

Oracle Warehouse Management Cloud

Getting Started Guide

Release 21D



This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software" or commercial computer software documentation pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program website](#).

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit [My Oracle Support](#) or visit [Accessible Oracle Support](#) if you are hearing impaired.

Contents

Preface	i
<hr/>	
1 System Overview	1
Parent Child Company Hierarchy	1
User Menu Configuration	1
System Integration Framework	4
2 Business Intelligence	7
Adding Business intelligence to the Oracle Warehouse Management Cloud Environment	7
<hr/>	
3 Appendix	9
Appendix	9

Preface

Oracle® Warehouse Management Cloud Getting Started Guide, Release 21D

Part No. F46335-01

This guide describes in detail how to configure and use Oracle Warehouse Management (WMS) Cloud. All functionality unless specifically noted is available in Oracle Warehouse Management Enterprise Edition Cloud. Please direct any functionality questions to [My Oracle Support](#).

Change History

Date	Document Revision	Summary of Changes
9/22/21	-01	Updates for 21D.

Using Applications

Additional Resources

- **Community:** Use [Oracle Cloud Customer Connect](#) to get information from experts at Oracle, the partner community, and other users.
- **Guides and Videos:** Go to the [Oracle Help Center](#) to find guides and videos.
- **Training:** Take courses on Oracle Cloud from [Oracle University](#).

Conventions

The following table explains the text conventions used in this guide.

Convention	Meaning
boldface	Boldface type indicates user interface elements, navigation paths, or values you enter or select.
<code>monospace</code>	Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.
>	Greater than symbol separates elements in a navigation path.

Contacting Oracle

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit [My Oracle Support](#) or visit [Accessible Oracle Support](#) if you are hearing impaired.

1 System Overview

This section provides details and an overview on configuring the user menu and the system integration framework.

Parent Child Company Hierarchy

In WMS, 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 accordingly:

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

In the following screen, the first drop-down denotes a facility (DC), while the second drop-down denotes the companies in the environment:

User Menu Configuration

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

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.

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.

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 (corresponding/desired/appropriate supported language)
- Your default printer
- Your fixed equipment type

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

1. On the Screens UI screen, click **Generate Screens**.
2. Select all the necessary screens for the Group (e.g. ASNs, Appointments, Loads, etc.).
3. 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.

4. Click **Save** when done.

Adding Screens to Different Menus

On the Menus 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.

2. To name a folder:
 - a. Select the folder (1)
 - b. Type in the name in the field to the right (2).

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.

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.

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.

A sample User/Group set up is shown below:

System Integration Framework

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

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:

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.

3 Appendix

Roles and Permission

The following tables list the roles and permission for different user roles in the warehouse.

SI No.	User Actions
1	Add company
2	Delete company
3	Change company
4	Add user
5	Delete user
6	Change user
7	Add group
8	Delete group
9	Change group
10	Add facility
11	Change facility
12	Delete facility
13	Modify view columns
14	Reorder view columns
15	Save company view
16	Save group view
17	Save user view
18	Modify menus
19	Save company menu
20	Save group menu
21	Modify view columns
22	Reorder view columns
23	Save group view
24	Save user view

SI No.	User Actions
25	Modify menus
26	Save company menu
27	Save group menu

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

SI No.	User Actions
1	Change user
2	Add user
3	Add facility
4	Change facility
5	Delete facility
6	Modify view columns
7	Reorder view columns
8	Save group view
9	Save user view
10	Modify menus
11	Save group menu
12	Modify view columns
13	Reorder view columns
14	Save group view
15	Save user view
16	Modify menus
17	Save group menu

SI. No.	User Action
1	Change user

Sl. No.	User Action
2	Change facility
3	Modify view column
4	Reorder view columns
5	Save group view
6	Save user view
7	Modify menus
8	Save group menu

Sl. No.	User Action
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.

Sl. No.	User Action
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.

