

# Create Order Release (Order Base Line Packing)

Role Based Trainings  
SCHOLASTIC START

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# 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 for more than 1 Purchase Order / Order Base on a pallet in OTM

## Target Audience:

- Scholastic Domestic Vendors (US & Canada), Other

## Pre-requisites:

Basic Navigation for Vendors Training Module, Create Order Release Training Module

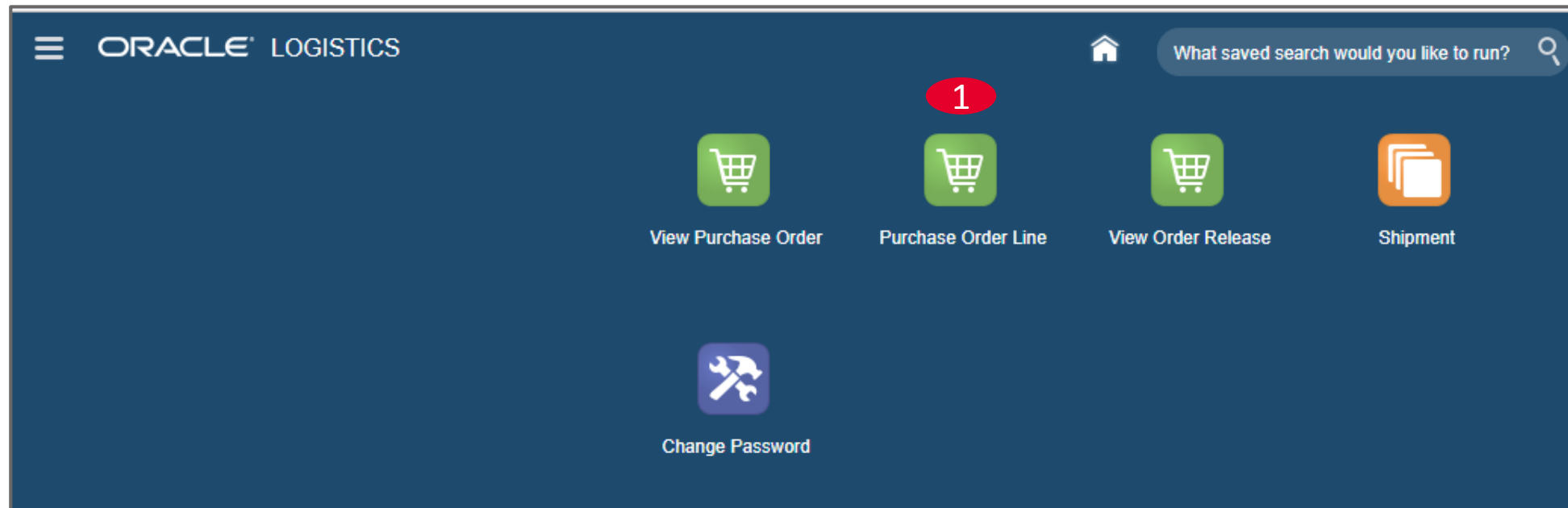
## Course Duration:

15 minutes

# CREATE ORDER RELEASE (ORDER BASE LINE PACKING)

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 (ORDER BASE LINE PACKING)

- 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

Order Line Item Status

**1** Purchase Order

Contains

Packaged Item

Source Location

Destination Location

**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
<input type="checkbox"/>	☆	START.JDE-572378-1000	JDE-572378	JDE-572378-1000	○
<input type="checkbox"/>	☆	START.JDE-567682-1000	JDE-567682	JDE-567682-1000	▲
<input type="checkbox"/>	☆	START.JDE-549150-20000	JDE-549150	JDE-549150-20000	○

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

# CREATE ORDER RELEASE (ORDER BASE LINE PACKING)

- 1 Select the orders that need to be shipped.
- 2 Click on the Actions button and click on Order Management > Change Order > Order Base Line Packing

The screenshot shows the Oracle Logistics interface. At the top, there is a navigation bar with the Oracle Logistics logo and a home icon. Below the navigation bar, the main header reads "Purchase Order Line" with "Total Found: 2" on the right. A toolbar contains an "Actions" dropdown menu, a refresh icon, a print icon, a refresh icon, and a print icon. The main table has columns for "Purchase Order" and "Packaged Item". Two rows are visible, both with "START.OPS-00216211-0001" and "START.OPS-00216211-0002" in the "Purchase Order" column and "9781443164474" in the "Packaged Item" column. The first two rows are selected, indicated by checkmarks in the selection column. A red circle with the number "1" is placed over the first checkmark. The "Actions" dropdown menu is open, showing a list of actions. A red circle with the number "2" is placed over the "Order Base Line Packing" option in the menu.

	Purchase Order	Packaged Item
<input checked="" type="checkbox"/>	00216211	9781443164474
<input checked="" type="checkbox"/>	00216211	9781443164474

# CREATE ORDER RELEASE (ORDER BASE LINE PACKING)

## Update Source Location

- 1 The Order Base Line Packing screen will appear. Click on the Search icon below the Source Location Override field to update the Source 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 Source Location for this shipment. Click on the Finish button at the top right of the screen.

**Order Base Line Packing**

Order Header

Source Location Override

Destination Location Override

**Location Finder**

Location **Address** Role Contact General Audit

Address Line 1

Address Line 2

City

Province

Province Code

Postal Code

Saved Query:

**Location** Total Found: 9

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 (ORDER BASE LINE PACKING)

- 1 The Order Base Line Packing screen will appear. Click on the Calendar icon below the Early Pickup Date field to update the Date and Time as applicable.
- 2 Select the Line Items that need to be shipped.
- 3 Click on the New Ship Unit button at the bottom left of the screen

The screenshot shows the Oracle Order Base Line Packing interface. A 'Select Date and Time' modal is open, showing a calendar for September 2017. The date '1' (September 1st) is selected, and the time is set to 16:00. Red circles with the number '1' point to the calendar icon, the date '1', and the time '16:00'.

Below the modal, the 'Order Header' section includes fields for Source Location Override (268035), Early Pickup Date (2017-09-19 16:00:00), and Early Delivery Date. A red circle with '1' points to the calendar icon next to the Early Pickup Date field.

The 'Line Items' table is shown below:

	Packaged Item ID	Source Location ID	Destination Location ID	Early Pickup Date	Late Pickup Date	Early Delivery Date	Late Delivery Date	Ordered Quantity	Remaining Quantity
<input checked="" type="checkbox"/>	9781443164474	CMD_LOC_100095705	4668383					3500	3500
<input checked="" type="checkbox"/>	9781443164474	CMD_LOC_100095705	4668383					2400	2400

A red circle with '2' points to the checkboxes in the first column of the table. At the bottom left, a 'New Ship Unit' button is highlighted with a red circle and the number '3'.



# CREATE ORDER RELEASE (ORDER BASE LINE PACKING)

- 1 Enter all the applicable details for the OB Lines being released:
  - Transport Handling Unit
  - Gross Weight per Ship Unit
  - Remark Qualifier ID
  - Remark Text

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

- 3 Enter Ship Quantity as applicable at the bottom right of the screen

- 4 Click on Save at the bottom left of the screen

Order Base Line Packing Detail

Transport Handling Unit **1**  
VENDOR-PALLET

Gross Weight per Ship Unit **1**  
500 LB

Gross Volume per Ship Unit  
CU FT

Length per Ship Unit  
FT

Width per Ship Unit  
FT

Height per Ship Unit  
FT

Order Base Remarks

Remark Qualifier ID	Remark Text

Order Release Remarks

Remark Qualifier ID **1**  
NUMBER-OF-BOXES

Remark Text **1**  
2 Boxes for Packaged Item ID 9781443164474

**2** Save

Line Items

Packaged Item ID	Source Location ID	Destination Location ID	Early Pickup Date	Late Pickup Date	Early Delivery Date	Late Delivery Date	Ordered Quantity	Remain <b>3</b>	* Ship Quantity <b>3</b>
<a href="#">9781443164474</a>	<a href="#">CMD_LOC_100095705</a>	<a href="#">4668383</a>					3500	3500	500
<a href="#">9781443164474</a>	<a href="#">CMD_LOC_100095705</a>	<a href="#">4668383</a>					2400	2400	500

**4** Save Cancel



Please note: You **MUST** enter the number of boxes and the Packaged Item ID for those boxes in the Remark Text box.

# CREATE ORDER RELEASE (ORDER BASE LINE PACKING)

- 1 The Order Base Line Packing screen will appear. Click on the Finished button at the bottom left of the screen.

**Order Base Line Packing** 1

**Order Header**

Source Location Override:

Destination Location Override:

\* Master Order Base:

Early Pickup Date:

Late Pickup Date:

Early Delivery Date:

Late Delivery Date:

Ship With Group:

**Line Items**

<input type="checkbox"/>	Packaged Item ID	Source Location ID	Destination Location ID	Early Pickup Date	Late Pickup Date	Early Delivery Date	Late Delivery Date	Ordered Quantity	Remaining Quantity
<input type="checkbox"/>	9781443164474	CMD_LOC_100095705	4668383					3500	3000
<input type="checkbox"/>	9781443164474	CMD_LOC_100095705	4668383					2400	1900

**Release Instructions**

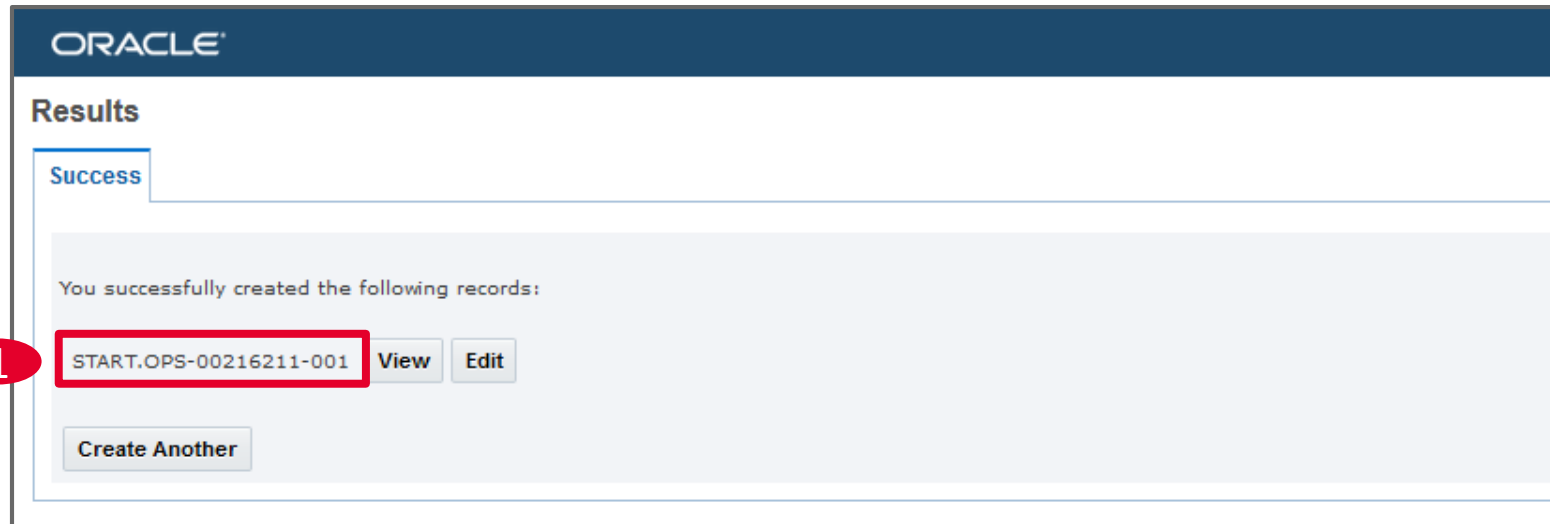
Select	Transport Handling Unit	Length per Ship Unit	Width per Ship Unit	Height per Ship Unit	Gross Weight per Ship Unit	Gross Volume per Ship Unit	Ordered Quantity
<input type="radio"/>	VENDOR-PALLET	FT	FT	FT	500.00 LB	CUFT	1000

Top  1

# CREATE ORDER RELEASE (ORDER BASE LINE PACKING)

On successfully updating 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	Early Pickup Date is in the past	Update Early Pickup 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	<a href="mailto:jboyle@scholastic.com">jboyle@scholastic.com</a>
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Noah Clark	Canada	Traffic & Customs Specialist	<a href="mailto:nclark@scholastic.ca">nclark@scholastic.ca</a>

THANK YOU