

Oracle® Warehouse Management Cloud

Getting Started Guide

Update 20B

Part No. F29967-01

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Oracle® Warehouse Management Cloud Getting Started Guide, Update 20B

Part No. F29967-01

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Preface

This document provides you the basic instructions on basic user configuration for Oracle Warehouse Management Cloud. Oracle Warehouse Management Cloud was formerly known as LogFire.

Change History

| Date | Document Revision | Summary of Changes |
|---------|-------------------|----------------------|
| 03/2017 | -01 | Initial publication. |
| 04/2018 | -02 | Updates for 9.0. |
| | | |
| | | |
| | | |

1. System Overview

Parent-Child Company Hierarchy

In Oracle Warehouse Management Cloud, companies are divided into parent and child companies. This structure exists in order to help 3PLs view and manage their clients' inventory separately. Depending on how many clients and how many warehouses the 3PL has, views can be managed.

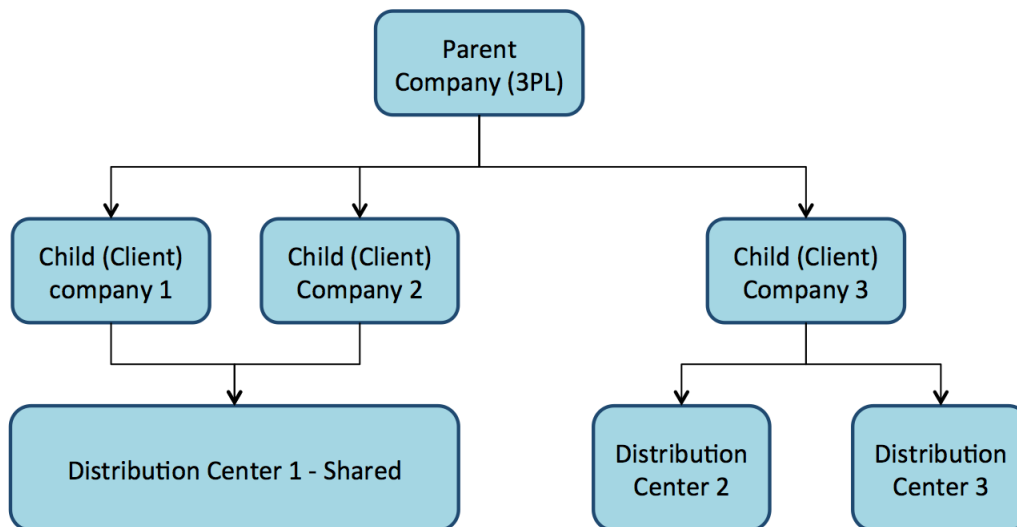


Figure 1-1: Parent-Child Company Example Diagram

To toggle a specific Distribution Center (DC) view for a company, select the choices from the two dropdown menus located at the top right of the UI screen.

In Figure 1-2, the first dropdown denotes a facility (DC), while the second dropdown denotes the companies in the environment:

The screenshot shows the Oracle Warehouse Management Cloud (WMS) interface. At the top right, there are two dropdown menus labeled 'FACILITY' and 'PARENT'. The 'FACILITY' dropdown is currently set to 'PARENT', and the 'PARENT' dropdown is currently set to 'PARENT'. Below these dropdowns, a table of LPNs (Lot Picking Numbers) is displayed. The table has columns for LPN Nbr, Status, Item, Received Qty, Current Qty, Allocated Qty, Nbr Locks, Location, Putaway Type, Pack Qty, Case Qty, Previous Location, Expiry Date, and Batch Nbr. The table contains several rows of data, including LPNs that are Received, Cancelled, Allocated, Located, Lost, and Canceled. The 'FACILITY' and 'PARENT' dropdowns are highlighted with a red box, and the 'PARENT' dropdown is also highlighted with a red box.

| LPN Nbr | Status | Item | Received Qty | Current Qty | Allocated Qty | Nbr Locks | Location | Putaway Type | Pack Qty | Case Qty | Previous Location | Expiry Date | Batch Nbr |
|-------------|-----------|------|--------------|-------------|---------------|-----------|----------|--------------|----------|----------|-------------------|-------------|-----------|
| LPN_0313_02 | Received | THK5 | 0 | 10 | 0 | 0 | | PT6 | 2 | 5 | | | |
| LPN_0313_01 | Received | THK5 | 0 | 10 | 0 | 0 | | | | | | | |
| LPN_0312_01 | Cancelled | THK5 | 0 | 0 | 0 | 0 | CC-4-4 | | | | | 03/31/2015 | 030215 |
| LPN_0311_01 | Allocated | THK5 | 0 | 5 | 5 | 0 | PTS-1-1 | | | | | | |
| LPN_0306_03 | Located | THK6 | 0 | 8 | 0 | 0 | D1-1-1-1 | | | | | 03/31/2015 | |
| LPN_0306_02 | Lost | THK6 | 0 | 10 | 0 | 0 | | | | | | | |
| LPN_0306_01 | Cancelled | THK6 | 0 | 0 | 0 | 0 | CC-5-5-5 | PT6 | 5 | 20 | | | |
| LPN_0305_01 | Located | THK6 | 0 | 8 | 0 | 0 | D1-1-1-1 | PT6 | 5 | 20 | CC-4-4-4 | 03/31/2015 | |
| LPN_0304_10 | Lost | THK6 | 0 | 7 | 0 | 0 | | PT6 | 5 | 20 | CC-1-1-1 | 03/29/2015 | |

Figure 1-2: Facility and Company Views from the UI

User Menu Configuration

The Oracle Warehouse Management Cloud organizes your structure in the following way:

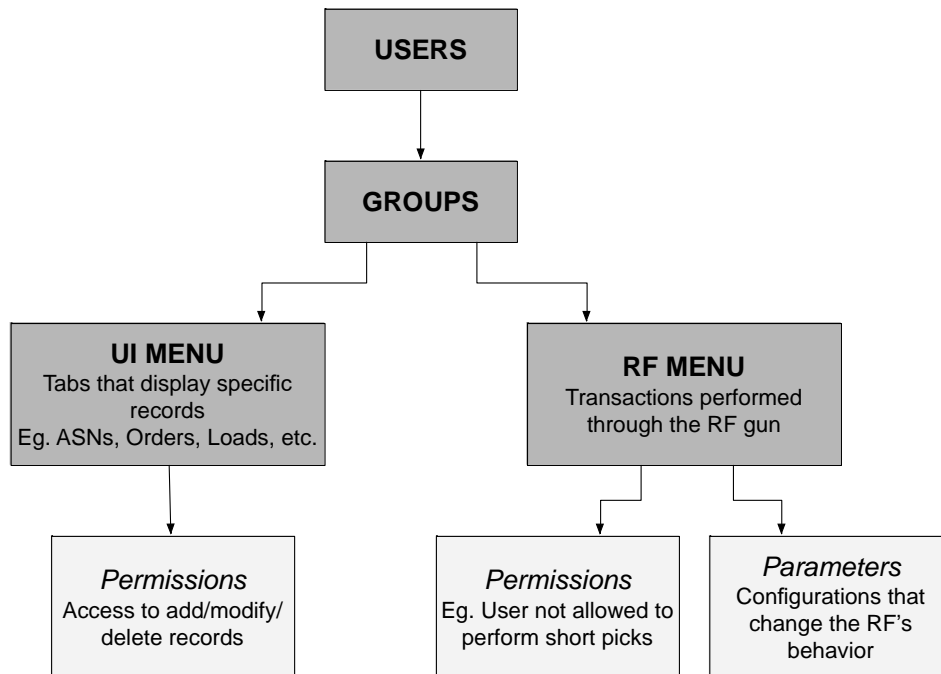


Figure 1-3: User, Group and Menu Organization

Users, Groups and Menus

Users are separated into groups based on their operational purpose in the warehouse. Every user within a group shares the same user interface (UI) and radio frequency (RF) menus. Within each menu, you can configure your permissions and parameters for RF menus.

What is a UI menu?

The UI menu is a series of windows and dialog boxes that are accessible to you in the WMS via the browser. See Figure 1-4.

| Company | Code | Alternate Item C... | Style | Part b | Part c | Description | External Style | Barcode | Putaway Type |
|---------|----------|---------------------|----------|--------|--------|-------------------|----------------|----------|--------------|
| PARENT | GALAXYS6 | GALAXYS6 | GALAXYS6 | | | Samsung Galaxy S6 | | GALAXYS6 | |
| PARENT | THK6-1 | THK6-1 | THK6-1 | | | THK ITEM 6-1 | | THK6-1 | PT6 |
| PARENT | GALAXYS5 | GALAXYS5 | GALAXYS5 | | | Samsung Galaxy S5 | | GALAXYS5 | |
| PARENT | BANANA | BANANA | BANANA | | | Banana | | BANANA | |
| PARENT | ZUNE | ZUNE | ZUNE | | | Zune | | ZUNE | |
| PARENT | IPOD | IPOD | IPOD | | | iPod Touch | | IPOD | |
| PARENT | NOKIA | NOKIA | NOKIA | | | Nokia Phone | | NOKIA | |
| PARENT | ITEM2 | ITEM2 | ITEM2 | | | Item 2 | | ITEM2 | PT2 |
| PARENT | ITEM1 | ITEM1 | ITEM1 | | | Item 1 | | ITEM1 | PT1 |
| PARENT | THK11 | THK11 | THK11 | | | THK1.1 | | THK11 | PT1 |
| PARENT | THKPP03 | THKPP03 | THKPP03 | | | THK Prepack 3 | | THKPP03 | PT7 |
| PARENT | THKPP02 | THKPP02 | THKPP02 | | | THK Prepack 2 | | THKPP02 | PT7 |
| PARENT | THKPP01 | THKPP01 | THKPP01 | | | THK Prepack 1 | | THKPP01 | PT7 |
| PARENT | THK6 | THK6 | THK6 | | | THK ITEM 6 | | THK6 | PT6 |
| PARENT | THK5 | THK5 | THK5 | | | THK ITEM 5 | | THK5 | PT6 |
| PARENT | THK4 | THK4 | THK4 | | | THK ITEM 4 | | THK4 | PT4 |
| PARENT | THK3 | THK3 | THK3 | | | THK ITEM 3 | | THK3 | PT1 |
| PARENT | THK2 | THK2 | THK2 | | | THK ITEM 2 | | THK2 | PT2 |
| PARENT | THK1 | THK1 | THK1 | | | THK ITEM 1 | | THK1 | PT1 |

Figure 1-4: Warehouse Management System (WMS) User Interface (UI) Menu

Note: When using the RF gun, you must ensure that the RF is in the correct facility. This can be seen at the top right of the RF menu management.

What is an RF menu?

The RF menu is the series of transactions that are made with the RF gun on the warehouse floor. These screens, or modules, are used to perform processes such as Receiving, Put away (also called putaway), Picking, and Loading.

LogFire WMS FACILITY/PAR

- 1) Execute Task
 - 2) Receive LPN Shipment
 - 3) Receive LPN (XDOK)
 - 4) Receive LPN Shipment Expiry
 - 5) Receive LPN Shipment Cases
- => _____

Env: lgf62_qa
 Ctrl-L: Change Language
 Ctrl-F: Change Facility
 Ctrl-U: Page Up
 Ctrl-D: Page Down
 Ctrl-X: Exit App
 Ctrl-W: Previous screen

Figure 1-5: RF Menu

LogFire WMS FACILITY/PAR

- 1) Execute Task
 - 2) Receive LPN Shipment
 - 3) Receive LPN (XDock)
 - 4) Receive LPN Shipment Expiry
 - 5) Receive LPN Shipment Cases
- => _____

Figure 1-6: Validating Your Current Facility in the RF


Note: To change facilities, press Ctrl-F and type in the Facility code.

Creating Users

New users can be created through you screen where you can define the following:

- Username and password
- The facilities and companies you have access for
- Your role (Administrator, Management, Supervisor, etc.)
- Your default group (UI and RF Menus)
- Your language (English or Spanish)
- Your default printer
- Your fixed equipment type


Creating New Users

1. On the Users screen.
2. Click the **Create**  button and populate the necessary fields:

| | |
|-------------------------|---|
| Active | <input checked="" type="checkbox"/> |
| Login * | <input type="text" value="Username"/> |
| First Name * | <input type="text" value="Name"/> |
| Last Name * | <input type="text" value="Surname"/> |
| Password | <input type="text" value="password123"/> |
| password_life_in_days * | <input type="text" value="0"/> |
| RUT * | <input type="text" value="12345678"/> |
| Type * | <input type="text" value="Internal"/> |
| Hire Date * | <input type="text" value="01/01/2015"/> |
| Hourly Wage | <input type="text"/> |
| E Hour Wage | <input type="text"/> |
| Facility * | <input type="text" value="(None)"/> |
| Company * | <input type="text" value="(None)"/> |
| Shift * | <input type="text" value="DEFAULT"/> |
| Role * | <input type="text" value="ADMINISTRATOR"/> |
| Language * | <input type="text" value="English"/> |
| Default group | <input type="text" value="LGF Super User"/> |
| Default label printer | <input type="text"/> |

Figure 1-7: Creating New Users

Description of Fields for Users

- **RUT:** Unique identifier (alphanumeric). New User
 - **Type:** Field used to distinguish between internal and external users.
 - **Facility:** Defines the default Facility that you is displayed upon login.
 - **Company:** Defines the default company that you is displayed upon login.
 - **Shift:** Defines your shift, if applicable. Shifts are created in the Shifts screen, which defines the start and end time.
 - **Role:** Defines your role in the warehouse. Each role has a different set of permissions for performing transactions in Oracle Warehouse Management Cloud (UI permissions only).
 - **Language:** Sets your language (English or Spanish).
 - **Default Group:** Defines the default group that you display upon login. Users can be assigned to multiple groups via the Groups button. If a user is assigned to multiple groups, you can switch Group views by clicking the  gear button on the top right and then clicking View, and finally selecting the desired Group.
 - **Default label printer:** User should input the label printer name defined in the Printers screen.
3. Click **Save** when done.
 4. To configure the Facilities and Companies that he user has access to, select user and click the **Eligible Facilities & Eligible Companies** buttons. This takes you to a new screen displaying all records you currently have access to view.

| Eligible Facilities Eligible Companies Work Areas Groups Assign Equipment Type (None) | | | | | | | | |
|--|------------|------------|-----------|-----------------|----------|------------|-------------|------|
| Active | Login | First Name | Last Name | RUT | Type | Hire Date | Hourly Wage | E Ho |
| Yes | lgf_thkim2 | Tae | Kim | 376511232123231 | Internal | 10/12/2010 | 0 | 0 |
| Yes | lgf_thkim | Tae | Kim | 37651 | Internal | 10/12/2010 | 0 | 0 |

Figure 1-8: Viewing Your Eligible Facilities/Companies

- Click the **Create** button to add new Facilities or Companies.

| User | Facility | Name | Create Timestamp |
|-----------|----------|-----------------------|-----------------------|
| lgf_thkim | SKC_DC | SKC_DC | 10/13/2014 6:30:23 PM |
| lgf_thkim | DC_01 | Distribution Center 1 | 09/17/2014 3:06:03 PM |

Figure 1-9: Updating Your Eligible Records

- When finished, click Back to return to the main screen.
- To assign Equipment Types to a user:
 - Select user.
 - Select an Equipment Type from the dropdown menu.
 - Click the Assign Equipment Type label.

| Eligible Facilities Eligible Companies Work Areas Groups Assign Equipment Type (None) | | | | | | | | |
|--|------------|------------|-----------|-----------------|----------|------------------------------------|--|--|
| Active | Login | First Name | Last Name | RUT | Type | | | |
| Yes | lgf_thkim2 | Tae | Kim | 376511232123231 | Internal | | | |
| Yes | lgf_thkim | Tae | Kim | 37651 | Internal | | | |
| | | | | | | * FLT1 FLT2 FLT3 LIFT1 | | |

Figure 1-10: Assigning Users with Equipment Types

Note: Equipment Types must first be defined in the Equipment Types screen before assigning them to users.

Configuring Menus for Users

There are five steps in adding Group menus.

- Adding Screens
- Adding Screens to different Menus
- Assigning Menus to Groups
- Assigning Groups to Users
- Creating and Assigning Facilities & Companies to Users

Adding Screens

- On the Screens UI screen, click **Generate Screens**.
- Select all the necessary screens for the Group (e.g. ASNs, Appointments, Loads, etc.).
- You add both UI and RF screens.

Note: For RF menus, extra configuration might be required (RF module parameters). To modify its parameters, select the RF screen and click the **Details** button.
- Click Save when done.

Adding Screens to Different Menus

On the Menu screen, to create a new menu (one for the UI and the RF):

1. Select the menu and click on the Details  button. In the new dialog box, you are able to separate screens into different folders.



Figure 1-11: Naming Folders

To name a folder:

1. Select the folder (1)
2. Type in the name in the field to the right (2).

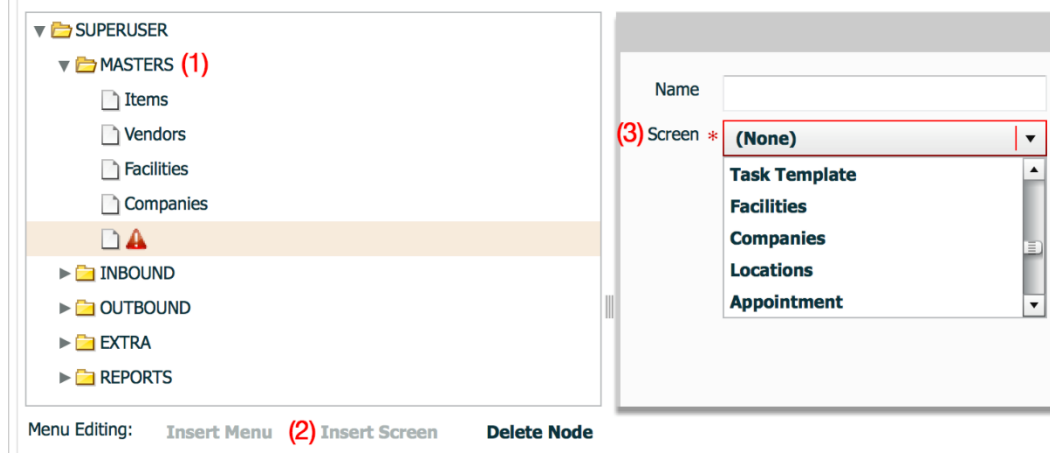



Figure 1-12: Adding Screens to a Folder

To add a screen within the folder:

1. Select the folder first (1).
2. Click **Insert Screen** (2).
3. Pick the screen to add from the dropdown menu (3).
4. Repeat steps until all the screens have been added.
5. Click **Save** to complete.

Assigning Menus to Groups

Once the Menus have been set up, it is now time to add them to Groups. On the Groups screen:

1. Click the **Create**  button to create a new group.
2. Type in the group name.
3. Select the UI/RF menus from the dropdown menus.
4. Click **Save**.

Note: You can also assign specific permissions to a Group by clicking the Permissions button. This displays a list of additional permissions that the group can access. To provide access, check the activity.



Figure 1-13: Accessing a Group's Permissions

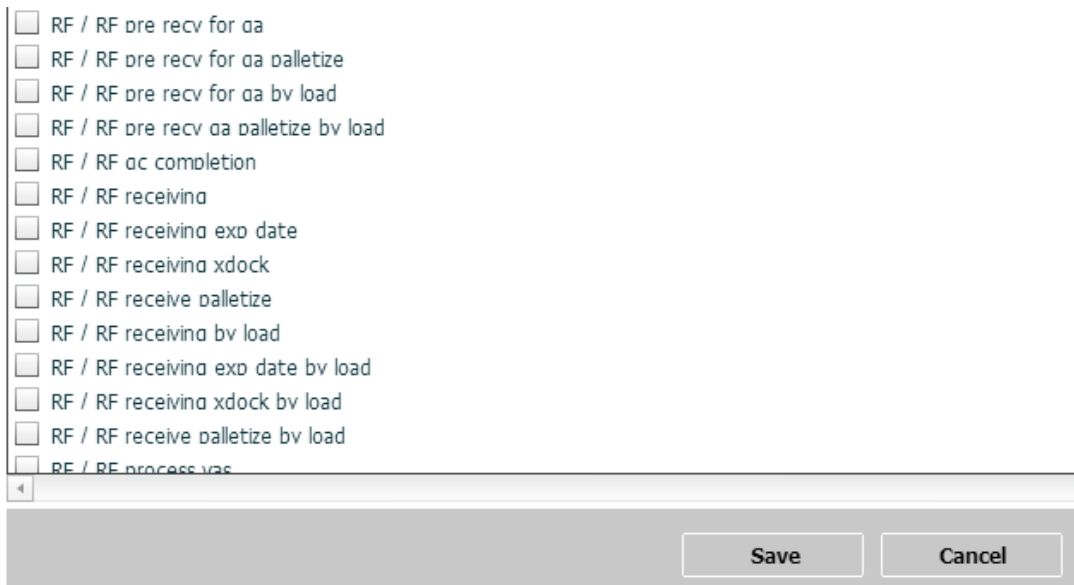



Figure 1-14: List of Permission Activities

Assigning Groups to Users

Now that Groups have been created, you now adds users to each group. On the User screen:


1. Select a user to assign to a group.
2. Click on **Groups**.
3. Using the Create  button, add the Group(s) to assign the user to the Group.

Note: If the user is assigned to multiple groups, you can toggle between different groups by clicking the gear button at the top right, hovering the mouse over the View menu, and selecting the Group name.

Creating and Assigning Facilities & Companies to Users

Once user and group setup is complete, you must create facilities and companies in Oracle Warehouse Management Cloud.

To create companies, on the Companies screen:

1. Click the **Create**  button.
2. Populate the company's information such as the Code, Name, and Address.

Note: The first company is the parent company in the environment by default. To verify this, observe the Parent Company column.


| Parent company ▲ | Code | Name | Address 1 | City | State | ZIP |
|------------------|---------|----------------------|----------------------|---------|-------|-------|
| * | PARENT | THK Company | 100 Galleria Parkway | Atlanta | GA | 30339 |
| PARENT | CHILD_1 | Client Child Company | North Ave NW | Atlanta | GA | 30332 |

Figure 1-15: Parent Company has an Asterisk in the Parent Company Column

3. Click **Save** when complete.

Facilities are controlled at the company level. This means that every company has its own set of facilities. This link is defined in the Parent Company column in the Facilities screen. By default, all parent and child company facilities are displayed.


To Create Facilities, on the Facilities screen:

1. Click the Create  button.
2. Populate the facility's information such as the Code, Name, and Address.


Functional Field Descriptions for Facilities

- **Default Ship Via Code:** This field is used when ship via codes are activated through the company's PACKING_ROUTING_MODE parameter. The system defaults to this ship via value if the order header doesn't have a ship via code specified.
- **Parent Company:** Denotes the company that the facility belongs to.
- **Accept Transfer Shipment:** If checked and if this facility is a warehouse in Oracle Warehouse Management Cloud, this facility accepts ASNs from other facilities configured in the environment.

Once the Companies and Facilities have been created, the next task is to assign them to users. This task defines the companies and facilities that you have access to. On your screen:

1. Select the user to modify.
2. Click on **Eligible Facilities** button.
3. Using the Create  button.
4. Add the Facilities that this user requires to access.

To add companies:

1. Select you to modify.
2. Click the Eligible Companies button
3. Using the Create  button.
4. Add the Facilities that this user requires to access.

| Active | Login | First Name | Last Name | RUT |
|--------|--------|------------|-----------|-------|
| Yes | thkim2 | Tae Hoon | Kim | 47831 |

User: thkim2

Company: (None)

Facility: (None)

Facilities List:

- DEMO_FAC
- FACILITY
- THKDC1
- THK_STORE1
- THK_STORE2

Figure 1-16: Assigning Users to Facilities and Companies

A sample User/Group set up is shown below:

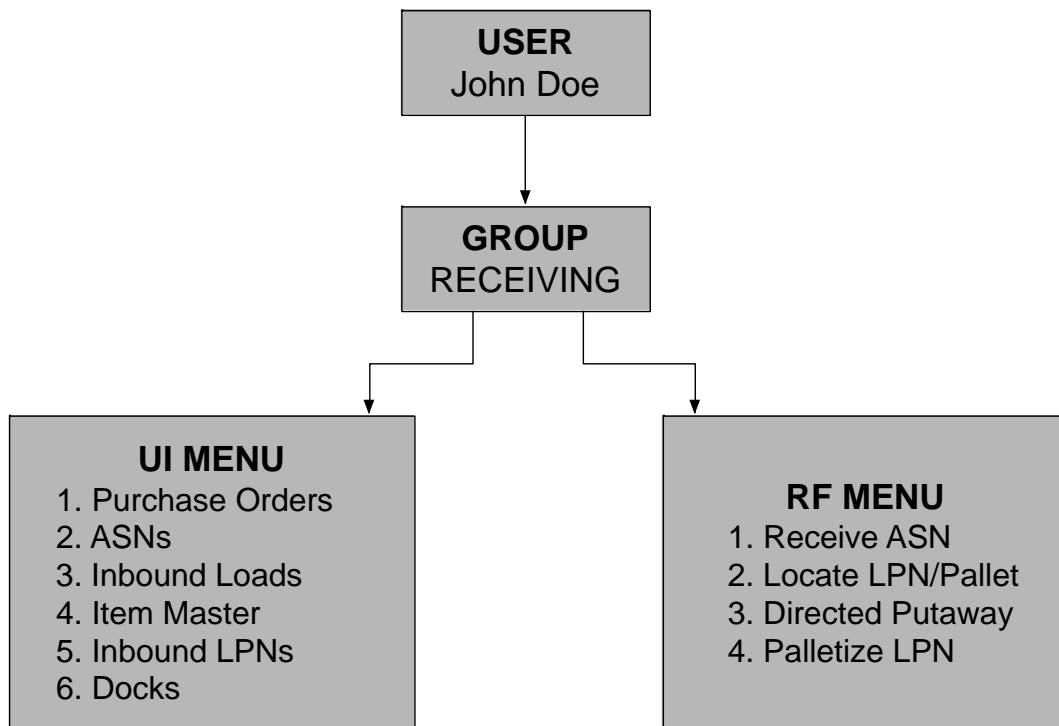


Figure 1-17: Sample User/Group set up in Oracle Warehouse Management Cloud

System Integration Framework

Oracle Warehouse Management Cloud uses the following methods for processing interface files into and out of Oracle Warehouse Management Cloud:

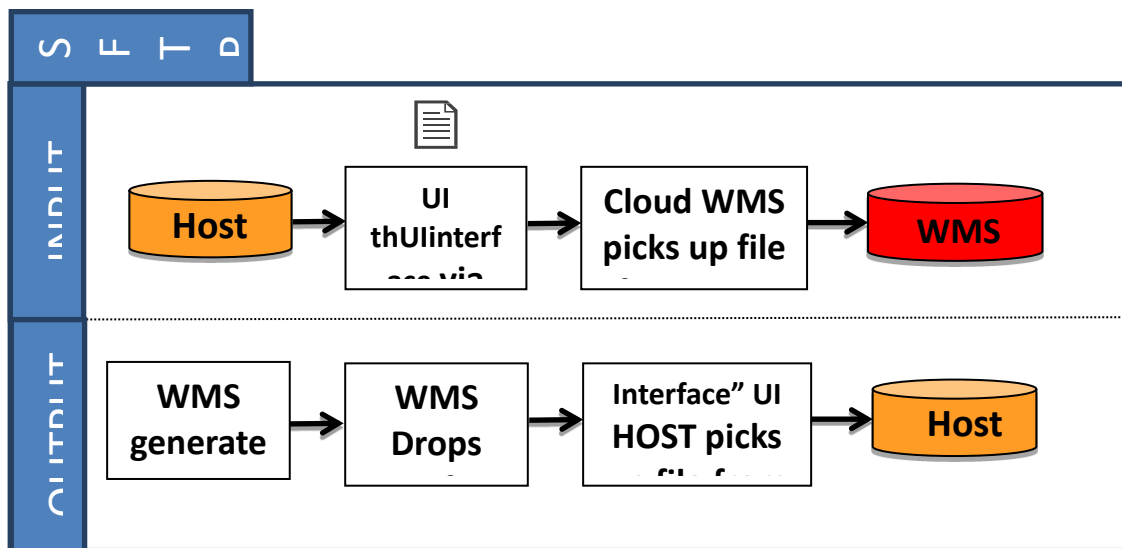


Figure 1-18: SFTP Method in Oracle Warehouse Management Cloud

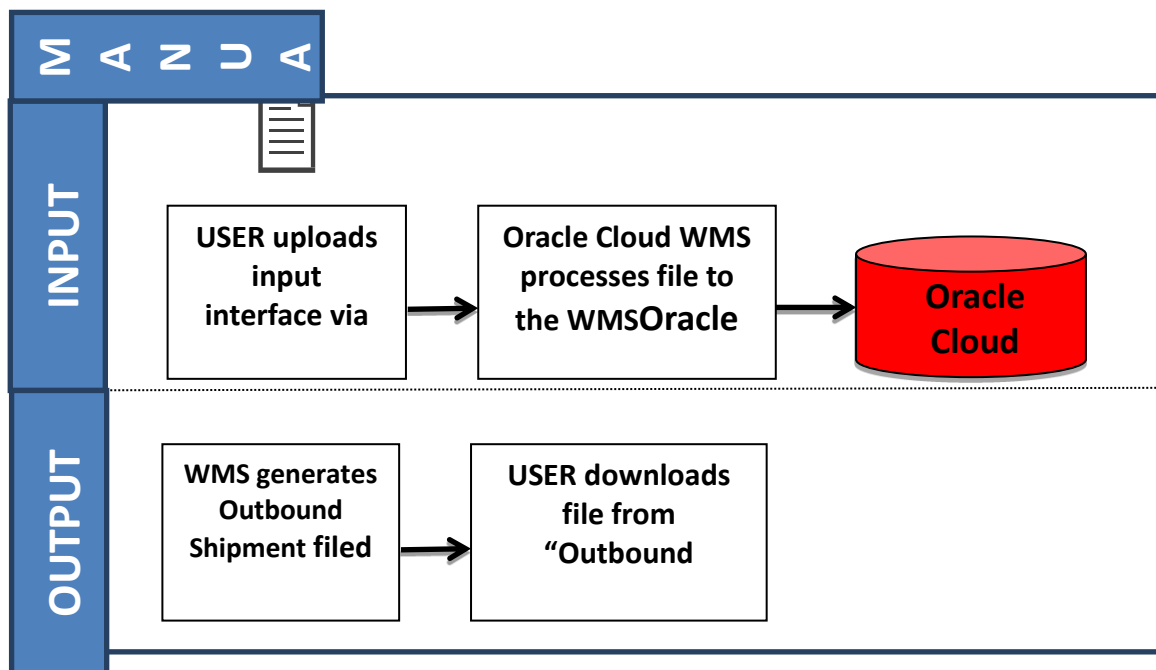


Figure 1-19: Interfacing Methods in Oracle Warehouse Management Cloud

Supported Formats

Oracle Warehouse Management Cloud supports the following formats (both inbound/outbound) with interfaces:

- Flat files
- XML files
- CSV files
- XLS files
- EDI files (translated through a 3rd party application)

- MHE messages (translated through a 3rd party application)
- FedEx web services
- UPS web services

Input Interfaces

- Purchase order
- Item
- Item (facility specific)
- Item barcode
- Item pre-pack
- Inbound shipment
- Order
- Vendor
- Appointment
- Store
- Locations
- Route
- Price label
- Ship to company
- Site
- Asset
- Cubiscan
- Point of sale

Output Interfaces

- ASN verification
- Parcel Manifest shipment confirmation
- LTL Shipment confirmation
- Inventory history

Note: For more details on each interface, please refer to the Oracle Warehouse Management Cloud Interface File Formats file.

Uploading Interface Files with Oracle Warehouse Management Cloud

If you are manually preparing the input interface file via Excel, it is important to follow these best practices:

- The filename must start with the phrase as specified in the Input File Formats document (the filename must begin with ORR for uploading Order files).
- The columns specified as required in the interface specification document must be populated.
- For Purchase Order, Order, and Inbound Shipment interfaces, you must populate [H1] for every distinct header record and [H2] for each of its detail records.
- You must populate the correct sequence in the seq_nbr field (i.e. no duplicate values).


Setting Email Notifications for Failed Interfaces

You can set up email notifications for interfaces that fail to process into Oracle Warehouse Management Cloud. The email notification provides the following information:

- The interface file that failed
- Error message – the reason why the file failed.

To Set Up Email Notification

On the Company Parameters screen:

1. Select INTF_ERROR_EMAIL_LIST parameter and click the **Edit**  button.
2. In the Parameter Value, populate with the emails that are to receive the error notifications. Separate multiple emails without spaces between emails.

| | |
|-----------------|---|
| Company | <input type="text" value="SNEPHEW"/> |
| Parameter Key | <input type="text" value="INTF_ERROR_EMAIL_LIST"/> |
| Parameter Value | <input type="text" value="joe@email.com,jane@email.com"/> |

Figure 1-20

2. Business Intelligence

What is Business Intelligence?

Business intelligence is a powerful tool within Oracle Warehouse Management Cloud that allows you to create custom reports. It is a user-friendly method of pulling data from Oracle Warehouse Management Cloud without having to run SQL queries.

Adding Business intelligence to the Oracle Warehouse Management Cloud Environment

Adding Business intelligence to the current Oracle Cloud WMS environment is a two-step process:

Enabling Business intelligence in the Environment

By default, the Web Report functionality is disabled. You must create a Happy Fox ticket requesting access to the tool. When creating the ticket, ensure that the Request Type is set to Application Admin Request.

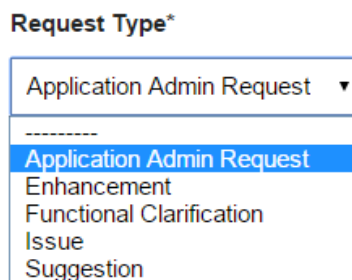



Figure 2-1: Application Admin Request Type

Adding the Business intelligence Screen to Oracle Warehouse Management Cloud

Just like any other screen, you add the Business intelligence screen to a specific menu. On the Screen Configuration screen:

1. Click the **Create**  button.
2. Select Business intelligence from the dropdown menu.

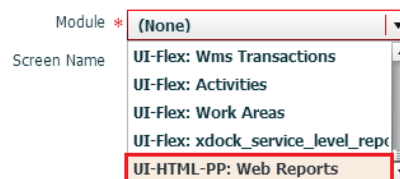


Figure 2-2: Selecting Business intelligence Screen

3. Appendix

Roles and Permissions

| PERMISSIONS FOR ROLE: ADMINISTRATOR | | | | |
|-------------------------------------|----|----------------------|----|----------------------|
| Add company | 10 | Add facility | 19 | Save company menu |
| Delete company | 11 | Change facility | 20 | Save group menu |
| Change company | 12 | Delete facility | 21 | Modify view columns |
| Add user | 13 | Modify view columns | 22 | Reorder view columns |
| Delete user | 14 | Reorder view columns | 23 | Save group view |
| Change user | 15 | Save company view | 24 | Save user view |
| Add group | 16 | Save group view | 25 | Modify menus |
| Delete group | 17 | Save user view | 26 | Save company menu |
| Change group | 18 | Modify menus | 27 | Save group menu. |

Note: By default, Administrators have access to all companies that the facility is eligible to access.

| PERMISSIONS FOR ROLE: MANAGEMENT | | | |
|----------------------------------|----------------------|----|----------------------|
| 1 | Change user | 10 | Modify menus |
| 2 | Add user | 11 | Save group menu |
| 3 | Add facility | 12 | Modify view columns |
| 4 | Change facility | 13 | Reorder view columns |
| 5 | Delete facility | 14 | Save group view |
| 6 | Modify view columns | 15 | Save user view |
| 7 | Reorder view columns | 16 | Modify menus |
| 8 | Save group view | 17 | Save group menu. |
| 9 | Save user view | | |

| PERMISSIONS FOR ROLE: SUPERVISOR | | | |
|----------------------------------|----------------------|---|------------------|
| 1 | Change user | 5 | Save group view |
| 2 | Change facility | 6 | Save user view |
| 3 | Modify view column | 7 | Modify menus |
| 4 | Reorder view columns | 8 | Save group menu. |

| PERMISSIONS FOR ROLE: GUARD | |
|-----------------------------|---|
| 1 | Read-only access; users can't create, copy, edit or delete. |

| PERMISSIONS FOR ROLE: EMPLOYEE | |
|--------------------------------|---|
| 1 | Read-only access; users can't create, copy, edit or delete. |

Note: These permissions apply for the UI screens only; RF permissions aren't affected.