not displayed and you want an Additional tab, use the Folder feature to display the tab.

In the Additional tab, you can select additional criteria for your query:

- Deliver To, and Intermediate Ship To
- LPN Fill status
- Choose Include Immediate Contents, if applicable. Use Shared Criteria and Include Containers for Selected Orders Only are disabled when querying LPNs.
- From and To Production Lines

- From and To Production Sequence
- From and To Job Numbers
- From and To Dock Code
- From and To Model Serial Number

Note: The LPNs region is disabled, since your query is for Delivery Lines.

5. When you have completed your entries, click Find to display the search results in the Shipping Transactions form.

Note: Alternatively, in the Query Manager window, you can click Open, select an existing query, click OK, then click Find. Searching by using an existing query can also be performed in the Shipping Transactions form.

Managing Trips

This chapter covers the following topics:

- Overview of Trips
- Creating a Trip
- Firming a Trip
- Unfirming a Trip
- Purging Trips and Trip Stops
- Assigning Freight Costs to a Trip
- Printing a Document Set for a Trip
- Printing a Master Bill of Lading for a Trip
- Calculating Weight and Volume for a Trip Stop
- Ship Confirming at Trip
- Trip Workflow Status
- Using Quick Ship for Trips
- Finding and Confirming Quick Ship Trips

Overview of Trips

A trip is an instance of a specific freight carrier departing from a particular location containing deliveries.

A trip is carrier specific and contains at least two stops, such as a stop to pick up goods and another stop to drop off goods, and may include intermediate stops. Trip stops are displayed in sequence on the Stops tab within the Shipping Transactions form once you have queried your trip. The Stop sequence will not re-sequence if a stop is removed. For example, if you have two stops, each with an arrival and departure date and time, and you remove one, the remaining stops will stay in the same sequence as they were originally.

Trips can be created automatically or manually.

You can perform the following tasks with trips:

- Create a trip, page 3-2
- Plan a trip, page 3-5
- Unplan a trip, page 3-6
- Assign freight costs to a trip, page 3-8
- Print a document set for a trip, page 3-10
- Calculate weight and volume for a trip stop, page 3-10
- Ship confirm a trip, page 3-11

Creating a Trip

You can create trips automatically or manually.

Automatic

Trips are required for all deliveries and can be created automatically as part of Ship Confirmation transparent to the user for those not interested. If your shipping process does not require advanced planning, you may prefer to automatically create trips:

- Auto-creating a trip for a delivery: You can find the delivery you want to ship, and auto-create a trip and related trip stops.
- Auto-creating a trip for containers and lines: You can find the lines and containers you want to ship and auto-create a trip which creates a trip, related deliveries, and trip stops.

To autocreate a trip for a delivery:

1. Navigate to the Query Manager window, and find the delivery or group of deliveries.

Shipping Transactions

Query: Query <2> Context: Delivery - 10110

Name	Consignee	Ultimate Ship to	Status	Consolidation Delivery	Firm Status	Exceptions
10110	World of Busine	1684 : Le Monde-Paris-	Open		Not Firm	<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

Deliveries | Contents | Path by Stop | Path by Trip

Ship Confirm | Print Doc Set | Actions View Shipping Status Go Detail...

- At least one trip and its related stops are created based on the deliveries Shipped From and Shipped To locations.

5. Save your work.

1. Navigate to the Query Manager window and find the delivery lines and containers.
2. Select the delivery lines.
3. From the Actions menu, select Auto-create Trip.
4. Click Go.

6. Save your work.

Manual

You can manually create a trip and later assign delivery lines or find the delivery lines and create a trip. For example, for a regular trip scheduled to depart every Friday, you can manually set up a trip ahead of time and then assign delivery lines.

When you manually create a trip, you can manually assign stops, deliveries, and delivery lines to that trip.

To manually create a trip:

1. Navigate to the Trip window.

Trip Window

The screenshot shows the 'Trip Window' for trip ID 1047118. The form is organized into two main columns of fields. The left column includes: Name (1047118), Ship Method, Carrier (Yellow), Mode of Transport (LTL), Freight Terms, Vehicle Org Code, Vehicle Item Name, Vehicle Number Prefix, Vehicle Number, and Routing Instructions. The right column includes: Status (Open), Activity, Service Level (Standard), Firm Status (Not Firm), an unchecked Exceptions checkbox, Arrive After Trip, Vehicle Item Description, Tender Status, and Master BOL Number. At the bottom, there are buttons for 'Ship Confirm', 'Print Doc Set', an 'Actions' dropdown menu currently showing 'Unfirm', a 'Go' button, and a 'Done' button.

2. Enter a name for the trip.

Note: If you do not define a name, then a default name is assigned by Shipping Execution.

3. Select the Ship Method. For example, Overnight or LTL.

If you update Ship Method and one or more delivery legs of the trip have bill of lading numbers generated, Oracle Shipping Execution checks the Document Code for the Document Type BOL from the Document Categories form and:

- If Document Code is All, it updates ship method for the trip and all of its delivery legs.
- If Document Code is One, it cancels all the bill of lading numbers associated

with the trip and logs a trip exception. You must then regenerate and reprint those bills of lading.

Note: If the trip is firmed, you cannot change the stops on the trip, but you can add deliveries to the trip as long as they are for existing stops. You can also unassign deliveries from trips and if the delivery is the last delivery on the stop, the stop will remain associated with the trip, however it will be empty.

4. Select a Vehicle Org Code.
5. Select the Vehicle Item Name such as 50' Truck.
6. Select the Vehicle Number Prefix and Vehicle Number.
7. Optionally, enter Routing Instructions.
8. Optionally, select a trip in the Arrive After Trip field if you want the new trip to follow after another trip.

In the Arrive after Trip field, you can define the order in which trips arrive at their final destination. For example, if you created Trip B and want it to arrive after Trip A, enter Trip A in the Arrive after Trip field.

9. Save your work.
10. Click Done.

Related Topics

Process Deliveries SRS, page 12-28.

Firming a Trip

Once deliveries and delivery lines have been assigned to a trip, you can set the status of the trip to one of the following:

- **Firm Routing:** Prevents trip stops from being added, or removed for the selected trip.
- **Firm Routing and Contents:** Prevents trip stops from being added, or removed for the selected trip and prevents contents from being added or removed.

If the trip status is Firm Routing, you can still update trip details, delivery, and delivery line information. For example, you can add delivery lines and make changes to the delivery. However, to add or remove trip stops, you first must set the status of the trip

to Unfirm before making the changes.

When you firm a trip, Shipping Execution performs the following:

- Validates that the sequence numbers between the deliveries of the trip are unique for containers within the deliveries
- Validates that the weight, volume, and fill percentage do not exceed their maximum number of containers in the delivery
- Validates that the minimum fill percentage is met
- Validates the planned arrival date and planned departure trip dates are not in the past
- Validates pick-up and drop-off dates and times with the Transportation Calendar for the shipper, carrier, and receiver

Prerequisites

At least two stops must be assigned to the trip.

At least one delivery must be assigned to the trip.

At least one delivery line must be assigned to each delivery in the trip.

All delivery lines for the trip must be assigned to a delivery.

To firm a trip:

1. Navigate to the Query Manager window, and find the trip.
2. From the Actions menu, select Firm Routing or Firm Routing and Contents.
3. Click Go.
4. Save your work.

Unfirming a Trip

When a trip is in Firm Routing or Firm Routing and Contents status, you cannot add, remove, or re sequence trip stops unless you first Unfirm the trip. When the trip is in Not Firm status, you can remove or rescreen existing trip stops or add new stops.

After the changes are done, the trip can be Firmed to prevent the trip stop settings from being changed. However, if you leave the trip Not Firm, the existing trip stops can be removed or new trip stops can be added.

When you unfirm a trip, Shipping Execution:

- Sets the status of all deliveries in the trip to Open.
- Sets the status of the trip to Open.

Note: All delivery lines remain assigned to their respective deliveries when you unfirm a trip.

Prerequisites

Trip Firm status must be set to Firm Routing or Firm Routing and Contents.

Trip Firm status for all deliveries must be set to Firm Routing or Firm Routing and Contents.

To unfirm a trip:

1. Navigate to the Query Manager window and find the trip.
2. From the Actions menu, select Unfirm.
3. Click Go.
4. Save your work.

Purging Trips and Trip Stops

If purge criteria of deliveries, delivery lines, and LPNs associated to trips and trip stops are met, then Oracle Shipping Execution enables you to purge (permanently delete) trip and trip stop records from the Oracle Shipping Execution tables. The following criteria must be met before trips and trip stops are purged:

- Trip entities (stops, deliveries, lines, and LPNs) must meet the given criteria of the entity in order to purge the trip that they belong to. For example, in order to purge a trip that contains two stops and one delivery, the stops must meet the purge criteria and the delivery must meet the delivery purge requirements. See Purging Deliveries, page 4-29.
- If a trip is part of a multi-delivery consolidation and is in progress, then the trip will not be purged.
- Only Closed trips and Intransit trips (if selected) can be purged.

All information associated with the purged entities is also purged, for example freight costs, weight and volume, dates, and exceptions.

Related Topics

Shipping Purge Concurrent Process, page 12-31

Assigning Freight Costs to a Trip

You can assign freight costs to a specific trip, override the suggested freight costs, or update existing freight costs. For example, if you wanted to add additional costs to a particular vehicle that is used in the trip to deliver goods. A freight cost can also be assigned to a delivery, a stop, a delivery leg, a delivery detail, or a container.

To assign freight costs to a trip:

1. Navigate to the Query Manager window, and find the trip.
2. From the Actions menu, select Assign Freight Costs.
3. Click Go to display the Freight Costs window.

Note: When assigning freight costs from the Quick Ship window, the Freight Costs window is displayed for the Delivery that your cursor is on.

Freight Costs Window

Freight Costs Window

Trip: 1047118

Freight Costs

Name	Type	Trip	Currency Code	Amount

Sub Total: 0 USD

Summary Freight Cost From Other Levels

Delivery Line	150	USD
LPN	0	USD
Delivery	0	USD
Trip Stop	0	USD

Total Freight Cost: 150 USD

Done

4. Enter the Freight Cost Name.
The Type and Trip will default based on the Name.
5. Enter a Currency Code or accept the default.
6. Enter an Amount or accept the default.
7. Optionally, enter a Conversion Type, Conversion Date, and Conversion Rate.
8. Click Done to save your work.

To view freight costs:

1. Navigate to the Query Manager window and find the trip.
2. From the Actions menu, select Assign Freight Costs.
3. Click Go.
4. View the freight cost information.

Type displays the freight cost type associated with the freight cost name. Freight cost name and freight cost type uniquely identify a freight cost charge.

Trip is blank for manually entered freight costs.

Printing a Document Set for a Trip

You can print a group of shipping documents and other reports in a set for a trip. These document sets might include pick release documents, pack slip, bill of lading, or any other shipping document.

Any Shipping document enabled for XML Publisher can also be included in a document set. Once included, the document automatically prints with other documents in the document set. XML Publisher enabled Shipping documents enable the flexibility to define your own report layouts, include additional fields on reports, and print the document in PDF format. See: Report Customization with Layout Templates, page 12-3

To print a document set for a trip:

1. Navigate to the Query Manager window, and find the trip.
2. From the Actions menu, select Print Document Set, or if you have added a Print Document Set button, click it.
3. Click Go.

The Document Sets window displays a list of document sets.

4. Select the document set and click OK.

The document set for the trip is printed.

Printing a Master Bill of Lading for a Trip

You print the Master Bill of Lading report for trips from the Actions menu on the Trips window. The Master Bill of Lading is XML Publisher enabled and can be printed in PDF if the Master Bill of Lading PDF template is enabled in the document set for Master Bill of Lading. See: Report Customization with Layout Templates, page 12-3.

To print a Master Bill of Lading for a trip:

1. Navigate to the Query Manager window, and find the trip.
2. From the Actions menu, select Print Master BOL.
3. Click Go.

Calculating Weight and Volume for a Trip Stop

The weight and volume is always calculated based on values defined as the physical

attributes in the Master Item window in Oracle Inventory. The automatic calculation of weight and volume includes the fill percentage.

You can manually enter the weight and volume in each delivery, which will be used at ship confirmation.

When the weight, volume, and fill percentage for a trip stop is calculated, Shipping Execution:

- Calculates the weight, volume, and fill percentage of each open delivery and adds the values to the trip stop's current weight, volume, and fill percentage.
- Validates that the maximum load weight, the maximum internal volume, and the maximum fill percentage are not exceeded.
- Validates that minimum fill percentage requirements are attained.

Note: A vehicle must be assigned to the trip before the actual fill percentage can be calculated.

To manually enter weight and volume for a trip stop:

1. Navigate to the Query Manager window, and find the trip stop.
2. Click Details.
3. Enter your weights and volume.
4. Save your work.

Related Topics

Calculating Weight and Volume for a Delivery, page 4-17

Calculating Weight and Volume for Delivery Lines, page 5-14

Ship Confirming at Trip

You can ship confirm a trip from the Shipping Transactions form which will also progress the status of all assigned deliveries, LPNs, and delivery lines. This method of ship confirming might be preferable if your trips consist of multiple deliveries.

Note: A new role, with the privilege Ship Confirm enabled at the trip tab, will need to be defined in order for you to perform ship confirm at the trip level.

To Ship Confirm at the Trip level:

1. Navigate to the Query Manager window.
2. Find your Trip.
3. From the Actions menu, select Ship Confirm.

Shipping Transactions - Trip Window

[illegible]

4. Within the Confirm Trip window, select the options suitable to your needs.

Confirm Trip (Ship Confirm Trip) Window

Confirm Trip

Ship Options

☒ Ship Entered Quantities Unspecified Quantities: Ship

☐ Ship All

☐ Backorder All

☐ Cycle Count All

☒ Create Delivery for Staged Quantities

Trip Options

Trip Stop: M1- Seattle:Seattle

Actual Departure Date: 21-SEP-2006 09:30

☒ Set Delivery In-Transit ☒ Create Bill of Lading

☒ Close Trip ☐ Defer Interface

☒ Create Master Bill of Lading

Document Set:

OK Cancel

Note: You can ship confirm all deliveries, set deliveries in-transit, or close trip, if the deliveries have the same pickup location. If the trip has multiple pickups, Multiple is defaulted in the Pickup Stop field and you will not be able to choose any of the trip options. Clicking OK will confirm all deliveries at the initial pickup location and you must close the drop off stops manually. If the trip includes multiple pickup stops, you must manually ship confirm any delivery that is not part of the initial pickup otherwise it's pickup will not be closed. Ship confirming a trip only closes the pickup stop for deliveries that occur at the start of the trip; not intermediate pickup stops.

Related Topics

To ship confirm a delivery, page 8-9

Trip Workflow Status

With the use of Oracle Workflow, Oracle Shipping Execution enables you to view the status of trip specific workflow through the Shipping Transactions Form or the Quick Ship window.

The Workflow Monitor is used to graphically display the status of the workflow associated with the trip.

Trip Workflow must be enabled in the Global parameters.

Viewing Trip Workflow Status

To view the workflow status of a trip:

1. Navigate to the Shipping Transactions form.
2. Find your trip.
3. From the Tools menu, select Workflow status.

Related Topics

Workflow Status, page 10-4

Using Quick Ship for Trips

The Quick Ship window enables you to process shipments quickly, using the minimum shipping requirements with the benefit of a highly configurable window. You can access trips and perform several actions within the Quick Ship window.

Related Topics

Quick Ship Window, page 1-5

Finding and Confirming Quick Ship Trips, page 3-14

Finding and Confirming Quick Ship Trips

Similar to finding deliveries, you use a find window to search for applicable trips.

To find a trip:

1. Navigate to the Quick Ship window.

2. Ensure that the window view is set to Trip Confirm View.
3. With the cursor in the trip Name field, press F11 or select Find from the View menu.
There are several ways to find trips in the Quick Ship window:
 - The Find icon
 - The LOV for the Trip Name
 - Enter the Trip Name and press [Tab]
4. Enter your search criteria.
5. Click Find.

To confirm a trip using the Quick Ship window:

1. Navigate to the Quick Ship window.
2. Ensure that the window view is set to Trip Confirm View.
3. Within the Trip region, enter or find the trip Name.
4. Verify all data in the header fields and update as necessary.

Any of the following actions can be executed by clicking the appropriate button at the bottom of the window, or by right-clicking and selecting the action from that menu:

- Assign Freight Costs, page 3-8
 - Serial Numbers, page 8-23
 - Reset Weight and Volume, page 3-10
 - Print Packing Slip, page 12-14
 - Print Bill of Lading (BOL), page 12-8
 - Print Document Set, page 3-10
 - Ship Confirm, page 3-11
5. Click the Ship Confirm button or right click and select Ship Confirm.

Managing Deliveries

This chapter covers the following topics:

- Overview of Deliveries
- Creating a Delivery
- Auto-creating Deliveries
- Consolidating Delivery Lines and Deliveries
- Viewing Shipping Status
- Manual Packing Delivery Lines for a Delivery
- Auto-packing Delivery Lines assigned to Deliveries into LPNs
- Automated Packing
- Unpacking a Delivery Detail
- Calculating Weight and Volume for a Delivery
- Generating a Loading Sequence for Delivery Lines in a Delivery
- Example of Loading Sequence Generation
- Printing a Document Set for a Delivery
- Printing a Bill of Lading for a Delivery
- Printing a Packing Slip for a Delivery
- Assigning Deliveries to a Trip
- Assigning Freight Costs to a Delivery
- Unassigning a Delivery from a Trip
- Closing a Delivery
- Firming a Delivery
- Unfirming a Delivery
- Reopening a Delivery

- Delivery Workflow Status
- Purging Deliveries
- One Step Shipping
- Using Quick Ship for Deliveries
- Locating and Confirming Quick Ship Deliveries
- XML Transactions

Overview of Deliveries

A delivery consists of a set of delivery lines that are scheduled to be shipped to a customer's ship-to location on a specific date and time. In a delivery, you can include items from different sales orders as well as back orders. You can group multiple deliveries together to create a trip.

You can perform the following delivery tasks:

- Creating new deliveries, page 4-3
- Auto creating deliveries, page 4-6
- Consolidating deliveries and delivery lines, page 4-7
- View shipping status, page 4-7
- Manual packing of delivery lines, page 4-11
- Auto packing delivery lines, page 4-12
- Unpacking deliveries, page 4-16
- Calculating weight and volume for a delivery, page 3-10
- Generating a load sequence, page 4-18
- Printing a document set, page 3-10
- Assigning a delivery to a trip, page 4-22
- Assigning freight costs to a delivery, page 4-24
- Unassigning a delivery from a trip, page 4-26
- Closing a delivery, page 4-26
- Firming a delivery, page 3-5

- Unfirming a delivery, page 3-6
- Re-opening deliveries, page 4-28
- One-step shipping, page 4-29
- Using Quick Ship for deliveries, page 4-31

You can either manually or automatically group delivery lines to create a delivery. If a delivery is auto-created, the delivery lines are grouped together by the mandatory default criteria, Ship From Location and Ship To Location. However, additional grouping criteria can be included such as:

- Customer
- Freight Terms
- FOB Code
- Intermediate Ship To Location
- Ship Method

If you auto-create a trip for delivery lines, the process creates a delivery also. If you generate a bill of lading number, and then unassign the delivery lines from the delivery, the delivery lines are also unassigned from the trip and the delivery retains the bill of lading number. To remove the bill of lading number, unassign the delivery from the trip.

Creating a Delivery

You can create a delivery in the Delivery window either manually or automatically. Additionally, a delivery can be auto-created at pick release by selecting Auto-create Deliveries in the Shipping Parameters window. See Shipping Execution Setup, Defining Pick Release Parameters in *Oracle Order Management Implementation Manual*.

To create a delivery:

1. Navigate to the Delivery window.

Delivery Window

Delivery - 1456165

Delivery Legs

Name: 1456165

Org Code: M1

Status: Open

Initial Ship from: M1- Seattle : 3455 108th Ave

Packing Slip:

Firm Status: Not Firm

Initial Pick-Up Date: 21-SEP-2006 23:59:00

FOB:

Exceptions:

Consignee: Business World

FOB Location:

Ship Method:

Carrier:

Service Level:

Mode of Transport:

Ultimate Ship to: 2619 : 2391 L STREET-SAN

Intermediate Ship to:

Num of LPNs:

Ultimate Ship to Date: 21-SEP-2006 23:59:00

Volume UOM: FT3

Weight UOM: Lbs

Freight Terms:

Volume: 4

Net Weight: 60

Waybill:

Lines Loading:

Tare Weight: 0

Additional Info:

Loading Sequence:

Gross Weight: 60

Ship Confirm Print Doc Set Actions View Shipping Status Go Done

2. Enter a Name and Org Code for the delivery.

Note: Shipping Execution will generate a delivery name for you if you leave the Name blank, enter the Org Code, and the Ultimate Ship to, then save.

3. Select the Initial Ship from location and the Ultimate Ship to.

At this point, you can save the delivery. Optionally, enter the following fields:

- Initial Ship from Date
- Consignee
- Ultimate Ship to Date
- Freight Terms
- Waybill
- Additional Info
- Enable Auto-pack (only applicable during the use of Auto-Pack Deliveries SRS)
- FOB
- FOB Location

- Intermediate Ship to
- Volume UOM
- Volume
- Lines Loading
- Loading Sequence
- Ship Method
- Number of LPNs
- Weight UOM
- Net Weight
- Tare Weight
- Gross Weight

You can change Intermediate Ship-to regardless of whether it is part of the delivery grouping rule.

You can add and remove fields by using the folder options Show Field and Hide Field.

Note: The Ship from Date is the earliest schedule date for the sales order lines assigned to the delivery.

The Ship to Date is the earliest scheduled date for all of the delivery details assigned to the delivery.

You can change freight terms, ship method, and FOB regardless of whether they are part of the delivery grouping rule. In addition, you can only change ship method if the delivery is not assigned to a trip.

Note: If your organization does not have FOB as an enforced grouping attribute, the FOB field will not be populated when you auto-create a delivery or when you assign a line to an LPN.

The load sequence (Load Seq) number and the Lines Loading pattern determine the order in which lines are loaded into a container or lines loaded within a delivery, if applicable. The order lines must be associated with a Customer Production Sequence on the Sales Order line.

You can select from Forward, Reverse, Forward-Inverted, or Reverse-Inverted.

Refer to the topic *Generating a Loading Sequence*, page 4-18

4. Click Done to save your work.

Note: Order lines belonging to different operating units can be combined into a single delivery. However, the order lines will not be successfully processed during invoicing. Delivery based invoicing is not supported if order lines within the delivery belong to different operating units.

Auto-creating Deliveries

You can automatically create deliveries for delivery lines that are not assigned to a delivery. Additionally, you can autcreate deliveries at pick release by selecting Auto-create Deliveries in the Shipping Parameters window. See *Shipping Execution Setup, Defining Pick Release Parameters* in *Oracle Order Management Implementation Manual*.

One or more deliveries can be created depending on the default delivery grouping criteria set up in the Shipping Parameters/Client Parameters. For example, if two groups of delivery lines have different Ship To addresses, a different delivery number is assigned to each group. See *Oracle Inventory User's Guide* for client parameters.

Prerequisites

Delivery status must be Open.

To auto-create deliveries:

1. Navigate to the Query Manager window, and find the delivery lines.
2. Select the delivery lines for which you want to create a delivery.
3. From the Actions menu, select Auto-create Deliveries.
4. Click Go to create a delivery or deliveries for the selected lines.

You can view the delivery name created for the delivery lines in the Delivery column in the Lines/LPNs tab.

5. Choose the Delivery tab to view or add additional delivery details.
6. Save your work.

See *Shipping Execution Setup, Defining Delivery Grouping Parameters* in *Oracle Order Management Implementation Manual*.

Consolidating Delivery Lines and Deliveries

Delivery Consolidation enables you to join a new delivery line, or a line released from backorder, to an existing delivery. You can also group deliveries with similar attributes into trips.

Rather than creating a new delivery when Auto-Create Deliveries is executed, through batch or Pick Release, delivery consolidation functionality systematically assigns delivery lines to qualified existing deliveries.

The Process Deliveries - SRS concurrent program is another method used to consolidate delivery lines into deliveries, and to consolidate deliveries into trips. See: Process Deliveries SRS, page 12-28

The following is required in order to utilize delivery consolidation:

- Delivery status is Open.
- Appending Limit is not Do Not Append (Shipping Parameters window)
- Autocreate Deliveries is enabled (Shipping Parameters window)
- Ship Confirm Rule is Null (Shipping Parameters window)
- Auto-pack Options is No (Shipping Parameters window)
- Append Deliveries is Yes (Release Sales Orders for Picking window)
- Organization is selected (Release Sales Orders for Picking window)
- Customer and Ship Method Delivery Grouping Attributes must be selected (Shipping Parameters window)

Note: When a line is appended to a delivery, the appending shipping exception is logged if this exception type is enabled. If this line is later unassigned from the delivery, the shipping exception is not removed. Further, when ship confirming the delivery, the exception will still be displayed despite the fact that the appended line was previously unassigned.

See *Oracle Order Management Implementation Manual*, Shipping Execution Setup chapter.

Viewing Shipping Status

Use the View Shipping Status window to view the shipping status of all of the delivery details of a delivery from an Order Entry line. The shipping status includes the following types of information:

- **Quantity:** For example, ordered quantity, pick released quantity, back ordered quantity, ship confirmed quantity.
- **Line status:** The current status for each delivery line and the next step needed to progress the delivery line.

You access the View Shipping Status window from the Shipping Transactions form, Delivery tab region. From the Actions menu, you can view the shipping status of all delivery lines associated with the delivery. Also, you can view the shipping status of an order's delivery lines within the Order Organizer, Sales Order pad at the header level, and Sales Order pad at the line level, by selecting Action view shipping status.

You can also access the View Shipping Status window by selecting View Shipping Status from the actions menu on the Order header in the Sales Order Pad or Order Organizer.

Note: You can only utilize the View Shipping Status feature if the Role that you are assigned to has the View Shipping Status box selected in the Shipping Execution Role Definition window.

The main region of the window displays each of the order lines belonging to the delivery with its summary information. Select any sales order line and view delivery detail information in the Delivery Line Details region.

The main region information is as follows:

- **Delivery Name** is displayed in the title bar.
- **Order Number and Line:** The sales order number and line associated with the delivery.
- **Ordered Item, UOM, and Ordered Quantity:** The delivery detail item, delivery detail unit of measure (the item primary unit of measure), and sales order line ordered quantity in primary unit of measure.
- **Quantity Delivery Requested:** The requested quantity assigned to the delivery from the order line.
- **Quantity Not Ready to Release:** Total requested quantity from the delivery lines (associated with this order line) at status Not Ready to Release.
- **Quantity Ready to Release:** Total requested quantity from the delivery lines (associated with this order line) at status Ready to Release.
- **Quantity Released To Warehouse:** Total requested quantity from the delivery lines (associated with this order line) at status Released to Warehouse.
- **Quantity Back Ordered:** Total back ordered quantity from the delivery lines

(associated with this order line) at status Back Ordered.

- Quantity Staged/Pick Confirmed: Total picked quantity from the delivery lines (associated with this order line) at status Staged/Pick Confirmed.
- Quantity Shipped: Total shipped quantity from the delivery lines (associated with this order line) at status Shipped.
- Quantity Interfaced: Total interfaced quantity from the delivery lines (associated with this order line) at status Interfaced.

The Delivery Line Details region information is:

- Delivery Name, Detail, Quantity, and Line Status: Identifying information from the delivery detail.
- Next Step: The next step for lines with statuses of Interfaced or Canceled is Not Applicable as shown in the following table.

Next Step

Current Delivery Detail Status	Next Step
Not Applicable	Ship Confirm
Not Ready to Release	Progress Order to Awaiting Shipping
Ready to Release	Run Pick Release
Back ordered	Run Pick Release
Released to Warehouse	Transact Move Order
Staged/Pick Confirmed	Ship Confirm/Close Trip Stop
Shipped	Run Interfaces or Close Trip Stop
Planned for Cross Docking	Transact Move Order

- Ship Method: The carrier, service level, and mode passed from the sales order line to be used for shipping the goods. This ship method may be changed at the delivery level or at ship confirmation. The ship method in delivery line details will always display the carrier passed from the sales order line regardless of whether a different ship method is selected from within the Shipping Transactions form.

- **Actual Departure Date:** The date that the carrier departed on the current leg of the trip.
- **Actual Arrival Date:** The date that the carrier arrived from the current leg of the trip.
- **Tracking Number:** Delivery line tracking number. A tracking number that is assigned to an LPN will not be displayed here.
- **Bill of Lading Number:** Delivery bill of lading numbers. If there are bill of lading numbers for each delivery leg, a pop-up window shows the numbers.
- **Waybill Number:** The delivery waybill number.
- **Move Order Number and Move Order Line Number:** For delivery details with statuses Released to Warehouse and Staged/Pick Confirmed, the delivery detail move order number and move order line number.

To view shipping status:

1. Navigate to the Query Manager window.
2. Find your delivery.
3. Select your delivery and from the Actions menu, select View Shipping Status.
4. Click Go.

View Shipping Status Window

View Shipping Status: Delivery (1456165) - Business World

Order Number	Line	Ordered Item	UOM	Ordered Quantity	Delivery Quantity
68120	1.1	AS55888	Ea	2	2

Delivery Line Details

Delivery Name	Detail	Quantity	Line Status	Next Step	Ship Method	Actual Dep:
1456165	1972394	2	Staged/Pick Confir	Ship Confirm/Cl		

View Picking Request View Exception Done

5. View Picking Request is enabled if the delivery detail has status Released to Warehouse, Staged/Pick Confirmed, Shipped, or Interfaced. Click it to view the pick release request for the delivery detail.
6. View Exception is enabled if the delivery detail has exceptions associated with it. Click it to view the shipping exceptions for the delivery detail.
7. Click Done when you are finished viewing the shipping status.

Manual Packing Delivery Lines for a Delivery

You can pack delivery lines into containers which prevents changes to containers/lines assigned to containers within the delivery.

Once a delivery is packed, the delivery line information cannot be changed until you unpack the delivery. The weight and volume is calculated automatically. However, if you manually enter a weight or volume value, the nature of the operation changes. See Calculating Weight and Volume for a Delivery, page 4-17.

Prerequisites

The delivery must be open.

At least one delivery line must be assigned to the delivery you want to pack.

To pack an entire delivery without details required:

1. Navigate to the Query Manager window, and find the delivery you want to pack.
2. Select the Contents tab, and select the delivery lines you want to pack.
3. From the Actions menu, select Pack.
4. Click Go.
5. Select the container.
6. Click OK.
The delivery lines assigned to the delivery are packed into the container.
7. Save your work.

Auto-packing Delivery Lines assigned to Deliveries into LPNs

You can auto-pack delivery lines for a delivery into LPNs (containers). When you auto-pack a delivery, the delivery lines are grouped together by shared attributes such as the Ship To location, and are packed into LPNs based on the grouping and LPN type. If you specify LPN Name Generation defaults in the Organization Parameters, then these parameters are used for naming LPNs during auto-packing delivery lines.

Once a delivery is packed, the delivery line information cannot be changed until you unpack the delivery. The weight and volume is calculated automatically.

Note: Auto-packing is not allowed for items that are lot indivisible.

Prerequisites

All delivery lines must be assigned to a delivery.

A container-item relationship must be defined for the delivery line item and container item. See *Setup Container-Load Relationships for Containers and Items, Oracle Order Management Implementation Manual*.

To auto-pack delivery lines assigned to deliveries into containers:

1. Navigate to the Query Manager window, and find delivery you want to pack.
2. From the Actions menu, select Auto-pack or Auto-pack Master.
Auto-pack Master will enable the system to auto-pack the delivery then pack it again.

into another container. For example, you can auto-pack a delivery into a container, then pack that container into another container, such as a pallet or an export container.

3. Click Go.

The delivery lines assigned to the delivery are packed into containers.

4. Save your work.

Automated Packing

Automated Packing enables you to auto pack individual deliveries as needed, or concurrently during pick release. This helps avoid the process of invoking auto packing for individual deliveries. You can execute Automated Packing as needed using Auto-Pack Deliveries SRS or as a concurrent process along with the pick release process. If you specify LPN Name Generation defaults in the Organization Parameters, then these parameters are used for naming LPNs during automated packing.

The Auto-pack Report is printed automatically at the end of the Automated Packing procedure. Refer to the topic Auto-pack Report, page 12-4 for more information.

Prerequisites

A container-item relationship must be defined between the delivery line item and the container item. Refer to Setup Container-load Relationships for Containers and Items topic in the *Oracle Order Management Implementation Manual*.

To automatically execute Automated Packing during Pick Release:

1. Navigate to the Release Sales Orders for Picking window.
2. Query the specific sales order, or query the batch number.
3. Within the Inventory tab, enable Auto Pick Confirm by selecting Yes from the list of values.
4. Within the Shipping tab, enable Autocreate Deliveries by selecting Yes from the list of values.

Note: If the delivery lines are already assigned to a delivery, you must also select the Include Assigned Lines check box.

5. In the Autopack Delivery field, select either Yes (the system will auto pack the delivery lines), or Autopack Master (the system will pack the delivery lines into two levels of containers.)

6. Proceed with the remaining tasks to complete the release of your sales order.

Note: If you have defined a Release Rule with the parameter Autopack Delivery set to Yes or Autopack Master, then you can use your Release Rule when executing the Release Sales Orders SRS which will autopack your deliveries based on the rule.

To Auto Pack Deliveries using SRS:

1. Navigate to the Auto-Pack Deliveries SRS window.
2. Populate the following parameter fields as needed:
 - Auto Pack Level: Select the appropriate level (Auto-pack: packs items into containers, or Auto-pack Master: packs items into containers then packs those containers onto a master container such as a pallet or export container) from the list of values. This field is required.
 - Auto Pack Batch Prefix: Define a batch prefix to uniquely identify your request. Although this field is free form, it is required.
 - Organization: Optionally, select the organization.
 - Pick Release Batch: Optionally, select the Pick Release Batch name that contains the deliveries that you are packing.
 - Delivery Name (Low): Optionally, select the low end of delivery names, if you choose to auto pack based on a range of delivery names.
 - Delivery Name (High): Optionally, select the high end of delivery names, if you choose to auto pack based on a range of delivery names.
 - Bill of Lading (Low): Optionally, select the low end of bill of ladings, if you choose to auto pack based on a range of bill of ladings.
 - Bill of Lading (High): Optionally, select the high end of bill of ladings, if you choose to auto pack based on a range of bill of ladings.
 - Firm Status: Optionally, select from the LOV to indicate whether the deliveries scheduled for automated packing are: Not Firm, Contents Firm, or Routing and Contents Firm.
 - Ship From Location: Optionally, select a ship from location.
 - Ship To Location: Optionally, select a ship to location.

- Intermediate Ship To Location: Optionally, select an intermediate ship to location.
- Pooled Ship To Location: Optionally, select a pooled ship to location.
- Consignee/Customer Name: Optionally, select a consignee who is a customer or a supplier.
- Ship Method: Optionally, select a ship method.
- FOB: Optionally, select FOB terms.
- Freight Terms: Optionally, select freight terms.
- Pick-up Date (Low): Optionally, select the low end of a pick up date.
- Pick-up Date (High): Optionally, select the high end of a pick up date.
- Drop-off Date (Low): Optionally, select the low end of a drop off date.
- Drop-off Date (High): Optionally, select the high end of a drop off date.
- Log Level: Optionally, select log level for this run. This determines whether a debug file is created. Select zero for no debugging log, or one to create a debugging log.

Auto-Pack Deliveries SRS Window

The screenshot shows a window titled "Auto-Pack Deliveries SRS Window" with a sub-header "Parameters". The window contains a list of parameters, each with a corresponding input field. The parameters are: Auto Pack Level (with a dropdown arrow), Auto Pack Batch Prefix, Organization, Pick Release Batch, Delivery Name (Low), Delivery Name (High), Bill of Lading Number (Low), Bill of Lading Number (High), Firm Status, Ship From Location, Ship to Location, Intermediate Ship to Location, Pooled Ship to Location, Consignee/Customer Name, Ship Method, and FOB. At the bottom right of the window are four buttons: OK, Cancel, Clear, and Help. A vertical scrollbar is visible on the right side of the parameter list.

3. Click OK.

Related Topics

One Step Shipping, page 4-29

Releasing Sales Orders for Picking , page 7-16

Unpacking a Delivery Detail

You can unpack delivery line items if you want to modify the delivery lines assigned to a Packed delivery. Unpacking returns the delivery to the status it held prior to packing, and allows for changes.

Prerequisites

Delivery must be packed.

Contents must be Firm.

Delivery must be open.

To unpack a delivery detail:

1. Navigate to the Shipping Transactions form.
2. Find your delivery.
3. Click the Contents tab.
4. Select your Detail.
5. From the Actions menu, choose Unpack.
6. Click Go to unpack the delivery.
7. Save your work.

Calculating Weight and Volume for a Delivery

The weight and volume for a delivery is calculated automatically as shipping entities are processed using the default weight and volume of the item that is defined in the Master Item window. This calculation is done by multiplying the weight and quantity, and the volume and quantity.

When a new delivery detail (line) is created because of change in order line quantity, the system will retrieve the unit weight and volume from the existing delivery details (belonging to same order line) so that all delivery details belonging to same order line have the same unit weight and volume. When a delivery detail is created for a new order line, the system will retrieve the latest unit weight and volume from Inventory Master Item window.

You can manually enter weight and volume within the Shipping Transactions form for delivery lines, LPNs, deliveries, and stops.

The weight and volume of a delivery will automatically update whenever an action is executed that affects the weight or volume of a delivery. Also, the action Reset Weight/Vol will return the weight and volume values from the item master (the original values) for the entity level where it is invoked, as well as for any associated lower level entities. If the quantity of a delivery is changed at ship confirm, then the system will automatically recalculate the weight and volume for the delivery, unless the weight and volume information has already been entered manually.

A warning is displayed if any of the delivery details have a null weight or volume depending on the Percent Fill Basis parameter (on the Shipping Parameters window.) For example, if Percent Fill Basis is set to Weight and one of the delivery details has a null weight then the system will provide a warning at ship confirmation. It will not provide a warning if one of the delivery details has null volume, since Percent Fill Basis is set to Weight. If Percent Fill Basis is set to Quantity, then the system will not give a warning if one of the delivery details has null weight or volume. There is no warning if

any of the containers have null weight or volume.

When the weight, volume, and Fill Percentage for a delivery is calculated, Shipping Execution:

- Calculates the weight, volume, and fill percentage of each open delivery and adds the values to the delivery's current weight, volume, and fill percentage
- Validates that the maximum load weight, the maximum internal volume, and the maximum fill percentage are not exceeded
- Validates that minimum fill percentage requirements are attained
- Calculates (estimates) the number of containers for each delivery line based on container/load relationships and the master/detail container specified on the delivery line

You can enter weight and volume manually except under the following circumstances:

- The delivery status is In-Transit or Closed
- The stop is closed

Entering Weight and Volume

To manually enter weight and volume for a delivery:

1. Navigate to the Query Manager window, and find the delivery.
2. Click Detail.
3. Enter your weight and volume.
4. Save your work.

The Manual Wt/Vol check box is checked when you manually enter the weight and volume for a delivery. This check box will not be checked if the action Reset Weight/Vol is invoked.

Related Topics

Calculating Weight and Volume for a Trip Stop, page 3-10

Calculating Weight and Volume for Delivery Lines, page 5-14

Generating a Loading Sequence for Delivery Lines in a Delivery

The loading sequence defines the order in which the delivery lines are loaded into

containers. You can generate a loading sequence for delivery lines within a delivery by selecting the Generate Loading Sequence item from the Actions menu.

The loading sequence applies to the lowest level of packing (loading). For example, if a Detail container is specified for a delivery line, the loading sequence determines the order the item is loaded into the container. If a container is not specified, the loading sequence determines the order an item is placed in a vehicle.

If an item is loaded into a container first and then into a vehicle, a loading sequence of the items can only be reviewed through the vehicle load sheet. The vehicle load sheet prints the loading sequence in the correct order.

Prerequisites

The status of the delivery must be open.

The Lines Loading field (located on the Delivery tab of the Delivery Detail window) must be defined for the delivery. The Customer Production Sequence field (located in the Contents tab) must be defined for the delivery lines assigned to the delivery.

Note: You can manually define the Lines Loading in the Delivery tab. The Customer Production Sequence number can be defined in one of two ways: the number can be defined for the order line at the customer site and the order line can then be imported via Order Import, or you can define the number in the Others tab in the Sales Orders window.

You must assign containers to each of the delivery line items.

You must calculate the weight and volume of the delivery and/or trip.

The Volume and Weight Unit of Measure fields must be defined for the trip and/or delivery.

To generate a loading sequence for delivery lines in a delivery:

1. Navigate to the Delivery window.
2. Select the lines loading order to determine the order the delivery lines are placed in containers.
3. Click Done.
4. In the Deliveries tab, select Generate Loading Sequence from the Actions menu to generate a loading sequence for the delivery lines in the delivery.
5. Click Go.
6. Save your work.

Related Topics

Example of Loading Sequence Generation, page 4-20

Example of Loading Sequence Generation

Assume you have the following six delivery lines with unique production sequence numbers.

Production Sequence Number	Delivery Line
22	1
23	2
24	3
25	4
26	5
27	6

If each container can only hold 2 items, the following loading sequence will be generated for each given loading order.

Loading Order	Container 1	Container 1	Container 2	Container 2	Container 3	Container 3
Forward	1	2	3	4	5	6
Reverse	6	5	4	3	2	1
Forward Invert	2	1	4	3	6	5
Reverse Invert	5	6	3	4	1	2
Reverse	6	5	4	3	2	1

Printing a Document Set for a Delivery

You can print a group of shipping documents and other reports in a set for a delivery. For example, document sets can include pick release documents, all shipping documents, and packing slip information. Printing document sets can be executed from the Shipping Transactions form, the Release Sales Orders window, the Quick Ship window, and as part of several concurrent processes.

Any XML Publisher enabled Shipping document can also be included in a document set. Once included, the document is automatically printed with other documents in the document set. An XML Publisher enabled Shipping document enables the flexibility to define your own report layouts, include additional fields, and print the document in PDF format. See: XML Publisher Enabled Shipping Documents, page 12-3

To print a document set for a delivery:

1. Navigate to the Query Manager window, and find the delivery.

The delivery displays in the Shipping Transactions form.

2. Click Print Document Set.

The Document Sets window displays a list of document sets.

3. Select the document set and click OK.

The document set for the delivery is printed.

4. Save your work.

See Defining Shipping Document Sets, *Oracle Order Management Implementation Manual*

Related Topics

Using Quick Ship for Deliveries, page 4-31

Printing a Bill of Lading for a Delivery

Oracle Shipping Execution enables you to print a bill of lading for your deliveries. Bill of lading is available to print from the Shipping Transactions form, Quick Ship window, and as part of a document set.

Bill of lading is XML Publisher enabled and can be printed in PDF. An XML Publisher enabled Shipping document enables the flexibility to define your own report layouts, include additional fields, and print the document in PDF format. See: XML Publisher Enabled Shipping Documents, page 12-3.

To print a bill of lading for a delivery:

1. Navigate to the Query Manager window and find your delivery.
2. From the Actions menu, select Print BOL.
3. Click Go.

The bill of lading is printed.

Printing a Packing Slip for a Delivery

You print packing slips from the Quick Ship window, Shipping Transactions Form, or as part of a document set.

Packing Slip is XML Publisher enabled and can be printed in PDF. An XML Publisher enabled Shipping document enables the flexibility to define your own report layouts, include additional fields, and print the document in PDF format. See: XML Publisher Enabled Shipping Documents, page 12-3.

To print a packing slip for a delivery:

1. Navigate to the Query Manager window and find your delivery.
2. From the Actions menu, select Print Pack Slip.
3. Click Go.

The packing slip is printed.

Assigning Deliveries to a Trip

You can create a new delivery and assign it to a trip, or assign an existing delivery to a trip.

Note: When a delivery is manually or automatically assigned to a trip, the Shipping Transactions form creates a delivery leg. If a trip for the delivery is created during ship confirmation, a delivery leg is created using the sourcing warehouse as the initial pick-up and the ultimate destination as the drop off.

Prerequisites

Status for the trip must be Open.

Status for the Delivery must be Open.

To manually assign a delivery to a trip:

1. Navigate to the Query Manager window, and find the delivery.
2. From the Actions menu, select Assign to Trip to display the Assign Deliveries to Trip window.

Assign Deliveries to Trip Window

Assign Deliveries to Trip

Trip 5549

Pick-up Stop

☐ New

Location

Planned Arrival Date

Planned Departure Date

Stop Sequence Number

Drop-off Stop

☐ New

Location

Planned Arrival Date

Planned Departure Date

Stop Sequence Number

OK Cancel

3. Select the trip name that you want the delivery assigned to.

You can add a new pick up and drop-off stop for the delivery, or alternately, select an existing pick up and drop-off stop associated with the trip.

- To assign the delivery to a new stop: In the Pick-up Stop region, enable the New box if you want to add a new pick up stop. In the Drop-off region, enable the New box if you want to add a new drop off stop. Select the location, arrival date, and departure date for each stop.

Note: You can assign deliveries to stops that are in Open or Arrived status. You cannot assign deliveries to stops that are in Closed status.

- Alternately, to assign the delivery to an existing stop: Select the location for the

pick up stop and the drop off stop. The default departure and arrival dates for each stop location are automatically selected.

4. Click OK and save your work.

You use the Process Deliveries SRS program to automatically assign deliveries to trips.

Related Topics

Process Deliveries SRS, page 12-28

Assigning Freight Costs to a Delivery

You can assign freight costs to a specific delivery, or update existing freight costs. For example, if you want to add additional costs to a particular delivery of goods. Freight cost can also be assigned to a delivery detail, a container, a stop, or a trip.

To assign freight costs to a delivery:

1. Navigate to the Query Manager window or Quick Ship window and find the delivery.
2. From the Actions menu, select Assign Freight Costs.
3. Click Go.

Freight Costs Window

Delivery 1456165

Freight Costs

Name	Type	Trip	Currency Code	Amount
...				

Sub Total 0 USD

Summary Freight Cost From Other Levels

Delivery Line 20 USD

LPN 0 USD

Total Freight Cost 20 USD

Done

4. Enter, or select from the list of values, the Freight Cost Name.
5. Enter a Currency Code, or accept the default.
6. Enter an Amount, or accept the default.
7. Optionally, select a Conversion Type, Conversion Date, and Conversion Rate.
8. Click Done to save your work.

Note: Freight cost Name and freight cost Type uniquely identify a freight cost charge. If freight costs are manually entered, then the Trip field in the Freight Costs region is null.

The Order Management Interface concurrent process transfers the carrier freight costs to the sales order for invoicing if a price modifier is properly defined to pass freight cost. For more information, refer to the *Oracle Order Management Implementation Manual*.

Freight Rate Recalculation Actions

To recalculate freight rates:

- Ship confirm and close the pick up stop

To view freight costs:

1. Navigate to the Query Manager window and find the delivery.
2. In the Actions menu, select Assign Freight Costs.
3. Click Go.
4. View the freight cost information as needed.

Related Topics

To assign freight costs to a delivery, page 4-24

Unassigning a Delivery from a Trip

You can unassign a delivery from a trip. For example, if you wanted to reassign a delivery that was already assigned to a trip, you could reassign it from one trip and assign it to another.

Prerequisites

Trip status for the delivery you want to unassign must be Open.

Delivery status must be Open.

To unassign a delivery from a trip:

1. Navigate to the Query Manager, and find the delivery you want to unassign.
2. From the Actions menu, select Unassign from Trip.
3. Click Go to unassign the delivery from the trip.
4. Save your work.

Closing a Delivery

A delivery is status Closed after you have successfully ship confirmed the delivery. You can close an Open or Contents Firm delivery.

Note: Once a delivery is Closed, no further actions can be performed on

the delivery.

Related Topics

Overview of Ship Confirm, page 8-1.

Firming a Delivery

You can firm a delivery once delivery lines have been assigned to the delivery. Firming a delivery prevents changes from being made to the delivery. To make changes to a firm delivery, you must unfirm it first and then make the required changes.

Prerequisites

At least one delivery line must be assigned to the delivery.

Delivery status must be Open.

To firm a delivery:

1. Navigate to the Query Manager window, and find the delivery.
2. From the Actions menu, select Firm Contents or Firm Routing and Contents.
3. Click Go.
4. Save your work.

Related Topics

Unfirming a Delivery, page 3-6

Unfirming a Delivery

You can unfirm the contents of a delivery to unassign delivery lines. When you unfirm a delivery, Shipping Execution Sets the status of the delivery to Open.

Note: All delivery lines remain assigned when you unfirm a delivery.

Prerequisites

The delivery cannot be Closed or Cancelled.

To unfirm a delivery:

1. Navigate to the Query Manager window, and find the delivery.
2. From the Actions menu, select Unfirm.
3. Click Go.
4. Save your work.

Related Topics

Firming a Delivery, page 3-5

Reopening a Delivery

You can reopen a confirmed delivery to modify details for the delivery. You can modify and ship confirm the delivery.

Prerequisites

The delivery must not be Closed or Intransit.

To re-open a delivery:

1. Navigate to the Query Manager window and find the delivery.
2. From the Actions menu, select Re-open.
3. Click Go.
4. Save your work.

Delivery Workflow Status

With the use of Oracle Workflow, Oracle Shipping Execution enables you to view the status of delivery specific workflows through the Shipping Transactions form or the Quick Ship window.

The Workflow Monitor is used to graphically display the status of the workflow associated with the delivery.

Delivery workflow must be enabled in Global and Shipping parameters.

Viewing Delivery Workflow Status

To view the workflow status of a delivery:

1. Navigate to the Shipping Transactions form.
2. Find your delivery.
3. From the Tools menu, select Workflow status.

Related Topics

Workflow Status, page 10-4

Purging Deliveries

Oracle Shipping Execution enables you to purge (permanently delete) delivery records from the Oracle Shipping Execution tables as long as specific criteria is met. All associated delivery lines and LPNs must be eligible for purge in order for deliveries to be eligible for purge.

All information associated with the purged entities is also purged, for example freight costs, weight and volume, dates, and exceptions.

Related Topics

Shipping Purge Concurrent Process, page 12-31

One Step Shipping

One step shipping is the process of picking, optionally packing, and ship confirming delivery lines in one step. Utilizing the Actions named Pick and Ship, and Pick, Pack, and Ship, within the Shipping Transactions form, Deliveries tab and Delivery Lines tab, enables this functionality. The two actions can be utilized depending on your business needs.

- **Pick and Ship:** This action can be used for one or more deliveries or delivery lines. Pick and Ship will perform the following:
 - Auto create deliveries if deliveries are not associated with all or some of the lines.
 - Launch Pick Release and pick confirm all lines assigned to the deliveries (auto-created as well as manually created.)

- Ship confirm all deliveries if all assigned lines have a line status of Staged/Pick Confirmed and do not require any additional actions such as serial numbers or other inventory controls. Pick and Ship utilizes Actual Departure Date: System date and Create Bill of Lading: Yes

Note: The ship confirm options are used from the default auto ship confirm rule specified in the shipping parameter for the organization.

- Auto create trips if manually created trips/stops are not associated with any or all of the deliveries
- Close auto created or manually created trips
- Perform all other shipping functions that are performed during ship confirm and trip closing, for example executing interfaces

Note: If as part of Pick, Pack, and Ship process, all delivery lines of a delivery cannot be released resulting in a status of staged/pick confirmed, the entire delivery will not be ship confirmed as part of the automated process. Deliveries that require additional input from you, such as inventory controls, will not be ship confirmed.

- Pick, Pack, and Ship: This action can be used for one or more deliveries or delivery lines.

Pick, Pack, and Ship will perform the following:

Note: For Pack to occur, you must setup a container-item relationship between the delivery lines item and the container item. For packing items into containers, then containers into containers, you must setup container-item relationships from container to container. For more information on container-item relationships, refer to the *Oracle Order Management Implementation Manual*.

- Auto create deliveries if deliveries are not associated with all or some of the lines.
- Launch Pick Release and pick confirm all lines assigned to the deliveries (auto-created as well as manually created.)
- Auto pack all delivery lines with a status of Staged/Pick Confirmed, and all deliveries with a status of Open.

- Ship confirm all deliveries that have all line status of Staged and do not require any additional actions such as serial numbers. Pick, Pack, and Ship utilizes the following ship confirm options:

Actual Departure Date: System date

Defer Interface: No

Note: The ship confirm options are used from the default auto ship confirm rule specified in the shipping parameter for the organization.

- Auto create trips if manually created trips/stops are not associated with any or all of the deliveries
- Close auto created or manually created trips
- Perform all other shipping functions that are performed during ship confirm and trip closing, for example executing interfaces

Note: If as part of Pick and Ship process, all the delivery lines of a delivery cannot be released resulting in a status of staged/pick confirmed, the entire delivery will not be ship confirmed as part of the automated process.

Delivery details that require additional information, such as inventory controls, from you will not be ship confirmed.

Using Quick Ship for Deliveries

The Quick Ship window enables you to process shipments quickly, using the minimum shipping requirements with the benefit of configurability. You can access deliveries and perform several actions within the Quick Ship window.

Related Topics

Quick Ship Window, page 1-5

Locating and Confirming Quick Ship Deliveries, page 4-31

Locating and Confirming Quick Ship Deliveries

You locate deliveries using the Quick Ship or Query Manager windows.

To find a delivery:

1. Navigate to the Quick Ship window.
2. Ensure that the window view is set to Delivery Confirm View, page 1-6.
3. With the cursor in the delivery Name field, press F11 or select Find from the View menu.

There are several ways to find deliveries in the Quick Ship window:

- The Find icon
- The LOV for the Delivery Name
- Enter the Delivery Name and press [Tab]

Find Deliveries Window

The screenshot shows the 'Find Deliveries' window with the following sections:

- Deliveries:** Fields for Delivery Name (with a dropdown icon), Bills of Lading, Pick-Up Date, Drop-Off Date, Status (dropdown), Organization (two input fields), Ship from, Consignee, Intermediate Ship to, Pooled Ship to, Planned (dropdown), Assigned (dropdown), Ship Method, Ship to, FOB, and Freight Terms.
- Lines:** Fields for Source System (dropdown), Order Type, and Order Number.
- Batches:** Fields for Auto Ship Confirm, Pick Release, and Auto-pack.

At the bottom right, there are 'Clear' and 'Find' buttons.

4. Enter your search criteria.
5. Click Find.

To confirm a delivery using the Quick Ship window:

1. Navigate to the Quick Ship window.
2. Ensure that the window view is set to Delivery Confirm View, page 1-6.
3. Within the Deliveries region, enter or find the delivery Name.
4. Verify all data in the header fields and update as necessary.

Quick Ship Window

The screenshot shows the 'Quick Ship Window' with a title bar 'Quick Ship-Delivery Confirm View - Delivery'. The window is divided into two main sections: 'Delivery' and 'Trip'. The 'Delivery' section contains fields for Name, Status (Open), Firm Status (Not Firm), Initial Ship from, Initial Pick-Up Date, Consignee, Ultimate Ship to, Freight Terms, Bill of Lading, Ship Confirm Rule, Ship Method, Num of LPNs, Net Weight, Tare Weight, and Gross Weight. The 'Trip' section contains fields for Name, Status (Open), Firm Status (Not Firm), Vehicle Org Code, Vehicle Item Name, Vehicle Num Prefix, and Vehicle Number. Below these sections is a table titled 'Delivery Lines/LPNs' with columns: Detail, LPN, Item Name, Delivery, Line Status, Next Step, Exceptions, Order, Requested Qty, and Shipper. The table has several rows, with the first row showing 'Not Applicable' in the Next Step column. At the bottom of the window is a toolbar with buttons: Freight Cost, Serial Numbers, Reset Wt Vol, Print Pack Slip, Print BOL, Print Document Set, and Ship Confirm.

Any of the following actions can be executed by clicking the appropriate button at the bottom of the window, or by right-clicking and selecting the action from that menu:

- Assign Freight Costs, page 4-24
- Serial Numbers, page 8-23
- Reset Weight and Volume, page 3-10
- Print Packing Slip, page 12-14
- Print Bill of Lading (BOL), page 12-8
- Print Document Set, page 3-10
- Ship Confirm, page 8-1

5. Click the action to be performed.

Note: When you click Ship Confirm from the Quick Ship window, the Confirm Delivery window will display by default. If a Ship Confirm Rule is selected or defaulted however, the Ship Confirm window will not be displayed and the ship confirm options will default from the selected rule, unless the folder option Show Ship Confirm Options is selected and the folder is enabled.

XML Transactions

Oracle Shipping Execution enables the communication of information with external sources outside of the Oracle E-Business Suite and internal sources outside of Oracle Shipping Execution through the use of XML (Extensible Markup Language). Oracle XML Gateway must be installed and configured before using XML with Oracle Shipping Execution. Oracle Shipping Execution uses XML transactions in many shipping processes such as carrier manifesting (shipment request and shipment advice).

See Appendix B, Electronic Messaging, page B-1, for more information on XML transactions with Oracle Shipping Execution.

Managing Delivery Lines

This chapter covers the following topics:

- Overview of Delivery Lines
- Viewing the Status of a Delivery Line
- Delivery Line Statuses
- Viewing Delivery Line Status
- Splitting Delivery Lines
- Transferring Delivery Lines to Cycle Counting
- Assigning Delivery Lines to a Delivery
- Unassigning Delivery Lines from a Delivery
- Auto-creating Deliveries for Delivery Lines
- Auto-creating a Trip for Delivery Lines
- Purging Delivery Lines
- Assigning Freight Costs to Delivery Lines
- Calculating Weight and Volume for Delivery Lines
- Pick Releasing Delivery Lines from the Shipping Transactions Form
- Managing Sales Order Changes

Overview of Delivery Lines

A booked order line that is eligible to be shipped can be viewed as a delivery line in the Shipping Transactions form. Delivery lines with common attributes such as Ship From and Ship To addresses can be grouped together as a delivery. Delivery lines from different sales orders can be grouped together as a single delivery.

You can manage the following tasks for delivery lines:

- View status of a delivery line, page 5-3
- Split delivery lines, page 5-7
- Transfer delivery lines to cycle counting, page 5-8
- Assign delivery lines to a delivery, page 5-10
- Unassign delivery lines from a delivery, page 4-26
- Auto-create deliveries for delivery lines, page 5-11
- Auto-create a trip for delivery lines, page 5-12
- Assign freight costs to delivery lines, page 5-13
- Calculate weight and volume for delivery lines, page 5-14
- Pick release delivery lines, page 5-14
- Manage sales order changes, page 5-14

Note: The Line/LPN, Inventory Details, and Source regions on the Line window include dual unit of measure, grade, and lot process fields. If the OPM item is dual UOM controlled, lot controlled, and has a grade, then you will see values in these fields. Otherwise, these fields will be blank. Refer to *Using Oracle Order Management with Process Inventory* for description of process fields.

The application does not allow the following actions for delivery lines, if you have set Fulfillment Batch as the value for WSH: Distributed Source Entity profile option:

- Auto-create deliveries
- Assign to delivery
- Auto-create trip
- Auto-pack
- Auto-pack master
- Launch pick release
- Pack
- Unpack

- Packing workbench
- Pick and ship
- Pick, pack, and ship
- Cycle count

Viewing the Status of a Delivery Line

The released status of a delivery line identifies its progress through the shipping process. A typical shipping process includes the following stages: orders are entered, booked, scheduled, and the delivery detail goes to Ready to Release status where the next step is pick release. Then the order is pick released, and the delivery detail goes to either staged/pick confirmed status or to released to warehouse. You can view released status in the:

- Oracle Shipping Execution Shipping Transactions window and the Quick Ship window
- Oracle Order Management Orders window, Actions button, Additional Line information, Deliveries tabbed region

Delivery Line Statuses

Not Applicable

The delivery line is invoicable but non-shippable, for example, a service line or a warranty line.

Not Ready to Release

The delivery line is not eligible for pick release.

Occurs when the order line is manually imported into Oracle Shipping Execution using the Import Delivery Line concurrent process. It has not reached the Awaiting Shipping workflow activity. It is not scheduled and has no reservations.

Ready to Release

The delivery line is eligible for pick release.

Occurs when the order line has reached the Awaiting Shipping workflow activity (it is booked, scheduled, and in Oracle Shipping Execution).

Note: Only lines that are in Ready to Release status will be considered for Pick and Ship and Pick, Pack, and Ship processes.

Released to Warehouse

Pick release has processed the delivery line and has:

- Created move order headers and lines.
- Found available quantity and created inventory allocations.
- Not pick confirmed. If you want to progress the delivery lines, navigate to Oracle Inventory Move Order Transaction window and perform manual pick confirm.

Planned for Crossdocking

Crossdocking in Oracle Warehouse Management refers to the use of inbound receipts to satisfy outbound demands. Planned crossdocking occurs during pick release when Oracle Warehouse Management uses release sequence rules to sequence demand sources, and fulfills the demand based on the allocation method specified during pick release. When you run pick release, the system uses the allocation method to determine whether crossdock should be planned. A delivery line in *Planned for Crossdocking* status indicates that a crossdock supply has been identified and the delivery line has been pick released. For more information, see the *Oracle Warehouse Management User's Guide*, Oracle Warehouse Management Crossdocking.

Note: The crossdocking feature is valid only for Oracle Warehouse Management-enabled organizations.

Staged/Pick Confirmed

The delivery line is pick confirmed; inventory is transferred from storage sub inventory to staging sub inventory. Oracle Order Management's Line Item tab shows the status as Picked.

It remains staged until ship confirm.

Backordered

Any of the following circumstances will cause this delivery line status to occur:

- Pick release has processed the delivery line and cannot find the entire quantity.

This typically occurs when the inventory balance indicates that there is not enough material (either because there is not enough material or because the inventory

balance is incorrect).

- At ship confirm, you:
 - Enter Shipped Quantity that is less than original Requested Quantity
 - Back order the entire delivery quantity
 - Transfer a reservation to cycle count

This typically occurs when the material that you want to ship:

- Has become unavailable, for example, damaged between picking and shipping.
- Is not available. There is a discrepancy between the actual quantity and the system quantity. The discrepant quantities are moved to cycle count and the remainder ship.

Shipped

The delivery line is ship confirmed and posted as intransit, interface to Oracle Order Management and Oracle Inventory has not completed, or has been deferred.

Interfaced

Delivery sourced from Oracle Order Management: The delivery line is shipped and the OM Interface and Inventory Interface concurrent processes have completed.

Delivery sourced from all other Oracle Applications: The delivery line is shipped and the Inventory Interface concurrent process has completed.

Cancelled

The sales order line that the delivery line supports is cancelled.

Replenishment Requested

Forward pick replenishment is an important activity in a warehouse. By replenishing a forward pick area, a distribution center disaggregates material stored in a reserve or bulk area and moves it to a pick area that is optimized for unite picking. Replenishment to a forward pick area allows a distribution center to reap the benefits of bulk procurement and optimized storage in a reserve area as well as optimized picking for order profiles with smaller quantities. The replenishment types are available:

- Pull Replenishment: A replenishment suggestion is auto-created as soon as a shortfall is detected during the order release process. This type of replenishment is useful for items with high uniform demand in forward pick areas.

- **Push Replenishment:** Using push replenishment, the aggregated future demand for an item is replenished to a forward pick area for future picking activity. This type of replenishment is useful for items with irregular demand in a forward pick area.
- **Dynamic Execution:** Dynamic execution orchestrates the warehouse tasks in such a way that a pick task to a forward pick area will be dispatched only when replenishment has been completed. Similarly a replenishment task will be dispatched only when a forward pick area has enough capacity to receive the replenished material.

If the quantity is not available in the correct pick unit of measure, instead of backordering the quantity, the delivery lines are assigned a status of *Replenishment Requested*.

- Supports the Forward Pick Replenishment feature in Oracle Warehouse Management System (WMS).
- The Replenishment Requested status is assigned only when *Pull* or *Push* replenishment is initiated.

Replenishment Completed

The warehouse management system changes the status of delivery detail lines from *Replenishment Requested* to *Replenishment Completed* after Oracle Warehouse Management releases the tasks that are associated with the replenishment requested delivery lines.

Note: Supports the Forward Pick Replenishment feature in Oracle Warehouse Management System (WMS).

Related Topics

Oracle Warehouse Management User's Guide, Dynamic Replenishment

Viewing Delivery Line Status

To view the status of a delivery line:

1. Navigate to the Query Manager window, and find the delivery lines.
2. Find the column named Line Status to see the status of the delivery line, or select the line and click Detail to display the line details and the Line Status field.
3. Click Done.

4. If the delivery line is for a contract deliverable from Oracle Project Contracts:
 - Navigate: Tools > Show Contract Details.
 - View the contract details on the web page that displays.

Project Contracts Screen - View a Contract

ORACLE
Project Contracts

Return to Portal Logout Preferences Help

View a Contract

Contract Number SA-010402-1

Header Information

Contract Number	SA-010402-1	Contract Type	Award
Contract Status	Entered	Description	

System Attributes

Customer Quality Acceptance Required?	Yes	Export Required?	Yes
Prime Contract Alias	PC	Prime Contract Number	PC0987650

Terms & Conditions

Previous 1-1 of 1 Next

Name	Value
Outbound FOB	Destination

Articles

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Splitting Delivery Lines

You split delivery lines under various situations. You might split a delivery line to accommodate packing requirements, or when a backorder occurs.

To split delivery lines:

1. Navigate to the Query Manager window, and find the delivery line(s) you want to split.
2. Select the delivery line you want to split.
3. From the Actions menu, select Split Line.
4. Click Go. The Original Quantity displays the line quantity.

Split Delivery Line Window

The screenshot shows a window titled "Split Delivery Line". Inside, there are two panels. The "Primary" panel on the left contains three input fields: "Original Quantity" (containing the number 2), "Quantity to Split", and "UOM" (containing the text "Ea"). The "Secondary" panel on the right contains three empty input fields: "Original Quantity", "Quantity to Split", and "UOM". At the bottom right of the window are two buttons labeled "OK" and "Cancel".

5. Enter the quantity you want to split.

For example, if you split 9 items from a line consisting of 10 items, two delivery lines would result: one line with one item, and the second line with nine items.

6. Click OK.

The delivery lines are split into two lines.

7. Save your work.

Note: When you split a staged delivery detail and when fulfillment base of the order line is secondary, the application checks for deviation not only in the new detail being created, but also on the quantities remaining on the original detail. If the quantities on original detail do not meet deviation, then the application displays an error message saying that the remaining quantity is higher than the allowed deviation for the item. You must reenter the quantity. For information regarding fulfillment base of the line, see *Defining Sales Order Line Shipping Information, Oracle Order Management User's Guide*.

Transferring Delivery Lines to Cycle Counting

You can transfer delivery lines to cycle counting to manage inventory discrepancies.

If you back order a line with an inventory discrepancy, the backorder removes the reservation so that the quantity of the backorder remains available until you perform an inventory adjustment to correct it. The unavailable item could be pick released again before you perform the inventory adjustment transaction, unnecessarily sending pickers to retrieve it.

If the reservation for the unavailable quantity is moved to cycle count, however, it is not available for pick release and the inventory control staff can correct the discrepancy on the next cycle count.

By specifying a quantity for cycle counting in the Shipping Transactions form, you create a back order for the entire quantity or for a partial quantity of the delivery line. The Shipping Transactions form transfers the reservation for the back ordered quantity to cycle counting.

For example, you are processing a staged delivery line with quantity 10. If you use the transfer cycle count functionality with this delivery line and specify two, the transfer cycle count functionality:

- Splits the delivery line into two delivery lines, one with quantity eight and one with quantity two.
- Leaves the delivery line with quantity eight as staged.
- Back orders the delivery line with quantity two and transfers its reservation to cycle counting.

If you use the transfer cycle count functionality with this delivery line and specify 10, the transfer cycle count functionality back orders the entire delivery line and transfers its reservation to cycle counting.

To use this functionality, you must have security privilege Cycle Count Delivery Line. This security privilege appears on the Shipping Execution Role Definition form, Lines/LPNs tabbed region. See: *Oracle Order Management Implementation Manual*, Shipping Execution Setup chapter.

To view the reservation, use the Oracle Inventory Item Reservations form. Query the reservations for the organization and item number of the delivery and select the demand source as Cycle Count. The connection between the delivery line and the reservation is the item number. See: *Oracle Inventory User's Guide*.

You can also transfer delivery quantities to cycle counting during ship confirm by specifying:

- Cycle count the entire quantity
- Cycle count unspecified quantities

To transfer delivery lines to cycle counting:

1. Navigate to the Query Manager window, and find the delivery line that you want to transfer to cycle counting.
2. From the Actions menu, select Cycle Count.
3. Click Go.

Transfer to Cycle Count Window

Transfer to Cycle Count

Primary

Original Quantity

Quantity to Cycle Count

UOM

Secondary

Original Quantity

Quantity to Cycle Count

UOM

OK Cancel

4. In the Primary region:
 - In Original Quantity and UOM, verify the delivery line quantity and item unit of measure
 - In Quantity to Cycle Count, enter the quantity that you want transferred to cycle counting.

Note: The Secondary region is used by Oracle Process Manufacturing.

5. Click OK.
6. Save your work.

Assigning Delivery Lines to a Delivery

You can assign delivery lines to an existing delivery.

Prerequisites

The delivery lines cannot be assigned to an existing delivery.

To assign delivery lines to a delivery:

1. Navigate to the Query Manager window, and find the delivery lines.
2. Select the delivery lines you want to assign.
3. From the Actions menu, select Assign to Delivery.

4. Click Go to display the Deliveries window.
5. Select the delivery to which you want to assign the delivery lines.
The delivery lines are assigned to the selected delivery.
6. Save your work.

Unassigning Delivery Lines from a Delivery

You can unassign selected delivery lines from a delivery.

Prerequisites

The delivery lines must be assigned to an existing delivery.

To unassign delivery lines from a delivery:

1. Navigate to the Query Manager window, and find the delivery lines.
2. Select the delivery lines that you want to unassign from the delivery.
3. From the Actions menu, select Unassign from Delivery.
The line is unassigned from the delivery.
4. Save your work.

Auto-creating Deliveries for Delivery Lines

During Pick Release, you can automatically create deliveries for delivery lines that have been successfully released for shipment. Lines are grouped onto deliveries based on the grouping attributes specified in the Shipping Parameters window.

To auto-create deliveries for delivery lines:

1. Navigate to the Query Manager window, and find the delivery lines.
2. Multi-select the delivery lines for which you want to create a delivery.
3. From the Actions menu, select Auto-create Deliveries.
4. Click Go.

The deliveries are created for the selected lines based on the delivery grouping rules set up in the Shipping Parameters window.

5. Save your work.

Note: You can autocreate deliveries during pick release by setting the Autocreate Delivery option to Yes within the Shipping tab of the Release Sales Orders for Picking window or by specifying a Release Rule that has the Autocreate Delivery option set to Yes.

Auto-creating a Trip for Delivery Lines

You can automatically create trips for delivery lines that have not been assigned to an existing delivery or trip. Auto-creating trips automatically creates a trip, stops, deliveries, and delivery legs for selected delivery lines.

Prerequisites

The delivery lines cannot be assigned to an existing delivery or trip.

To auto-create a trip for delivery lines:

1. Navigate to the Query Manager window, and find the delivery lines.
2. Select the delivery lines for which you want to create a trip.
3. From the Actions menu, select Auto-create Trip.
4. Click Go.

Trips are created for the selected delivery lines based on the delivery grouping rules defined in the Shipping Parameters window. You can view the trip name that has been created for the delivery lines in the Path by Stop tab in the Shipping Transactions form.

5. Save your work.

Purging Delivery Lines

Oracle Shipping Execution enables you to purge (permanently delete) delivery lines from the Oracle Shipping Execution tables.

All information associated with the purged entities is also purged, for example freight costs, weight and volume, dates, and exceptions.

The following list identifies the limitations when purging delivery lines:

- The parent sales order or purchase order must either be purged and not have any open activities, such as invoices.

- To purge delivery lines, the status must be Interfaced, Canceled, or Closed. In the case of inbound delivery lines, Canceled delivery lines cannot be purged because the status can be reversed.

Related Topics

Shipping Purge Concurrent Process, page 12-31

Assigning Freight Costs to Delivery Lines

Freight costs are shipment-related costs such as freight, insurance, duty fee, special handling, or priority service. You can assign freight costs to delivery lines at any time even after ship confirmation. However, costs assigned after ship confirmation are not passed as freight costs to Order Management; instead, they are stored in the shipping system for future reference.

Although freight costs can be defined in any currency, only the currency that is defined for the operating unit is displayed. When costs are passed to Order Management, the currency is converted to the order header currency.

If you want to pass freight costs entered in the Shipping Transactions form to Oracle Order Management for invoicing, then you have to set up a pricing modifier. Refer to the latest version of *Oracle Order Management Implementation Manual* for more information about Freight and Special Charges.

To assign freight costs to a delivery line:

1. Navigate to the Query Manager window, and find the delivery line.
2. Select your delivery line, then select Assign Freight Costs from the Actions menu.
3. Click Go.

The Freight Costs window appears. In this window, you enter the freight cost for the delivery line.

4. Enter the Name, Type, Currency Code, Amount, and Conversion Type, and Creation Date.
5. Click Done.

At ship confirmation, the freight cost is applied. If a pricing modifier was set up, then the information is interfaced to Oracle Order Management.

6. Save your work.

See Defining Freight Costs, *Oracle Order Management Implementation Manual*

Calculating Weight and Volume for Delivery Lines

You can calculate the weight and volume for selected delivery lines.

When a new delivery detail (line) is created because of change in order line quantity, the system will retrieve the unit weight and volume from the existing delivery details (belonging to same order line) so that all delivery details belonging to same order line have the same unit weight and volume. When a delivery detail is created for a new order line, the system will retrieve the latest unit weight and volume from Inventory Master Item window.

Related Topics

Calculating Weight and Volume for a Delivery, page 4-17

Calculating Weight and Volume for a Trip Stop, page 3-10

Pick Releasing Delivery Lines from the Shipping Transactions Form

During pick release, delivery lines are released to the warehouse for picking based on the Pick Release and shipping criteria. In addition to pick releasing by trip, delivery, and container, you can also pick release by delivery lines. If the stop and delivery are not specified, only lines that are not assigned to the delivery are selected for release. If stop and delivery are specified, all selected lines meeting the release criteria, whether they are assigned to a delivery or not, are released.

To pick release delivery lines:

1. Navigate to the Query Manager window, and find the delivery lines.
2. Select the delivery lines you want to pick release.
3. From the Actions menu, select Launch Pick Release.
4. Click Go.

The selected delivery lines are pick released and the Messages box displays if the pick release was successful or failed.

Related Topics

Overview of Pick Release, page 7-1.

Managing Sales Order Changes

Changes to sales orders affect Oracle Shipping Execution if the order is booked. Since

delivery details exist, they must remain coordinated with the sales order lines.

Oracle Shipping Execution evaluates the delivery details every time there are any of the following sales order line updates:

- Split
- Change quantity
- Change schedule
- Change schedule date
- Change ship set
- Change delivery group
- Changes resulting from automatic end item substitution initiated by:
 - Planner Workbench actions in Oracle Advanced Supply Chain Planning
 - Scheduling or rescheduling actions from Oracle Order Management
 - Automatic end item substitution can be done until the status of the order line is *Pick Release*.
 - Item changes are restricted for ship sets, pick-to-order (PTO), and assemble-to-order (ATO) processes.

In general, Oracle Shipping Execution honors sales order line changes as long as their delivery lines are not:

- Shipped or in a confirmed delivery
- In Warehouse Management organizations and require unpacking or unassignment from delivery

Changing Delivery Line Item

Item changes initiated from Oracle Order Management are updated in Oracle Shipping Execution until the status of the order line is *picked*. Oracle Shipping Execution evaluates the status of the delivery details to ensure that the item change is acceptable and then updates the item on the delivery detail. Item attributes such as Description, Pickable flag, Weight/Volume UOM codes, Unit Weight/Volume and Hazard Classification are also updated. Shipping also completes weight and volume changes for the item change.

Additional Considerations:

- If the delivery detail is required by Oracle Transportation Management (OTM), then the corresponding delivery will be identified as *Update Required* so that it can re-sent to OTM for planning. Shipping will update any existing reservations for the order line from the old item to the new item.
- If the primary UOM of the new item is different than the primary UOM of the old item, then the item change is not allowed and an error message will be displayed.
- If the line belongs to a warehouse that is either third party warehouse (TPW) or carrier manifesting enabled in the Organization parameters and the delivery status is either Shipment Requested or Shipment Advice Received, then the item change is not allowed.
- If there is an item change and if either the old organization or the new organization (if organization is also changed as part of item substitution) is an OPM organization, then the update is not allowed.
- If any detail exists that is packed into a container, then the update is not allowed.

Note: Item changes are restricted for ship sets/ ship model complete and assemble-to-order (ATOs), and pick-to-order (PTOs).

Split

Oracle Shipping Execution performs as follows during an order line split:

- Disallows the order line to split if any delivery line is shipped or in a confirmed delivery.
- Sequences the delivery details by their released status in the following order: Shipped, Staged/Pick Confirmed, Ready to Release, Not Ready to Release, Backordered, and Released to Warehouse, and attempts to fulfill the sales order split line quantity by using them one-by-one.
- If an existing delivery line Requested Quantity can fulfill or partially fulfill the remaining split order line quantity, then the delivery line is assigned the quantity from the split sales order line.
- If an existing delivery line Requested Quantity is too large to fulfill the split order line quantity, then the split the delivery and assign the split delivery to the split order line. Carry serial numbers with the split delivery details.
- Retain reservations with inventory controls; randomly assign the others to the new delivery details.

- Change delivery lines with status Released to Warehouse to status Ready to Release, cancel their move order lines, and recreate reservations for them.

Change Quantity

Oracle Shipping Execution performs as follows during an order line change quantity. Change quantity is a change in the ordered quantity:

1. Sequence the delivery details by packed status in the order Not packed, Packed.
2. Then, sequence the delivery details by firm status in the order Not Firm, Contents Firm, or Routing and Contents Firm.
3. Then, sequence the delivery details by released status in the order Ready to Release, Not Applicable, Backordered, Released to Warehouse, Staged/Pick Confirmed.

Increased quantity

Oracle Shipping Execution performs as follows during an increase to the delivery line quantity:

- Attempt to increase the delivery detail Requested Quantity of the first delivery detail. For this to succeed, the detail must be unassigned or the delivery must be open, the delivery line must not be packed in a container, and released status must be Not Ready to Released or Ready to Released.
- Otherwise, create a new delivery detail.
- Do not modify reservations. You can create a manual reservation for the quantity.

Note: If the order line quantity is increased, you will have to manually create the extra reservations.

Decreased quantity

Oracle Shipping Execution performs as follows during a decrease to the delivery line quantity:

- Decrease the Requested Quantity of delivery details one-by-one but skip delivery details with delivery status Confirmed, Closed, In transit.
- Refuse the reduction if there are not enough eligible lines to meet the decreased quantity.
- If the delivery line released status is Released to Warehouse, Oracle Inventory adjusts reservation quantity during pick confirm. For all other delivery line released statuses, Oracle Shipping Execution reduces the reservation quantity.

- Logs an exception for any lines that are staged, part of a firm delivery, or packed inside a container.

Note: If the order line quantity is decreased, you will have to manually change the reservation.

Change Schedule

Change schedule is:

- A change in ship-from organization
- A change in subinventory
- Uncheduling a line

Subinventory

Oracle Shipping Execution performs as follows during a sub inventory change:

- Changes sub inventory if status is Not Ready to Release or Ready to Release.
- Does not change sub inventory if status is Released to Warehouse or Staged/Pick Confirmed. Pick confirm can change the sub inventory.

Ship-from organization and unscheduling

Oracle Shipping Execution performs as follows during a ship-from organization and unscheduling change:

- If no allocations were created:
 - Delete the move order line.
 - Set the status to Ready to Release.
- If allocations were created, and the line is not pick confirmed:
 - Cancel the move order line.
 - Clear the inventory control information. Leave sub inventory information if delivery detail is Released to Warehouse.
 - Delete and recreate the reservation for the new subinventory.
 - Set the status to Ready to Release.

- Pick confirmation is completed:
 - Clear the inventory control information. Leave sub inventory information if delivery detail is Released to Warehouse or Staged/Pick Confirmed.
 - Delete and recreate the reservation for the new subinventory.
 - Set the status to Ready to Release.
 - Log an exception.
 - Unassign from container and delivery.

Change Scheduled Date

Oracle Shipping Execution performs as follows during an order line change scheduled date. Change scheduled date is a change in the date scheduled:

- Change the date.
- Log an exception if the new scheduled date is after the original scheduled date.

Change Ship Set

Oracle Shipping Execution performs as follows during an order line change ship set. Change ship set is a changed ship set name:

- If there is no current ship set, assign the ship set to the delivery lines.
- If there is a current ship set, change the ship set on the delivery line if the status is Not Ready to Release, Ready to Release, Released to Warehouse (without allocations), or Staged/Pick Confirmed. If the status is Released to Warehouse (without allocations), change the ship set on the move order also.
- If the status is Released to Warehouse and there are allocations, refer to the shipping parameter Enforce Ship Set at Picking. If ship sets are enforced, do not honor the change to the sales order line.

Change Delivery Group

Delivery Grouping attributes consist of, ship-to location, ship-from location, intermediate ship-to location, customer, freight terms, FOB, or ship method:

- Check the shipping parameter grouping attributes.
- Change all values for the attributes that are mandatory or enforced.
- If the sales order line is assigned to a delivery or container, unassign the line from

the delivery and log an exception.

- If none of the enforced or mandatory attributes are changed but customer, freight terms, FOB, or ship method is changed, log an exception for each packed delivery line.

Order Cancellations

With the material picking process, a sales order can be canceled after it has been pick released without requiring you to backorder in Oracle Shipping Execution. If an order quantity is reduced after pick release, any requested and detailed quantities on the move order line are reduced accordingly and any Reservations that exist for the sales order will be updated to reflect the new order quantity. These changes are made automatically and require no intervention from you.

Note: If you cancel an entire order that has serial numbers assigned to it, the system will remove the serial numbers during cancellation. If you are canceling a serialized line from an order (not canceling the entire order) then you will be required to unassign the specific line serial numbers before proceeding.

Managing Containers

This chapter covers the following topics:

- Overview of Containers
- LPN Statuses
- Auto-packing Delivery Lines into Containers
- Creating a Container
- Naming Containers
- Manually Packing Delivery Lines into Containers
- Assigning Freight Costs to a Container
- Purging Containers/LPNs
- Packing Workbench
- Using the Packing Calculator
- Assigning Containers to a Delivery
- Unassigning Containers from a Delivery

Overview of Containers

In the Shipping Transactions form, you can create and manage containers (LPNs) at any point in the shipping process. If you are using the Auto-packing feature, containers can be automatically packed using the container-item relationships set up in the Container-Item Relationships window.

Note: LPN is an acronym for License Plate Number. A packing container has a license plate number for unit identification and reporting capability, so containers are also called LPNs in Oracle Shipping Execution.

You can create containers without assigning them to a delivery. This is useful if you want to create multiple containers of the same type then pack them with unassigned delivery lines.

Customer Items can be associated with containers within Oracle Inventory. See: *Oracle Inventory User's Guide*. This association is used when packing the Customer Item into a container in Oracle Shipping Execution. When the Customer Item is packed, the container associated with the Customer Item in Oracle Inventory is used as the default container.

You can pack multiple containers with multiple lines using one of the following packing methods:

- Auto-packing, page 4-13
- Packing Workbench, page 6-11
 - Equal packing: splits the delivery lines equally between the selected LPNs. You cannot use this method with delivery lines of serial controlled items.
 - Sequential packing: fully packs one container at a time to its capacity (weight, volume, or quantity) before packing the next selected container.
- Manual packing, page 6-8

You can complete the following tasks in container management:

- Create containers, page 6-6
- Assign freight costs, page 6-9
- Assign containers to deliveries, page 6-17
- Unassign containers from deliveries, page 6-17

Containers for Oracle Warehouse Management Enabled Organizations

The following container management conditions apply only if Oracle Warehouse Management (WMS) is enabled at the warehouse organization:

- You must be in Warehouse Management to pack the contents before pick confirming or staging them. In Warehouse Management enabled organizations, Warehouse Management does the packing and passes the updated shipping information to Shipping Execution.
- If Oracle Warehouse Management is installed, you can only assign and unassign the topmost container from a delivery. For example, if you have detail LPNs packed into a master container, you can only assign/unassign the master container not the detail container.

LPN Statuses

LPNs are used throughout Oracle Applications, including Oracle Shipping Execution. LPNs created in Oracle Warehouse Management are viewable on the Shipping Transactions form and Quick Ship window. The entire LPN hierarchy is passed to Oracle Shipping Execution upon pick confirmation completion and are kept synchronized through the shipping processes.

Note: LPNs created in Oracle Warehouse Management have statuses specific to Oracle Warehouse Management.

The following Oracle Warehouse Management statuses are visible in Oracle Shipping Execution:

- Staged/Pick Confirmed
- Loaded to Dock
- Loaded in Staging

Certain fields on Oracle Warehouse Management generated LPNs can be modified through Oracle Shipping Execution, for example weight and volume. The Frozen Weight/Volume option is ignored for LPNs created by Oracle Warehouse Management. The weight and volume of these LPNs are kept synchronized with Oracle Warehouse Management.

See: *Oracle Warehouse Management User's Guide*

Auto-packing Delivery Lines into Containers

Auto-packing provides a convenient and quick way of automatically packing delivery lines into containers (LPNs). The delivery lines are packed into LPNs based on the container-item relationship set up in Oracle Shipping Execution or in Oracle Inventory (defined as a customer item) and the setting of the Shipping parameter Percent Fill Basis must be set to Quantity. The container-item relationship defines the container that is used for packing the delivery lines. If Percent Fill Basis is set to Quantity, then auto-pack will look at Container-Load Relationships set up for the item and the Detail Container.

If multiple container-item relationships exist for the same item, the Preferred setting in the Container-Item Relationships window indicates the default container-item relationship used for that item.

Auto-packing can also be performed for those items in Oracle Inventory that are defined as Customer Items.

Naming of the LPNs depends on whether or not you specify naming defaults when

setting up your Organization Parameters. If you specify LPN Name Generation defaults, then those parameters are used during auto-packing of delivery lines into containers.

Using the Auto-pack Master Option

- If you select Auto-pack, then only the detail LPNs are created and packed.
- If you select Auto-pack Master, the delivery lines are packed into the detail container, and the detail containers are packed into the parent/master container in one action:

For example, a delivery line with a quantity of 12 of Item A has a container-load relationship set up so that 6 of Item A fits into Container A and 2 of Container A fits into Container B (the percent fill basis is set to quantity). If you run Auto-pack Master, the line is split into 2 lines of 6, the first line is packed into the first container, the second line is packed into the second container, and the two detail LPNs (2 Container As) are packed into Container B.

- The Auto-pack Master option is available from the Actions menu in the Lines/LPNs tab in the Shipping Transactions form. It is also available at the delivery level.

Note: Container-Item Relationships must be pre-defined between the item and the detail container and between the detail container and the master container.

Naming of the LPNs depends on whether or not you specify naming defaults when setting up your Organization Parameters. If you specify LPN Name Generation defaults, then those parameters are used when auto-pack master is used.

Note: If your organization has Oracle Warehouse Management enabled, see Containers for Oracle Warehouse Management (WMS) enabled Organizations, page 6-2

To auto-pack delivery lines into containers:

1. Navigate to the Query Manager window, and find the delivery lines.

Shipping Transactions

Query

Query <1>

Context

Line - 1972394

Detail

LPN

Item Name

Delivery

Line Status

Next Step

Exceptions

Order

Requested Qty

1972394	<input type="checkbox"/>	AS55888	1456165	Staged/Pick Confir	Ship Confirm/Cl	<input type="checkbox"/>	68120	
	<input type="checkbox"/>					<input type="checkbox"/>		
	<input type="checkbox"/>					<input type="checkbox"/>		
	<input type="checkbox"/>					<input type="checkbox"/>		
	<input type="checkbox"/>					<input type="checkbox"/>		
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	<input type="checkbox"/>					<input type="checkbox"/>		
	<input type="checkbox"/>					<input type="checkbox"/>		
	<input type="checkbox"/>					<input type="checkbox"/>		

Lines/LPNs

Delivery

Path by Stop

Path by Trip

Auto-pack

Pick and Ship

Actions

Cycle Count

Gg

Detail...

- Auto-pack Master

4. Click Go.

5. Save your work.

Related Topics

Automated Packing, page 4-13

Creating a Container

You can create multiple instances of an existing container type and assign them to trips or deliveries or use them in the future to pack delivery lines. This makes packing more flexible because you can plan and pack ahead of time or as needed. Once the container instances are created, they can be viewed in the Shipping Transactions form.

You can pack delivery lines into LPNs regardless of whether they are pick released or not pick released.

Related Topics

Naming Containers, page 6-6

Naming Containers

In the Create LPNs window, you assign names to identify and track individual LPNs. Naming of the LPNs depends on whether or not you specify naming defaults when setting up your Organization Parameters. If you specify LPN Name Generation defaults, then those parameters are used. Another option is to create your own container names or the system generates default container names based on your entries in the following Create LPNs window fields:

- Name Prefix
- Starting Number
- Pad to Width
- UCC-128 Suffix
- Name Suffix

See: *Oracle Order Management Implementation Manual* for more information on creating LPNs.

Example: In the following table, ten container instances named VIS100BOX and ending with VIS109BOX are created.

Container Example

Prefix	Base Number	Quantity	Suffix
VIS	100	10	Box

Note: To define a new container type rather than create an instance of an existing container (LPN), see Setting Up in the *Oracle Inventory User's Guide*.

To create containers:

1. Navigate to the Shipping Transactions form, and find the Lines/LPNs.
2. From the Actions menu, select Create LPNs.
3. Click Go to display the Create LPNs window.

Create LPNs Window

Organization **M1** **Seattle Manufacturing**

Container Item ...

Item Description

Count

Name Generation

Name Prefix

Base Number

Pad to Width

☐ UCC-128 Suffix

Name Suffix

4. Select the Organization for the container.
5. Select the Container Item such as a box or pallet.
6. Enter a Count for the number of container instances you want to create.
For example, to create ten instances of the BX54888 Container, enter 10 in the Count field.
7. Enter a Name Prefix for the container name.
The Prefix is defaulted if you specify it in the Prefix field within the Organization

Parameters window/Revision, Lot, Serial and LPN tab.

8. Enter the Base Number for the container name.

The numbering starts from the base number and increments by 1. For example, if you enter 100 as the base number for the first instance of a container, the second is numbered 101, the third 102, and so on.

The Base Number is defaulted if you specify it in the Starting LPN Number field within the Organization Parameters window/Revision, Lot, Serial and LPN tab.

9. Enter the Pad to Width.

The default Pad to Width is the total number of digits in the base number. For example, the default Pad to Width for the container name VIS100BOX is 3.

10. Select the UCC-128 Suffix option if you want to enable the Uniform Code Council, 128 ASCII character set suffix functionality.

If you select the UCC-128 Suffix option (checked is Yes, unchecked is No), then you will not be able to specify the Name Suffix. The default suffix for UCC-128 is "No."

The UCC-238 Suffix is defaulted if you enable it by selecting the UCC-128 Suffix (Modulo-10) check box within the Organization Parameters window/Revision, Lot, Serial and LPN tab.

11. Enter a Name Suffix for the container name.

The Name Suffix is defaulted if you specify it in the Suffix field within the Organization Parameters window/Revision, Lot, Serial and LPN tab.

12. Click OK to create the container instances.

13. Save your work.

Manually Packing Delivery Lines into Containers

You can manually pack containers if you have delivery lines you want to pack without using the auto-pack method: for example, to quickly pack delivery lines into a box.

Prerequisites

An LPN must be available for packing.

The line(s) must not currently be assigned to another LPN.

To manually pack containers:

1. Navigate to the Shipping Transactions form, and find the delivery line(s) you want to pack.

2. Select the delivery line(s) that you want to pack.
3. From the Actions menu, select Pack.
4. Click Go to display the LPNs Query window.
5. Query a previously created LPN.
6. Select the LPN.
7. Click OK.

You can only pack one container at a time.

Assigning Freight Costs to a Container

You can assign new freight costs, override the suggested amounts, or update existing freight costs for a container. For example, you may need to add additional costs like Duty Fee or Priority Handling for a particular container. A freight cost can also be assigned to a delivery, a stop, or a delivery detail.

Prerequisites

A LPN must be created.

To assign freight costs for a container:

1. Navigate to the Query Manager window.
2. Find the LPN.
The container displays in the Shipping Transactions form.
3. From the Actions menu, select Assign Freight Costs to manually assign your freight costs.
4. Click Go to display the Freight Costs window.

Freight Costs Window

Trip 1047118

Freight Costs

Name	Type	Trip	Currency Code	Amount

Sub Total 0 USD

Summary Freight Cost From Other Levels

Delivery Line	150	USD
LPN	0	USD
Delivery	0	USD
Trip Stop	0	USD

Total Freight Cost 150 USD

Done

5. Enter the Name, Type, Currency Code, Amount, Conversion Type, and Creation Date.
6. Click Done.

Note: Costs assigned to an LPN can be interfaced to Oracle Order Management and Oracle Receivables for invoicing a consignee (that is, freight terms are Collect or Prepay & Add) if a pricing modifier is set up. See: Defining Freight and Special Charge Types in *Oracle Order Management Implementation Manual*.

Costs assigned after ship confirmation are not passed as freight costs to Order Management; instead, they are stored in the shipping system for future reference.

7. Save your work.

Purging Containers/LPNs

Oracle Shipping Execution enables you to purge (permanently delete) containers/LPNs from the Oracle Shipping Execution tables.

LPNs must be empty (no shipping entities included in the LPN) before purging.

Warehouse Management generated LPNs cannot be purged through Shipping Purge.

Related Topics

Shipping Purge Concurrent Process, page 12-31

Packing Workbench

You can use the Packing Workbench to split the delivery lines between containers or to pack sequentially one container at a time to its full capacity.

The Packing Workbench window consists of the LPNs tab which displays the LPNs and the Lines tab which displays the delivery lines. The packing workbench displays the tare or filled weight and volume of LPNs and delivery lines that can help you determine the number of delivery lines and LPNs.

Prerequisite

Weight and/or volume values must be defined for the items and containers within Oracle Inventory.

Packing Workbench Window

The screenshot shows the 'Packing Workbench' window with the 'LPNs' tab selected. On the left, there are three sections: 'Available Capacity' with fields for Weight, Volume, and Number of Containers; 'Item Total' with fields for Weight (60 Lbs), Volume (4 FT3), and Number of Lines (1); and 'Packing Mode' with radio buttons for 'Equal' and 'Full', and a 'Split %' field. The main area contains two multi-record displays. The top display has columns for 'Pack' (with a checkbox), 'Sequence', 'LPN Name', and 'Item Name'. The bottom display, titled 'Contents', has columns for 'Detail', 'LPN' (with a checkbox), 'Item Name', and 'Qu:'. At the bottom right are 'Cancel' and 'Pack' buttons.

The LPNs and lines multi-record displays have check boxes next to each record to indicate whether a particular container or line has been selected for packing. As the LPNs are selected/deselected, the total available weight/volume is recalculated. Similarly when the delivery lines to be packed are selected/deselected, the total net weight/volume of all the lines is recalculated and displayed.

By matching the total net weight/volume of all lines with the total available weight/volume of the LPNs, you can determine whether you can pack the selected delivery lines in the available number of LPNs. Matching weights and volume does not guarantee that all the selected lines will be packed into the selected LPNs. Due to incompatibilities or differences in grouping attributes of the different lines and LPNs, there could be lines that remain unpacked at the end of the packing operation.

To assign/pack a number of lines into one or more LPNs, the packing can be performed using two different algorithms; one method is based on the sequential packing of the lines into the specified LPNs, and the other involves an equal packing of all the lines into the LPNs.

The following process-enabled fields are available on the Packing Workbench window if you are using Order Management with Process Inventory. If the item specified on the delivery line is dual UOM controlled, and lot controlled, then you will see values in these fields. Otherwise, these fields will be blank. The process-enabled fields are display only and include the following:

- Secondary Quantity: Displays the quantity to be shipped in the secondary UOM
- UOM: Displays the secondary UOM for the item for the delivery line

Equal Packing Delivery Lines into Containers

You can split the delivery lines equally between the selected LPNs so that each of the resulting split lines (from every delivery line) is packed into each available container. This results in a packing in which every container is packed with items from every delivery line. Every container will have the same quantity of a particular delivery line item. This method of packing is useful if you have a number of lines (each with a different item) that are grouped together at shipment time: for example, packing different home computer components into one box for shipping purposes. You cannot use this method with delivery lines of serial controlled items.

A selected delivery line is split equally by the number of LPNs and every line is packed into all the LPNs in a one to many relationship, provided the container grouping attributes are satisfied by the line. The preferred container specified on the delivery line or the container load-relationship is ignored. This method of packing could result in a gross over-packing or under-packing. If the LPNs are over-packed or under-packed, a warning appears. Again, this packing method could result in delivery lines that remain unpacked at the end of the packing operation because of incompatibilities in grouping attributes of lines and LPNs.

Note: If your organization has Oracle Warehouse Management enabled, see Containers for Oracle Warehouse Management (WMS) enabled Organizations, page 6-2.

To equally pack delivery lines into containers

1. Navigate to the Query Manager window, and find the delivery lines and containers that you want to pack.

Shipping Transactions

Query

Query <1>

Context

Line - 1972394

Detail

1972394

LPN

Item Name

AS55888

Delivery

1456165

Line Status

Staged/Pick Confir

Next Step

Ship Confirm/Cl

Exceptions

Order

68120

Requested Qty

Lines/LPNs

Delivery

Path by Stop

Path by Trip

Auto-pack

Pick and Ship

Actions

Packing Workbench

Gp

Detail...

- Note:** To select more than one, press and hold the CTRL key and select the lines and LPNs you want. To select multiple lines as a sequential group, place the cursor on the first line that you want and then press and hold Shift and then select the last line in the sequential group.

4. From the Actions menu, select Packing Workbench.
5. Click Go.
6. Optionally, deselect any lines or containers that you do not want to include in the packing operation.
7. In the Packing Mode region of the Packing Workbench window, choose Equal.
8. Click Pack.
9. Save your work.

Sequential Packing Delivery Lines into Containers

You can fully pack one LPN and then proceed to pack the next LPN. When packing multiple lines into multiple LPNs, the packing is performed one container at a time. The first delivery line is packed into the first container until the container is full or the line is completely packed. If the line is completely packed, then the next line is packed into the same container until the container is full.

If the LPN is fully packed before the line is completed (only partial quantity fits), then the line is split so that the split line now fills up the first container and the remaining quantity of the original line is packed into the next container. This is continued until all the lines have been packed or all the LPNs are full. If the LPNs are full before all the lines can be packed, the remaining lines are left unpacked. A warning will be issued to inform you that some lines were left unpacked.

Note: If Oracle Warehouse Management is enabled in your organization, see Containers for Oracle Warehouse Management (WMS) enabled Organizations., page 6-2

To sequentially pack delivery lines into containers:

1. Navigate to the Query Manager window, and find the delivery lines and containers that you want to pack.

The delivery lines and containers display in the Shipping Transactions form.

2. From the Actions menu, select Packing Workbench.
3. Click Go.

The Packing Workbench window displays the LPNs in the LPN tab.

4. Select the Lines tab to display the lines.
5. Select the delivery lines you wish to pack into the LPNs.
6. In the Packing Mode region, choose Full.
7. Click Pack to pack the lines into the containers.
8. Save your work.

Note: To prevent unintended splitting of indivisible items during packing, the item should be defined as OM Indivisible within Oracle Inventory in the Master Items window, Physical Attributes tab.

Using the Packing Calculator

When using the Packing Workbench, you can use the Packing Calculator to help plan your packing requirements. The Packing Calculator uses the default weight and volume values for items and containers as defined in Oracle Inventory to determine if the delivery lines fit into the selected LPNs.

If you select or deselect lines or LPNs, you can recalculate the displayed values by choosing the Recalculate button

Note: If your organization has Oracle Warehouse Management enabled, see Containers for Oracle Warehouse Management (WMS) enabled Organizations, page 6-2.

To use the packing calculator:

- 1. Navigate to the Shipping Transactions form, and find the delivery lines and LPNs. Select the lines or LPNs.

Shipping Transactions form - Packing Calculator

The screenshot shows the 'Shipping Transactions' form with the 'Packing Calculator' panel open on the right. The main table lists shipping lines and LPNs. The 'Packing Calculator' panel includes fields for 'Available Capacity' (Weight, Volume) and 'Item Total' (Weight, Volume), along with a 'Recalculate' button. At the bottom of the form are buttons for 'Auto-pack', 'Pick and Ship', 'Actions' (set to 'Packing Workbench'), 'Go', and 'Detail...'.

Detail	LPN	Item Name	Delivery	Line Status	Next Step	E
1972394	<input type="checkbox"/>	AS55888	1456165	Staged/Pick Confir	Ship Confirm/Cl	
	<input type="checkbox"/>					
	<input type="checkbox"/>					
	<input type="checkbox"/>					
	<input type="checkbox"/>					
	<input type="checkbox"/>					
	<input type="checkbox"/>					
	<input type="checkbox"/>					
	<input type="checkbox"/>					
	<input type="checkbox"/>					

- 2. Choose the vertical bar located on the right side of the Shipping Transactions form to display the packing calculator.
- 3. Click Recalculate to display the available capacity of the LPNs or the weight and volume totals for the items.
- 4. Choose the bar again to close the Packing Calculator.

Assigning Containers to a Delivery

You can assign an LPN (container) to an existing delivery by searching for the LPN and adding it to a delivery. If Oracle Warehouse Management System (WMS) is installed, you can only assign and unassign the topmost container to a delivery. For example, if you have detail LPNs packed into a master container, you can only assign the master container to a delivery.

Prerequisites

Delivery status must be set to Open.

A delivery and container must already be created.

Note: If your organization has Oracle Warehouse Management enabled, see Containers for Oracle Warehouse Management (WMS) enabled Organizations, page 6-2.

To manually assign a container to a delivery:

1. Navigate to the Query Manager window, and find the container(s).
The container(s) display in the Shipping Transactions form.
2. Select the container(s) that you want to assign to the delivery.
3. From the Actions menu, select Assign to Delivery.
4. Click Go to display the Deliveries window.
5. Select the Delivery to which you want to assign the LPN(s).
6. Click OK to assign the LPN(s) to the delivery.

Note: Alternatively, you can select a delivery line assigned to a container, assign the line to a delivery, and the LPN will also be assigned to the delivery.

Unassigning Containers from a Delivery

You can unassign an LPN (container) by searching for the LPN and unassigning it from a delivery. If Oracle Warehouse Management (WMS) is installed, you can only assign and unassign the topmost container from a delivery. For example, if you have detail LPNs packed into a master container, you can only unassign the master container from

a delivery.

Note: If your organization has Oracle Warehouse Management enabled, see Containers for Oracle Warehouse Management (WMS) enabled Organizations., page 6-2

Note: Within a WMS enabled organization, unassigning a line from a delivery after LPN load will not prevent the line from being reassigned to the delivery during LPN drop.

Prerequisites

Delivery status must be set to Open.

To unassign a container from a delivery:

1. Navigate to the Query Manager window, and find the LPN.
The LPN(s) displays in the Shipping Transactions form.
2. From the Actions menu, select Unassign from Delivery.
3. Click Go to unassign the container from the delivery.
4. Save your work.

Pick Release

This chapter covers the following topics:

- Overview of Pick Release
- Defining Pick Slip Grouping Rules
- Releasing Sales Orders for Picking
- Credit Checking and Holds
- Pick Releasing from the Shipping Transactions Form

Overview of Pick Release

Pick Release finds and releases eligible delivery lines that meet the release criteria, and creates move orders. You can pick release by order, trip, stop, container, delivery, warehouse, customer, scheduled or requested dates, shipment priority, or combinations of the above criteria. The default release criteria is set up in Shipping Parameters, but you can override the default criteria in the Release Sales Order window at pick release.

The process of transacting move orders creates a reservation and determines the inventory source subinventory. Pick Slips can be created after the detailing process completes, and the quantity and source can be manually verified at pick confirm. Detailing and pick confirmation can be manually transacted through Oracle Inventory or set up in Shipping Parameters to occur automatically at pick release. See *Oracle Order Management Implementation Guide* for information on Shipping Parameters.

You can run one or more releases and customize release criteria to meet your requirements. You can define:

- Release Rules to specify your picking criteria and set the default Release Rule through Shipping Parameters Pick Release tab.
- Release Sequence Rules to specify the order in which eligible delivery lines are allocated during pick release.

- Pick Slip Grouping Rules to determine how released move order lines are grouped onto pick slips.

Pick Release can be run using the following methods:

- On-line: You can pick release one order immediately, thereby eliminating time spent waiting for the order to process through the Concurrent Manager queue. This is done in the Release Sales Orders for Picking window. This window can also be accessed from the Tools menu in the Shipping Transactions form.
- Concurrent: You can run pick release in the background, enabling you to run other processes simultaneously. This is done in the Release Sales Orders for Picking window. This window can also be accessed from the Tools menu in the Shipping Transactions form.
- Standard Report Submission (SRS): You can run a specific release at the same time every day. SRS runs pick release in the background and the program can be run multiple times daily. This is done in the Release Sales Orders for Picking SRS window.
- Shipping Transactions form: You can run pick release in the Shipping Transactions form by selecting Launch Pick Release from the Actions menu.
- Pick Release Application Program Interface (API): You can run pick release using this API. See: *Oracle Order Management APIs and Open Interfaces Manual*.

Related Topics

Viewing the Status of a Delivery Line, page 5-3.

Move Orders

A move order is a request for a sub inventory transfer or account issue. The pick release process creates move orders which are pre-approved requests for sub inventory transfers to bring material from its source locations in the warehouse to a staging sub inventory.

Note: In an Oracle Warehouse Management enabled organization, you must specify the staging subinventory and locator within the pick release criteria. If you fail to specify the staging subinventory and locator, then the line(s) will be backordered.

Picking Rules

Move orders use the picking rules set up in Oracle Inventory to locate the material required to fulfill the move order line. Together with item-sub inventory defaults

(required if the staging sub inventory is locator controlled), the picking rules suggest the staging transfer transaction lines with appropriate source information that will be required to obtain enough material in the staging location for the delivery. The process where the Picking Engine generates these transaction line suggestions is called allocating.

See *Oracle Inventory User's Guide*

Staging Locations

The destination sub inventory for a pick wave move order is the staging location into which the picked material should be deposited. Each organization should designate at least one staging sub inventory. Staging sub inventories should be reservable. Each batch created at pick release will have the same destination staging sub inventory. The default staging sub inventory and locator to be used for all pick wave move orders are specified through Oracle Shipping Execution's Shipping Parameters window. This location can be changed at pick release. To model different staging lanes within the staging area, facilities may choose to either create different sub inventories or designate staging lane locators within one staging sub inventory.

Configuring Your Picking Process:

You can determine the number of pick release steps the system will prompt to move material from pick release to ship confirmation. These steps are:

1. Pick Release
2. Move Order Line Allocation (detailing)
3. Move Order Line Pick Confirmation
4. Ship Confirmation

Pick Release

Oracle Shipping Execution's Pick Release process creates move orders. One move order line is generated for each order line included in the picking batch. That move order line includes the item, quantity, the staging location (the destination subinventory and locator) and a source subinventory and locator if one was specified on the sales order line or on the Release Sales Orders window.

For non-transactable items, pick release does not use the values of Enforce Ship Sets and Ship Models fields in the shipping parameters; however, ship confirm does validate non-transactable items for broken ship sets and ship models.

Note: The Enforce Ship Sets and Ship Models parameter, within the Pick Release tab on the Shipping Parameters window, enables you to

control where ship sets and models are enforced, at picking or at shipping. For more information on this parameter, refer to the *Oracle Order Management Implementation Manual*.

The allocation and pick release process executes for non-reservable items; however, suggestions are not created during pick release, and pick confirm will not run for the item. You can print pick slips; however, the pick slips will not be detailed with Subinventory and Locator to pick from. The pick slip will, however, list the item and quantity to be picked. Auto-allocate should be Yes and Auto Pick Confirm can be set to any value.

Related Topics

Non-Reservable Items, page 8-4

Detail Line Allocation (Detailing)

To release the move order lines created at Pick Release to the warehouse and to print pick slips, the lines must be allocated. The allocation process for a pick wave move order line also creates a high level (organization level) reservation for the item(s) if no previous reservations exist for them. You can choose to do this immediately after the move order lines are created or to postpone this step until a later point in time. Once the lines are allocated, they have a status of Released to Warehouse.

Postponing the detailing process might be employed by organizations that pick release across multiple warehouses but prefer to enable each warehouse to determine when to release their order lines to the floor. Detailing the order lines immediately after they are created is called auto-detailing. Postponing the detailing process is referred to as manual-detail. You can set up a default detailing mode in the Shipping Parameters window. This default can be overridden at each Pick Release through the Release Sales Orders window.

Pick Confirmation

The move order line details must be transacted (in Inventory) to confirm the material drop-off in staging. Pick confirmation executes the sub inventory transfer that systematically moves the material from its source location in the warehouse to the staging location. Pick Confirmation automatically transfers the high level reservation to a allocated reservation (including lots, sub inventory and locators) in the staging location.

Inventory updates Shipping Execution with the results of the pick confirm:

- Pick Confirmed quantity is assigned a status of Staged/Pick Confirmed.
- Unconfirmed quantity changes to the status Backordered.

At pick confirmation, you can report a missing quantity or change information if material is picked from a different lot, serial, locator, or sub inventory. Auto pick confirm can be set up as the default to occur immediately after the lines are detailed if an organization's picks rarely deviate from the suggested picking lines or the overhead of requiring a Pick Confirmation is unmanageable. You can set up a default Pick Confirm policy in the Inventory organization parameters. This default can be overridden at each Pick Release.

Pick confirmation follows the allocation and reservation process automatically if both the Auto Allocate and Auto Pick Confirm options are selected in the Release Rules window. Pick Confirm always follows the detailing and reservation process. If Auto Allocate is not chosen, it is not possible to Auto Pick Confirm.

Manual Pick Confirmation is required if you have Oracle Warehouse Management installed.

Note: Even if automatic pick confirm is used, the material is only transacted to the staging subinventory and reserved. You can still manage any discrepancies found by deleting the reservation and transacting the material back to its original subinventory.

If mobile devices, such as bar code scanners, are used to perform inventory transactions, it is suggested that you use manual pick confirmation for greatest inventory accuracy and control.

After you perform a partial move transaction on a move order, the delivery detail shipped quantity is usually blank. However, the application populates the shipped quantity for a WMS enabled organization when serial control is at sales order issue. For non-WMS enabled organizations, you must enter the shipped quantity and serial number manually, when serial control is at sales order issue. Generally, the requested quantity of a staged delivery detail is the shipped quantity because the non-shipped quantity is split into separate backorder delivery lines.

Overpicking

Overpicking is using the pick confirm transaction to pick more than the requested quantity of a delivery line, up to the overshipment tolerance. In addition, you can prevent LPNs and lots from breaking into small amounts only because delivery detail and lot quantities do not match.

To overpick, you must pick release with the Auto-pick Confirm parameter set to No, then Pick Confirm manually using the Oracle Inventory Transact Move Order form.

A delivery line with zero requested quantity is created for over picked quantities. Delivery lines with zero requested quantity cannot be ship confirmed alone or left behind by ship confirmation of the last delivery lines with non-zero requested quantities.

The error WSH_REQ_ZERO_INSIDE_ERROR will be generated if the total requested

quantity of delivery details inside the delivery, for one source line, is zero. The solution to this error is to assign the delivery detail with a non-zero requested quantity for that source line, to the delivery.

The error WSH_REQ_ZERO_OUTSIDE_ERROR will be generated if the total requested quantity of delivery details outside of the delivery for one source line is zero. There are three possible actions that you can take to avoid this error, including the following:

- Assign all of the delivery details for the source line to the delivery
- Unassign at least one delivery detail for the source line from the delivery
- Completely back order or cycle count all of the delivery details for the source line outside of the delivery

Overpicking Processing

The overpicking process calculates the following quantities and uses zero when the calculation results in a negative number:

- $\text{Excess Pick Quantity} = \text{Picked Qty} - \text{Shipped Qty} - \text{Backordered Qty} - \text{Staged Qty}$
- $\text{Backordered Quantity} = \text{Requested Qty} - \text{Shipped Qty} - \text{Staged Qty}$
- $\text{Staged Quantity} = \text{Requested Qty} - \text{Shipped Qty} - \text{Backordered Qty}$: You cannot stage in excess of this quantity.
- $\text{Quantity to Backorder} = \text{Requested Qty} - \text{Shipped Qty}$: You cannot backorder in excess of this quantity.

After you pick confirm, Oracle Inventory passes the following information to Oracle Shipping Execution:

- Quantity pick confirmed.
- Quantity of allocations pending pick confirm: The sum of quantities of allocations pending pick confirm transactions. You cannot create allocations in the pick confirm transaction.
- After pick confirm, Picked Quantity is the same as or more than Requested Quantity.

If you pick less than the Requested Quantity, pick confirm splits the delivery line:

- The original line quantity is the detailed quantity. Its released status progresses to Staged/Pick Confirmed.
- The new line quantity is the difference between the requested quantity and the detailed quantity. Its released status is Backorder.

When there is a pending quantity, Oracle Shipping Execution processes the delivery detail differently, depending on whether the overpick:

- Satisfies the delivery line requested quantity: It creates an overpick-pending delivery line with Requested Quantity of zero and Picked Quantity of the quantity that remains to be pick confirmed.
- Results in a pending quantity: It creates a normal delivery line to await subsequent pick confirm transactions. It has status Released to Warehouse and has a Requested Quantity.

When either the Picked Quantity or the Pending Quantity is blank, pick confirm:

- Backorders the delivery line if its Picked Quantity is null and the Requested Quantity is greater than zero.
- Delete the delivery line if its Requested Quantity is null and the Picked Quantity is greater than zero.

If there is at least one allocation pending, there will be a delivery line with status Released to Warehouse that may be pending overpick. If a delivery line is fulfilled by the Picked Quantity and there is a Pending Quantity, pick confirm creates a new delivery line pending overpick.

The unshipped, picked quantity in excess of the requested quantity is removed at ship confirm; it cannot be staged or backordered.

If a move order line quantity is reduced because the order line quantity is reduced, you cannot overpick the move order line in excess of the original allocated quantity.

- When you overpick, the requested quantity not yet staged is reduced accordingly. The move order line can be partially canceled. Although you sometimes have to overpick, you do not have to overship.

You can find the following fields that pertain to overpicking on the Shipping Transactions form, Lines/LPN tab:

- Picked Quantity
- Secondary Picked Quantity
- Pending Overpick check box

Overshipping

If you pick the requested quantity of a delivery detail, you can overship within the overship tolerance.

If you overpick the requested quantity of a delivery detail, you cannot overship that delivery detail but you can overship the cumulative line (the sum of all the split lines)

within the overship tolerance. However, you cannot ship confirm a greater quantity than the quantity that you picked, regardless of the overship tolerance.

You can overpick a ship set and you can overship items in the ship set as long as the amount shipped does not break the ship set.

The shipped quantity validation is executed at Ship Confirmation, enabling you to overship based on your overship tolerance. You can overship one delivery line or split the overshipment between delivery lines.

In the following example, assume all three lines were split from the same delivery line. If the overship tolerance is 50%, then the maximum total quantity that can be shipped for these three lines together is 15. Since lines two and three have a total shipped quantity of 5, then line one can have an overshipment of quantity 5. The table illustrates the outcome of the overship based on the three delivery lines:

Overshipping Example

Detail	Requested	Shipped
1	5	10
2	3	3
3	2	2

Ship Confirmation

Ship Confirming the items removes the existing reservations and performs the sales order issue transaction. You may choose to ship confirm only part of the sales order quantity. In this case, the balance of the sales order may be backordered. Backordering at Ship Confirm automatically splits the sales order into two lines. The first line represents the shipped quantity, and the second line represents the backordered quantity.

You have the following options if the partial inventory quantity shipped is less than the requested quantity:

- When the partial quantity is not available due to inventory discrepancy or damage, then you can select Action, Cycle Count. Cycle count the missing or damaged quantity and choose OK. The quantity transferred to cycle count defaults to the backorder field on the split line. Upon ship confirmation, the reservation is transferred to cycle count so the discrepant amount is not available to pick.
- You can enter the shipped quantity on the line, then enter the partial quantity in the Stage Quantity field on the line. The partial quantity remains in the staging sub

inventory with the reservation intact.

Shortages and Backorders

During detailing, if the quantity requested is greater than the quantity allocated on the move order line (shortage), pick release performs auto-backordering. It:

- Splits the delivery line as follows:
 - The original line quantity is the detailed quantity. Its released status progresses-- Ready to Release becomes Released to Warehouse (or Staged/Pick Confirmed if pick release auto pick confirms).
 - The new line quantity is the difference between the requested quantity and the detailed quantity. Its released status is Backordered. It has no move order line reference; it will have one after you pick release it.
 - Consolidates backordered delivery details into one (if your organization has Consolidate Backorders enabled.) See Consolidating Backorders, page 8-3
 - Updates the move order line that is associated with the original delivery detail: Oracle Inventory changes the requested quantity on the move order line to the detailed quantity.
 - Notifies Oracle Order Management to update the sales order line and to change its status to Backordered.
- Unassigns the delivery line from the delivery.
- If the delivery line is assigned to containers, unassigns the delivery line from the containers and unassigns the empty containers from the delivery.

Example: Shortage at Detailing

You book and release a sales order line for 10 units of item A. Pick release finds 7 available for allocation. The following occurs:

- Oracle Inventory updates Oracle Shipping Execution with the detailing results.
- Auto-backorder splits the delivery line.
- The backorder is consolidated with other backordered delivery details (if applicable.) See Consolidating Backorders, page 8-3
- Auto-backorder notifies Oracle Order Management to split the sales order line.
- Oracle Shipping Execution reduces the requested quantity on the move order line.

The sales order lines appear as follows:

Shortage at Detailing Sales Order Line

Line	Item	Quantity
1	A	7
1.1	A	3

The delivery details appear as follows:

Shortage at Detailing Delivery Details

Line	SO Line	Item	Quantity	Status	MO Line
100	1	A	7	Released	1000
101	1.1	A	3	Backordered	-

Note: If your organization consolidates backorders, and this delivery line already has an existing backorder, then Line 101 would be deleted and the quantity would be consolidated with the existing backorder. See Consolidating Backorders, page 8-3.

The move order line appears as: Line: 1000; Required Quantity: 7; Detailed Quantity: 7

The move order line detail appears as Line: 10000; Move Order Line: 1000; Quantity: 7; From Location: Stores; To Location: Staged

At pick confirm, since the move order line was changed at detailing, it closes the move order line even though all 10 units were not found. The move order line appears as Line: 1000; Required Quantity: 7; Detailed Quantity: 7; Complete Quantity: 7. It removes the move order line detail.

At ship confirm, the delivery details appear as Line: 100; Sales Order Line: 1; Item: A; Quantity: 7; Status: Shipped. It removes the move order line even though all 10 units were not found.

Example: Shortage at Pick Confirmation

You book and release a sales order line for 10 units of item A.

Shortage at Pick Confirm Sales Order Line

Line	Item	Quantity
1	A	10

Shortage at Pick Confirm Delivery Details

Line	SO Line	Item	Quantity	Status	MO Line
100	1	A	10	Released	1000

Shortage at Pick Confirm Move Order Line

Line	Required Qty.	Detailed Qty.
1000	10	10

Shortage at Pick Confirm Delivery Details

Line	MO Line	Quantity	From Loc.	To Loc.
10000	1000	10	Stores	Staged

At pick confirm, the picker can only find seven units, requests Oracle Shipping Execution to redetail the balance, and the detailing process cannot find more of the item. The following occurs:

- Oracle Inventory updates Oracle Shipping Execution with the detailing results.
- Auto-backorder splits the delivery line.
- Auto-backorder notifies Oracle Order Management to split the sales order line.
- The backorder is consolidated with other backordered delivery details (if applicable.) See Consolidating Backorders, page 8-3
- Oracle Shipping Execution reduces the requested quantity on the move order line.

The sales order lines appear as follows:

- Line: 1; Item: A; Quantity: 7
- Line: 1.1; Item: A; Quantity: 3

The delivery details appear as follows:

- Line: 100; Sales Order Line: 1; Item: A; Quantity: 7; Status: Released; Move Order Line: 1000
- Line: 101; Sales Order Line: 1.1; Item: A; Quantity: 3; Status: Backordered

Note: If your organization consolidates backorders, and this delivery line already has an existing backorder, then Line 101 would be deleted and the quantity would be consolidated with the existing backorder. See Consolidating Backorders, page 8-3

The move order line appears as: Line: 1000; Required Quantity: 7; Detailed Quantity: 7; Complete Quantity: 7. It removes the move order line detail.

At ship confirm, the delivery details appear as Line: 100; Sales Order Line: 1; Item: A; Quantity: 7; Status: Shipped. It removes the move order line.

Serial Numbers

Detailing can suggest serial numbers to be transacted to fulfill the pick wave move order line. You can change the suggested (pre-specified) serial numbers if the picker chose different serials. Some organizations, however, may choose to not suggest serial numbers and require the pickers to enter the numbers they have selected. This option is enabled using the Allocate Serial Numbers check box on the Organization Parameters window. If you choose not to detail serial numbers, any pick wave move order line for a serialized item will not be automatically pick confirmed and the picker must enter the serial numbers before the material is transacted into staging and becomes eligible for Ship Confirmation.

You can change serial numbers only for items with attribute Serial Generation At Sales Order Issue for Staged lines. For Serial Generation Predefined and At Receipt, you enter the serial numbers at pick confirm.

When you change pre-specified serial numbers:

- The list of values displays only serial numbers in the staging sub inventory. You must manually move the pre-specified serial number to the staging sub inventory. A serial controlled item that is not selected remains in the staging sub inventory
- Oracle Inventory marks pre specified serial numbers during pick confirm so that they cannot be used in a transaction for a different order.

If all orders should be automatically pick confirmed, then the Organization Parameter Pick Confirmation Required must be enabled (see: *Oracle Inventory User's Guide*). No reservations are placed on the specific serial numbers that are pick confirmed so if the picker chooses a serial number that was not recommended by the system, you can perform a sub inventory transfer to move the correct serial number to the staging location and then perform another sub inventory transfer to move the erroneous serial number back into the storage location.

At Pick Confirmation, Oracle Shipping Execution collects the serial numbers that were transacted into staging and assigns them to the appropriate delivery line. It is not necessary to enter serial numbers at Ship Confirmation unless a change occurs.

Reservations

The material picking process also manages Supply Chain Reservations. If no reservation was created prior to pick release through Oracle Order Management or Oracle Inventory, a high level (organization wide) reservation is placed on the item for that sales order. When the move order is transacted at pick confirmation, that reservation is transferred to a detail level (including locators, lots, revisions, and the staging sub inventory) reservation in the staging location. Staging sub inventories should be reservable.

Identifying Potential Shortages

If the allocation process was unable to locate enough material to fulfill the move order line, a shortage situation exists. A short move order line can be re-detailed through the Move Order Transaction window to enable the picker to direct it to another location or by re-releasing the Sales Order through Pick Release.

See Move Orders, *Oracle Inventory User's Guide*

Defining Pick Slip Grouping Rules

You can create grouping rules to organize how picking lines for released sales orders and manufacturing tasks are grouped on pick slips. For example, if you select Delivery as a grouping criteria, all picking lines for the same delivery are grouped together on a pick slip.

You can also select additional grouping attributes for your grouping rules. For example if you select Delivery and Carrier as grouping criteria, picking lines for the same delivery and carrier are grouped together on a pick slip.

To define pick slip grouping rules:

1. Navigate to the Pick Slip Grouping Rules window.

Pick Slip Grouping Rules

Pick Methodology: User Defined

Rule Name: Order Pick

Description:

Effective: 01-AUG-2012 - []

Group By

Sales Order

- ☒ Order Number
- ☒ Customer
- ☐ Ship To
- ☐ Carrier
- ☐ Trip Stop
- ☐ Delivery
- ☐ Shipment Priority

Common

- ☐ Source Subinv
- ☐ Source Locator
- ☒ Item
- ☒ Revision
- ☐ Destination Subinv
- ☒ Destination Locator
- ☐ Project
- ☐ Task

Manufacturing

- ☐ Job / Schedule
- ☐ Operation
- ☐ Department
- ☐ Push / Pull

Perform Bulk Picking: Honor item/sub flag

2. Select a pick methodology. For more information, see *Defining Pick Methodologies, Oracle Warehouse Management Implementation Guide*.
3. Enter a unique name in the Rule Name field.
4. Enter a rule Description if desired.
5. Enter an Effective Date range for the rule. The start date field populates automatically with the current date, you can change this if necessary. You can also enter an expiration date for the picking rule, however the expiration date must be after the start effective date.
6. In the Group By alternative region, select the following applicable parameters:
 - *Order Number*: Items assigned to this order number are assigned to the same pick slip number.
 - *Customer*: Orders for this customer are assigned to the same pick slip number.
 - *Ship To*: Orders addressed to the ship to address are assigned to the same pick slip number.
 - *Carrier*: Orders for a particular freight carrier are assigned the same pick slip

number.

- *Trip Stop*: Orders within a shipping group of deliveries are assigned to the same pick slip number.
- *Delivery*: Orders within a particular delivery are assigned to the same pick slip number.
- *Shipment Priority*: Orders with the same shipment priority are assigned to the same pick slip number.
- *Source Subinventory*: Items with the same source subinventory are assigned to the same pick slip number.
- *Source Locator*: Items with the same source locator are assigned to the same pick slip number.
- *Item*: Items with the same part number are assigned to the same pick slip number.
- *Revision*: Items with the same revision number are assigned to the same pick slip number.
- *Destination Subinventory*: Items with the same destination subinventory are assigned to the same pick slip number.
- *Destination Locator*: Items with the same destination locator are assigned to the same pick slip number.
- *Project*: When project manufacturing is enabled, all items assigned to a project are assigned the same pick slip number.
- *Task*: When project manufacturing is enabled, all items assigned to the same task are assigned to the same pick slip number.
- *Job / Schedule*: All tasks you create for a job or schedule are assigned the same pick slip number.
- *Operation*: All tasks you create for the same operation are assigned the same pick slip number.
- *Department*: All tasks from the same department are assigned the same task type regardless of whether or not you select Job / Schedule.
- *Push versus Pull*: All push tasks are assigned the same pick slip number, and all pull tasks are assigned the same pick slip number regardless of whether or not you select Job / Schedule.

Note: This is the supply subinventory defined on the Bill of Material.

This applies only to manufacturing tasks with supply type of pull, and push components that specify a supply subinventory and locator. Enabling Supply Subinventory also groups push and pull tasks separately, because pull tasks are assigned to a subinventory, and push tasks are not assigned to a subinventory.

This is more specific than enabling Push versus Pull because tasks that have different supply subinventories are grouped separately only if you include Supply Subinventory in the grouping criteria.

7. Select the desired Perform Bulk Picking option from the drop down list. The available choices are as follows:
 - *For entire wave:* At pick release, every item in a pick wave is a candidate for bulk picking.
 - *Honor item/sub flag:* At pick release, only bulk picked enabled items and subinventories are candidates for bulk picking.
 - *No:* Disables bulk picking.

Related Topics

Component Picking, *Oracle Work in Process User's Guide*

Releasing Sales Orders for Picking

The Release Sales Orders for Picking window specifies the criteria for releasing one or more order lines. You can select order lines based on a number of criteria such as warehouse, shipment request date, and item. Shipping Execution only releases delivery lines that have been booked and have met the prerequisites for pick release.

Note: A WARNING message is displayed if there is a risk of processing an unwanted high volume of delivery lines. To ensure that an unwanted number of delivery lines are not processed, define at least one of the following release criteria: Order Number, Ship Set, Trip, Delivery, Line/Container, Stop, Project, or Task.

The Release Sales Orders for Picking window features three tabs containing multiple

fields including the following:

- Header:
 - Based On Rule
 - Document Set
 - Batch
- Order tab:
 - Orders: Select the status of the orders to be included in the release criteria. Select *Replenishment Completed* to enable pick release to be submitted for delivery lines with the status of Replenishment Completed.

Note: You cannot pick release delivery line with the status of *Replenishment Requested*. The shipping process evaluates these delivery lines like back-ordered delivery lines except delivery lines with a status of *Replenishment Requested* are not eligible to pick release.

- Order Number
- Prior Reservations Only
- Destination Type
- Customer
- Order Type
- Ship Set
- Ship To
- Item Category Set
- Item Number
- Item Category
- Scheduled Ship Dates To and From
- Requested Dates To and From
- Client

- Shipping tab:
 - Trip
 - Delivery
 - Ship Method
 - Line/Container
 - Release Sequence Rule
 - Autocreate Delivery
 - Auto Pick Confirm
 - Ship Confirm Rule
 - Actual Departure Date
 - Stop
 - Ship From
 - Shipment Priority
 - Include Assigned Lines
 - Autocreate Delivery Criteria
 - Autopack Delivery
 - Append Deliveries
- Actual Departure Date: The default value is the system date and time. If you need to reflect a date other than the current system date, you can enter the desired date.

For example, if the picking and shipping took place yesterday and you update your system today, the inventory and shipping transactions resulting from the automated processes will reflect today's date (the system date). However, to reflect the actual date when the picking and shipping actually occurred, enter that date in the Actual Departure Date field .

Note: You must select a ship confirm rule for the Actual Departure Date if ship confirm needs to be completed as part of pick release. A ship confirm rule is required to run ship

confirm during the pick release process.

- Inventory tab:
 - Warehouse (the organization code)
 - Subinventory (sales order lines booked and scheduled with this particular subinventory specified will be selected for pick released)
 - Project (used if Oracle Project Manufacturing is enabled)
 - Task (used if Oracle Project Manufacturing is enabled)
 - Pick Slip Grouping Rule
 - Allocation Method
 - Cross Dock Criteria
 - Auto Allocate
 - Plan Tasks (used if Oracle Warehouse Management is enabled)
 - Task Priority (used if Oracle Warehouse Management is enabled)
 - Pick From Subinventory and Locator (if the item is not in the specified Pick From Subinventory or Locator, the system will not specify another location)
 - Default Stage Subinventory and Locator

Note: Include Assigned Lines is a check box that, if selected, enables the lines assigned to the delivery to be selected and picked. If this check box is not selected, the lines assigned to the delivery will not be selected and picked.

Running Pick Release

There are two methods for running Pick Release from this window, including the following:

- Execute Now: Releases an order, Trip, Trip Stop, or delivery immediately, thus eliminating time spent waiting to process through the Concurrent Manager queue. If this method is selected, however, you must wait until pick release completes prior to running other processes.

- Concurrent: Releases in the background for multiple orders, Trips, or deliveries, enabling you to run other processes simultaneously.

The source from which the material is allocated and the criteria used to allocate the material is determined by the Allocation Method and Cross Dock Criteria fields, located on the Inventory tab of the Release Sales Orders for Picking window:

- Allocation Method: There are 4 modes to choose from when selecting an Allocation Method:
 - Inventory Only (default): Pick release allocates inventory materials only
 - Cross Dock Only: Pick release allocates cross docking materials only
 - Prioritize Inventory: Pick release checks for inventory availability before all other sources, then allocates material from other sources if needed.
 - Prioritize Cross Dock: Pick release checks for material available for cross docking from all other sources other than Inventory, then allocates materials from Inventory if needed.

Cross Dock Only and Prioritize Cross Dock are only applicable in a WMS Enabled organization.

Note: The check for prior reservations is applicable for the Inventory Only allocation method.

- Cross Dock Criteria: Enables a rule to be named, which limits the cross docking criteria. This field is disabled if the organization is not WMS Enabled, or the Allocation Method is Inventory Only.

See: *Oracle Warehouse Management User's Guide*

See: *Oracle Inventory User's Guide*

By selecting Yes in the Append Deliveries field, on the Shipping tab, you can optimize the creation of deliveries. This feature enables the system to check to see if the delivery line meeting the release criteria can be consolidated with an existing delivery based on your Delivery Grouping Rules and compatibility constraints, if applicable. By doing this, the system reduces the number of deliveries created. Appending Limit, within the Shipping Parameters window, must not be Do Not Append in order to Append Deliveries. Several conditions are required to use the appending limit to consolidate deliveries.

When you release a partial quantity of a delivery line, Pick Release releases the available quantity and creates a new delivery line consisting of the remaining quantity. For example, if you wanted to release a delivery line consisting of 10 items but only 6 items were available to release, Pick Release would release the 6 items and create a backordered line consisting of the 4 remaining items.

If reservations are not available for a particular item, Pick Release leaves the item as submitted to inventory. Pick Release uses item attributes you define in Oracle Inventory, such as lot and locator control, to determine which attributes must be maintained when an item is released. If you place a reservation for an item and include some of the necessary inventory attribute information, Pick Release verifies the existing reservations and adds the outstanding required information. For example, if you are releasing an item under lot and locator controls and you reserve the item on-line to the lot level, Pick Release uses the lot you reserved to and automatically adds the locator to the reservation.

See: Consolidating Delivery Lines and Deliveries., page 4-7

Oracle Shipping Execution Setup chapter, *Oracle Order Management Implementation Manual*.

Parallel Pick Release

Parallel pick release enables multiple pick release processes to run simultaneously as child processes through the Pick Release SRS Parameters window and Release Sales Orders window through the concurrent mode. Parallel pick release is available when pick releasing from the Tools menu on the Shipping Transactions form through the concurrent mode.

Parallel pick release enables you to set a default number of child processes by defining the profile option: WSH: Number of Pick Release Child Processes. See: Parallel Pick Release, *Oracle Order Management Implementation Manual*.

Ship sets and ship models are processed first during pick release. They are included as part of the child processes.

Parallel pick release can be run from the Shipping Transactions form Tools menu. It cannot, however, be executed from the Shipping Transactions form action Launch Pick Release. Parallel pick release does not run when Pick Release is executed Online.

Pick Release Rules

The following rules determine how Pick Release handles order lines and picking lines:

A Pick Release Rule can be defined to determine which order lines are considered for picking and how pick release handles those lines.

Release Rules provide a means of performing one-time setup of your picking criteria through the pick release parameters. Then, you are able to use the Pick Release Rule in the Release Sales Orders for Picking window and the Release Sales Orders SRS concurrent program. You can define multiple rules, if necessary.

By using a Release Rule, you can avoid many repetitive steps normally performed during pick release.

See Defining Release Rules, *Oracle Order Management Implementation Manual*

Note: The date displayed depends on the relationship of the release rule date and the current date.

- If the current date is later than the release rule date, the date that displays is the current date. For example, if the release rule date is 21-August and you launch pick release on 24-August, the date that displays is 24-August.
- If the release rule date is later than the current date, the date that displays is the date on the release rule. For example, if the release rule date is 29-August and you launch pick release on 24-August, the date that displays is 29-August.

Note: The timestamp display always shows the timestamp of the release rule, regardless of the time that you launch pick release.

For more information on Release Rules, refer to the Shipping Execution Setup chapter of the *Oracle Order Management Implementation Manual*.

Release Rules

Release Rules enable the definition of picking criteria before pick release is executed. When executing pick release, a release rule is selected, which contains the picking criteria. Multiple release rules can be defined for various business processes.

Release Sequence Rules

Release Sequence Rules specify the order in which eligible delivery lines are released. The order in which delivery lines are released using a Release Sequence Rule is based on the following attributes:

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

For example, if you wanted to ensure that delivery line items with the earliest Scheduled Ship Dates were released before any other similar items, you could create a Release Sequence Rule to perform this operation. You could then include the Release Sequence Rule when defining a Release Rule, or select the Release Sequence Rule in the Release Sales Orders for Picking window or the concurrent program.

For more information on Release Sequence Rules, refer to the Shipping Execution Setup chapter of the *Oracle Order Management Implementation Manual*.

Pick Slip Grouping Rules

Pick Slip Grouping Rules define how move order lines are grouped together on a pick slip. You must specify a Pick Slip Grouping Rule.

To define a pick slip grouping rule, see *Defining Pick Slip Grouping Rules*, page 7-13.

Pick Release SRS

Pick Release SRS enables you to run pick release (release sales orders for picking) concurrently as many times during the day as needed.

Among other parameters, Pick Release SRS enables you to manually set the actual departure date and enables you to set the number of child processes for each batch (splitting the batch into smaller batches, thus speeding up the process as a whole).

See *Pick Release SRS*, page 12-26 in the Reports and Processes chapter.

Credit Checking and Holds

Credit checking and holds prevent an eligible order line from releasing until the order line is reviewed and removed from hold. For example, you may have a hold on defective products received from your supplier. Shipping Execution prevents release of order lines, even if they have passed all the cycle prerequisites, until the hold is removed.

Credit checking is activated in the Transaction Types window utilizing Credit Check Rules that are assigned to any or all of the following:

- Ordering
- Pick Release: The order is evaluated to see if it violates your credit checking policies at pick release. If it does, the order is placed on hold and the lines are not released. If an order was previously on credit hold but no longer violates your credit checking policies, Pick Release automatically releases the order from credit hold and processes the appropriate order lines
- Shipping: The order is evaluated to see if it violates your credit checking policies before it is shipped.

Note: It is not mandatory that you enforce Credit Checking. You can choose not to assign a Credit Check Rule in the Transaction Types window. Utilizing this option will ensure that the system does not run Credit Checking at any point.

Credit holds will be enforced from the supplier instance. If you utilize a third-party shipping warehouse, and a credit hold is enforced on an order, the shipment request will not be sent to your third-party shipping warehouse until the hold has been lifted.

The only prerequisite is that you must book an order (order lines must be shippable and the line must have a shipping Workflow activity).

See *Oracle Order Management Implementation Manual* and *Oracle Receivables User's Guide*

Pick Releasing from the Shipping Transactions Form

From the Shipping Transactions form, you can pick release trips, stops, deliveries, containers (LPNs), and lines. You can run pick release in the Shipping Transactions form by selecting any of the following from the Actions menu:

- Launch Pick Release
- Pick and Ship
- Pick, Pack, and Ship

For more information on Pick and Ship or Pick, Pack, and Ship, refer to the topic One Step Shipping, page 4-29.

You can pick release an entire trip independently. This is convenient if you want to pick release all deliveries and delivery lines.

To pick release all delivery lines for a trip:

1. Navigate to the Trip window.
2. From the Actions menu, select Launch Pick Release.
3. Click Go.
Pick Release is launched and pick releases the deliveries and delivery lines for that trip.
4. Click Done.
5. Save.

Note: Alternate Pick Release method from within the Shipping Transactions form:

If you want to release only those delivery lines for a specific delivery within a trip, within the Delivery window, select Pick Release Form from the Tools menu or the action Launch Pick

Release from the Shipping Transactions form.

To Pick Release a trip:

1. Navigate to the Query Manager window and find the trip.
2. The trip displays in the Shipping Transactions form.

Trip Window

The screenshot shows a window titled "Trip - 1047118". Inside, there's a tab labeled "Trip" with a small icon. The form contains several input fields and checkboxes arranged in two columns. The left column includes fields for Name (1047118), Ship Method, Carrier (Yellow), Mode of Transport (LTL), Freight Terms, Vehicle Org Code, Vehicle Item Name, Vehicle Number Prefix, Vehicle Number, and Routing Instructions. The right column includes Status (Open), Activity, Service Level (Standard), Firm Status (Not Firm), a checkbox for Exceptions, Arrive After Trip, Vehicle Item Description, Tender Status, and Master BOL Number. At the bottom, there are buttons for "Ship Confirm", "Print Doc Set", an "Actions" dropdown menu set to "Unfirm", a "Go" button, and a "Done" button.

3. From the Tools menu, select Pick Release Form.
4. Complete your entries in the Release Sales Order for Picking window. Optionally, select a Based On Rule to automatically default the pick release criteria for the selected rule.

Note: If you have not created a release rule or do not want to use an existing release rule, do not select a Based on Rule. See Shipping Execution Setup, Defining Release Rules in *Oracle Order Management Implementation Manual*.

5. Click Concurrent or Execute Now to pick release the deliveries and delivery lines for the trip.
6. Save your work.

Ship Confirm

This chapter covers the following topics:

- Overview of Ship Confirm
- Ship Confirm Features
- Running the Ship Confirm Process
- Automated Ship Confirmation
- Defining a Ship Confirm Rule
- Using a Ship Confirm Rule within the Release Sales Order Window
- Auto Ship Confirm from the Shipping Transactions Form
- Auto Ship Confirm from the Quick Ship Window
- Using the Ship Confirm Deliveries SRS to Ship Confirm
- Interface Trip Stop-SRS
- Assigning Serial Numbers to Delivery Line Items

Overview of Ship Confirm

Ship confirm is the process of confirming that items have shipped. When you ship confirm a delivery, Shipping Execution confirms that the delivery lines associated with the delivery have shipped.

You use the Confirm Delivery window to manually select or deselect ship confirm options. The options in the Confirm Delivery window provide flexibility for automating many tasks associated with processing deliveries with many delivery lines. For example, when the Ship Entered Quantities, Unspecified Quantities Ship option is selected at ship confirm, the shipped amounts are automatically processed so that each delivery line with a missing shipped quantity value is recorded as fully shipped. This saves you from manually entering each item as fully shipped.

Note: Oracle Shipping Execution supports up to 5 decimal points for order quantities created in Discrete Inventory organizations. Existing order quantities containing more than 5 decimal points should not be entered during ship confirm to avoid the ship confirm process from failing.

During ship confirm, you can also automatically create a trip and related stops for a delivery that has not been assigned to a trip.

Note: For a list of the actions that cause recalculating, see Freight Rate Recalculation Actions, page 4-25

During Ship confirm, the application validates the actual departure against the following:

- Shipping calendar associated with the location of the organization.
If there is no assignment of a shipping calendar to the organization location, and if there is any assignment at organization level (shipping calendar), then the application defaults the shipping calendar of the assignment at the organization level and validates against that.
- Receiving calendar for customer.
If there is any assignment of receiving calendar at customer location, then the application considers it for validation. Otherwise, the application defaults the calendar at customer level (if any).
- Carrier calendar.
If there are any assignments at organization location or customer location, then the application considers these calendars. Otherwise, the application considers the calendar defined at organization level (for a particular carrier), and the one defined at customer level (if any).

Ship Confirm Features

Backordering

You might choose to partially backorder when a customer determines that they will have a down production line if you do not ship allocated material to them right away. You can ship a partial quantity to the intended customer and backorder the remaining quantity to accommodate the down line situation. You run pick release on the backordered delivery line to allocate it to the down-line customer.

If you decide to backorder at ship confirm, use either of the following ship confirm

options:

- Ship Entered Quantities, Unspecified Quantities Backorder: The ship confirm process splits the delivery line as follows:
 - The original line quantity is the detailed quantity. Its released status progresses--Released to Warehouse becomes Staged/Pick Confirmed and Staged/Pick Confirmed becomes Shipped.
 - The new line quantity is the difference between the requested quantity and the detailed quantity. Its line status is backordered. It has no move order line reference; it will have one after you pick release it.
- Backorder All: The ship confirm process places the delivery line into backorder.
- With either option, if the delivery detail is assigned to a trip in Contents Firm status, the ship confirm process keeps the delivery and container assignments. If the trip is not firm, the ship confirm process unpacks packed containers.

When you backorder at ship confirm, the inventory shows in a staging location. If you move the backordered material, you should perform a subinventory transfer transaction, if the material needs to be moved back to its original location, to record this movement.

If an Assemble to Order (ATO) item is backordered, the sales order line will be split (one part of the line contains the quantity that shipped and the other part of the line contains the backordered quantity) and the reservation for the item will be lost. You will have to re-reserve the item. However, by setting the profile option WSH:Retain ATO Reservations to Yes, you can avoid the redundancy of re-reserving the item. The inventory system retains the reservation and the reservation status changes from Staged to Unstage, while the delivery line status changes to Backordered.

Consolidating Backorders

Consolidation of backordered delivery details is done during Pick Release, Cycle Count, or Ship Confirmation. When a backorder occurs, Shipping Execution searches the database for existing delivery detail backorders for the particular source line. If an existing backorder is found, then the current backordered delivery detail is consolidated with the existing backordered delivery detail.

For example, a source line is split into two delivery details: DD1 and DD2, of a requested quantity of 5 each. A quantity of only 3 are available. If Pick Release is run for DD1 first, then the splits would be handled in the way depicted in the following table.

Delivery Line with Backorder Example

Delivery Detail	Order Quantity	Status
DD1	3	Staged
DD2	5	Ready to Release
DD3	2	Backordered

Next, Pick Release is run for DD2 and Oracle Inventory does not find enough quantity to release and Shipping backorders the quantity. Shipping then consolidates DD2 with DD3 and deletes one of them altogether as represented in the following table.

Delivery Line with Consolidated Backorder Example

Delivery Detail	Order Quantity	Status
DD1	3	Staged
DD3	7	Backordered

Whether or not your organization consolidates backorders is determined by selecting the Consolidate Backordered Lines parameter on the Global Shipping Parameters window.

Note: Only unassigned and unpacked backordered delivery details will be consolidated. Also, backordered delivery details with updated flexfield information or backordered delivery details with exceptions or attachments, will lose the flexfield, exceptions, and attachment information. Packing and shipping instructions will be inherited from the source line.

Non-Reservable Items

Non-reservable items require that you specify the subinventory and stock locator to pick the items from at ship confirm. You will also specify lot, serial, and revisions at ship confirm if applicable. You can also specify the subinventory and stock locator, to pick the item from, through the Item Transactions Default form. Using this method will also require that you specify lot, serial, and revision at ship confirm, if necessary.

Models

You can ship a model non-proportionately, for example:

- You ship all of the components but not in the correct proportion.
- You do not ship all of the components.

When you ship a model in this manner, Oracle Order Management breaks the model and treats each order line as an individual line. Non-shippable lines become fulfilled and eligible for invoicing. To prevent this, do either of the following:

- Put the PTO model into a fulfillment set: none of the lines move beyond fulfillment until all the lines are fulfilled.
- Use header level invoicing; none of the lines are eligible for invoicing until all of the lines are eligible for invoicing.

Ship Confirm Message Configuration

Message configuration enables you to change certain ship confirmation constraint messages from the default of Warning to Error. These constraint messages are displayed (Warning or Error) when you perform ship confirmation.

The ship confirmation messages that are applicable include:

- **Breaking Ship Sets:** For example, your customer requests that you do not send partial ship sets. Setting this message to Error will prevent this by displaying an Error at ship confirm.
- **Missing Inventory Controls:** For example, if a delivery contains a delivery line that is missing inventory controls (for example, serial number or lot number), then an error is displayed at ship confirm.
- **Breaking Proportionality of Ship Model Complete:** For example, if your customer requires a specific percent to ship orders complete, then this will display an error at ship confirm if the proportion of the order is not shipping complete.

Message configuration is defined in the Shipping Execution Role Definition window. See the Shipping Execution Setup chapter of the *Order Management Implementation Guide* for information on defining message configuration.

Examples of Warning and Error Messages During Ship Confirmation

The following scenarios describe situations where Warning or Error messages are displayed for the following ship confirmation actions:

- Broken Ship Set

- Broken Ship Model Complete
- Missing Inventory Controls

Third Party Warehouse Scenarios

The following scenarios apply if your system is configured with the third party warehouse feature:

Scenario 1: Warning message appears during ship confirmation at the supplier site.

When sending a shipment request, the system displays a warning message for any of the following conditions:

- Broken ship set
- Broken ship model complete
- Missing inventory controls

If you ignore the warning messages and continue to send the shipment request, the ship confirmation process will complete successfully and the transactions will be sent back to the supplier side. When the shipping transactions are received from the third party warehouse, the ship confirmation process will complete successfully because these scenarios are configured as *warnings* (on the supplier side).

Scenario 2: Error message appears during ship confirmation at the supplier site.

When sending a shipment request, the system displays a warning message for any of the following conditions:

- Broken ship set
- Broken ship model complete
- Missing inventory controls

If you ignore the warning message and continue to send the shipment request, then the ship confirmation process continues successfully and the shipping advice transactions will be sent back to the supplier. When the shipping advice is received from the third party warehouse, the ship confirmation process fails because these messages are configured as *errors* on the supplier side. To complete the ship confirmation process, you can ship confirm the delivery on the supplier side by configuring the messages as *warning* messages (message configuration done at the role level).

Carrier Manifesting Scenarios

The following scenarios apply during carrier manifesting:

Scenario 1: Warning message appears during ship confirmation.

During carrier manifesting (Send Shipment Advice, 940), the system displays a warning

message for any of the following conditions:

- Broken ship set
- Broken ship model complete
- Missing inventory controls

If you ignore the warning message and send the shipment advice, the shipment advice will get processed successfully. The carrier manifesting will return the shipping advice (945) transactions with the manifesting done successfully even if one or more of the preceding conditions occur. During ship confirmation, you will be warned again that a condition exists (such a broken ship set), and you can choose to either proceed or cancel the ship confirmation process.

Scenario 2: Error message appears during ship confirmation.

During carrier manifesting (Send Shipment Advice), the system displays a warning message for any of the following conditions:

- Broken ship set
- Broken ship model complete
- Missing inventory controls

If you ignore the warning message and send the shipment advice, the shipment advice (940) will be processed successfully. The carrier manifesting system will return the shipping advice (945) transactions with the manifesting done successfully even if one or more of the preceding conditions occur.

During ship confirmation, if any of these conditions exist, an error message appears and you will be unable to complete ship confirmation because the messages are configured as errors. To complete the ship confirmation process, you can use a role that has the message configured as a *warning*. (You can set up the message configuration at the user role level.)

Running the Ship Confirm Process

Prerequisites

The following prerequisites are required to successfully run ship confirm:

- Delivery lines must be Staged/Pick Confirmed.
- Delivery must be open.
- At least one delivery line must be assigned to the delivery.
- For Oracle Warehouse Management organizations, the shipped quantity is

disabled, unless the item is either non-reservable or non-transactable.

Considerations for the Material Onhand Status Feature (in Oracle Inventory)

- If lines are not staged/pick confirmed or do not satisfy Inventory controls, a warning appears and they are unassigned from the delivery at Ship Confirm time.
- You can enter only inventory controls (Sub-inventory, Locator, Lot and Serial Numbers) that have a valid material status. You cannot ship confirm if the delivery details inventory controls have material status that do not allow ship confirm. The following transaction types are evaluated when you enter inventory controls and during ship confirmation:

Transaction Type	Description
Sales order issue	Ship confirm external sales order.
Internal order issue	Ship confirm internal order issue.
Internal Order Xfer	Subinventory transfer sourced by internal order.
Int Order Intr Ship	Ship to intransit sourced by internal order.
Int Order Direct Ship	Direct transfer between two organizations on a internal order.
Miscellaneous issue	Perform miscellaneous issue of material.
Project Contract Issue	Project contract Issue.

- *Shipping deliveries:* When a delivery is being ship confirmed, the material status of all delivery details for that delivery are validated. The validation process ensures that the material status allows appropriate inventory transactions on particular SKUs. If Material Status Check fails for any delivery detail, then one of the following actions occurs:
 - If the Roles definition setup for Ship confirm message Invalid Material Status is set to Warning, then that delivery detail will be unassigned from the delivery and remains in Staged status.
 - If the Roles definition setup for Ship confirm message Invalid Material Status is set to Error, then the delivery will not be ship confirmed.

To manually ship confirm a delivery:

1. Navigate to the Query Manager window, and find the delivery.
2. From the Actions menu, select Ship Confirm to display the Confirm Delivery window.

Confirm Delivery Window

Ship Confirm Rule

Ship Options

☒ Ship Entered Quantities Unspecified Quantities

☐ Ship All

☐ Backorder All

☐ Cycle Count All

☒ Create Delivery for Staged Quantities

Trip Options

Ship Method

Actual Departure Date

☒ Set Delivery In-Transit ☐ Create Bill of Lading

☒ Close Trip ☐ Defer Interface

Document Set

3. Optionally, select a Ship Confirm Rule.

Note: A ship confirm rule is defaulted from the shipping parameters for the organization or from client parameters for the client. See *Oracle Inventory User's Guide* for setting up client.

Ship Confirm Rule offers a way to default the shipping options automatically. It eliminates the task of selecting the shipping options individually. If you select a ship confirm rule that meets your business needs, then you can skip the remaining steps, and click OK.

4. In the Ship Options region, select one of the following ship confirm options:
- **Ship Entered Quantities, Unspecified Quantities Ship:** Ship confirms the quantity of items specified in the Shipped Quantity field and treats blank values as full quantity (shipped quantity = requested quantity). For example, if the Requested Quantity is 10 and the Shipped Quantity field is blank (no values entered), the full quantity (10) is shipped and displays in the Shipped Quantity field.
 - **Ship Entered Quantities, Unspecified Quantities Backorder:** Ship confirms the quantity of items specified in the Shipped Quantity field and treats blank quantities as full backorders (backorder quantity = requested quantity). For example, if the Requested Quantity is 10 and the Shipped Quantity field is blank (no values), the full quantity (10) is backordered and displays in the backordered Quantity field.
 - **Ship Entered Quantities, Unspecified Quantities Stage:** Leaves the unspecified delivery line quantity as staged and removes it from the delivery. For example, if the Requested Quantity is 10 and the Shipped Quantity field is blank (no values), the full quantity (10) remains in the Stage Quantity field and the line is no longer associated with a delivery.

Note: If a non-zero Stage Quantity exists on a line, it is split from the line and unassigned from the delivery. If the Create Delivery for Staged Quantities is enabled, all staged delivery lines are grouped together in a new delivery.

- **Ship Entered Quantities, Unspecified Quantities Cycle Count:** Ship confirms the quantity of items specified in the Shipped Quantity field, treats blank quantities as full backorders (backorder quantity = requested quantity), and transfers the backorder reservation to cycle counting. For example, if the Requested Quantity is 10 and the Shipped Quantity field is blank (no values), the full quantity (10) is backordered and the reservation for quantity 10 is transferred to cycle counting. You can also transfer delivery quantities to cycle count prior to ship confirm by using the Shipping Transactions form, Cycle Count action. Transferring the reservation quantity to cycle count prevents this quantity of the item from being considered for selection during the next pick release.
- **Ship All:** Ship confirms the entire quantity regardless of what was entered in the Shipped Quantity field (shipped quantity = requested quantity). For example, if the Requested Quantity is 10 and the Shipped Quantity field is 5, the full requested quantity is shipped (10) and displays in the Shipped Quantity field.
- **Backorder All:** Backorders the entire quantity irrespective of what was entered

(shipped quantity = 0, backorder quantity = requested quantity).

Note: If the delivery status is Closed, the delivery is unassigned from all trips and all lines will be unassigned from the delivery.

- Cycle Count All: Backorders the entire quantity irrespective of what was entered (shipped quantity = 0, backorder quantity = requested quantity) and transfers the backorder reservation to cycle counting. You can also transfer delivery quantities to cycle count prior to ship confirm by using the Shipping Transactions form, Cycle Count action.
5. Enable the Create Delivery for Staged Quantities box (default setting), if you want all staged delivery lines grouped together in a new delivery.

If you do not want to create a trip for the delivery, click Go to ship confirm and save your work.

Note: Auto-create trip options are dimmed if the selected delivery is already assigned to a trip.

6. In the Trip Options region, select or update the Ship Method and the Actual Departure Date.

This enables you to specify the stop departure date which is the date Order Management Inventory interface will occur.

One way to ship confirm one or more deliveries is to enable the Set Delivery in-Transit and Close Trip fields in the Confirm Delivery window:

- Set Delivery In-transit: Creates a trip and stops for the delivery. Closes the first stop of the delivery, but leaves second stop open. Sets status of delivery to In-transit and initiates Order Management (OM) and Inventory interfaces.
- Close Trip: Creates a trip and stops for the delivery. Closes trip, all stops, and the delivery.

The Actual Departure Date default is the current date and time; however, you can change the date and time to any other date and time.

Note: If Allow Future Ship Date is not selected (in the Global Parameters window), then entering any future date will cause an error. You must enable Allow Future Ship Date if you want to enter future ship dates when ship confirming.

If you set the Allow Future Ship Date parameter in Global Parameter to Yes, enter a future date as the actual departure

date, and try to interface the records to Inventory, then the Inventory Interface does not process the delivery line record with the future ship date. Instead, the program ends in a warning.

7. Enable the Create Bill of Lading box if you want to create a Bill of Lading. This generates a Bill of Lading number and prints it if it is part of a document set.
8. Choose one of the following:
 - If you disable the Defer Interface box and run Ship Confirm, inventory gets decremented and the order line is updated with the shipped quantity.
 - If you enable the Defer Interface box and run Ship Confirm, you need to run the Interface Trip Stop-SRS concurrent request to update the Inventory and the Order Line status. When the Defer Interface box is enabled, a request is not automatically submitted to interface the trip stops.

Note: The Defer Interface is defaulted by the Shipping Parameters setup.

9. Optionally, select the document set you want printed for the delivery and click OK.
10. Save your work

Note: If a delivery is in confirmed status, the pick-up stop has to be closed manually to update Inventory/Order Management (OM). The delivery can be re-opened at any time to make changes as long as the delivery is in confirmed status.

Note: If you are utilizing Oracle Project Contracts and your delivery or a delivery line requires inspection (per Oracle Project Contracts), the Inspection Status field, within the Shipping tab of the LPN window, will display Required. You must change this status to Inspected before Oracle Shipping Execution will ship confirm the delivery. A WARNING message will be displayed, at ship confirm, if this circumstance occurs.

You can also perform ship confirmation from the Quick Ship window. See: Quick Ship Window., page 1-5

Automated Ship Confirmation

Automated Ship Confirm enables you to automatically ship confirm all deliveries that have all lines at status of staged. Automated Ship Confirm can be executed as a concurrent program (set to run at specific intervals) or it can be launched manually.

Each method of executing Automated Ship Confirm has its advantages. You can utilize either or both processes depending on your business needs.

- **Concurrent Submission:** If you use a Ship Confirm Rule within the Ship Confirm SRS program and schedule this concurrent program to run periodically, you will not have to manually ship confirm each delivery. It is designed to support delivery selection based on range of parameters.
- **Ad Hoc (or one time) Submission:** Submitting the Ship Confirm SRS program on an ad hoc basis enables you to control when each ship confirm process will be executed by invoking the process manually.

You can disable Automated Ship Confirm for any delivery by utilizing the Enable Auto Ship Confirm flag at the Delivery tab. If the check box is selected, the delivery will be considered for Automated Ship Confirm. If it is not selected the delivery will not be considered.

You can view the deliveries included in an Automated Ship Confirm batch by utilizing the Query Manager Window to search for Deliveries. In the Ship Confirm Batch field, find the batch number in the list of values.

Note: Only deliveries that do not need manual input or intervention can be automatically ship confirmed.

Within the Automated Ship Confirm parameters, you must choose a Ship Confirm Rule that you have pre-defined in the Ship Confirm Rule window. Using the Ship Confirm Rules, page 8-14 window, you can define as many rules as you need depending on your business needs.

Auto Ship Confirm Report

The Auto Ship Confirm Report, page 12-5 is submitted automatically at the end of Auto Ship Confirm.

Related Topics

Executing the Auto Ship Confirm Process, page 8-14

Executing the Auto Ship Confirm Process

The process of executing the auto ship confirm process includes the following:

- Defining a Ship Confirm Rule, page 8-14
- Using a Ship Confirm Rule within the Release Sales Order Window, page 8-17
- Auto Ship Confirm from the Shipping Transactions Form, page 8-18
- Auto Ship Confirm from the Quick Ship Window, page 8-19
- Using the Ship Confirm Deliveries SRS to Ship Confirm, page 8-19
- Interface Trip Stop-SRS, page 8-22

Defining a Ship Confirm Rule

You define Ship Confirm Rules within the Ship Confirm Rules window.

To define a Ship Confirm Rule:

1. Navigate to the Ship Confirm Rules window.
2. Enter a unique rule name in the Ship Confirm Rule field.
3. Optionally, select an Effective date.

Note: The default Effective date will be the current date. You can modify this date to suit your business needs. Also, you can enter an ending Effective date to disable the rule if needed.
4. Within the Ship Options region, select one of the following options from the Action list of values:
 - Ship Entered Quantities: To ship the quantities entered
 - Ship All: To ship all
 - Backorder All: To backorder all
 - Cycle Count All: To cycle count all

Note: If you want your rule to be eligible as the default rule in the Shipping Parameters window, you must select Ship All as

your option.

5. The Ship Options region also enables you to determine the action to perform with Unspecified Quantities. Select one of the following options:
 - Ship
 - Backorder
 - Stage
 - Cycle Count
6. Determine whether you want to Create Delivery for Staged Quantities.

If this option is selected, the system will create deliveries for delivery lines that are staged but not yet assigned to a delivery, and subsequently perform the other operations defined by this Ship Confirm Rule. If this option is not selected, delivery lines not assigned to deliveries will not be considered for ship confirm using this rule.

Ship Confirm Rules Window

Ship Confirm Rule Effective -

Ship Options

Action Unspecified Quantities

☒ Create Delivery for Staged Quantities

Trip Options

Ship Method Default Option

☒ Ship Method

☐ Default from Trip/Delivery

☒ Set Delivery In-Transit ☐ Defer Interface

☒ Close Trip ☐ Create Bill of Lading

Document Set

7. Within the Trip Options region, select a Ship Method using the list of values.
8. The remaining options within the Trip Options region also require attention. These options include the following:
 - Set Delivery In-Transit
 - Close Trip
 - Defer Interface
 - Create Bill of Lading

Note: If Close Trip is not enabled (if the Close Trip check box is not selected) all trips must be manually closed.

9. Optionally, select a Document Set that will print with the shipment.

Note: Current system date is used as the actual departure date for these deliveries

Using a Ship Confirm Rule within the Release Sales Order Window

You can manually execute Auto Ship Confirm within the Release Sales Orders for Picking window.

From the Release Sales Orders for Picking window, you can specify an individual sales order from which to perform Auto Ship Confirm. Auto Ship Confirm will be performed for all the deliveries assigned to the individual order.

To manually execute the Auto Ship Confirm process from the Release Sales Orders for Picking window:

1. Navigate to the Release Sales Orders for Picking window.
2. Query the specific sales order, or query the batch number.

Note: For detailed information on running Pick Release and the Release Sales Orders for Picking window, refer to the topic Releasing Sales Orders for Picking., page 7-16

3. Optionally, select a ship confirm rule.

Note: A ship Confirm Rule is defaulted from the shipping parameters for the organization or from the client parameters for the client. See Oracle Inventory User's Guide for setting up client.

4. Delete the dates that are in the Scheduled Ship Dates and Requested Dates regions. These dates must be deleted, otherwise the system will only look for shipments within those dates. If your order number does not fall within those dates, the lines will not be picked.
5. Within the Inventory tab, select the warehouse.
6. Pull Replenishment: For pull replenishment, a replenishment suggestion is auto-created as soon as a shortfall is detected during the order release process. This replenishment is useful for items with high uniform demand in forward pick areas.
 - Yes: Enables pull replenishment.
 - No: Disables pull replenishment.

Note: You cannot select the pull replenishment value if the value in the Allocation Method field is Cross Dock Only or Prioritize Inventory. The pull replenishment feature is valid only for Oracle

Warehouse Management-enabled organizations. For more information on replenishment, see the *Oracle Warehouse Management User's Guide*.

7. Within the Inventory, in the Auto Pick Confirm field, select Yes.
8. Within the Shipping tab, in the Auto Ship Confirm Rule field, select the rule that you want to use for auto ship confirming.
9. From the list of values in the Autocreate Delivery field, select Yes.
10. Select Online to process the request.

Note: You can use a Ship Confirm Rule in the Release Rules window which can then be used in the Release Sales Orders -SRS concurrent program.

Auto Ship Confirm from the Shipping Transactions Form

From within the Shipping Transactions form, you can select deliveries or delivery lines that you want Auto Ship Confirm to run against.

To manually execute the Auto Ship Confirm process from the Shipping Transactions form:

1. Navigate to the Query Manager window.
2. Find your delivery or order.

Note: For detailed information on using the Query Manager, refer to the topic Query Manager, page 2-1

3. Select the delivery or delivery lines for the shipment.
4. Within the Actions region, select Pick and Ship or Pick, Pack and Ship from the list of values depending on your needs.

Note: The action Pick, Pack, and Ship is used if an organization utilizes the packing features of Oracle Shipping Execution. The packing functionality is determined in the Autopack Deliveries field, within the Pick Release tab of the Shipping Parameters window.

5. Select Go.

Auto Ship Confirm from the Quick Ship Window

From within the Quick Ship Window, you can select deliveries that you want to Ship Confirm.

To Ship Confirm from the Quick Ship window:

1. Navigate to the Quick Ship window.
2. Find your delivery or trip.
3. Click Ship Confirm.
4. Within the Confirm Delivery window, determine your ship confirm options.
5. Click OK.

Using the Ship Confirm Deliveries SRS to Ship Confirm

You use the Ship Confirm Deliveries SRS window to systematically ship confirm your deliveries.

To execute the Auto Ship Confirm process concurrently:

1. Navigate to the Ship Confirm Deliveries SRS window.

Note: The Parameters window will be active immediately.

2. Populate the parameter fields as needed, including the following:
 - Ship Confirm Rule: Select the appropriate rule from the list of values. This field is required.
 - Actual Departure Date: Accept the system default date or change the default to the actual date that the shipment departs your facility. For example, you might ship confirm yesterday's deliveries today. In this case, you would enter yesterday's date in place of the default system date.
 - Ship Confirm Batch Prefix: Define a batch prefix to uniquely identify your request. Although this field is free form, it is required.
 - Client: Select the client name from the list if you have set LSP mode as the value for WMS: Deployment Mode profile option. See *Oracle Inventory User's Guide*

for setting up client.

- **Organization:** Optionally, select the organization that the shipment is originating from.
- **Pick Release Batch:** Optionally, select the Pick Release Batch name that contains the deliveries that you are ship confirming.
- **Auto Pack Batch:** Optionally, select the Auto Pack Batch name that contains the deliveries that you are ship confirming.
- **Delivery Name (Low):** Optionally, select the low end of delivery names, if you choose to ship confirm based on a range of delivery names.
- **Delivery Name (High):** Optionally, select the high end of delivery names, if you choose to ship confirm based on a range of delivery names.
- **Bill of Lading (Low):** Optionally, select the low end of bill of ladings, if you choose to ship confirm based on a range of bill of ladings.
- **Bill of Lading (High):** Optionally, select the high end of bill of ladings, if you choose to ship confirm based on a range of bill of ladings.
- **Firm Status:** Optionally, select Yes/No to indicate whether the deliveries scheduled for auto ship confirm are: Not Firm, Contents Firm, or Routing and Contents Firm.
- **Ship From Location:** Optionally, select a ship from location to ship confirm.
- **Ship To Location:** Optionally, select a ship to location to ship confirm.
- **Intermediate Ship To Location:** Optionally, select an intermediate ship to location to ship confirm.
- **Pooled Ship To Location:** Optionally, select a pooled ship to location to ship confirm.
- **Consignee/Customer Name:** Optionally, select a consignee who is a customer or a supplier to ship confirm.
- **Ship Method:** Optionally, select a ship method to ship confirm.
- **FOB:** Optionally, select a FOB terms to ship confirm.
- **Freight Terms:** Optionally, select freight terms to ship confirm.
- **Pick-up Date (Low):** Optionally, select the low end of a pick up date, if you

want to use a range of pick up dates, to ship confirm.

- Pick-up Date (High): Optionally, select the high end of a pick up date, if you want to use a range of pick up dates, to ship confirm.
- Drop-off Date (Low): Optionally, select the low end of a drop off date, if you want to use a range of drop off dates, to ship confirm.
- Drop-off Date (High): Optionally, select the high end of a drop off date, if you want to use a range of drop off dates, to ship confirm.
- Log Level: Optionally, select log level for this run. This determines whether a debug file is created. Select zero for no debugging log, or one to create a debugging log.

Ship Confirm Deliveries SRS Window

Parameters

Ship Confirm Rule

Actual Departure Date 27-OCT-2009 22:27:47

Ship Confirm Batch Prefix

Client AT&T Universal Card AT&T Unive

Organization

Pick Release Batch

Auto Pack Batch

Delivery Name (Low)

Delivery Name (High)

Bill of Lading (Low)

Bill of Lading (High)

Firm Status

Ship from Location

Ship to Location

Intermediate Ship to Location

Postal Ship to Location

OK Cancel Clear Help

3. Select OK.
4. Within the At These Times... region, use the Schedule to specify how often you require the process to run.

Note: Ship Confirm Deliveries SRS will not ship confirm a partial ship set. Ship Confirm Deliveries SRS will either ship all of a ship set or none.

Interface Trip Stop-SRS

The Interface Trip Stop-SRS process runs the interface to update Order Management sales order lines, initiates the generation of Departure Ship Notice Outbound (DSNO) generation, and calls a process to update Oracle Inventory. You can run this process one of two ways:

1. **Automatically:** The request will be executed upon ship confirm if the delivery is not assigned to a trip, or the Defer Interface check box is not selected. If the delivery is assigned to a trip, the Interface Trip Stop concurrent request program will be run automatically when the destination Trip Stop is closed. If the delivery is not assigned to a trip, and at the time of ship confirm the Defer Interface is checked, the Interface Trip Stop concurrent request will be automatically run when the destination Trip Stop is closed.
2. **Manually:** To manually execute the concurrent request, navigate to the Shipping Interfaces form and select Interface Trip Stop-SRS from the Name field. The parameters window will be displayed.

The Interface Trip Stop-SRS parameters window contains the following fields:

- **Mode:** You select the interfaces that you want the process to run against. The list of values contains the following choices:
 - All
 - Inventory
 - OM and DSNO
- **Trip Stop:** Select a trip stop that you want to run the process for. The list of values will display all open trip stops.
- **Delivery:** Select a delivery that you want to run the process for. The list of values will display all open deliveries.

Note: If you selected a trip stop from the Trip Stop field, the Delivery field will default to the delivery associated with that trip stop when you select the list of values in the Delivery field.

- **Debug Level:** This is the debug log level that is used when attempting to identify the cause of an error. You can enter zero (0) for Off and one (1) for On.

Note: When the debug log level is turned on, a debug file is generated for further analysis of the issue.

- **Organization:** If you select an organization, then all eligible trip stops for the organization will be processed. Trip Stop and Delivery fields must be left blank if you use this option.
- **Number of Child Processes:** The number of child concurrent programs that should be run in parallel and is defaulted to one. If the number is not greater than 1, then the Interface Trip Stop will not run the child processes in parallel, instead the Interface Trip Stop process itself will finish the process.
- **Stops per Batch:** Indicates how many trip stops should be processed per child request and is defaulted to one.

Note: When the profile OM: Invoice Numbering Method is set to Delivery Name, then even if you specify the Stops per Batch in the Interface Trip Stop concurrent program with a number greater than 1, it is treated as only one stop per request and runs Interface Trip Stop for one stop at a time. If the profile is NOT set to Delivery Name, then it takes the Stops per Batch that you specify and processes accordingly.

Note: The Interface Trip Stop program does not validate the Number of Child Processes or the Stops per Batch fields.

When the Interface Trip Stop runs, you can view the status of your request. The status will be Error, Warning, or Success. The result will be Success if all child processes are successful. The result will be Error if all child processes errored. The result will be Warning if the child processes have any mixture of Error, Warning, or Success.

Assigning Serial Numbers to Delivery Line Items

At the Lines/LPNs tab, you can manage assignment of serial numbers to delivery line items. Serial numbers can be assigned singly or consecutively to a range of items depending on your requirements.

Items must already be set up in inventory so that serial numbers can be assigned at ship confirm. This is done in Oracle Inventory in the Master Item window (Inventory tab > Serial section > Generation > At Sales Order Issue).

After pick release is run, you must enter the shipped quantity in the Shipping Transactions form before you can enter the serial numbers at ship confirm.

If you enter multiple serial numbers in the Shipping Transactions form for a staged delivery line, the Interface Trip Stop concurrent process explodes the delivery line into multiple delivery lines, each having a serial number range. For example, you are shipping a delivery line with a quantity of 10,000. If you enter 10 ranges of 1000 serial numbers each, the Interface Trip Stop concurrent process splits the delivery line into ten

delivery lines. You can view the deliveries' low and high serial numbers in the Shipping Transactions form, after a run of the Inventory Interface concurrent process, by:

- Querying the Lines/LPNs folder
- Querying the Lines/LPNs folder, clicking Detail, and selecting the Inventory Details tabbed region

To assign serial numbers to delivery line items:

1. Navigate to the Query Manager window and query the order.
The order displays in the Shipping Transactions form.
2. From the Actions menu, select Launch Pick Release to pick release the order.
3. Click Detail.
4. Choose the Line/LPN tabbed region and confirm that the delivery line is in Staged/Pick Confirmed status.
5. In the Shipped Qty field, enter the shipped quantity.
6. Remove the cursor from the Shipped field; the process accepts the shipped quantity.
7. If you are shipping a quantity of one item:
 - Enter the Serial Number, if applicable.
 - Click Done.

Note: You must select Serial Numbers from the Tools menu in order to view serial numbers for Closed lines with shipped quantity greater than one.

Note: You cannot partially cancel lines from the Sales Order window that have Staged Delivery details with serial numbers assigned. You must delete the assigned serial numbers before canceling the line partially.

8. If you are shipping more than one of the items:
 - On the menu bar, select Tools > Serial Numbers.
 - To enter individual serial numbers for the item, in the Serial Number Entries Mode area, select Individual and enter the serial numbers.

To enter a range of serial numbers for the item, leave Range selected and enter the serial number range. The Range selection assumes that you are entering a consecutively numbered series beginning with the first serial number. For example, if you ship three and enter the serial number as 345, the series is 345, 346, and 347.

9. Click Done.

Note: If you reduce the quantity for a Staged line that has serial numbers assigned at ship confirm, then a warning message will indicate all serial numbers will be unmarked. It is suggested that you first unmark the serial numbers from the Serial Numbers window before reducing the quantity to be shipped.

Note: Also note that if you ship partial quantity of lines that are assigned serial numbers at ship confirm, and stage the remainder, you will be required to manually split the delivery and serial numbers assigned and then stage the delivery.

Lines with serial controlled items are not split automatically into multiple delivery lines during pick release or during inventory interface when the picked/shipped quantity is greater than 1. The table WSH_SERIAL_NUMBERS stores the serial numbers after the delivery line is interfaced. The delivery line will no longer contain the serial number if the picked/shipped quantity is greater than 1.

If the delivery lines shipped quantity is 1, then the serial number is stored on the delivery line.

Using Shipping Exceptions

This chapter covers the following topics:

- Overview of Shipping Exceptions
- Viewing and Updating Logged Shipping Exceptions
- Logging New Shipping Exceptions
- Purging and Resolving Logged Shipping Exceptions

Overview of Shipping Exceptions

During the shipping and transportation of goods, unforeseen shipping exceptions can occur that conflict with the actual requirements of the shipper, transportation carrier, or customer.

If these exceptions are not handled promptly or properly, it could result in reduced customer satisfaction and loss of business and revenue for a company. Tracking exceptions can also be helpful to identify and correct defects in the business process.

Shipping Execution enables you to do the following:

- View and update logged shipping exceptions, page 9-2
- Log a new shipping exception manually, page 9-7
- Purge logged shipping exceptions, page 9-12

Note: Exceptions and processes for exception handling must already be set up before exceptions can be viewed, logged, or updated. For more information, see Shipping Execution Setup, Defining Shipping Exceptions in *Oracle Order Management Implementation Manual*.

Viewing and Updating Logged Shipping Exceptions

In the View Exceptions window, you can track, review, and update current and past exceptions that have been logged either manually or automatically.

You can use the Find Exceptions window to find selected exceptions or all exceptions. The search displays the results in a series of tabs in the View Exceptions window:

- **Exception tab:** Displays general information about the exception, including exception name, exception ID, logging entity, logging user ID, logged at location, exception location, exception type, exception behavior, status, and a flag to indicate if exception was manually logged.
- **Trip tab:** Displays all trip information specific to the exception, including: trip name, stop location, departure date, and arrival date.
- **Delivery tab:** Displays all delivery information specific to the exception, including: delivery name, and delivery detail ID.
- **Container tab:** Displays the LPN (container) name specific to the exception.
- **Inventory tab:** Displays all inventory information specific to the exception, including: inventory item, inventory organization, item description, lot number, serial number, UOM, quantity, secondary UOM secondary quantity, subinventory, and locator.

You can also select a single exception to view or update it. Single exceptions display in the Log Exceptions window.

In both the View Exceptions and Log Exception windows, you can update details about a selected exception by choosing the tab that corresponds to the information you want to update, and updating the fields in that tab.

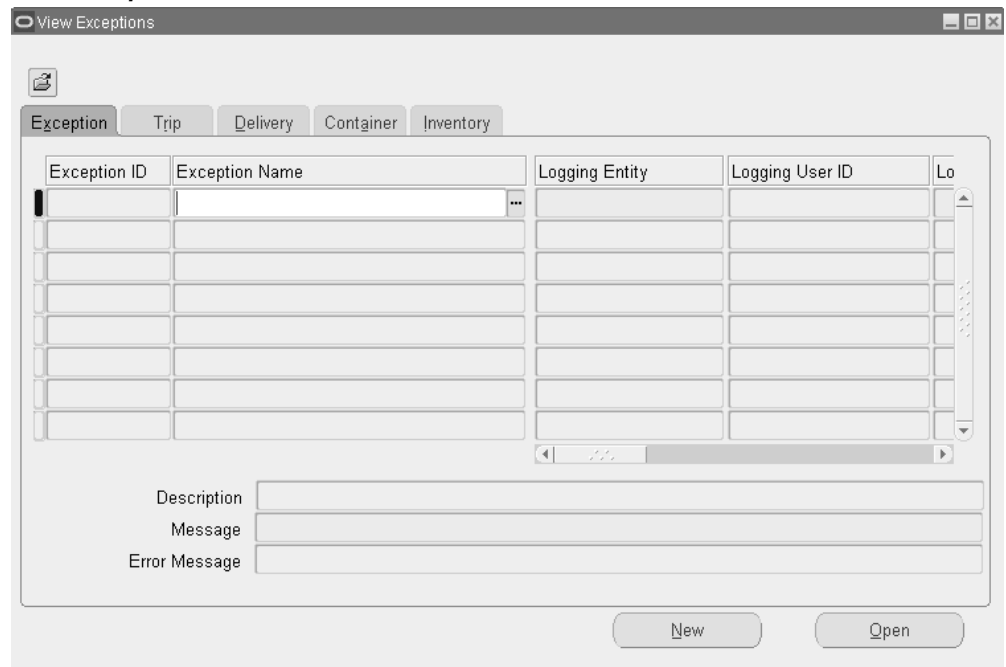
Some exceptions are set up to notify you automatically if an exception occurs during a shipping process (such as ship confirm). The notification alerts you that an exception has occurred and displays details to help you identify the exception.

Note: Exceptions and processes for exception handling must already be set up before exceptions can be viewed, logged, or updated. For more information, see *Shipping Execution Setup, Defining Shipping Exceptions* in *Oracle Order Management Implementation Manual*.

To view and update logged shipping exceptions:

1. Navigate to the View Exceptions window.

View Exceptions Window



The screenshot shows a software window titled "View Exceptions". At the top, there is a tab bar with five tabs: "Exception", "Trip", "Delivery", "Container", and "Inventory". The "Exception" tab is currently selected. Below the tabs is a table with five columns: "Exception ID", "Exception Name", "Logging Entity", "Logging User ID", and "Lo". The table contains several rows of data, with the first row having a value in the "Exception ID" column. To the right of the table is a vertical scrollbar. Below the table, there are three text input fields labeled "Description", "Message", and "Error Message". At the bottom right of the window, there are two buttons: "New" and "Open".

Exception ID	Exception Name	Logging Entity	Logging User ID	Lo
1				

Description

Message

Error Message

New Open

2. Choose the Find icon to display the Find Exceptions window.

Find Exceptions Window

Find Exceptions

Exception Name

Logging Entity

Logged At Location

Exception Location

Inventory Organization

Exception Type

Exception Behavior

Delivery Name

Status

Departure Date -

Arrival Date -

Creation Date -

3. Select one or more of the following criteria for your query. Select only the criteria for the exception(s) you want to find:

Note: To view all exceptions, leave the search fields blank and click Find.

- Exception Name: The particular name of the exception: for example, Picking Hold exception.
- Logging Entity: The log-on entity of the exception: shipper, receiver, or transportation carrier.
- Logged At Location: The location where the exception was entered into the system.
- Exception Location: The location where the shipping exception occurred.
- Inventory Organization: Exceptions according to a particular inventory organization.
- Exception Type: Type of exception: Batch, Delivery, Picking, and Trip.
- Exception Behavior: Type of alert provoked by the exception: Error, Warning, or Information Only.

- Delivery Name: Exceptions by delivery.
 - Status: Describes the current status of the exception:
 - Open: Select to query shipping entities with exceptions that have not been resolved or closed.
 - Closed: Select to query exceptions that have been closed.
 - No Action Required: Select to query exception for which no action is required, such as an exception provided as information only.
 - Departure Date: Exceptions according to the departure date.
 - Arrival Date: Exceptions according to the arrival date.
 - Creation Date: Exceptions according to the date the exception was created.
4. Once you have completed your entries, click Find to display the search results in the View Exceptions window.

View Exceptions Window (with results)

The screenshot shows the 'View Exceptions' window with the 'Exception' tab selected. The window title is 'View Exceptions'. Below the tabs, there is a table with the following data:

Exception ID	Exception Name	Logging Entity	Logging User ID	Lo
2706888	WSH_CHANGE_DEL_GROUP	Shipper	1318	V1
2706891	WSH_CHANGE_DEL_GROUP	Shipper	1318	V1
2707887	WSH_CHANGE_DEL_GROUP	Shipper	1318	V1
2707889	WSH_CHANGE_DEL_GROUP	Shipper	1318	V1

Below the table, there are three text areas:

Description: Changes in one or more delivery grouping attributes

Message: Delivery detail 1583356 has been unassigned from Delivery 1127153 because delivery grouping

Error Message:

At the bottom right, there are two buttons: 'New' and 'Open'.

5. Click the tab that corresponds to the information you want to view regarding the exception.

You can view details for the Exception, Trip, Delivery, Container, and Inventory.

6. To view or update a single exception:
 - Select the exception in the View Exceptions window.
 - Click Open to display the selected exception in the Log Exception window.

Log Exception Window

The screenshot shows the 'Log Exception' window with the 'Exception' tab selected. The fields are as follows:

Field	Value
Exception ID	2706888
Exception Type	Delivery Exception
Exception Name	WSH_CHANGE_DEL_GROUP
Description	Changes in one or more delivery grouping attributes
Message	Delivery detail 1583356 has been unassigned from Delivery 1127153 because delivery grouping
Error Message	
Exception Behavior	Error
Status	Open
Logging Entity	Shipper
Logging User ID	1318
Location	V1 Ship Site A : 475 Park Ave
Logged At Location	V1 Ship Site A : 475 Park Ave

- Choose the tab to display the details that you want to view or update: Exception tab, Trip/Delivery/Container tab, or Inventory tab.
- View or update the available fields in the selected tab.
- Click OK to save your changes.

Logging New Shipping Exceptions

Exceptions are logged automatically and manually. For information on automatically logged exceptions, refer to the Order Management Implementation Manual.

The following outlines a simple shipping process that requires a manual exception to be logged:

- Process: Transport Shipment
- Logging Entity: Customer, Transportation Carrier
- Exception: The transportation carrier does not deliver goods to the customer on time.
- Handling: The exception should be logged and customer may be given discount for their inconvenience. Transportation carrier may be charged for the delay.

The following are ways of logging a manual exception:

- Select an existing exception name as a "template" to which you can add specific shipping entity details. For example, if you had a seeded exception called Picking Hold that defined handling for picking exceptions, you could enter the exception

name Picking Hold in the Log Exception window to default the handling procedures into the new exception window. Then you only need to add information about the specific shipping entities you are logging the exception against such as the trip name, delivery name, or container name.

- Log a new exception without selecting an exception name. This is useful if you want to create a new exception not based on the default values of an existing exception name.

To log a new shipping exception:

1. Navigate to the Log Exceptions window.
2. Select an exception name from the LOV.

When you select an exception name, the exception definition associated with that name defaults into the Log Exception window. After the values default into the window, you can update fields you want to change (those not grayed out). For example, you may want to change the exception behavior of the exception.

If you do not want to use a pre-defined exception name, leave the Exception Name blank and complete the fields required for the new exception you are logging:

3. Enter a message to explain the nature of the exception.
This message will be visible to other users who view the exception.
4. Based on your exception setup, one of the following Exception Behaviors is defaulted:
 - Information Only: An exception flag is issued but the operation can be completed without handling the exception.
 - Warning: A warning flag is issued but the operation can be completed without handling the exception.
 - Error: An error flag is issued and the operation cannot be completed without handling the exception.
5. The Status is determined by your other selections:
 - If an exception name is defined, then the status defaults based on the Exception Behavior for the exception defined in the Define Exceptions window. Information Only exception behavior defaults to No Action Required. Warning/Error defaults to Open.
 - If no exception is named (the Exception name field is blank), then the exception status is Open.

One of the following statuses can display in the Status field:

- Open: Exception has not yet been resolved.
- Closed: Exception handling was completed successfully.
- No Action Required: No handling required for this exception.

Note: The Manually Logged box is automatically checked if this exception is logged manually in the Log exception window. It is unchecked if it is logged through a program.

6. Select the logging entity to indicate the party that the exception is being logged against (the party who caused the exception).

Choices in the LOV include: Receiver, Shipper, and Transportation Carrier.

Logging User ID is not user-enterable. The application user ID of the person submitting the exception is automatically stored as the Logging User ID.

7. Enter the logged at location to identify the location the logging entity belongs to.
8. Select the exception location where the exception occurred.
9. Navigate to the Trip/Delivery/Container tab.
10. Select the trip name of the shipping exception.

The Stop Location field defaults with the stop locations for the particular trip.

Log Exceptions Window - Trip/Delivery/Container Tab

The screenshot shows a software window titled "Log Exception" with three tabs: "Exception", "Trip/Delivery/Container", and "Inventory". The "Trip/Delivery/Container" tab is active. It contains three main sections: "Trip", "Delivery", and "Container".

- Trip Section:** Includes fields for "Trip Name" (containing "1557"), "Stop Location", "Departure Date", and "Arrival Date".
- Delivery Section:** Includes fields for "Delivery Name" and "Delivery Detail ID" (containing "1583356").
- Container Section:** Includes a field for "LPN".

An "OK" button is located at the bottom right of the window.

11. Select the departure date for the trip.

This window validates the arrival date is later than the departure date.

12. Select the arrival date of the trip.

This window also validates that the arrival date is later than the departure date.

13. Select the delivery name of the exception.

14. Select the delivery detail ID of the delivery.

15. Select the container name of the exception.

16. Choose the Inventory tab:

17. Enter the inventory item involved in the exception.

If the inventory item is not specified or if the exception name selected is not an inventory exception, the inventory fields are grayed and you cannot make any entries.

Log Exceptions Window - Inventory Tab

Log Exception

Exception Trip/Delivery/Container **Inventory**

Inventory Organization V1

Item

Inventory Item

Item Description

Lot Number

Revision

Serial Number

Primary

UOM

Quantity

Secondary

UOM

Quantity

Stocking

Subinventory

Locator

OK

18. Enter the details of the inventory item if you are logging an exception against an inventory item.

If the exception is not logged against an inventory item, then the fields are grayed out.

The following fields are dependent on the inventory item: item description, revision, serial number, lot number, unit of measure (UOM), and quantity:

- The Item Description field displays the default description of the inventory item.
- The Lot Number field displays the default lot number of the inventory item.
- The Revision field displays the item revision, if applicable.
- The Serial Number field displays the serial number of the inventory item, if applicable.
- The Primary UOM field displays the default unit of measure of the inventory item.
- The Primary Quantity field displays the quantity based on the Primary UOM.
- The Secondary UOM field displays the secondary unit of measure of the inventory item.
- The Secondary Quantity field displays the quantity based on the Secondary UOM.
- The Stocking Subinventory field displays the subinventory associated with the

inventory organization.

- The Stocking Locator field is dependent on the Subinventory field. It is enabled only if the Subinventory field is populated.

19. Click OK to save your changes.

Purging and Resolving Logged Shipping Exceptions

To help maintain your shipping exception records and conserve computer storage space, you may want to purge (delete) logged shipping exception records that are no longer required. For example, you may want to purge shipping exception records that are five months and older.

You might also want to mass change the status of (resolve) shipping exceptions.

You must use the Resolve/Purge Exceptions Parameters window to resolve or purge shipping exceptions.

Note: Be careful when resolving and purging (deleting) shipping exception records—you cannot undo the action or retrieve your purged data.

To resolve or purge selected logged shipping exceptions:

1. Navigate to the Resolve/Purge Exceptions Parameters window.

Resolve/Purge Exceptions Parameters Window

Request Id

Exception Name

Logging Entity

Logged At Location

Exception Location

Exception Type

Exception Behavior

Delivery Name

Status

Departure Date -

Arrival Date -

Creation Date -

Data older than number of days

Action

Select and enter only the criteria required for your resolve or purge:

- Request ID: Close/purge exceptions by a particular Request ID.
- Exception Name: Close/purge exceptions by exception name.
- Logging Entity: Close/purge exceptions by a particular logging entity.
- Logged At Location: Close/purge exceptions by logged at location. This is the location the logging entity belongs to.
- Exception Location: Close/purge exceptions by location. This is the location where the shipping exception occurred.
- Exception Type: Close/purge exceptions by exception type such as a delivery exception or picking exception.
- Exception Behavior: Action is taken on exceptions by type of alert provoked by the exception: error, warning, or information only.
- Delivery name: Close/purge exceptions for the delivery.
- Status: Close/purge exceptions by status:
Open: Action taken on exceptions that have not been resolved.

Closed: Action taken on exceptions that have been closed (resolved).

No Action Required: Action taken to close or purge exceptions for which no action was required, such as an exception provided as information only.

- **Departure Date:** Close/purge exceptions by range of departure dates. For example, if you enter 20-MAY-2000 to 29-MAY-2000, exceptions with departures in this date range are purged.
- **Arrival Date:** Close/purge exceptions by range of arrival dates. For example, if you enter 20-MAY-2000 to 29-MAY-2000, exceptions with arrivals on and between this date range are purged.
- **Creation Date:** Close/purge exceptions by range of creation dates. For example, if you enter 20-MAY-2000 to 29-MAY-2000, exceptions created on or between this date range are purged.
- **Data older than number of days:** Close/purge exceptions older than the number of days entered. For example, if you enter 25, exceptions 25 days and older are purged.
- **Action:** Mass updates (close or purge) the status of exceptions selected by the other criteria to the selected status but does not purge them.

Note: Be careful when resolving or purging (deleting) shipping exception records—you cannot undo the action or retrieve your purged data.

2. Click Submit to resolve or purge the exceptions.

To resolve or purge all logged shipping exceptions:

1. Navigate to the Resolve/Purge Exceptions Parameters window.
2. Leave all the fields blank in the Resolve/Purge Exceptions Parameters window and select Close or Purge from the Action list of values.
3. Click Submit to display the Decision box.
4. Choose Yes to purge all logged shipping exceptions or choose No to cancel the purge.
5. If you chose Yes, the logged exceptions are purged.

Using Oracle Workflow with Oracle Shipping Execution

Overview of Using Oracle Workflow with Oracle Shipping Execution

Oracle Shipping Execution enables you to utilize Oracle Workflow to enhance your day-to-day business. Using Oracle Workflow with Oracle Shipping Execution is optional; however, if you choose to enable Oracle Workflow with Oracle Shipping Execution, specific tasks and output are enabled through the use of customized business objects. For example, the workflow can be configured so that specific users receive a notification email when an overship or backorder occurs.

The following list represents a few of the enhancements when Oracle Workflow is utilized with Oracle Shipping Execution:

- Workflow Monitor displays Oracle Shipping Execution delivery and trip workflows directly from the Shipping Transactions form or Quick Ship window. See: Viewing Workflow from Shipping Windows, page 10-4.
- Workflows are independent, enabling you to use only those processes, activities, and subprocesses that you need.

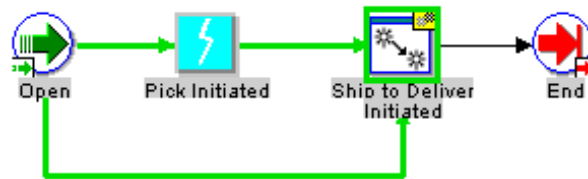
The parameters to enable and disable workflows are located within the Shipping Parameters and Global Parameters. See *Oracle Order Management Implementation Guide*.

- Ease of communication with other Oracle and non-Oracle Applications
- Ability to print Oracle Shipping Execution documents at any point in the shipping process
- Notifications can be sent to users or external system components (3rd party warehouses, carrier manifest systems, and so on) upon activity completion, errors, or rejections.

Delivery Flow - Generic

This process is initiated when a delivery line is assigned to a delivery and completed when the delivery reaches its final drop-off location. This workflow applies to outbound deliveries, such as a delivery that is created with assigned delivery lines that are picked and ship confirmed. Delivery workflow is not raised for consolidation deliveries.

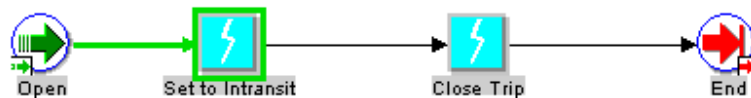
Delivery Flow - Generic



Trip Flow - Generic

This process is initiated when a trip is created and completed when the ultimate drop-off stop is closed. This workflow applies to trips that are created automatically or manually, such as a trip that is created automatically at ship confirmation.

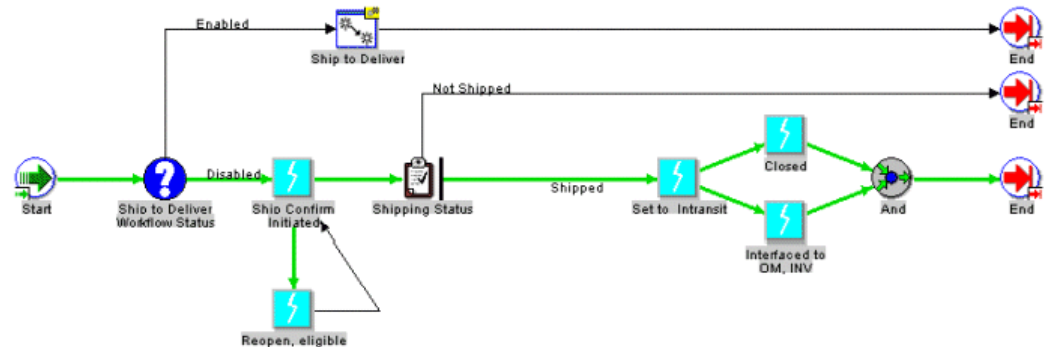
Trip Flow - Generic



Ship to Deliver Process Workflow

This process models the ship confirm process through the Order Management and Inventory interfaces. This workflow is optional, therefore, Oracle Shipping Execution continues to function without the use of this workflow. This can be enabled if you need it for your business.

Ship to Delivery Process Workflow



Extending Workflows: You can modify or extend workflows through the use of the Oracle Workflow Builder. Certain processes, messages, functions, subprocesses, and properties may be customized. Delivery and Trip workflow offers limited extension capabilities. See *Oracle Workflow User's Guide* and *Oracle Order Management Using Workflow in Oracle Order Management* for more information on extending workflows.

Purging Workflows: Workflows are eligible for purging through the use of Oracle Workflow or when deliveries or trips are purged; using Shipping Purge.

Activities and Notifications

Oracle Shipping Execution offers a seeded activity and a seeded notification. Both are available to use in your custom workflows.

The seeded activity is Print Document Set. This activity enables you to print a document set at a specific time during the course of the workflow.

The seeded notification is Delivery is Ship Confirmed. This notification sends information to specified users when a delivery is ship confirmed. This notification can be customized and leveraged to be used in any part of the workflow.

Business Events

Business events are optional. They can be enabled or disabled through the Global Parameters and Shipping Parameters. In addition, individual Business Events can be enabled via the Business Events definition window. See: *Oracle Order Management Implementation Manual* and *Oracle Workflow User's Guide*.

The following business events are available for use in Oracle Shipping Execution:

- **Delivery**
 - Delivery Create: Records the delivery ID
 - Submit Manifest: Records the delivery ID
 - Manifest Response: Records the delivery ID
 - Submitted for ITM Screening: Records the delivery ID
 - ITM Response Received: Records the delivery ID
- **Trip**
 - Trip Ship Confirmed: Records the trip ID
 - Trip Create: Records the trip ID
- **Trip Stop**
 - Trip Stop Arrived: Records the trip stop ID
 - Trip Stop Closed: Records the trip stop ID
 - Trip Stop Create: Records the trip stop ID
- **Delivery Line**
 - Delivery Line Ready to Release: Records the delivery line ID
 - Delivery Line Release to Warehouse: Records the delivery line ID
 - Delivery Line Staged: Records the delivery line ID
 - Delivery Line Back-Ordered: Records the delivery line ID

Viewing Workflow from Shipping Windows

To view workflow status from the Shipping Transactions Form or Quick Ship window:

1. Navigate to the Shipping Transactions Form or Quick Ship window.
2. Find and select your delivery or trip.

- From the Tools menu, select Workflow Status.

Oracle Workflow Status Monitor

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Diagnostics Preferences Help Personalize Page Close Window

Activity History
Status Diagram
Participant Responses
Workflow Details

Monitor Activities History

Activity History: WSHDEL, 2407147

Workflow Type **Shipping Delivery** Started **26-Apr-2006 22:18:31**

Status **Active** Completed

Search

Set activity filters and select the "Go" button to view corresponding results.

Activity Type
☒ Response Notifications
☒ FYI Notifications
☒ Functions and Processes
☒ Standard Workflow
☒ Events

Activity Status
☒ Active
☒ Complete
☒ Error
☒ Suspended

Go

Results: Activities

Select	Status	Activity	Parent Activity	Performer	Started	Completed	Activity Result
<input type="radio"/>	Notified	Pick Initiated	Delivery Flow - Generic		26-Apr-2006 22:18:32		
<input type="radio"/>	Notified	Ship Confirm Initiated	Ship to Deliver		26-Apr-2006 22:18:32		
<input type="radio"/>	Complete	Start	Ship to Deliver		26-Apr-2006 22:18:32	26-Apr-2006 22:18:32	
<input type="radio"/>	Active	Ship to Deliver	Ship to Deliver Initiated		26-Apr-2006 22:18:32		
<input type="radio"/>	Complete	Ship to Deliver Workflow Status	Ship to Deliver Initiated		26-Apr-2006 22:18:32	26-Apr-2006 22:18:32	Enabled
<input type="radio"/>	Complete	Start	Ship to Deliver Initiated		26-Apr-2006 22:18:32	26-Apr-2006 22:18:32	
<input type="radio"/>	Active	Ship to Deliver Initiated	Delivery Flow - Generic		26-Apr-2006 22:18:32		
<input type="radio"/>	Complete	Open	Delivery Flow - Generic		26-Apr-2006 22:18:31	26-Apr-2006 22:18:32	
<input type="radio"/>	Active	Delivery Flow - Generic			26-Apr-2006 22:18:31		

View Diagram

- Select, or deselect, any Activity Type and click Go to limit the activities displayed on the window.
- Click any of the following links on the Workflow Status window to view the specific information or diagram:
 - Activity History: View the history of activities for the given delivery or trip.
 - Status Diagram: View the workflow status diagram for the given delivery or trip.
 - Participant Responses: View the responses of each participant (user on the notification list) for the given delivery or trip.
 - Workflow Details: View the details of the workflow for the given delivery or trip.
- Click View Diagram to view the workflow in a graphic format.

Status Diagram

ORACLE

Diagnostics Preferences Help Personalize Page Close Window

Activity History

Status Diagram

Participant Responses

Workflow Details

Activity History >

Status Diagram: WSHDEL, 2407147

Workflow Type **Shipping Delivery** Started **26-Apr-2006 22:18:31**

Status **Active** Completed

Current Status

TIP Status Diagram Time Zone Pacific Time

Delivery Flow - Generic : WSHDEL,2407147

Zoom In WFMON_ZOOM_OUT

```
graph LR; Open((Open)) --> PickInitiated[Pick Initiated]; PickInitiated --> ShipToDeliverInitiated[Ship to Deliver Initiated]; ShipToDeliverInitiated --> End((End));
```

Definition

Usage

Status

Notification

Current Location : Delivery Flow - Generic/Delivery Flow - Generic

Item Type : Shipping Delivery

Activity Name : Delivery Flow - Generic

Description : Process that reflects the operations performed on a generic delivery

Activity Type : Process

Result Type :

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- Click the Definition, Usage, Status, or Notification tab to display specific information about the workflow.

Carrier Integration

This chapter covers the following topics:

- Overview of Carrier Integration
- Calculating Rate and Selecting Service
- Tracking Lines and Containers
- Calculating Time in Transit for a Delivery
- Validating Addresses

Overview of Carrier Integration

Oracle Shipping Execution integrates with third party carriers through the following common APIs (application programming interfaces) in the `wsh_custom_pub` custom hook to provide common solutions for customers who use both Oracle Shipping Execution and third party carriers:

- Carrier Address Validation: `WSH_CUSTOM_PUB.csp_shipment_services`
- Carrier Rate and Service: `WSH_CUSTOM_PUB.rate_shipment_services`
- Carrier Time in Transit: `WSH_CUSTOM_PUB.tnt_shipment_services`
- Carrier Tracking: `WSH_CUSTOM_PUB.trk_shipment_services`

See: Step 17: Specify Carrier Options in `wsh_custom_pub` Custom Hook, *Oracle Order Management Implementation Manual*.

The integration enables you to do the following shipping-related tasks:

- Estimate shipping costs for packages.
- Track lines and LPNs (containers).
- Find time in transit for ground shipments.

- Validate address and postal code information for a shipment.

When you specify your third party carrier details in the `wsh_custom_pub` custom hook, the carrier related actions available in the Shipping Transactions window are:

- Calculating rate and selecting service
- Tracking Lines and Containers
- Calculating Time in Transit for a Delivery
- Validating Addresses

The following topics explain these actions the carrier.

Calculating Rate and Selecting Service

In the Carrier Rate and Service Selection window, you can calculate rates in US dollars, and select carrier services for deliveries, lines, and LPNs (containers).

You can update freight cost values for a delivery line. Lines and deliveries with the same Ship From and Ship To address are grouped into Rate and Service Groups, and total charges for each group can be calculated. When you calculate the total charges for a line item, you can also update the freight costs for that item.

You can compare charges for different carrier services, for example, between two-day express versus overnight delivery. You can also select different tracking options, view charges, and surcharges for an item, and enter dimensions for an item.

To calculate carrier rate and service costs for a delivery:

1. Navigate to the Carrier Rate and Service Selection window.
2. Navigate to the Rate and Service Group tabbed region. It displays the total freight charges in US dollars for a group and the Ship From and Ship To addresses for a delivery. You can view freight costs for a group or update freight costs for an item after completing your entries in the remaining tabs.
3. Select the rate chart and service such as ground or worldwide express.
4. Navigate to the Address Details tabbed region and view the detailed Ship From and Ship To address information.
5. Navigate to the Service Options tabbed region.
6. Select one or more service options such as Saturday Pickup or Additional Handling.
7. Navigate to the Tracking Options tabbed region.

8. Select the First and Second Ship Notification. Choose None, Domestic, or International.
9. Select the Call Tag.
10. Select the Delivery Confirmation.
11. Enable the Verbal Confirmation box if you want verbal confirmation.
12. Click Calculate to calculate the charges.
13. Navigate to the Charges tabbed region and view the product charge and surcharge and each line and item.
14. Navigate to the Weight tabbed region and view the default weight (from Oracle Inventory) for the line item displays in pounds.
15. Navigate to the Dimensions tabbed region.
16. Optionally, enter the length, width, and height for each line item.
17. Navigate to the Value tabbed region.
18. Select the packaging type and declared value for each item.
19. Click Update Freight Costs to update freight costs for the delivery lines.
20. Navigate to the Errors tab and view any errors that occur when calculating charges.
21. Click Done to save your work.

Tracking Lines and Containers

You can track carrier ground shipments for lines and containers (LPNs) and view information such as tracking numbers, status, and service type. You can also view detailed tracking information for a selected line such as the date and location where a package was picked up or dropped off. This information displays in the Carrier Tracking Detail window.

To track lines and containers:

1. Navigate to the Carrier Tracking Summary window.
2. The window displays the most recent tracking information including tracking number, status such as undelivered or delivered, service type, and date.
3. To view tracking details, select a line and click View Details to display the UPS

Tracking Detail window. Otherwise, click Done to exit the window.

4. The Carrier Tracking Detail window displays the package progress including the date, location, and activity such as the arrival and departure scan.
5. Click Done.

Calculating Time in Transit for a Delivery

The time in transit refers to the time in business days that it takes to ship between two sites using Carrier Ground service. The Carrier Time in Transit window displays the time in transit, Ship From and Ship To addresses, and the corresponding origin and destination addresses used by a carrier for a delivery.

To view time in transit for a delivery:

1. Navigate to the Carrier Time in Transit window.

The Carrier Time in Transit window displays the selected items, the Ship From and Ship To codes, and the number of business days in transit.

2. Click Done to close the window.

Validating Addresses

The Carrier Address Validation window validates the Ship From and Ship To address postal codes for a delivery line and matches it against UPS address information. Matches are ranked using a quality rating system with 1.000 being the closest (highest) match.

To validate an address:

1. Navigate to the Carrier Address Validation window.

The top half of the window displays the results of the validation such as the number of address candidates and the accuracy of the validation.

The lower half of the window displays a ranking of matches from highest to lowest for the Ship From and Ship To addresses.

2. Click Done.

Reports and Processes

This chapter covers the following topics:

- Oracle Shipping Execution Reports
- Oracle Shipping Execution Processes

Oracle Shipping Execution Reports

Overview of Reports and Processes

Oracle Shipping Execution provides you with a variety of flexible and easy-to-use reports that help to improve productivity and increase control. Text attachments can be used with reports and processes to print shipping application data: for example, unpacking instructions entered on a delivery line can be printed on the Packing Slip.

Using an XML Publisher-enabled shipping document, you can define your own report layouts, include additional fields, and print the document in PDF format.

Note: A printer must be assigned to the reports. This is set up in the Choose Printers for Shipping Documents window. See *Oracle Order Management Implementation Guide*.

User Procedures

Oracle Shipping Execution reports are visible (depending on your user role) from the Shipping Reports and Documents window. Using the list of values in the Name field, select the report that you are running. Once selected, the Parameters window is displayed for your report. The parameters must be defined where applicable.

Note: Depending on the report you are running, some parameters are required, some are optional, and some reports do not require any

parameters.

See: *Oracle E-Business Suite User's Guide*

User Types

Super User and Business User are typical Oracle Application user types that enable different levels of access to the applications.

Super User

A super user is typically the System Administrator / IT Engineer. This user may define and extend the Oracle XML Publisher layout templates for shipping documents as part of the application setup.

Business User

The business user typically includes most manager roles, including Sales Managers, Sales Representatives, Customer Service Managers, Customer Service Representatives, Contract Administrators / Negotiators, and well as other business managers. This user has extensive business domain knowledge, including business document authoring, negotiation, and approval. This user is typically responsible for defining the layouts of the business document and working with super users to define or update the layout templates to generate business documents in the appropriate format.

Printing Document Sets from Release Sales Orders for Picking Window

Document sets can be printed as part of the pick release process through the Release Sales Orders for Picking window. The field Document Set is in the header region. Use the list of values to select the document set that you want printed with the pick release process.

Any XML Publisher enabled Shipping document can also be included in a document set. Once included, the document is automatically printed with other documents in the document set.

See: *Oracle Order Management Implementation Manual* for information on document sets.

Printing Document Sets Using Release Rules

Document sets can be printed per release rules. Defining release rules enables you to specify a Document Set (within the Shipping tab of the Release Rules window). Use the list of values to select the document set that you want printed when your release rule is used, for example during ship confirm.

Any XML Publisher enabled Shipping document can also be included in a document set. Once included, the document is automatically printed with other documents in the document set.

See: *Oracle Order Management Implementation Manual* for information on defining release

rules.

Printing Document Sets from Shipping Transactions Form or Quick Ship Window

Document sets can be printed for trips and deliveries through the Shipping Transactions Form or the Quick Ship window. After querying your delivery or trip, click Print Document Set and select the document set from the list (if more than 1 document set exists).

Any XML Publisher enabled Shipping document can also be included in a document set. Once included, the document is automatically printed with other documents in the document set.

XML Publisher Enabled Shipping Documents

Oracle XML Publisher enables you to extend various Oracle Shipping Execution reports to suit your business needs. The following list represents those seeded Oracle Shipping Execution report templates within Oracle XML Publisher:

- Bill of Lading
- Commercial Invoice
- Mailing Label
- Master Bill of Lading
- Packing Slip
- Pick Slip
- Vehicle Load Sheet Summary

Once defined or modified, these templates can be used when printing reports from the Reports and Processes window, Shipping Transactions Form, Quick Ship window, and through document sets.

The management of shipping document templates is performed in Oracle XML Publisher.

Note: Editing software can be used to modify and customize templates. For example, Microsoft Word and Adobe Acrobat.

See: *Oracle XML Publisher User's Guide*

See: *Oracle Order Management Implementation Manual* for information on document sets.

Printing Shipping Documents in Adobe PDF Format

Oracle Shipping Execution along with Oracle XML Publisher, enable you to print various reports in the Adobe PDF format. PDF format enabled reports are run in exactly the same way as other shipping reports. (See: *Oracle E-Business Suite User's Guide* for information on report printing procedures). You must, however, enable PDF printing within Oracle Shipping Execution on the Shipping Document Sets window or through the use of concurrent requests. See: *Oracle Order Management Implementation Manual* for information on defining document sets.

Seeded concurrent requests, that enable PDF printing include the following:

- Pick Slip PDF
- Packing Slip PDF
- Mailing Label PDF
- Bill of Lading PDF
- Master Bill of Lading PDF
- Commercial Invoice PDF
- Vehicle Load Sheet Summary PDF

The chosen template for each report (within Oracle XML Publisher) is the template used when executing the concurrent request for each report.

Multiple Templates: Multiple templates can be created for each report. If your report has multiple templates, then you select which layout to use when printing. Within the Shipping Reports and Documents window, Upon Completion region, click Options to select the layout template to be used.

Auto-pack Report

The Auto-pack Report is designed to provide visibility to batches that have been successfully packed by the Auto Pack concurrent program.

Submission

In the Shipping Reports and Documents window, select Auto-pack Report in the Name field.

Note: This report is automatically printed as a result of the Auto Pack concurrent process.

Parameters

When you request a Auto-pack Report, Shipping Execution provides you with the following parameters:

- Auto-pack Batch: Select the Auto-pack Batch from this required field.
- Delivery From/Delivery To: Optionally, select the range of deliveries to be queried.
- BOL From/BOL To: Optionally, select the range of bill of lading to be queried.
- Customer: Optionally, select a customer.
- Ship From/Ship To: Optionally, select a ship from and/or ship to address.
- Pick-up Date From/Pick-up Date To: Optionally, select a pick up date range for the query.
- Drop-off Date From/Drop-off Date To: Optionally, select a drop off date range for the query.
- Firm Status: Optionally, select a status to query the deliveries.
- Ship Method: Optionally, select a shipping method for the query.
- Pick Release Batch: Optionally, select a pick release batch for the query.
- Exceptions Only: Optionally, select whether or not you want to have only exceptions reported in this query.

Note: Warnings and error messages will only be displayed if the Shipping exception WSH_BATCH_MESSAGE is enabled. See: Oracle Shipping Execution Setup chapter of the *Oracle Order Management Implementation Manual*.

Auto Ship Confirm Report

The Auto Ship Confirm Report is designed to provide visibility to batches that have been successfully ship confirmed by Auto Ship Confirm concurrent program.

Submission

In the Shipping Reports and Documents window, select Auto Ship Confirm Report in the Name field.

Note: This report is automatically generated as a result of ship confirmation.

Parameters

When you request a Auto Ship Confirm Report, Shipping Execution provides you with the following parameters:

- Ship Confirm Batch: Select the Ship Confirm Batch from this required field.
- Ship Confirm Rule: Optionally, select a Ship Confirm Rule.
- Delivery From/Delivery To: Optionally, select the range of deliveries to be queried.
- Bill of Lading From/Bill of Lading To: Optionally, select the range of bill of ladings to be queried.
- Customer: Optionally, select a customer.
- Ship From Address/Ship To Address: Optionally, select a ship from and/or ship to address.
- Pick-up Date From/Pick-up Date To: Optionally, select a pick up date range for the query.
- Drop-off Date From/Drop-off Date To: Optionally, select a drop off date range for the query.
- Firm Status: Optionally, select a status to query the deliveries.
- Ship Method: Optionally, select a shipping method for the query.
- Pick Release Batch: Optionally, select a pick release batch for the query.
- Exceptions Only: Optionally, select whether or not you want to have only exceptions reported in this query.

Note: Warnings and error messages will only be displayed if the Shipping exception WSH_BATCH_MESSAGE is enabled. See: Oracle Shipping Execution Setup chapter of the *Oracle Order Management Implementation Manual*.

Backorder Detail Report

The Backorder Detail Report prints details about backordered items for your organization and displays the information based on the report parameters.

Submission

In the Shipping Reports and Documents window, select Backorder Detail Report in the Name field.

Parameters

When you request a Backorder Detail Report, Shipping Execution provides the following parameters for you to enter. If you leave any of the non-required parameters blank, this report includes all orders that meet your other parameter criteria.

- Source System: Select the source system where the line has been imported to Shipping. This is a mandatory field.
- Warehouse: Optionally, select the warehouse containing the backordered picking line items you want printed in this report.
- Item: Optionally, select the item you want printed in this report.
- Item Category Set: Optionally, select the item category set you want printed in this report. If you make a selection for this parameter, select a specific item category.
- Item Category: Optionally, select the item category you want printed in this report. This field is available when Item Category Set is entered.
- Customer: Optionally, select a customer name.
- Source Header Type: Optionally, select an order source type. If this option is selected, Source Header Number From and To fields will become available.
- Source Header Number From: Optionally, select the source header number (based on the Source Header Type option) that you want to report from.
- Source Header Number To: Optionally, select the source header number (based on the Source Header Type option) that you want to report to.
- Item Display: Select one of the following as the Item Display (mandatory):
 - Both: Print both item description and flexfield
 - Description: Print item description only
 - Flexfield: Print item flexfield only
- Created By: Optionally, select the name of the person that created the delivery detail.
- Ship To Country: Optionally, select the ship to country.
- Sort By: Optionally, select one of the following to sort the report by:
 - Customer (default)
 - Order Number

- Warehouse

Backorder Summary Report

The Backorder Summary Report prints a list of all unshipped orders and includes only open orders that include pick release. Multiple orders and their back ordered lines are displayed on the same page. It displays order information such as the order type, order numbers, warehouse, last shipped date, monetary value of items ordered, and the quantity of items outstanding and shipped. These amounts involve totals for shippable items only because the Backorder Summary Report does not account for non-shippable items.

Submission

In the Shipping Reports and Documents window, select Backorder Summary Report in the Name field.

Parameters

When you request a Backorder Summary Report, Shipping Execution provides you with the following parameters. If you leave any parameters blank, this report includes all unshipped orders that meet your other parameter criteria.

- Transaction Type: Select the transaction type that you want printed.
- Sales Order Number (Low/High): Select the order number(s) that you want printed in this report.

Note: You must select a transaction type before entering a sales order number(s).

- Warehouse: Select the warehouse for which you want the report printed.
- Item Display: Select Description, Flexfield, or Both depending on whether you want the item name, description, or both the item name and description to be printed in this report.

Bill of Lading Report

The Bill of Lading prints (on preprinted forms) all sales orders that have been confirmed from a selected delivery. This document lists the ship date, carrier, bill of lading number, delivery name, shipper, ship-to address, carrier name, waybill number, quantity and description of unpacked items, quantity and total of items packed in containers, total quantity of items, and weight/volume information defined in shipping. Any shipping notes you may have created are also printed.

XML Publisher Enabled

This report is XML Publisher enabled and can be printed in PDF. An XML Publisher enabled Shipping document enables the flexibility to define your own report layouts, include additional fields, and print the document in PDF format. See: XML Publisher Enabled Shipping Documents, page 12-3

Submission

In the Shipping Reports and Documents window, select Bill of Lading in the Name field. This report can also be executed from an Action list, a button (on the Shipping Transactions form or the Quick Ship window, for example), or could be included in a document set.

Parameters

When you request a Bill of Lading, Shipping Execution provides you with the following parameters. If you leave any of the non-required parameters blank, this document includes all picking lines that meet your other parameter criteria.

- Warehouse: Select the warehouse for which you want the report printed.
- Delivery Date (Low and High): Enter the range of delivery dates to be included in the shipping report.
- Freight Carrier: Select the freight carrier you want printed in this shipping report.
- Delivery Name: Select the delivery you want printed in this shipping report.
- Trip Name: Select the trip you want printed in this shipping report.
- Bill of Lading Number: Select the Bill of Lading Number you want printed in this shipping report.
- Item Display: Select Description, Flexfield, or Both depending on whether you want the item name, description, or both the item name and description to be printed in this report under the Item column heading.

Commercial Invoice Report

The Commercial Invoice Report lists all confirmed shipped items in a delivery. If you specify only a delivery name when defining the parameters of this report, Shipping Execution prints one commercial invoice per delivery within the trip.

This report lists ship date, commercial invoice ID (same as the delivery name), shipper/exporter, ship-to address, exporter identification number, freight carrier, all confirmed items within each delivery (including purchase order number, order number, quantity, unit of measure, unit value, and extended value for the items), total packages, total weight, and total value. Country of origin is for future use.

You can print order and line level notes on the commercial invoice. However, Shipping Execution maintains a two line maximum for notes at the header or footer to allow

space for the fixed footer information that prints at the bottom of this report.

This report does not show tax or freight charges.

XML Publisher Enabled

This report is XML Publisher enabled and can be printed in PDF. An XML Publisher enabled Shipping document enables the flexibility to define your own report layouts, include additional fields, and print the document in PDF format. See: XML Publisher Enabled Shipping Documents, page 12-3

Submission

In the Shipping Reports and Documents window, select Commercial Invoice in the Name field.

Parameters

When you request a Commercial Invoice, Shipping Execution provides you with the following parameters. If you leave any of the non-required parameters blank, this document includes all picking lines that meet your other parameter criteria.

- Trip Stop: Select the trip stop code.
- Stop Planned Depart Date (Low and High): Enter the range of departure dates for the trip(s) and/or delivery(s) to be printed in this report. If you do not enter a value for this parameter, it is the equivalent of choosing all.
- Freight Carrier: Select the freight carrier you want printed in this report.
- Warehouse: Select the warehouse for which you want the report printed.
- Delivery Name: Select the delivery.
- Item Display: Select Description, Flexfield, or Both depending on whether you want the item name, description, or both the item name and description to be printed in this report.
- Currency Code: Select the currency code for the document.
- Print Customer Item: Select if you want customer item information included in the document.

Location to Region Mapping Concurrent Process

Location to Region Mapping Concurrent Process processes locations (addresses) and submits a report of location data that cannot be matched to existing regions. Optionally, it can insert new region data into the regions interface table.

Submission

Navigate to the Shipping Interfaces form. If the process is not listed in the Name list of

values, have your system administrator add it to the All Shipping Interfaces request group.

Parameters

- Insert Flag: Yes
- Number of Regions to Process: Enter a suitable number. The concurrent program processes the bulk information in this number of batches.
- Location Start Date and Location End Dates: The concurrent process maps locations from the starting date to the ending date.

Mailing Label Report

The Mailing Label Report consists of labels that print at document generation for identifying the ship-to address of the shipment. You can print mailing labels before Ship Confirm for LPNs since containers can be created without having to be associated to a Delivery. If delivery and trip information is available, it also appears on the mailing label, for example, customer name, ship to address, carrier name, waybill number, number of packages in the shipment, delivery number, container number, order number, and tracking number.

XML Publisher Enabled

This report is XML Publisher enabled and can be printed in PDF. An XML Publisher enabled Shipping document enables the flexibility to define your own report layouts, include additional fields, and print the document in PDF format. See: XML Publisher Enabled Shipping Documents, page 12-3

Submission

In the Shipping Reports and Documents window, select Mailing Label in the Name field.

Parameters

When you request a Mailing Label, Shipping Execution provides you with the following parameters. If you leave any of the non-required parameters blank, this report includes all customer addresses that meet your other parameter criteria.

- Trip Stop: Select the trip stop for which you want labels printed.
- Stop Planned Depart Date (Low and High): Enter the range of dates containing the delivery/deliveries for which labels are printed.
- Freight Carrier: Select the freight carrier for the report you want to print.
- Warehouse: Select the warehouse for the report.
- Delivery Name: Select the delivery name for which you want labels printed.

- LPN: Select the LPN for which you want labels printed.

Master Bill of Lading Report

The master bill of lading is a record of the physical bills of lading and prints the ship confirmed deliveries for a trip. It includes origin, final destination, stop off points, container description, and trailer weight.

The Master Bill of Lading report shows information when a trip has multiple deliveries from the origin.

XML Publisher Enabled

This report is XML Publisher enabled and can be printed in PDF. An XML Publisher enabled Shipping document enables the flexibility to define your own report layouts, include additional fields, and print the document in PDF format. See: XML Publisher Enabled Shipping Documents, page 12-3

Submission

- In the Shipping Reports and Documents window, select Master Bill of Lading in the Name field
- From the Shipping Transactions form, at the Trip tab, select Print Master BOL from the Actions menu
- When ship confirming a trip, select the Create Master Bill of Lading check box
- Within the Trip window, select the Action Print Master BOL

Parameters

- Trip: Select the trip you want printed in this shipping report. This field is required.
- Print BOLs: Select Yes if you want the corresponding BOLs to be printed at the same time as the Master BOL. If you do not want the corresponding BOLs to be printed at the same time as the Master BOL, then select No.

Open Deliveries Report

Use the Open Deliveries Report to view deliveries that you have not recorded as ship-confirmed or shipped.

Use it as:

- A list of all deliveries that need processing and need ship-confirm
- A list of the customer orders that the warehouse is processing
- A list of pending orders that need processing at the end of a fiscal period to

recognize revenue

- A list of deliveries with assigned lines that you need to lock in (status Firm)
- A list of deliveries that you may need to close

Submission

In the Shipping Reports and Documents window, select Open Deliveries Report in the Name field.

Parameters

- Batch Name: A picking batch.
- Customer Name: The customer or supplier's name that you are running the report against.
- Creation Date(Low) and Creation Date(High): Enter only a range of dates. The report shows deliveries from 00:00:00 of the from date to 23:59:59 of the to date.
- Item Display is required:
 - Description: The report shows the item descriptions. This is the default.
 - Flexfields: The report shows the item flexfield data. Some information may appear truncated.
 - Both: The report shows the item descriptions and the item flexfield data. Some flexfield information may appear truncated.
- Warehouse (required): If a value initially appears, it is from the PO: MFG Organization ID profile option.
- Ship Method: The ship method used.
- Ship To: The ship to address.
- Sort Order is required:
 - Batchname, Delivery: Batch Name ascending/descending; within Delivery, Source Ref. Number ascending.
 - Creation Date, Delivery: Creation Date ascending/descending; within Delivery, Source Ref. Number ascending.
 - Delivery: Delivery ascending; within Delivery, Source Ref. Number ascending.
 - Ship Method, Delivery: Ship Method ascending/descending; within Delivery,

Source Ref. Number ascending.

- Shipment Priority, Delivery: Shipment Priority ascending/descending; within Delivery, Source Ref. Number ascending.

Packing Slip Report

The Global Packing Slip Report lists the goods that are in transit and is used to show that the goods do not belong to the carrier. The goods transported can be from sales orders, internal sales orders or transfers, project contract lines, and return order lines for return to vendor transactions. In some countries, the packing slip is optional while in others, it is required.

The Packing Slip Report prints the following information: the customer's name with both the ship-to and bill-to addresses, ship date, subplot, freight and payment terms, order date, cumulative quantity, and salesperson. Also included are the waybill number, freight type, freight weight, FOB point, freight carrier, and unit of measure.

Note: Set the profile option *RLM: Print Cum Data on Shipping Documents* to Yes to print the cumulative quantity (CUM Qty field) on the packing slip.

The Packing Slip lists each ordered item including the line level ship-to contact or order level contact, the purchase order number, the unit of measure, the quantities ordered, shipped, and backordered.

The Packing Slip layout and format contain the following:

- The contact names are included.
- The back ordered quantity is included as part of the Total Unshipped Quantity and appears separately in the Unshipped Quantity column.
- You can choose to display or not display the Unshipped Details in the Packing Slip Report by selecting *Yes* or *No* in the Display Unshipped Items field in the set-up parameters for this report.
- Shipping and packing instructions entered for an order line display on the report.
- Country names appear in the last line of the address: Ship From address, Ship to address and Bill To addresses.

Note: If a move order line has been purged and you attempt to print the associated packing slip, then a message No Data Found will be displayed.

For internal sales orders, Shipping Execution defaults the internal sales order number and requestor name to the Packing Instructions column.

Note: The Packing Slip Report cannot be printed from a third-party warehouse instance. The Packing Slip Report requires Bill to Location information that is stored in Order Management Order Lines and not in Shipping Delivery Details. This information cannot be transmitted from the supplier instance to the third party instance.

XML Publisher Enabled

This report is XML Publisher enabled and can be printed in PDF. An XML Publisher enabled Shipping document enables the flexibility to define your own report layouts, include additional fields, and print the document in PDF format. See: XML Publisher Enabled Shipping Documents, page 12-3

Submission

In the Shipping Reports and Documents window, select Packing Slip Report in the Name field.

Parameters

When you request a Packing Slip Report, Oracle Shipping Execution provides you with the following parameters. If you leave any of the non-required parameters blank, this report includes all picking lines that meet your other parameter criteria.

- Warehouse: Select the warehouse for the report.
- Delivery Name: Select the name of the delivery for which you want to run the report.
- Print Customer Item: Select if you want the customer item names printed on the report.
- Item Display: Select Description, Flexfield, or Both depending on whether you want the item name, description, or both the item name and description to be printed in this report under the Item column heading.
- Print Mode: Select if you want to print a draft or final version of the Packing Slip Report.
- Print All Option: Select if you want to print separate packing slips (a report for each container), a single consolidated packing slip (for all containers), or both separate and consolidated packing slips.
- Sort by: The information on the packing slip is first sorted by Header ID. Within the Header ID, you can specify to sort by inventory item number or customer item number.

- **Delivery Date (Low and High):** Enter the range of dates for the trip(s)/delivery(s) to be included in your report.
- **Display Unshipped Items:** Select if you want to list unshipped items on the packing slip.

Pick Slip Report

The Pick Slip Report prints all picking line details in a picking batch. This report is used by warehouse personnel to collect all items included in shipments.

The pick slip displays the following sections:

- **Pick slip header:** Lists report date, warehouse, pick slip number, and pick batch number.
- **Release criteria:** Lists pick slip grouping rule name and criteria used in grouping the pick slip such as customer, ship-to address, delivery name, trip stop address, order number, shipment priority, carrier, subinventory, and requisition number.

Note: The criteria defined on the selected pick slip grouping rule displays on the pick slip. For example, customer name and carrier display on the pick slip if the pick slip grouping rule with this criteria is selected for pick release.

- **Pick slip list:** The Pick Slip lists each item as well as the line number, unit of measure, quantity requested, quantity shipped, sales order number, sales order line, ship set, trip, delivery, task id, lot number, serial number from, serial number to, revision, pick from location, and whether the item is required for shipment. The requested quantity shows the total quantity.

This report also lists each sales order, including customer name, shipping address, order number and order date, purchase order number, freight and payment terms, and salesperson associated with the items. Also included are the pick slip number, FOB point, planned freight carrier, requisition number, requestor.

The Pick Slip displays separately the quantity of items picked from various lots: the Transaction Quantity from each lot displays separately under Quantity.

- **Shipping notes:** Lists any associated shipping notes.

XML Publisher Enabled

This report is XML Publisher enabled and can be printed in PDF. An XML Publisher enabled Shipping document enables the flexibility to define your own report layouts, include additional fields, and print the document in PDF format. See: XML Publisher Enabled Shipping Documents, page 12-3

Submission

The Pick Slip report is a pick release document that prints as a result of the pick release process.

Parameters

When you request a Pick Slip Report, Shipping Execution provides you with the following parameters:

- Pick Slip Number (Low/High): Select the range of pick slip numbers to be included on the report.
- Sales Order Type: Select the sales order type to be included in the report.
- Sales Order Number (Low/High): Select the range of sales order numbers to be included on the report.
- Move Order Number (Low/High): Select the range of move order numbers to be included on the report.
- Freight Carrier: Select the freight carrier for the report you want printed.
- Warehouse: Select the warehouse for which you want the report printed.
- Customer: Select the customer for which you want the pick slip number printed.
- Line Status: Select the status of the delivery lines: All, Picked, or Un-picked.
- Detailing Date (Low/High): Enter a date range that for the detailed lines.
- Item Display: Select an item display: Description, Flexfield, or Both.

Note: The document set named Pick Slip Report can be used to print this report automatically during the pick release process. The Shipping Parameter for Print Pick Slip determines when to initiate printing. If the parameter is set to Immediate, then the program looks at the parameter for Number of Pick Slip Lines to determine the number lines to process before printing begins. The pick slip will then immediately print after the system finds for pick release the number of pick slip lines specified by the Number of Pick Slip Lines parameter and include that number of lines on the pick slip. The pick release process will continue, then print the next pick slip when that number of lines is again identified. For example, if the Print Pick Slip parameter is set to Immediate and the Number of Pick Slip Lines is set at 20, then when the pick release process is initiated, a pick slip report will be generated immediately after the system finds 20 lines for release. This setup enables warehouse personnel to begin picking the first 20 lines without having to wait

until the system completes the full pick release.

Note: If the Print Pick Slip parameter is set to At the End, then the pick slip report will be generated when the system completes the review of all eligible lines for pick release. The Shipping Parameter for Number of Pick Slip Lines is ignored if the Pick Slip Report parameter is set to At the End.

Note: The most common method of submitting the Pick Slip Report is to enable it through the seeded document set for Pick Slip Report. If you choose to enable the report in the seeded document set, then you should not submit it as a standard document set. If the Pick Slip Report is submitted in the seeded document set and in a standard document set, then duplicate copies of the report will be printed. The seeded document set should not include any report except for the Pick Slip Report, otherwise the report will be ignored.

Shipped Delivery Lines Report

Use the Shipped Delivery Lines report to display all delivery lines that have been shipped. This report includes each shipped delivery line that satisfies your parameter criteria. With this report you can also print totals for the released and shipped quantities and the number of delivery lines that meet your parameter criteria.

The report will generate a released number that is greater than the shipped number in order to compare released versus shipped quantities. This typically occurs when an order has been partially backordered. For example, you have order number 590221 for 10 each of item AS33490. If a backorder of 6 occurs, then the Shipped Delivery Lines Report will display the following:

Order 590221

Line 1.1 quantity released 10 quantity shipped 4

Line 1.2 quantity released 10 quantity shipped 6

Total: Released 20 Shipped 10

Using this report, you can print information relative to all the delivery lines that have passed the ship confirm process (status: Interfaced) like order number, released, and shipped quantity, and so on. Delivery lines are selected based on the parameters used to generate the report.

You can use this report in several ways, including the following:

- A management report at the month end and quarter end for Accounts Receivables to assure that all shipments had completed and Auto Invoiced.
- As a tool to identify possible re-calls or to identify the customers that a particular item has been sent to.
- A management report by distribution management to compare the items that were released and shipped for a particular time period. It helps in determining picking and shipping performance metrics.

Submission

Submission parameters are displayed on the cover page and critical parameters are repeated on the other pages. The report has two breaks by level, including the following: Operating Unit and Ship From Organization. There is a page break at each new Operating Unit and Ship From organization. Within each, delivery lines appear as a list and the change of page is made when the maximum possible lines per page are reached.

Parameters

- Ship From Organization: This required parameter indicates the ship from organization on the delivery lines that are selected for printing.
- Source System: Optionally, select delivery lines to be printed based on a particular source system.
- Source Type: Select a Source Type if you selected a Source System.
- Source Number From/Source Number To: You can specify a Source Number From and a Source Number To if you selected a Source Type.
- Delivery From/Delivery To: Optionally, select delivery lines to be printed based on a range of deliveries.
- Item: Optionally, select the Item to be reported.
- Item Display: This required parameter indicates how to print the item related information on the report. The possible values are:
 - Item Description: Print the item description only.
 - Item FlexField: Print the item flexfield only.
 - Both: Print the item description and flexfield.
- Customer From/Customer To: Optionally, select delivery lines to be printed based on a range of customers or suppliers.

- Ship Date From/Ship Date To: Optionally, select the range of shipping dates on delivery lines that are printed.
- Ship method: Optionally, select delivery lines to be printed based on a particular ship method.
- Sort By 1, Sort By 2, Sort By 3: You can sort this report based on three sorting criteria. Possible sorting criteria include the following:
 - Customer name
 - Delivery
 - Item
 - Ship Date
 - Ship Method

Note: The Operating Unit and Ship From Organization are major criteria of sorting. For example, if you select Sort By 1 = Customer, Sort By 2 = Ship Date, and Sort By 3 = Delivery, then the report will be sorted by Operating Unit, Ship From Organization, then Customers, By Ship Date within the Customers, and finally by Delivery within the Ship Dates.

Shipping Exceptions Report

The Shipping Exceptions Report provides all the exception details from Shipping Execution.

For more information on defining shipping exceptions, see Shipping Execution Setup, Defining Shipping Exceptions in *Oracle Order Management Implementation Manual*.

Submission

You can print this report by running it through either SRS or during Pick Release processing.

Parameters

When you request a Shipping Exceptions Report, Shipping Execution provides you with the following parameters:

- Exception Name: Identifies the exception encountered in processing.
- Request ID: Identifies the exception request.
- Logging Entity: Displays exceptions for a selected log-on entity: shipper, receiver,

or transportation carrier.

- Exception Location Name: Identifies the location where the shipping exception occurred.
- Ship From Location Name: Identifies the location where the exception report was run (logged location may be different from where the shipping exception occurred).
- Creation Date Low/High: Identifies the range of creation dates for exceptions in the report.
- Last Update Date Low/High: Identifies the range of update dates for exceptions in the report.
- Severity:
 - Information Only: To query shipping entities with exceptions that are provided as information only and do not require resolution.
 - Warning: To query shipping entities with exceptions that cause a warning.
 - Error: To query shipping entities with exceptions that cause an error.
- Status: Describes the current status of the exception:
 - Open: To query shipping entities with exceptions that have not been resolved.
 - Closed: To query shipping entities with exceptions that have been resolved.
 - No Action Required: No handling required for this exception.
- Trip From/To: Identifies the range of trip IDs included in the report.
- Delivery From/To: Identifies the range of delivery IDs in the report.
- Move Order Number High/Low: Defines the move order number(s) for the report.
- Sort By: Defines how the report will be sorted.

Vehicle Load Sheet Details Report

The Vehicle Load Details report prints the loading sequence of items within a delivery. The report header includes the following: name of the report, the date the report is created, trip number, vehicle type, vehicle number, carrier, trip status, prior trip, and instructions.

This report prints the following information for the delivery: stop information for the delivery, planned arrival and departure date, customer name, delivery name, loading sequence number for the delivery, gross weight and net weight of the delivery, waybill number, customer production line to which the delivery is to be shipped, and final ship-to destination. This report also prints the following delivery line information for

the delivery: master or detail container name, loading sequence, production sequence, customer sequence number, customer job number, item number, and item description.

Submission

In the Shipping Reports and Documents window, select Vehicle Load Sheet Details in the Name field.

Parameters

When you request a Vehicle Load Sheet Details Report, Shipping Execution, you are required to select the Trip to be printed.

Vehicle Load Sheet Summary

The Vehicle Load Sheet Summary Report prints a list of all deliveries assigned to a specific trip. This report prints the following header information: report name, report date, and trip number.

This report contains the following trip information: trip date, initial ship from date, whether the trip follows another trip, freight carrier, vehicle type, and vehicle number.

The report contains the following delivery information within the trip: order in which the deliveries are to be loaded in the trip (load sequence), delivery name, gross weight and net weight of each delivery, waybill number, and customer name.

XML Publisher Enabled

This report is XML Publisher enabled and can be printed in PDF. An XML Publisher enabled Shipping document enables the flexibility to define your own report layouts, include additional fields, and print the document in PDF format. See: XML Publisher Enabled Shipping Documents, page 12-3

Submission

In the Shipping Reports and Documents window, select Vehicle Load Sheet Summary in the Name field.

Parameters

When you request a Vehicle Load Sheet Summary, Shipping Execution provides you with the following parameter:

Trip: Select the trip to be printed in this document.

Interface Trip Stop SRS

The Interface Trip Stop-SRS process runs the interface to initiate Oracle Order Management and Oracle Inventory interfaces as well as initiate the process for generating Departure Ship Notice Outbound (DSNO). This functionality is detailed within the topic Interface Trip Stop-SRS, page 8-22.

International Trade Management Reports and Processes

The International Trade Management (ITM) reports and processes enable you to submit transactions to the ITM Adapter. The ITM Adapter then communicates the transactions to the partner ITM application. See: International Trade Management topic in the Oracle Shipping Execution Setup chapter of the *Oracle Order Management Implementation Manual*.

If your current responsibility does not enable you to navigate to International Trade Management Reports and Processes, change responsibility to ITM Adapter Super User responsibility.

Oracle Shipping Execution Processes

Oracle Shipping Execution provides you with various processes, including:

- Automated Carrier Manifesting Concurrent Process, page 12-23
- Create Shipment Batches for Fulfillment, page 12-24
- Import Shipping Locations Concurrent Process, page 12-26
- Location to Region Mapping Concurrent Process, page 12-26
- Pick Release SRS, page 12-26
- Planned Shipment Interface, page 12-27
- Process Deliveries SRS, page 12-28
- Process Shipment Advices, page 12-30
- Process Shipment Requests, page 12-30
- Region Interface Concurrent Process, page 12-31
- Ship Confirm Deliveries SRS, page 12-31
- Shipping Purge Concurrent Process, page 12-31

Automated Carrier Manifesting Concurrent Process

If your business process requires manifesting a significant volume of deliveries, then you can use the Automated Carrier Manifesting concurrent program to complete this task systematically. This program searches for open deliveries with assigned lines that are staged and packed then it sends the Shipment Request automatically. Additionally, if the concurrent program parameter for autopack is set to Yes, then this program

searches for open deliveries with staged lines regardless of whether they are packed. Packing is systemically performed prior to manifesting since only packed delivery lines can be manifested.

Submission

Navigate to the Shipping Interfaces window and, after verifying the correctness of the parameters data, click Submit.

Parameters

- Organization: Select your organization.
- Carrier: Optionally, select a carrier.
- Customer: Optionally, select a customer.
- Customer Ship To: Optionally, enter a customer ship to address
- Scheduled From and To Dates: Optionally, enter a range of scheduled ship dates.

Note: A delivery can have multiple scheduled ship dates. If one of the delivery lines has a scheduled ship date within the range that you specify, then the entire delivery will be extracted.

- AutoPack: Select either Yes or No to determine whether autopacking should execute with your process.

If you select Yes, then unpacked lines that are staged and assigned to an open delivery will be packed and submitted for manifesting. A prerequisite for automated packing is that a container-item relationship must exist for any item considered during this process.

- Log Level: Enter 1 to turn debugging on and 0 to turn debugging off.

Create Shipment Batches for Fulfillment

Create Shipment Batches for Fulfillment concurrent program groups eligible delivery lines for the selected parameters into shipment batches based on grouping criteria.

The following grouping criteria are mandatory:

- Customer
- Ship From Organization
- ShipTo Site
- Operating Unit

- Currency Code

The following grouping criteria are optional:

- InvoiceTo Site
- DeliverTo Site
- ShipTo Contact
- InvoiceTo Contact
- DeliverTo Contact
- Ship Method
- Freight Terms
- FOB Code
- Within Order

Submission

Navigate to the Create Shipment Batches for Fulfillment window and enter the necessary parameters. Click Submit.

Parameters

Enter applicable values for the following parameters:

1. Organization: Select your organization.
2. Consignee/Customer: Optionally, select a customer.
3. ShipTo Location: Optionally, enter a customer ship to address.
4. Sales Order Type: Optionally, select the sales order type.
5. Sales Order Number (Low/High): Optionally, select the range of sales order numbers.
6. Request Date (Low/High): Optionally, select the range of request dates.
7. Schedule Date (Low/High): Optionally, select the range of schedule dates.
8. Shipment Priority: Optionally, select the shipment priority.
9. Include Internal Sales Orders: To include internal sales orders while creating shipment batch.

10. Log Level: Enter 1 to turn debugging on and 0 to turn debugging off.

Note: This concurrent program creates shipment batches even if the delivery detail's organization is not set up as 'Distributed Organization' in Organization Parameters window, ATP, Pick, Item Sourcing tabbed region.

Import Shipping Locations Concurrent Process

This program imports location data into shipping. You must run the program in one of the following conditions:

- You create new regions.
- You create new locations and you are not using the trading community architecture (TCA) business events that automatically propagate location changes to shipping.
- If you encounter issues with new locations that are not being mapped to regions.

Submission

Navigate to the Import Shipping Locations program and enter the necessary parameters. Click Submit.

Parameters

Map Regions: Set to Yes to enable all the available-to-promise transit time calculations.

Location to Region Mapping Concurrent Process

This is an optional program. You do not need to run this program if you have an alternative source of region data that you can enter using the interface table or the Regions and Zones window.

This program, which is typically run only once, examines all the existing location data, and lists any regions you require in the Regions Interface table. Review the suggested regions using the Regions Interface window, and correct errors present from the original location information. After you are satisfied that the entries are correct, you can run the Region Interface program (WSHRGINT).

Submission

Navigate to the Location to Region Mapping program and enter the necessary parameters. Click Submit.

Pick Release SRS

Use this process to run a specific release at the same time every day. SRS runs pick release in the background and the program can be run multiple times daily.

Submission

Navigate to the Pick Release window and enter the necessary parameters. Click Submit.

Parameters

- Release Rule Name: Enter the release rule to be used for this pick release.
- Batch Prefix: Enter a prefix for the pick release batch.
- Debug Level: 0 is Off, 1 is On.
- Actual Departure Date: Enter the actual date that the shipment departed, if the defaulted date is incorrect.

Actual Departure Date is only applicable when the Release Rule that is specified in the SRS Parameter form contains a Ship Confirm Rule. If it does not, then the Actual Departure Date is ignored.

When lines being pick released are also being auto ship confirmed, the actual day of shipping might be one or two days from now. In that case, you can enter the Actual Departure Date for two days from now even though the ship confirm runs automatically today.

- Number of Child Processes: Enter the number of pick release processes that you want to run in parallel, which increases the speed of the process run time by spreading the load to multiple processors. The default number of child processes is based on the profile option WSH: Number of Pick Release Child Processes, which has no default. Changing the profile option changes the default to that number of child processes. IF no value is entered in this profile option, then pick release submits a single process.

Related Topics

Overview of Pick Release, page 7-1

Planned Shipment Interface

You can automatically run the Planned Shipment Interface request every time a planned shipment is received from Oracle Transportation Management. However, for situations that may result in too many Planned Shipment Interface concurrent requests being run simultaneously, you may want to run this request either manually or on a scheduled interval. (Several concurrent requests running at the same time may reduce system performance.)

The *Defer Planned Shipment Interface* check box on the Global Parameters window (General tab) controls the default setting for running the Planned Shipment Interface concurrent request. Select Yes to run the request manually (or to schedule it), or No to run the request automatically every time the planned shipment is received from Oracle Transportation Management. For more information, see the Shipping Execution Setup

chapter in *Oracle Order Management Implementation Manual*.

Submission

Navigate to the Planned Shipment Interface window and enter the necessary parameters. Click Submit.

Parameters

Process Latest Version Only: Determines whether the latest version of the deliveries should be selected for processing. The default value is Yes.

- Yes: Processes all deliveries for a trip (even if only one delivery is to be processed in the list of parameters).
- No: The concurrent request processes the earlier versions of the deliveries (the current status of the delivery in the E-Business Suite should be in Open status waiting for an Update status from Oracle Transportation Management).

Note: The incoming trip (shipment) can have deliveries (releases) belonging to one or more organizations.

Process Deliveries SRS

Use this process to append deliveries and/or autcreate deliveries with unassigned delivery lines or to auto create trips with delivery groups according to the grouping parameters and compatibility constraints.

This process can be limited in the execution of the request to particular delivery lines status, delivery status, date ranges, ship method or customer.

This program is applicable only to outbound delivery lines and deliveries.

Note: Process Deliveries concurrent program does not support ship set enforcement.

Submission

Navigate to the Process Deliveries SRS window and enter the necessary parameters. Click Submit.

Note: If you click Cancel within the Parameters window, then you must also click Cancel within the Process Deliveries Concurrent Program window. Otherwise, the process will run using the default parameters.

Parameters

- Processed Entities: Choose either Deliveries Only or Delivery Lines Only
- Delivery Lines Status: Indicate what status of unassigned delivery lines will be

processed by the concurrent request.

- Deliveries Status: Indicate what delivery status will be processed by the concurrent request.
- Delivery Lines, Scheduled Ship Date Start: Enter a starting scheduled ship date
- Delivery Lines, Scheduled Ship Date End: Enter an ending scheduled ship date
- Delivery Lines, Source System: Indicate what type of source system will be taken in account in the process
- Deliveries, Pick Up Date Start: Enter a starting pick up date
- Deliveries, Pick Up Date End: Enter an ending pick up date
- Deliveries, Drop Off Date Start: Enter a starting drop off date
- Deliveries, Drop Off Date End: Enter an ending drop off date
- Client: Select the client name from the list if you have set LSP mode as the value for WMS: Deployment Mode profile option. See *Oracle Inventory User's Guide* for setting up client.
- Ship From Organization: Choose the Organization
- Customer: Choose the customer or supplier name
- Ship to Location: Enter the ship to location
- Ship Method: Enter a ship method
- Auto Create Deliveries: Yes or No
- Auto Create Delivery Criteria: Select a criteria
- Append Deliveries: Yes or No (Appending Limit in the Shipping Parameters window must be anything other than Do Not Append, the Delivery Line Status parameter must be Ready to Release or Released to Warehouse, the Delivery Lines and Source System parameters must be Order Management, the Ship From Organization parameter must be specified, the Auto Create Delivery parameter must be Yes, and the Auto Create Delivery Criteria parameter must be Across Orders.)
- Group Deliveries by Ship Method: Yes or No
- Group Deliveries by Ship From: Yes or No

- Max Number of Deliveries per Trip: Enter the maximum number of deliveries for the trip
- Log Level: Enter 1 to turn debugging on and 0 to turn debugging off.

Process Shipment Advices

The Process Shipment Advices concurrent program validates shipment advice interface data, creates, and ship confirms the delivery.

Submission

Navigate to the Process Shipment Advices window and enter the necessary parameters. Click Submit.

Parameters

- Shipment Advice Status: Select it from list 'AP' is Awaiting Processing, 'ER' is Error.
- Shipment Advice Number Low/High: Optionally, select the range of shipment request document numbers.
- Shipment Advice Creation Date Low/High: Optionally, select the range of shipment advice creation date.
- Debug Level: Enter 1 to turn debugging on and 0 to turn debugging off.

Process Shipment Requests

This program processes shipment request data from the Shipping Interface tables. Use this shipment request process to create, update, or cancel shipment request lines in Oracle Warehouse Management System instance with deployment as Distributed mode or LSP mode (set as the value of WMS: Deployment Mode profile option) based on data populated in the Shipping interface tables.

Submission

Navigate to the Process Shipment Requests window and enter the necessary parameters. Click Submit.

Parameters

Enter applicable values for the following parameters:

1. Shipment Request Status: Use the list of values to select either AP (Awaiting Processing) or ER (Error) to process respective requests.
2. Client: Select the client name from the list if you have set LSP mode as the value for WMS: Deployment Mode profile option. See *Oracle Inventory User's Guide* for setting up client.

3. Shipment Request Number Low/Shipment Request Number High: Optionally, select the range of Shipment Request Numbers to be processed.
4. Shipment Request Creation Date Low/Shipment Request Creation Date Low: Optionally, select a Shipment Request Creation Date range for which SRs are to be processed.
5. Debug level: Enter 1 to turn debugging on and 0 to turn debugging off.

Region Interface Concurrent Process

Use this process to load bulk geographical information from the regions interface table to Oracle Shipping Execution. This enables you to filter the data that you are loading so that you can repeat the process without loading all of the geographical information each time. The filters are country, country code, province/state, city, city code, and postal code.

Submission

Navigate to the Regions Interface form and, after verifying the correctness of the data, click Load All Regions. If the process does not start, have your system administrator add it to the All Shipping Interfaces request group.

Parameters

None

Ship Confirm Deliveries SRS

Ship Confirm Deliveries SRS enables you to utilize the Auto Ship Confirm functionality within Oracle Shipping Execution. This functionality is detailed within the topic Executing the Auto Ship Confirm Process Concurrently, page 8-19 .

Shipping Purge Concurrent Process

Shipping Purge concurrent process is used to review records that could be purged (based on prerequisite criteria, such as an open delivery), report on (by printing) records that would be candidates for purge, or both purge and report the records that have been purged. Entities that can be purged are trips, trip stops, deliveries, delivery details (lines), and LPNs/containers.

The following is a list of exceptions to purging Shipping Execution entities:

- Shipping Execution entities generated through Oracle Project Contracts cannot be purged.
- Any Shipping Execution entity that is tied to an Oracle Purchase order can only be purged after the purchase order is purged.

- Oracle Order Management generated Shipping Execution entities can only be purged if the order has been purged and no freight charges are open.
- In a WMS Enabled organization, delivery information cannot be purged until verification exists that there are no activities on Oracle Warehouse Management LPNs.

Submission

Select Shipping > Purge SRS from the Navigator window. The Shipping Purge Parameters window opens automatically. Enter your data into the parameters and click OK.

Parameters

- Execution Mode: Use the list of values to select either of the following:
 - Purge: The Oracle Shipping Execution data is purged based on the information you provide in the remaining parameters. A report is then generated detailing the data that has been purged.
 - View Purge Selection: The data is not purged. View Purge Selection generates a report, based on the information you provide in the remaining parameters, of data that is eligible for purge.
- Source System: Select the source system from which you want to select the entities to be purged:
 - All: Eligible shipping data will be purged from all sources.
 - Order Management: Only eligible Order Management shipping data will be purged.
 - Purchasing: Only eligible Purchasing shipping data will be purged.
 - Returns: Only eligible shipping data for Return to Vendor transactions will be purged.
 - Shipping: Only eligible Shipping Execution shipping data will be purged.
- Ship From Org: Use the list of values to select the organization of the entities to be purged.
- Order Number From/To: Use the list of values to select a range of order numbers containing entities to be purged.
- Order Type: Use the list of values to select the order type containing entities to be purged.

- Ship Date From/To: Enter a range of dates containing entities to be purged. The Ship Date refers to the initial pick up date on the delivery.
- Delete Beyond X Ship Days: Enter the number of ship days beyond which data is to be purged. For example, delete all Shipping data that is 90 ship days or older.
- Purge "In Transit" Trips: Yes or No. If Yes, then trips that are In Transit are purged. If No, then they are not purged.
- Delete Empty Records: Yes or No. If Yes, then empty records (for instance, deliveries with no data or LPNs with no data) are purged. If No, then empty records are not purged.
- Creation Date From/To: Use the list of values to select a creation date range containing entities to be purged. This parameter is used only when the Delete Empty Records parameter is set to Yes.
- Delete Beyond X Creation Days: Enter the number of creation days beyond which data is to be purged. For example, delete all empty deliveries that were created more than 120 days ago. This parameter is used only when the Delete Empty Records parameter is set to Yes.
- Sort Per Criteria: Select the sorting criteria for the report. Select from the following:
 - Delivery: The report is sorted by delivery number
 - Order: The report is sorted by order number
 - Trip: The report is sorted by trip number
- Print Detail: Select the detail of the report. Select from the following:
 - Detail: The report is printed with a summary page and detailed pages for deliveries, trips, and orders to be purged or that have been purged.
 - Detail with LPN: The report is printed with a summary page and detailed pages, including LPN information, for deliveries, trips, and orders to be purged or that have been purged.
 - Summary: The report is printed as a summary

Flexfields

Overview of Flexfields

Depending on your system's setup, Shipping Execution may use some or all of the following flexfields. For country-specific information, please see the appropriate country-specific user's guide.

Key Flexfields

Accounting (Oracle General Ledger)

Defining your Accounting key flexfield is part of setting up your sets of books. See: *Designing Your Accounting Flexfield, Oracle General Ledger User's Guide*.

Stock Locators (Oracle Inventory)

If you want to track items by a specific aisle or row, use this key flexfield to capture additional information about inventory stock locators. See: *Oracle Inventory Flexfields, Oracle Inventory User's Guide*.

System Items (Oracle Inventory)

Before you define items, set up this flexfield in order to record and report item information. See: *Oracle Inventory Flexfields, Oracle Inventory User's Guide* and *Oracle Order Management Profile Options*.

Descriptive Flexfields

Additional Trip Information (WSH_TRIPS)

This descriptive flexfield displays additional trip information.

Additional Stop Information (WSH_TRIP_STOPS)

This descriptive flexfield displays additional stop information.

Additional Automotive Trading Partner Trip Stop Information (WSH_TRIP_STOPS)

This descriptive flexfield displays additional automotive trading partner trip stop information.

Additional Delivery Information (WSH_NEW_DELIVERIES)

This descriptive flexfield displays additional delivery information.

Additional Automotive Trading Partner Delivery Information (WSH_NEW_DELIVERIES)

This descriptive flexfield displays additional automotive trading partner delivery information.

Additional Globalization Delivery Information (WSH_NEW_DELIVERIES)

This descriptive flexfield displays additional globalization delivery information.

Additional Delivery Detail Information (WSH_DELIVERY_DETAILS)

This descriptive flexfield displays additional delivery detail information.

Additional Automotive Trading Partner Delivery Detail Information (WSH_DELIVERY_DETAILS)

This descriptive flexfield displays automotive trading partner delivery detail information.

Additional Picking Batch Information (WSH_PICKING_BATCHES)

This descriptive flexfield displays additional picking batch information.

Additional Picking Rule Information (WSH_PICKING_RULES)

This descriptive flexfield displays additional picking rule information.

Additional Pick Grouping Rule Information (WSH_PICK_GROUPING_RULES)

This descriptive flexfield displays additional pick grouping rule information.

Additional Pick Sequence Rule Information (WSH_PICK_SEQUENCE_RULES)

This descriptive flexfield displays additional pick sequence rule information.

Additional Container Item Information (WSH_CONTAINER_ITEMS)

This descriptive flexfield displays additional container item information.

Additional Shipping Parameter Information (WSH_SHIPPING_PARAMETERS)

This descriptive flexfield displays additional shipping parameter information.

Additional Exception Definition Information (WSH_EXCEPTION_DEFINITIONS)

This descriptive flexfield displays additional exception definition information.

Additional Exception Information (WSH_EXCEPTIONS)

This descriptive flexfield displays additional exception information.

Additional Document Instance Information (WSH_DOCUMENT_INSTANCES)

This descriptive flexfield displays additional document instance information.

**Additional Document Category Information
(WSH_DOC_SEQUENCE_CATEGORIES)**

This descriptive flexfield displays additional document category information.

Additional Calendar Assignment Information (WSH_CALENDAR_ASSIGNMENTS)

This descriptive flexfield displays additional calendar assignment information.

Additional Carrier Ship Method Information (WSH_CARRIER_SHIP_METHODS)

This descriptive flexfield displays additional carrier ship method information.

Additional Freight Cost Information (WSH_FREIGHT_COSTS)

This descriptive flexfield displays additional freight cost information.

Additional Carrier Services Information (WSH_CARRIER_SERVICES)

This descriptive flexfield displays additional carrier services information.

Additional Carrier Vehicle Types Information (WSH_CARRIER_VEHICLE_TYPES)

This descriptive flexfield displays additional carrier vehicle types information.

Additional Freight Cost Types Information (WSH_FREIGHT_COST_TYPES)

This descriptive flexfield displays additional freight cost types information.

Additional Global Parameters Information (WSH_GLOBAL_PARAMETERS)

This descriptive flexfield displays additional global parameters information.

Electronic Messaging

Overview of Electronic Messaging

XML Transactions

Oracle Shipping Execution enables the communication of information to external sources outside of Oracle E-Business Suite (EBS) and internal sources outside of Oracle Shipping Execution through the use of XML (Extensible Markup Language).

Oracle XML Gateway must be installed and configured before using XML with Shipping Execution. See: *Oracle XML Gateway User's Guide*.

Oracle Shipping Execution uses XML transactions in many shipping processes such as carrier manifesting (shipment request and shipment advice) and for integration between EBS instance and Distributed Warehouse Management Systems (DWMS) instance (shipment request and shipment advice).

XML Transactions with Carrier Manifesting Systems

XML transactions are used to transmit delivery details to a carrier manifesting system. Once the carrier manifesting system has processed the delivery, the shipping details are transmitted back to Oracle Shipping Execution using an XML shipment response transaction.

The XML transactions used for carrier manifesting are ShowShipment Request and ShowShipment Advice. Both are modified versions of the Open Applications Group (OAG) document type definition (DTD) show_shipment_005 and contain data such as:

- Customer
- Delivery number
- Ship to Address

- Weight
- Carrier

Setting Up XML Transactions with Carrier Manifesting Systems

You can send an outbound message to a carrier manifesting system, including data pertinent to the delivery, that will allow the manifesting system to calculate the total weight, calculate the total freight costs, and produce the required shipping labels and paperwork for shipment. The XML transaction, Shipment Request, extracts data from the delivery tables. After the carrier manifesting system has performed its functions, Oracle Shipping Execution will receive shipment information from the manifesting system in the form an XML Shipment Response transaction. The data transmitted will have the information required to complete the shipment, including designated carrier, vehicle information, freight costs, and other information.

Note: You can use the Action View Message History at the delivery level to view the history of XML messages that have been exchanged. This Action is only available if you have the appropriate privilege assigned to your role.

To enable XML Transactions for carrier manifesting, you must do the following:

- Enable Carrier Manifesting Organization in Oracle Shipping Execution. (In the Organization Parameters window, ATP, Pick, Item Sourcing tabbed region, select Carrier Manifesting Organization.)
- Select Enable Manifesting for the carrier in Shipping Execution. (In the Carrier window, query the specific carrier and select Enable Manifesting.)
- Grant the user privilege Send Outbound XML Messages.

You can setup a concurrent request that will automatically send the Shipment Request to the manifest partner for eligible delivery lines.

To set up automated carrier manifesting:

1. Navigate to the Shipping Interfaces window.
2. Enter Automated Carrier Manifesting in Name field.
3. Define the parameters.

A concurrent request will be launched in the background that will automatically manifest deliveries that meet the criteria (ship from organization, carrier, customer, scheduled from/to dates, etc.) This concurrent request can be scheduled to run periodically so that the process is automated.

To manually initiate an XML transaction for a single delivery within the Shipping Transactions form

1. Navigate to the Shipping Transactions form.
2. Find your delivery.
3. Select the action Send Outbound Message.

A pop up window displays. You can select from the following transactions that send the corresponding XML transactions:

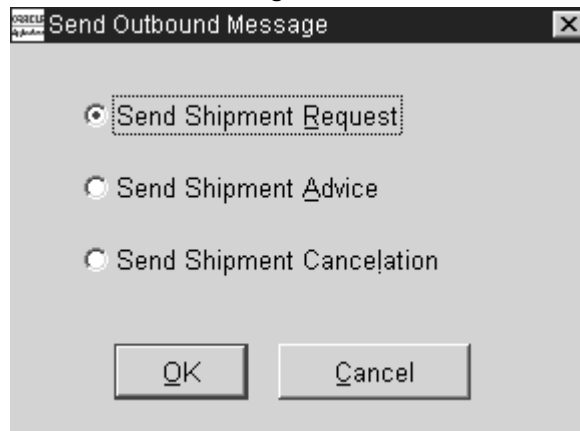
- Send Shipment Request: Shipment must be pick released and packed. Oracle Shipping Execution will extract shipment information and send it to the carrier manifesting system using an XML transaction (Request Shipment).

When a shipment request is sent, the delivery is locked to prevent updates while it waits for feedback from the carrier manifesting system. To update the delivery details, you can unlock the delivery by using the Send Shipment Cancellation. You must then send another Shipment Request if you expect a response.

Note: Manual ship confirm is disabled for a delivery if the organization and carrier are manifest enabled.

- Send Shipment Advice: Not currently used.
- Send Shipment Cancellation: Transmits a message to the carrier's manifesting system to cancel the shipment request

Send Outbound Message Window



XML Transactions with Distributed Warehouse Management Systems

XML transactions enable transmit of shipment batch information from EBS instance to Distributed Warehouse Management System (DWMS) instance and receive shipment advice from DWMS instance into EBS instance. The EBS instance needs to periodically communicate the shipment requests to DWMS instance to process warehousing activities and receive shipment advices from DWMS instance to update the main EBS instance with the shipping information. Hence, to provide seamless integration between EBS instance and DWMS instance, XML Gateway enables generation and posting of Shipment Request XML (For Shipment Batches) to DWMS instance and processing of the Shipment Advice XML posted from DWMS instance at the EBS instance.

Setting up XML Transactions with Distributed Warehouse Management Systems

To ensure seamless integration between EBS and DWMS instances for shipment request and advice, you must complete the following setups in the EBS instance and XML Gateway:

Setups in EBS Instance

1. Set up a distributed organization to enable XML transactions by enabling the applicable organization as a distributed organization in Oracle Shipping Execution. (Navigate: Shipping Execution > Shipping > Setup). In the Organization Parameters window, ATP, Pick, Item Sourcing tabbed region, select Distributed Organization check box.
2. Set Fulfillment Batch as the value for WSH: Distributed Source Entity profile option.

Setups in XML Gateway

1. Create Hubs (Navigate: XML Gateway > SetUp > Define Hubs)
2. Define Trading Partners (Navigate: XML Gateway > SetUp > Define Trading Partners)

See: Hub Definition Forms and Trading Partner Setup in Chapter 3 XML Gateway Setup, *Oracle XML Gateway User's Guide*

Miscellaneous Shipments

Transactions with Miscellaneous Shipments

Oracle Shipping Execution enables you to process and ship confirm deliveries that are not generated through Oracle Order Management, for example from a legacy, non-Oracle order management system. Further, deliveries can also be created for miscellaneous shipments, such as outside processing shipments or return to vendor shipments.

Shipments from legacy systems are sent to Oracle Shipping Execution using XML. The XML transactions Shipment_Request and Shipment_Advice are used to transmit the data to and from the legacy system and Oracle Shipping Execution.

The XML transaction Shipment_Request is equivalent to the EDI transaction 940 Inbound. This transaction is used to send miscellaneous shipment information to Oracle Shipping Execution. This information is then processed and a delivery is created. Ship confirm information is then sent back to the legacy system using the XML transaction Shipment_Advice, which is equivalent to the EDI transaction 945 Outbound. This transaction is used to send delivery and ship confirm information back (as confirmation) to the originating source of the shipment.

Oracle Shipping Execution uses Oracle XML Gateway to generate the XML messages. The organization can be a distributed or non-distributed organization as the organization serves normal inventory operations and miscellaneous shipments. See *Oracle XML Gateway User's Guide*.

Miscellaneous deliveries created in Shipping Execution are treated no different than deliveries created in Oracle Order Management; however, the following details are understood:

- Delivery lines cannot be assigned to a delivery
- Delivery lines cannot be unassigned from a delivery
- Closed deliveries cannot be re-opened
- Partial shipments will close the delivery
- Pick release cannot be executed
- Delivery and delivery line attributes cannot be modified
- Miscellaneous deliveries can be combined with Oracle Order Management generated deliveries within the same trip

Windows and Navigation Paths

Overview of Shipping Windows and Navigation Paths

The following shows the default navigation path for each Oracle Shipping Execution window.

Text in brackets ([]) indicates a button.

The following abbreviations refer you to other Oracle Applications documentation:

- BOM: *Oracle Bills of Material User's Guide*
- Flex: *Oracle E-Business Suite Flexfields Guide*
- INV: *Oracle Inventory User's Guide*
- ONT: *Oracle Order Management User's Guide*
- SYS: *Oracle E-Business Suite system administration guides*
- User: *Oracle E-Business Suite User's Guide*

Windows and Navigator Paths

Oracle Shipping Execution Windows and Navigation Paths

Window	Navigator Menu Path
Account Generator Processes	Shipping > Setup > Flexfields > Key > Accounts

Adapter Startup	ITM Adapter > Administration > Adapter Startup
Adapter Shutdown	ITM Adapter > Administration > Adapter Shutdown
Assign Calendars	Shipping > Setup > Calendars > Assign
Assign Security Rules	Shipping > Setup > Flexfields > Descriptive > Security > Assign > Find Descriptive Flexfield Segment [Find]
Auto-Pack Deliveries SRS	Shipping > Auto-Pack Deliveries SRS
Defaulting Setup-Entity Attributes (<i>See</i> ONT)	Setup > Rules > Defaulting
Calendar	<i>See</i> Assign Calendar and Workday Calendar
Carriers	Shipping > Setup > Freight Carriers, Cost Types > Freight Carriers
Choose Document and Label Printers	Shipping > Setup > Documents > Choose Printers
Container-Item Relationships	Shipping > Setup > Container Load Details > Organizations > [OK]
Create LPNs	Shipping > Transactions > Data Entry > LPN Data Entry > Create LPNs
Cross-Validation Rules	Shipping > Setup > Flexfields > Key > Rules
Define Security Rules	Shipping > Setup > Flexfields > Validation > Security > Define > Find Value Set [Find]
Define Shipping Exceptions	Shipping > Setup > Define Exceptions
Delivery	Shipping > Transactions > Data Entry (folder) > Delivery Data Entry (folder)
Descriptive Flexfield Segments	Shipping > Setup > Flexfields > Descriptive > Segments

Document Categories	Shipping > Setup > Documents > Document Categories - Summary > [New]
Document Categories-Summary	Shipping > Setup > Documents > Document Categories
Document Sequences	Shipping > Setup > Documents > Document Sequences
Find a Role Definition	Shipping > Setup > Grants & Role Definitions > Define Roles > Shipping Execution Role Definition > [Find]
Find Container-Item Relationships	Shipping > Setup > Container Load Details > [Find]
Find Exceptions	Shipping > Exceptions > [Find]
Find Grants	Shipping > Setup > Grants & Role Definitions > Grants > Shipping Execution Grants > [Find]
Find Key Flexfield Segment	Shipping > Setup > Flexfields > Key > Values
Find Personal Profile Values (<i>See</i> SYS)	Shipping > Setup > Profiles
Flexfield Qualifiers (<i>See</i> Flex)	Shipping > Setup > Flexfields
Freight Carriers	Shipping > Setup> Freight Carriers, Cost Types > Freight Carriers
Freight Costs	Shipping > Transactions > [Actions]
Freight Cost Types	Shipping > Setup > Freight Carriers, Cost Types > Define Freight Cost Types
Interfaces	<i>See</i> Shipping Interfaces
Inter-Org Shipping Methods	Shipping > Setup > Regions and Zones > Transit Times
ITM Adapter Status Report	ITM Adapter > Administration > ITM Adapter Status Report

ITM Application Users	ITM Adapter > Setup > ITM Users
ITM Error Classification	ITM Adapter > Setup > ITM Response Error Classification
ITM Parameter Setup	ITM Adapter > Setup > ITM Parameters
ITM Partners	ITM Adapter > Setup > ITM Partners
ITM Partner Service Types	ITM Adapter > Setup > ITM Service Types
ITM Service Parameters	ITM Adapter > Setup > ITM Partners > Service Parameters
Log Exceptions	Shipping > Exceptions > [New]
Lookups	Shipping > Setup > Lookups
Oracle Shipping Lookups	Shipping > Setup > Lookups
Organization Assignments	Shipping > Setup > Freight Carriers, Cost Types > Freight Carriers > Service tabbed region > Organization Assignments
Organization Parameters (<i>See INV</i>)	Shipping > Setup > Organization Parameters
Packing Workbench	Shipping > Transactions > [LPNs] > [Actions]
Personal Profile Values (<i>See SYS</i>)	Shipping > Setup > Profiles > Find Personal Profile Values [Find]
Pick Release	Shipping > Release Sales Orders > Release Sales Orders SRS
Pick Slip Grouping Rules	Shipping > Setup > Picking > Define Pick Slip Grouping Rules
Purge SRS	Shipping > Purge SRS

Query Manager	Shipping > Transactions [After the query is performed, the results display in the Shipping Transactions form.] Note: To perform a query from the Shipping Transactions form: Shipping Transactions form > [Flashlight icon]
QuickCodes (ITEM_TYPE) (See INV)	Setup > QuickCodes
Quick Ship	Shipping > Quick Ship
Regions Interface	Shipping > Setup > Regions and Zones > Regions Interface
Release Rules	Shipping > Setup > Picking > Define Release Rules Form
Release Sales Orders For Picking	Shipping > Release Sales Orders > Release Sales Orders
Release Sequence Rules	Shipping > Setup > Picking > Define Release Sequence Rules
Requests (<i>See User</i>)	Shipping > Requests > Find Requests [Find]
Resolve/ Purge Exceptions Parameters	Shipping > Exceptions > [Tools] > Resolve/Purge Exceptions
Resubmit Errored Requests	ITM Adapter > Administration > Resubmit Errored Requests
Rollup Groups	Shipping > Setup > Flexfields > Key > Groups> Find Key Flexfield Segment [Find]
Segment Values	Shipping > Setup > Flexfields > Validation > Values > Find Value Set [Find]
Sequence Assignments	Shipping > Setup > Documents > Assign Sequences
Ship Confirm Deliveries SRS	Shipping > Auto Ship confirm Deliveries SRS
Ship Confirm Rules	Shipping > Setup > Auto Ship Confirm Rules

Ship Method Lookups	Inventory > Setup > Organizations > Shipping Methods
Shipping Document Sets	Shipping > Setup > Documents > Document Sets
Shipping Execution Grants	Shipping > Setup > Grants and Role Definitions > Grants
Shipping Execution Role Definition	Shipping > Setup > Grants and Role Definitions > Define Roles
Shipping Interfaces	Shipping > Interfaces > Run > Submit a New Request > [OK]
Shipping Parameters	Shipping > Setup > Shipping Parameters
Shipping Reports and Documents	Shipping > Reports and Documents > Submit a New Request > [OK]
Shipping Transactions	Shipping > Transactions > Query Manager [Do a search in the Query Manager window. The search results display in the Shipping Transactions form.]
Shorthand Aliases (<i>See Flex</i>)	Shipping > Setup > Flexfields > Key > Aliases
Skip Screening	ITM Adapter > Administration > Skip Screening
Stop	Shipping > Transactions > Data Entry > Stop Data Entry > [Detail]
Submit Request	Shipping > Reports and Documents > Submit a New Request > [OK]
Trip	Shipping > Transactions > Data Entry > Trip Data Entry > [Detail]
UPS Address Validation	Shipping > Transactions > [Actions]
UPS Rate and Service Selection	Shipping > Transactions > [Actions]
UPS Time in Transit	Shipping > Transactions > [Actions]

UPS Tracking Summary	Shipping > Transactions > [Actions]
Value Sets	Shipping > Setup > Flexfields > Validation > Sets
View Exceptions	Shipping > Exceptions
View Shipping Status	Shipping > Transactions > <query the delivery > Actions > View Shipping Status
Workday Calendar (<i>See BOM</i>)	Shipping > Setup > Calendars > Enter

Glossary

C

call out

A site-specific customization independent of a Trading Partner.

capable to deliver

CTD (Capable to Deliver) refers to considering the transportation resources and transportation lead time to meet your customers delivery needs. In this release, only transportation lead time is being considered. Transportation resources will be added in a future release.

P

Package level tags

Package level tags can appear anywhere after a "CREATE OR REPLACE" statement and before any uncommented package contents, including variables, program units, etc. For example,

```
--<TPA_LAYER=layer name>
```

indicates that the package belongs to the specified Trading Partner Layer.

Program Unit

Any packaged PL/SQL procedure or function.

Program Unit Level Tags

Program unit level tags must appear immediately after keyword 'IS'.

TPS Program Unit: --<TPA_TPS>

Public Program Unit

Those program units published as customizable by Oracle Development teams. Layers can be built only on those program units that are designated by an Oracle Development team as public. These may also be referred to as published or customizable program units.

S

subinventory

Subdivision of an organization, representing either a physical area or a logical grouping of items, such as a storeroom or receiving dock.

T

TPA metadata file

Contains information extracted from the TPA repository about TPA enabled program units and layers built on top of them. This file is used to ship the TPA registry, or repository, and merge layers at the customer site. This file must be shipped with any patch that contains TPA enabled program units.

TPA package

The package containing TPA program units. This package is always generated from the TPA repository.

TPA program unit

The mirror program unit for a public program unit. For every public program unit, Oracle developers will designate a TPA program unit. TPA program units are generated by the architecture to insulate generic code from custom code. All calls to customizable generic code and custom code are made through the TPA program unit.

TPA repository

The registry which stores data required for the functioning of the Trading Partner Architecture. It includes information about public program units, TPA program units, TPS program units and complete definition of the layers including the Oracle Base Layer.

TPA tag

One-line hyphen comments which appear at the beginning of a new line and provide information about customizable program units within Oracle code. The syntax for a TPA tag is:

```
--<tag name=tag value>
```

For example, a label is specified as follows,

```
--<TPA_LABEL=label>
```

Trading Partner Architecture (TPA)

The framework that supports PL/SQL based layer development and deployment.

trading partner flexfield

Descriptive flexfields reserved on several base tables for capturing additional attributes applicable to specific trading partners. They are provided for most of the base tables in Oracle Release Management, Shipping, and Order Management.

trading partner layer

The trading partner specific code created to replace Base Layer code. The layer consists of a set of PL/SQL program units that perform trading partner specific processing or validations in place of the generic code provided by Oracle Development.

Layer Providers develop this code and populate the Trading Partner Layers by importing the trading partner specific code into the TPA repository. In this way, Layer Providers can develop Trading Partner Layers composed of trading partner specific code for various trading partners.

Trading Partner Selector (TPS)

A program unit which accepts context information for the business transaction and derives trading partner entities being processed in the current transaction instance.

All TPS Program units must have the following five output (OUT/IN OUT) arguments:

trip planning stop

The process of planning the necessary vehicles and grouping the scheduled shipments that will be included in a given trip. Planning the trip requires consideration of vehicle load capacities, container capacities and, in certain cases, the loading order for the customer's specified unload order.

trip stop

A location at which the trip is due for a pick-up or drop-off.

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