Oracle Warehouse Management Cloud

Getting Started Guide

Release 23A

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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Access the online help from the user drop-down menu in the Warehouse Management application.

Get Support

You can get support at *My Oracle Support*. For accessible support, visit *Oracle Accessibility Learning and Support*.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, and watch events.

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program*. (if videos) Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback

We welcome your feedback about Oracle Warehouse Managment. If you need clarification, or find an error, you can direct your questions via a service request to *My Oracle Support.*

2 System Overview

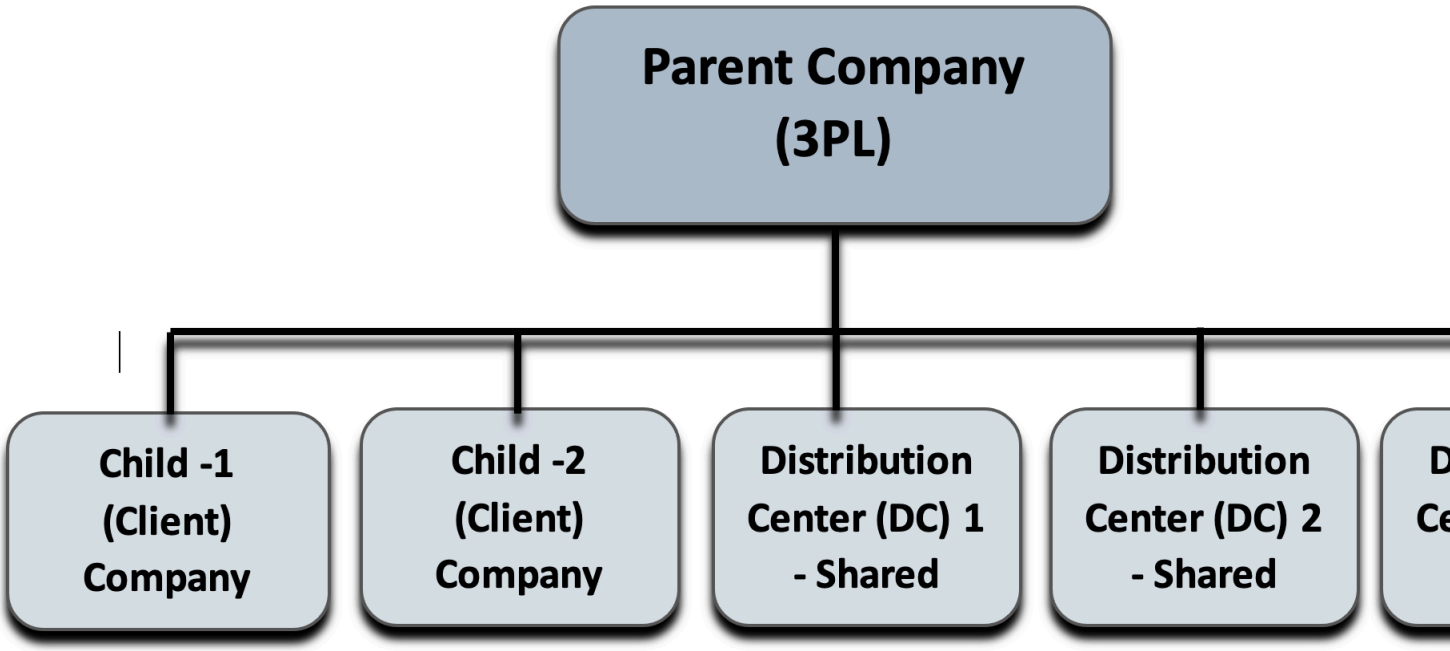
System Overview

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

Parent Child Company Hierarchy

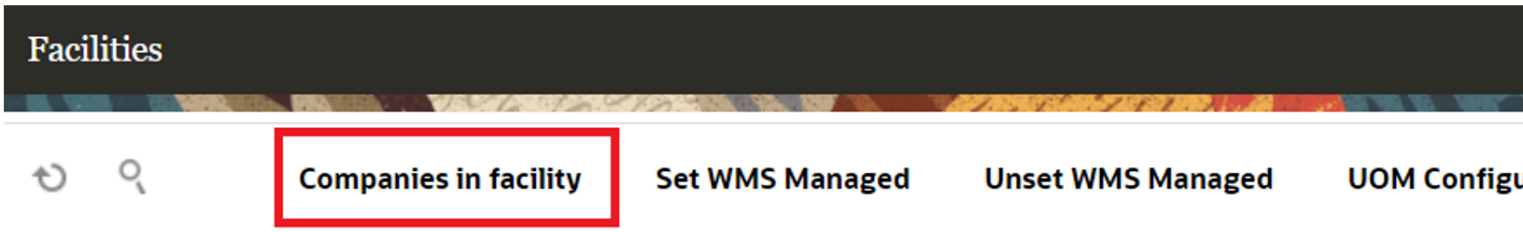
A Parent Company (3PL) allows you to store inventory based on the location by either dedicating the location for a specific (Client) company or storing inventory of different companies in a Distribution Centers (DCs) given the inventories are distinguishable, physically.

While, the Child (Client) company tracks and monitor their entity, this approach benefits the 3PL to view and manage the warehouse operation for their DCs, for example, inventory or labor management of different company's inventory. This provides the 3PL system to control and decide on managing multiple company's inventory to be stored in the available DC.



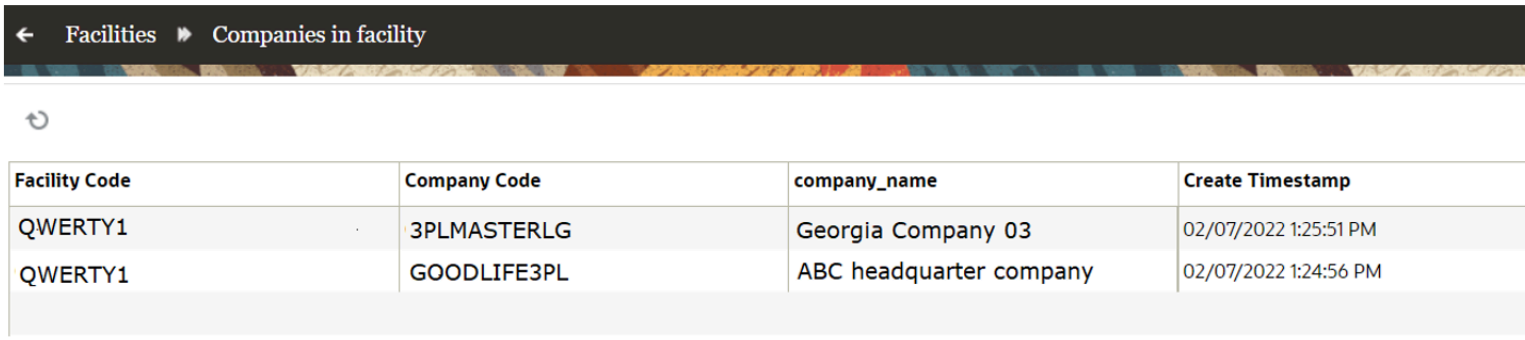
Depending on the number of clients and the DCs, this structure helps the 3PL to view and manage their warehouses accordingly through eligible Companies in facility at the Facility level.

You can view and manage the company's inventory to be stored in the DC via Companies in facility action button in the Facilities UI.



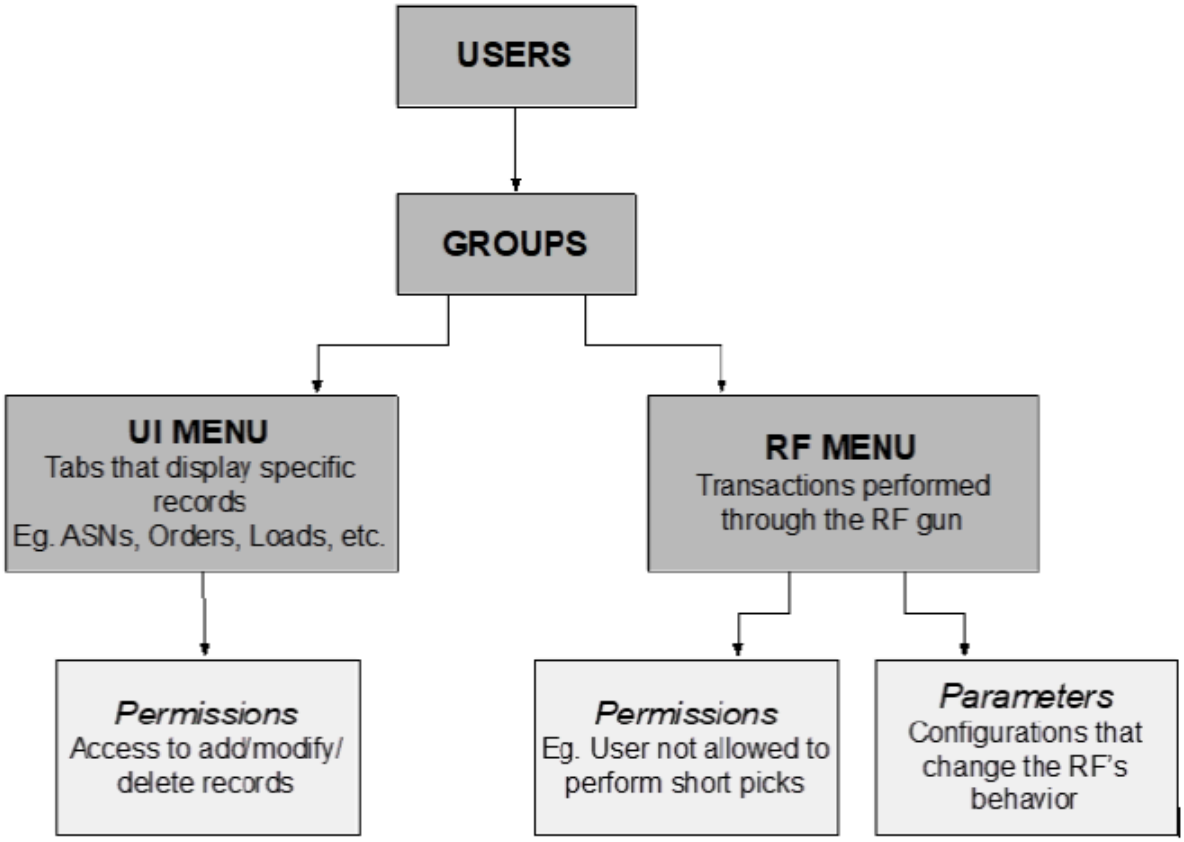
To add company to the facility, select the facility > Companies in facility. If the facility has multiple company, you can choose the child company from the Company Code drop down.

In the following figure, the first drop-down denotes a facility (DC), while the second drop-down denotes the companies in the environments.



User Menu Configuration

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

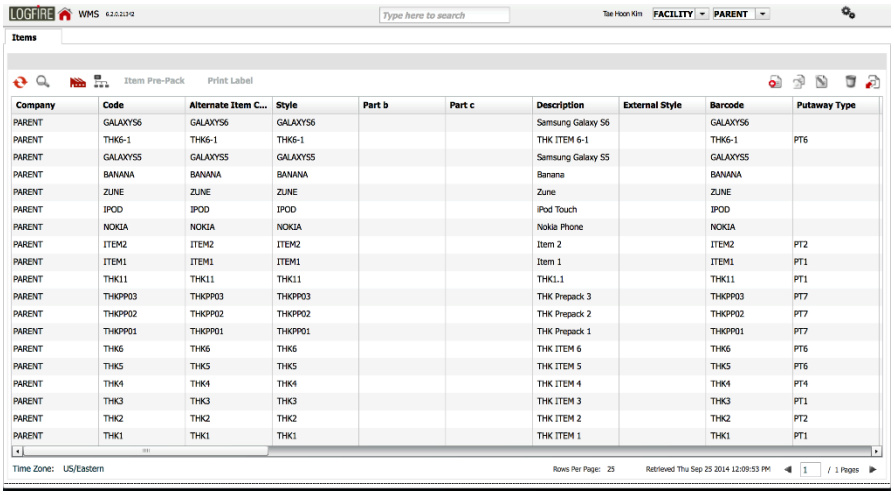


Users, Groups and Menus

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.



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

> **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 (XDOCK)
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
```

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.

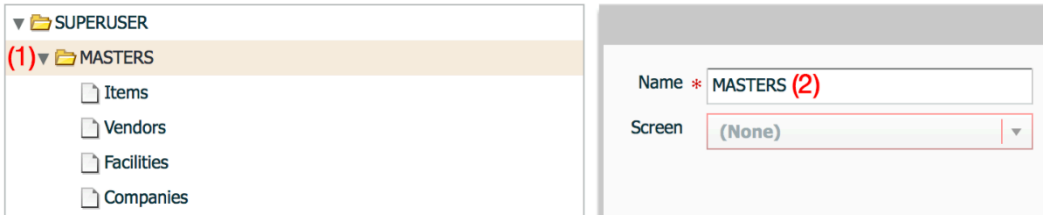
   > **Note:** For RF menus, extra configuration might be required (RF module parameters). To modify its parameters, select the RF screen and click the **Details** button.

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).

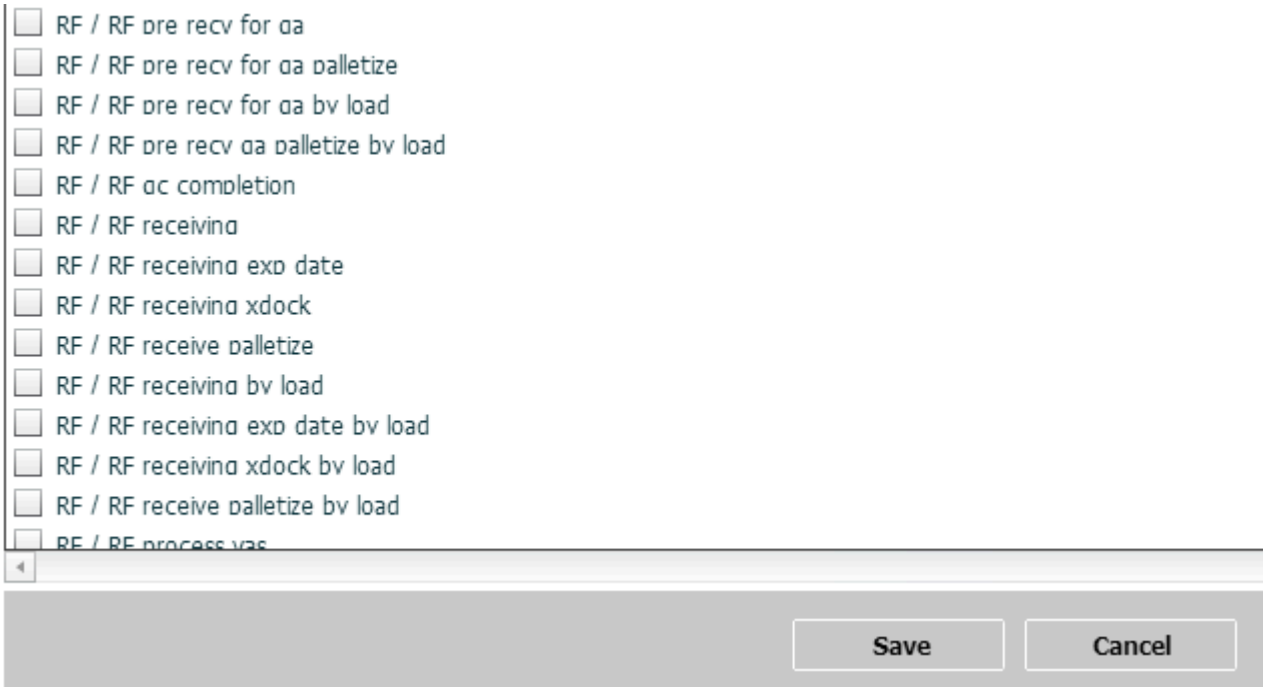
To add a screen within the folder:

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.

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

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.

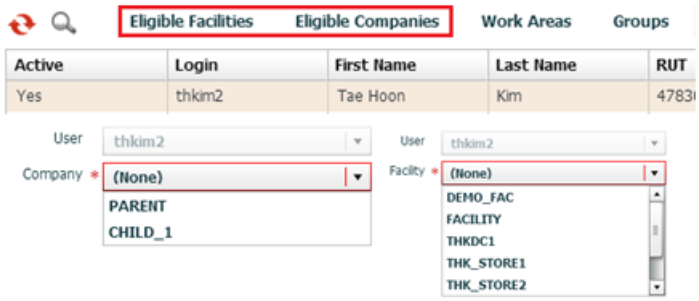
Once the Companies and Facilities have been created, the next task is to assign them to users. This task defines the companies and facilities that you have access to. On your screen:

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.

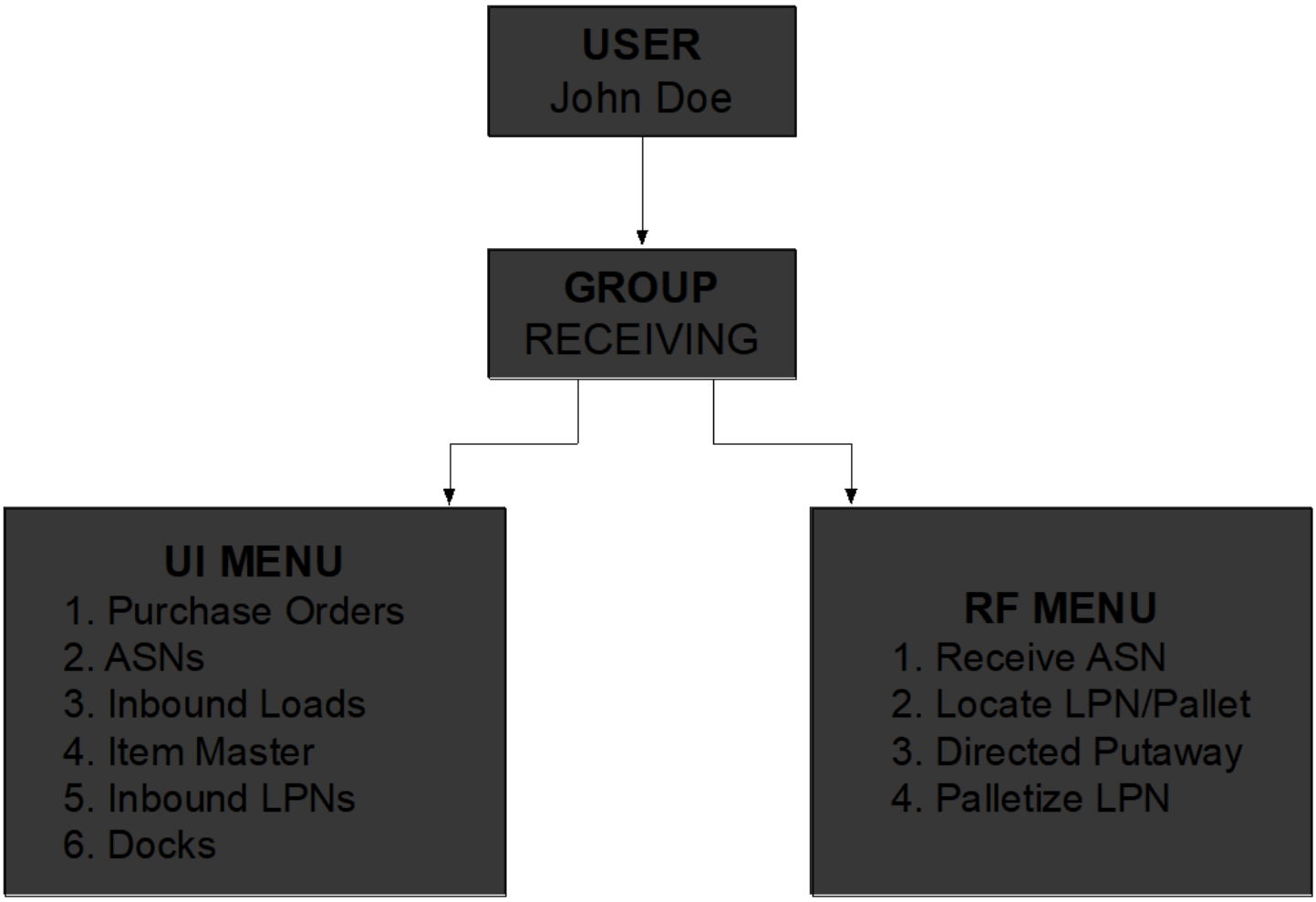
To add companies:

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.

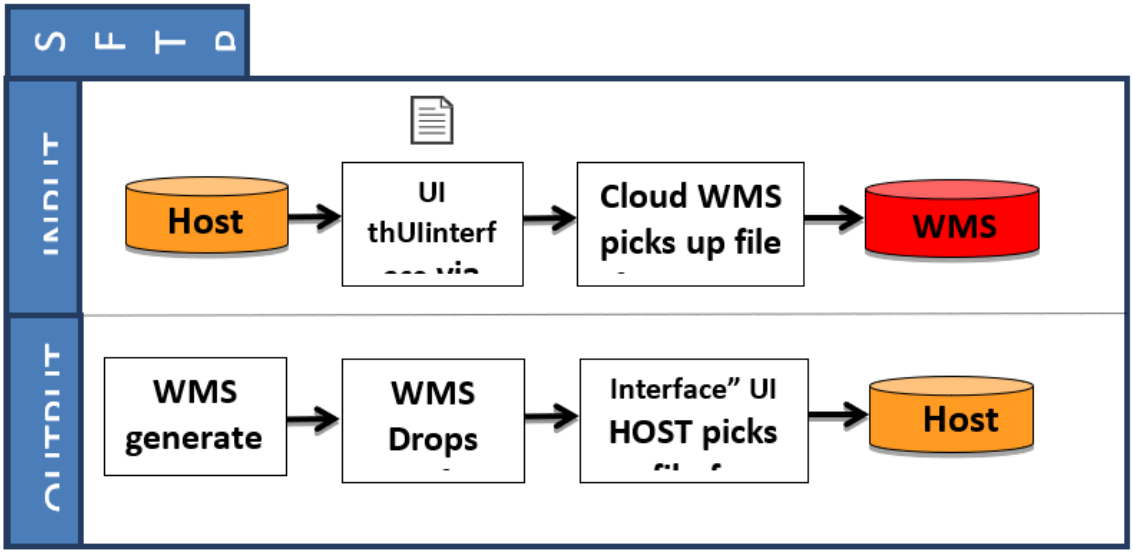


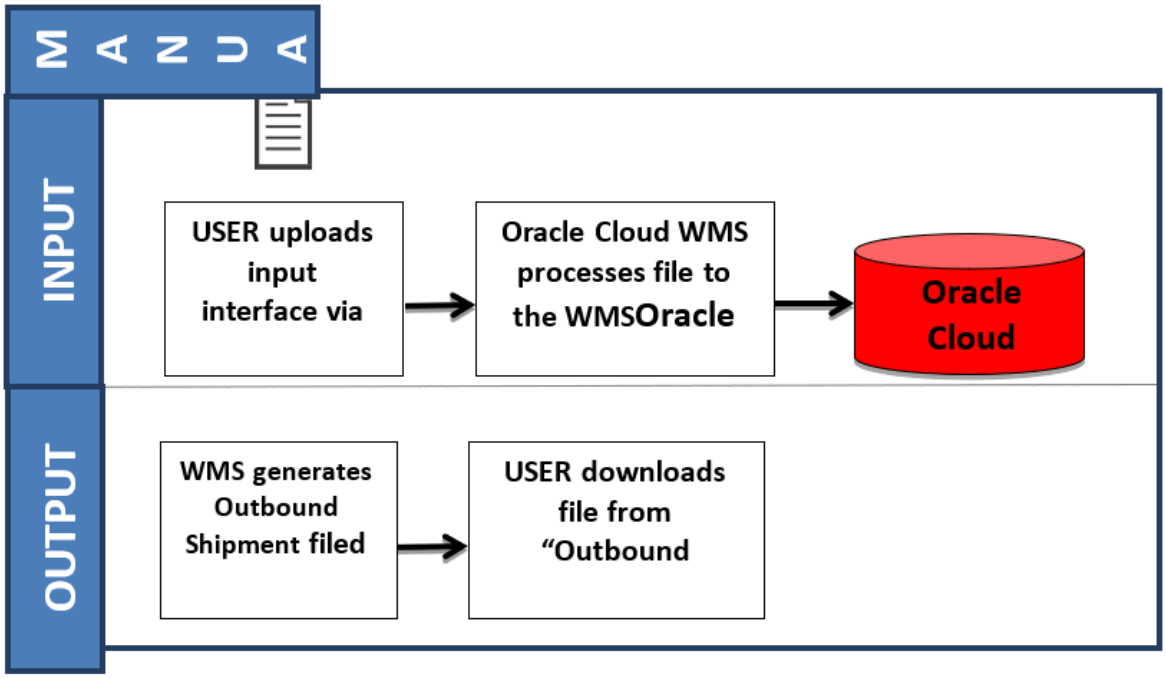
A sample User/Group set up is shown below:



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

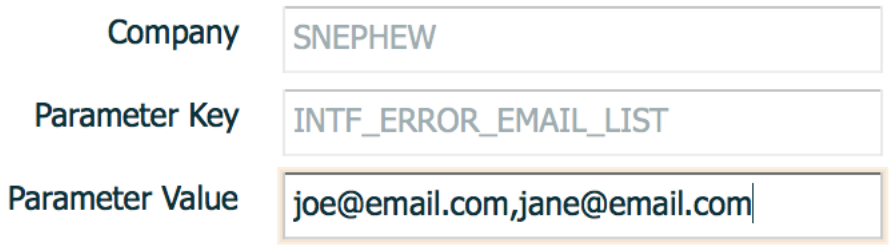
You can set up email notifications for interfaces that fail to process into Oracle Warehouse Management Cloud. The email notification provides the following information:

- 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.



3 Business Intelligence

Business Intelligence

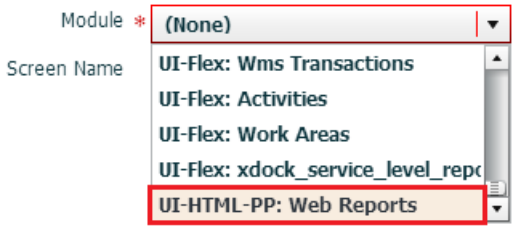
What is Business Intelligence?

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 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.



4 Appendix

Appendix

Roles and Permission

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

PERMISSIONS FOR ROLE: ADMINISTRATOR

Sl 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

Sl No.	User Actions
23	Save group view
24	Save user view
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.

PERMISSIONS FOR ROLE: MANAGEMENT

Sl 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

PERMISSIONS FOR ROLE: SUPERVISOR

Sl. No.	User Action
1	Change user
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

PERMISSIONS FOR ROLE: GUARD

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.

PERMISSIONS FOR ROLE: EMPLOYEE

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.