

Create Order Release

Role Based Trainings
SCHOLASTIC START

SCHOLASTIC DISCLAIMER

The content of this course is intended only for Scholastic employees and authorized contractors, who for purposes of this training we refer to as the “Scholastic Family.” If you are not in the Scholastic Family, you should not participate in this training and we respectfully ask you to leave or disconnect.

If you are in the Scholastic Family, we welcome the opportunity to share with you Scholastic confidential and proprietary information. We expect you to follow our policies in sharing any information discussed. Inappropriate disclosures could harm Scholastic. Disrespect of these conditions for sharing will be dealt with accordingly. No reproduction of this material in written, audio or electronic format is permitted without the expressed written consent of the Scholastic content owner.

INTRODUCTION

Welcome to this OTM course

This course provides an overview of the key actions that need to be performed in order to create an order release in OTM

Target Audience:

- Scholastic Domestic Vendors (US & Canada), Other

Pre-requisites:

Basic Navigation for Vendors Training Module

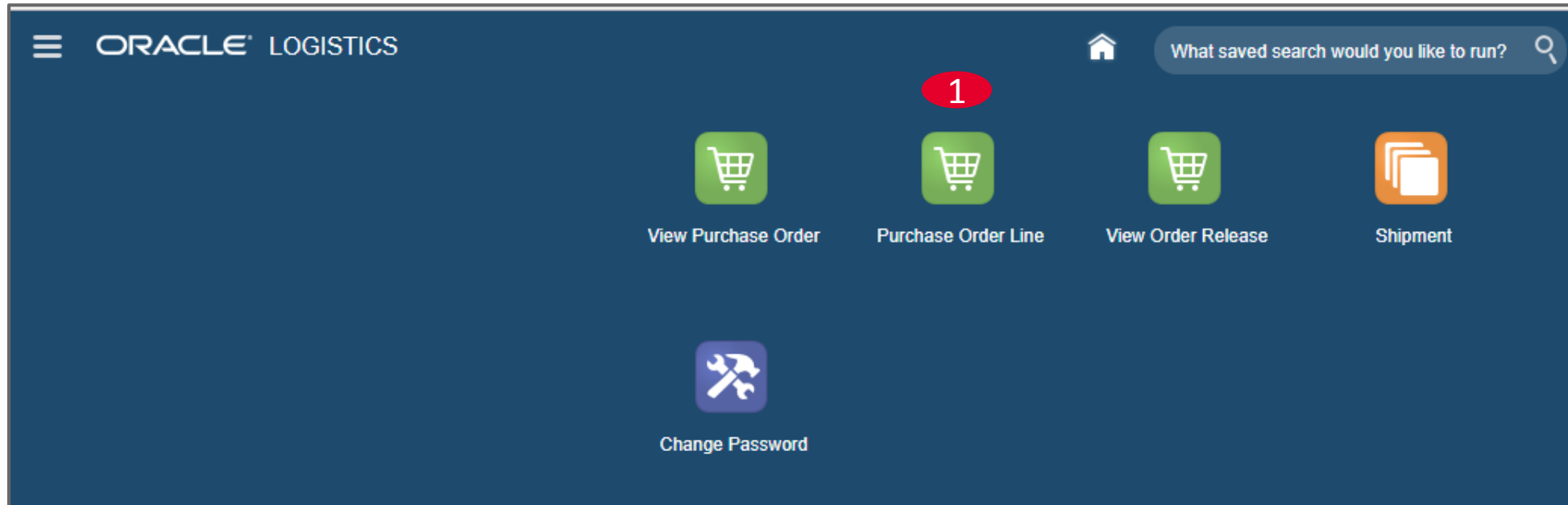
Course Duration:

15 minutes

CREATE ORDER RELEASE

From the OTM menu use Purchase Order Line to search for the Purchase Order Line (Purchase Order = Order Base)

- 1 Click on the Purchase Order Line Icon on the home page of the OTM menu



CREATE ORDER RELEASE

Search without Purchase Order / Order Base

- 1 The Purchase Order Line Finder screen will appear. The drop down menu should default to “Contains”. Click on Search at the bottom left of the screen.
- 2 All the Purchase Order Lines available in OTM for the associated Order Base will be displayed on the screen

ORACLE LOGISTICS

Purchase Order Line Finder 1

Order Line Item Status

1 Purchase Order **1**
Contains

Packaged Item
Begins With

Source Location
Begins With

Destination Location
Begins With

1 Search Sort Order Actions Export Saved Query:

Purchase Order Line Total Found: 1000 2

Actions

| <input checked="" type="checkbox"/> | ☆ | ID | Order Base ID | Order Base Line ID | Indicator | Purchase Order |
|-------------------------------------|---|------------------------|---------------|--------------------|-----------|----------------|
| <input type="checkbox"/> | ☆ | START.JDE-572378-1000 | JDE-572378 | JDE-572378-1000 | ○ | 572378 |
| <input type="checkbox"/> | ☆ | START.JDE-567682-1000 | JDE-567682 | JDE-567682-1000 | ▲ | 567682 |
| <input type="checkbox"/> | ☆ | START.JDE-549150-20... | JDE-549150 | JDE-549150-20000 | ○ | 549150 |
| <input type="checkbox"/> | ☆ | START.JDE-549150-23... | JDE-549150 | JDE-549150-23000 | ○ | 549150 |

| INDICATORS LEGEND | |
|---------------------|-------------------|
| ORDER BASE (OB) | Primary Indicator |
| OB Created | ○ |
| OB Partial Released | ▲ |
| OB Fully Released | ● |
| OB on Hold – Safety | ■ |

CREATE ORDER RELEASE

Search with Purchase Order / Order Base

- 1 The Purchase Order Line Finder screen will appear. Enter the Purchase Order number. The drop down menu should default to “Contains”. Click on Search at the bottom left of the screen. PO: 570480 has been used for illustration.
- 2 All the Purchase Order Lines available in OTM for the associated Order Base will be displayed on the screen

ORACLE LOGISTICS

Purchase Order Line Finder

Order Line Item Status

1 Purchase Order **1**

570480 Contains

Packaged Item

Source Location

Destination Location

1 Search Sort Order Actions Export Saved Query:

Purchase Order Line Total Found: 9 **2**

| Actions | ID | Order Base ID | Order Base Line ID | Indicator | Purchase Order |
|-------------------------------------|-------------------------|---------------|--------------------|-----------|----------------|
| <input checked="" type="checkbox"/> | ★ START.JDE-570480-1000 | JDE-570480 | JDE-570480-1000 | ▲ | 570480 |
| <input type="checkbox"/> | ★ START.JDE-570480-2000 | JDE-570480 | JDE-570480-2000 | ○ | 570480 |
| <input type="checkbox"/> | ★ START.JDE-570480-3000 | JDE-570480 | JDE-570480-3000 | ○ | 570480 |
| <input type="checkbox"/> | ★ START.JDE-570480-4000 | JDE-570480 | JDE-570480-4000 | ○ | 570480 |
| <input type="checkbox"/> | ★ START.JDE-570480-5000 | JDE-570480 | JDE-570480-5000 | ● | 570480 |

| INDICATORS LEGEND | |
|---------------------|-------------------|
| ORDER BASE (OB) | Primary Indicator |
| OB Created | ○ |
| OB Partial Released | ▲ |
| OB Fully Released | ● |
| OB on Hold – Safety | ■ |

CREATE ORDER RELEASE

- 1 Click on the Purchase Order Line check box for the line/s that you want to release. OB Line: JDE-570480-6000 has been used for illustration.
- 2 Click on the Actions button and click on Order Management > Change Order > Simple Ready To Ship

The screenshot displays the Oracle Logistics interface. At the top, there is a search bar with the text "What saved search would you like to run?". Below this, the "Purchase Order Line" section shows "Total Found: 1000". A table lists purchase order lines with columns for "ID", "Order Base ID", "Order", "Packaged Item", "Item Safety Status", and "Source Location". The first row is highlighted in blue and contains the following data: ID: START.JDE-570480-6000, Order Base ID: JDE-570480, Order: 9781338244083, Item Safety Status: (empty), and Source Location: CMD_LOC_100000866. A red box labeled "1" highlights the checkmark in the "ID" column of this row. Above the table, there is an "Actions" dropdown menu, also highlighted with a red box labeled "2". The dropdown menu is open, showing a tree structure: "Order Management" (expanded) -> "Change Order" (expanded) -> "Simple Ready To Ship" (highlighted with a red box labeled "2"). Other options in the "Change Order" menu include "Order Base Line Packing" and "Ready To Ship". Below "Change Order" is a "View" section with "Related Order Releases".

| ID | Order Base ID | Order | Packaged Item | Item Safety Status | Source Location |
|-----------------------|---------------|---------------|---------------|--------------------|-------------------|
| START.JDE-570480-6000 | JDE-570480 | 9781338244083 | | | CMD_LOC_100000866 |


CREATE ORDER RELEASE

Update Ship From Location

- 1 The Simple Ready To Ship screen will appear with the default Ship From location set at START.CHANGE. **Change the default Ship From location to the correct Ship From location.** Click on the Search icon below the Ship From Override field to change the default Ship From location.
- 2 The Location Finder screen will appear. Click on the Address tab. Enter the Ship From address in the Address Line 1 field. The drop down menu should default to “Contains”. Click on the Search button at the bottom left of the screen. Address: Grand Valley has been used for illustration.
- 3 The Location screen will appear and display all the addresses as per the search criteria. Select the correct Ship From location for this shipment. Click on the Finish button at the top right of the screen.

Simple Ready To Ship

PO
JDE-570480

Ship From Override  1

Ship From
START.CHANGE 1

Ship To
CMD_LOC_100094765
KENNESAW, GA USA 2

Location Finder 2

Location Address Role Contact General Audit

Address Line 1
GRAND VALLEY Contains 2

Address Line 2
 Same As

City
 Begins With

Province
 Begins With

Province Code
 Begins With

Postal Code

Search 2 Export Saved Query:

Location Total Found: 9 3

Finish

| ID | Location ID | Location Na... | Location De... | Address Line 1 | City |
|-------------------------|-----------------|-----------------|-----------------|-----------------------|------------------|
| START.268035 | 268035 | SUNRISE ELEM... | SUNRISE ELEM... | 7070 GRAND VALLEY ... | EL PASO |
| START.CDM_LOC_100007472 | CDM_LOC_1000... | | | 749 GRAND VALLEY DR | CAMBRIDGE |
| START.APN_LOC_100024659 | APN_LOC_1000... | | | 7070 GRAND VALLEY ... | COLORADO SPRINGS |

CREATE ORDER RELEASE

1 Enter all the applicable details for the OB Line being released:

- Ready to Ship Early Date
- Total Weight
- Transport Handling Unit
- Ship Unit Count
- Remark Qualifier ID
- Remark Text

2 Click on the Save button at the bottom right of the screen

The screenshot shows the 'Simple Ready To Ship' form with the following fields and annotations:

- PO:** JDE-570480
- Ship From Override:** 268035
- Ship From:** START.CHANGE
- Ship To:** CMD_LOC_100094765, KENNESAW, GA USA
- Ready To Ship Early Date:** 2017-09-18 22:20:00 (Annotated with a red box and '1')
- Transport Handling Unit:** VENDOR-PALLET (Annotated with a red box and '1')
- Ship Unit Count:** 1 (Annotated with a red box and '1')
- Total Weight:** 2052 LB (Annotated with a red box and '1')
- PO Remarks:** Remark Qualifier ID: PO-DESCRIPTION, Remark Text: SC Manu Purchase Orders
- Remarks:** Remark Qualifier ID: NUMBER-OF-BOXES (Annotated with a red box and '1'), Remark Text: 2 (Annotated with a red box and '1')
- Save button:** Located at the bottom right (Annotated with a red box and '2')



Please note: If the Transport Handling Unit is VENDOR-PALLET then you **MUST** select NUMBER-OF-BOXES under the Remark Qualifier ID and enter the number of boxes under the Remark Text.

CREATE ORDER RELEASE

- 1 Enter the Ship Quantity at the bottom right of the screen
- 2 Click on the Save button at the bottom left of the screen



Please note: Ship Quantity has a tolerance associated with it and an error message will appear if the tolerance limits are exceeded.

Simple Ready To Ship

PO: JDE-570480

Ship From Override: 268035

Ship From: START.CHANGE

Ship To: CMD_LOC_100094765
KENNESAW, GA USA

Ready To Ship Early Date: 2017-09-18 22:20:00

Transport Handling Unit: VENDOR-PALLET

Ship Unit Count: 1

Total Weight: 2052 LB

PO Remarks

| Remark Qualifier ID | Remark Text |
|---------------------|-------------------------|
| PO-DESCRIPTION | SC Manu Purchase Orders |

Remarks

* Remark Qualifier ID: NUMBER-OF-BOXES

* Remark Text: 2

Package Items

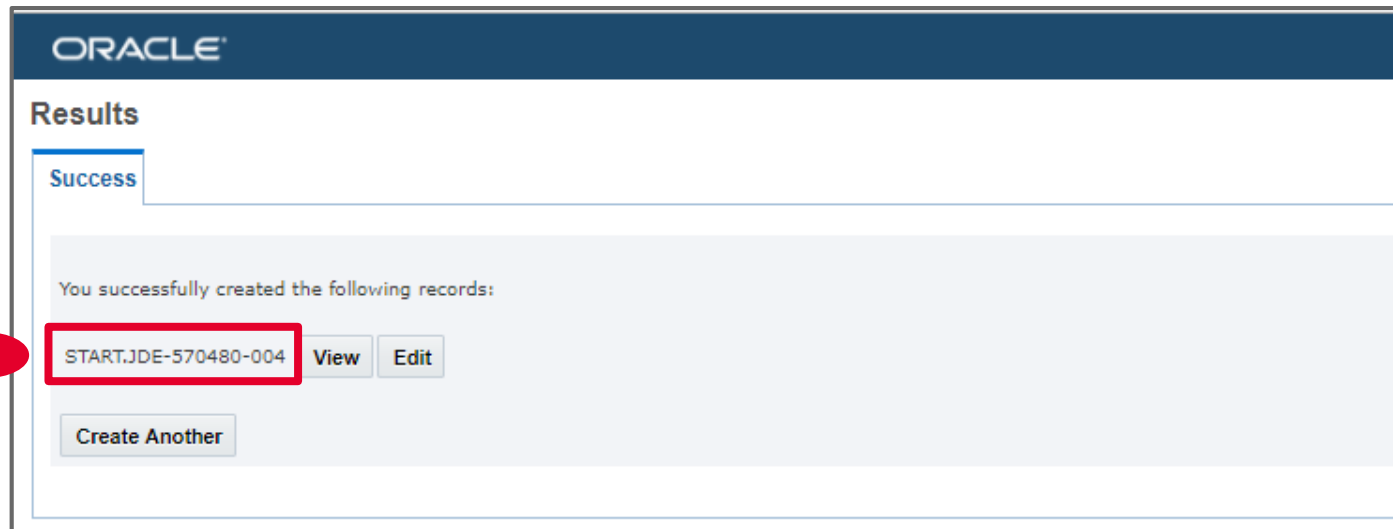
| Package Item ID | Early Pickup | Late Pickup | Ordered Quantity | Remaining Quantity | Ship Quantity |
|-----------------|--------------|-------------|------------------|--------------------|---------------|
| 9781338244083 | | | 1900 | 1800 | 100 |
| Total | | | | | 100 |

Buttons: Save, Cancel, Reset

CREATE ORDER RELEASE

On successfully saving the changes, you will get a confirmation message as displayed below

1 The Order Release ID is displayed



ERROR TROUBLESHOOTING

If an error occurs, it could be because of one of the below reasons:

| Number | Cause of Error | Recommended Course of Action |
|--------|-----------------------------------------|-------------------------------------------------------|
| 1 | Ship Quantity out of tolerance | Speak with the person handling the Scholastic account |
| 2 | Ready to Ship Early Date is in the past | Update Ready to Ship Early Date to a future date |
| | | |
| | | |

QUESTIONS



For any questions relating to this training module, please contact the OTM Inbound Super-User responsible for your country:

| Name | Country | Title | Email ID |
|------------|---------------|----------------------------------|------------------------------------------------------------------------------------|
| John Boyle | United States | Global Inbound Logistics Manager | jboyle@scholastic.com |
| Doug Jow | United States | Domestic Logistics Coordinator | djow-consultant@scholastic.com |
| Noah Clark | Canada | Traffic & Customs Specialist | nclark@scholastic.ca |

THANK YOU