GE Oil & Gas

Global Supply Chain

Oracle Transportation Management

Viewer
User Manual

Simpler >> Smarter >> Better

Cost
Quality
Deliver on time

imagination at work

Index

Index

1.0 Acronyms

Acronyms

DOA : Delegation of Authority
EBS : Oracle E-Business Suite
ERP : Enterprise Resource Planning
FIR : Florence New Units
FTL : Full Track Load
GE : General Electric
GLS : Global Logistic Services
GS : Global Services
IN : Inbound
ITO : Inquiry to Order phase
LEC : Logistic Execution Center
LPN : LICENCE PLATE NUMBER, comes from ORACLE , it is the striker applied on each box externally
LT : Lead Time
LTL : Less than Track Load
LSP : Logistics Provider
MRP : Manufacturing Resource Planning
NP : Nuovo Pignone
NU : New Units
VG : Vecto Gray

OB : Order Base
OBL : Order Base Line
OAPPL : Oracle Application
OM : Order Management
OOG : Out of Gauge
OR : Order Release
OTM : Oracle Transportation Management
OTR : Order to Remittance phase
OUT : Outbound
PO : Purchase Order
PT : Premium Transport
RC : Routing Center
RFQ : Request for Quotation
RFT : Request for Transport
SC : Support Central
SO : Sales Order
SSP5 : Self Service Purchasing
STD : Standard
THU : Transport Handling Units
UI : User Interface
WF : WorkFlow

Key terms

- **Order Release** : it is an order or part of an order for transportation planning and execution

- **Order Release Ship Unit** : defines how goods will be shipped ex.: pallet, box, etc. with related details and dimensions

- **Order Release Line Item** : it is the item list inside a box for transportation of related Ship Unit

- **Premium Transportation** : this is the transportation cost when a lower alternative price exists. Higher price for premium transportation is often due to very tight date for transport.

- **Job**: this object is created by Requestor, and it is a group of Order Releases which will be sent to the cost assignment and approval process; a Job can group together different ORs with different locations, dates and incoterms. The job is created for the approval of the transport requests.

Please see inside OTM - Help option Glossary for more details and drill down on these subject.

imagination at work

Key terms

- **Cost Calculation & Approval Control** : each Job will be submitted to Cost Assignment process (OTM will provide standard cost when rates are available or SPOT Cost, while the Execution center will provide cost if standard rates are not available); the job will be self-approved if the transportation cost is less then 2.000 euro, otherwise it should be approved from one or more approvers based on their own DOA level

- **Approvals**
    - "Self-Approval" for transportation cost less than 2.000 euro
    - Standard transportation with higher cost than 2.000 euro
    - Premium transportation with extra cost/urgency approval

- **Logistic Execution Center** : organization to manage transports during consolidation steps of OR after Job approval process, spot quotes generation, buy shipment creation, tender execution and carrier mgmt., extra costs control and creation management

Please see inside OTM - Help option Glossary for more details and drill down on these subject.

imagination at work

Key terms

- **Sell Shipment** : a grouping of ORs inside a Job with compatible locations and data in order to compute transportation costs

- **Buy Shipment** : this is the Transport Request, RFT. The shipment is a set of goods to be transported by the carrier from a location to another. A Shipment contains one or more Order Releases with compatible pickup and delivery date and same source and destination location

- **Cost Calculation** : this is the transportation cost of the Shipment (Sell/Buy) computed based on ORs information, as Transit Time (time between Early Pickup Date and Late Delivery Date), Pre-alert (time between Shipment creation and Pickup Date), locations distance, weight and dimensions

- **Spot** : if conditions on Order Releases are not compatible with any of the standard predefined cost inside OTM or there is no RATE in the system for the kind of transportation, then the cost will be defined as spot cost and cost will be assigned by the Execution Center

Please see inside OTM - Help option Glossary for more details and drill down on these subject.
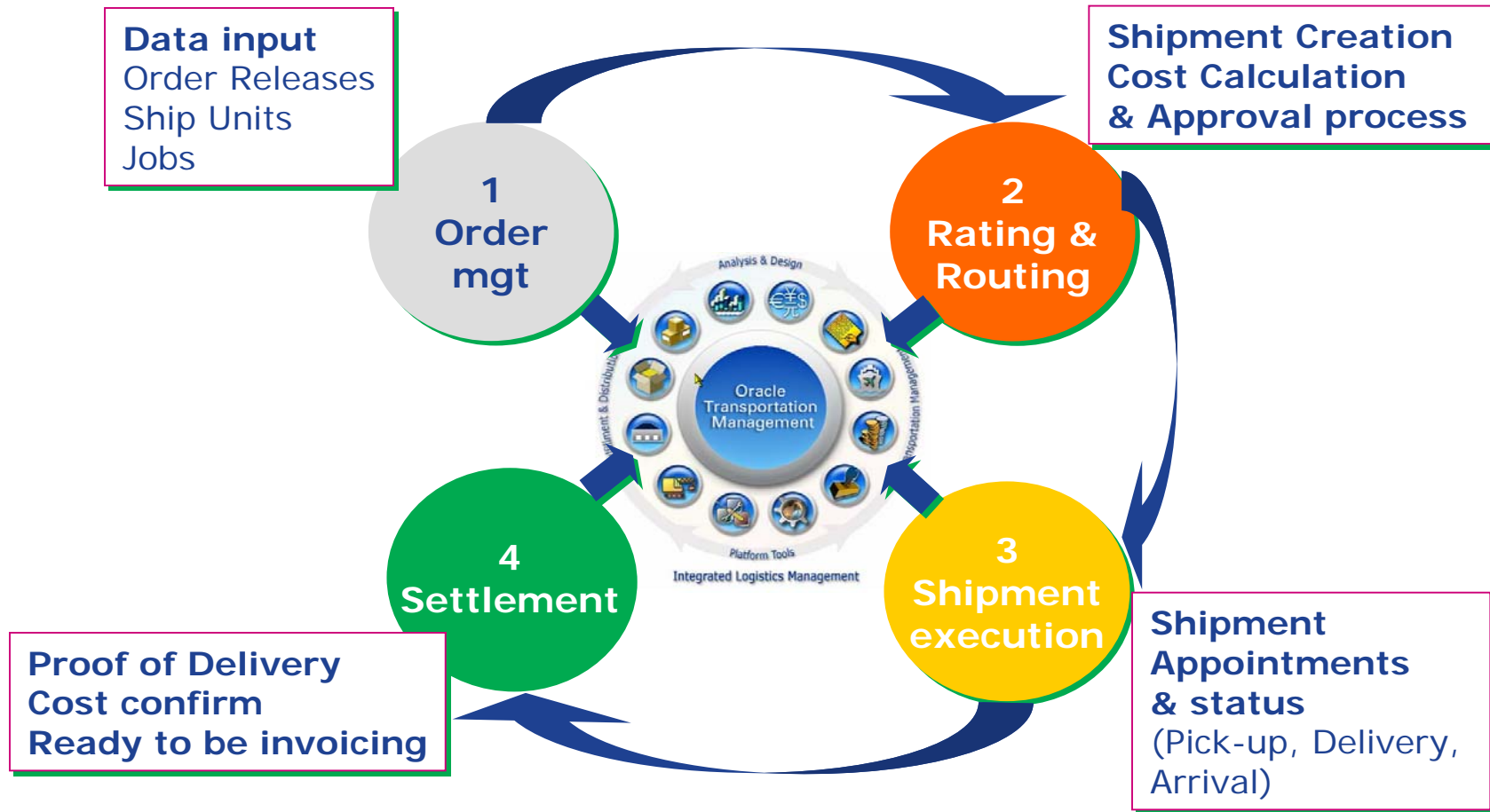
Key terms

- **<u>INBOUND</u>:** shipment from external location to VG plant

- **<u>OUTBOUND</u>:** shipment from internal location to external (customer)

- **<u>FARM-OUT</u>:** subcontract work on material (from plant to supplier and vice versa)
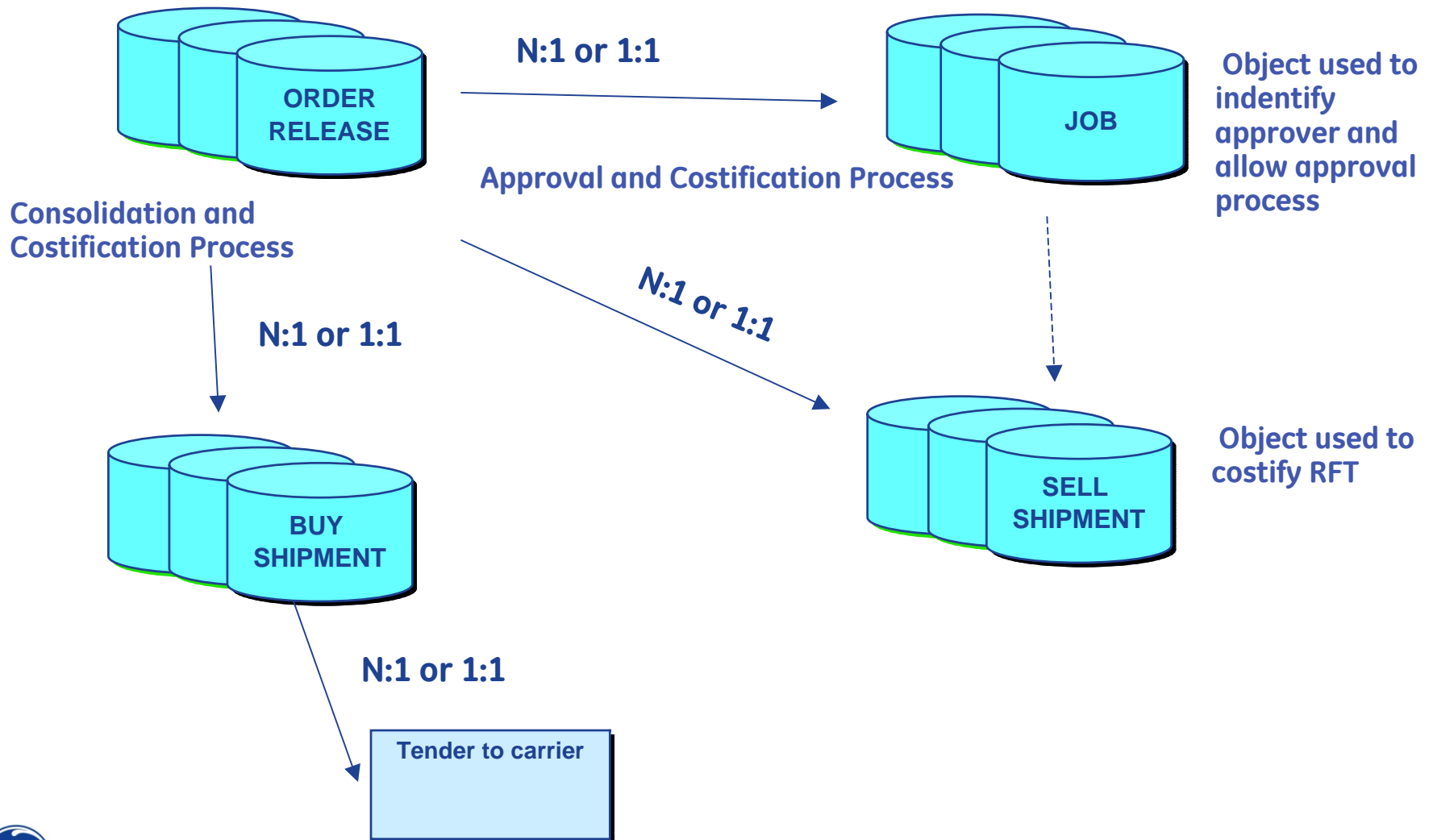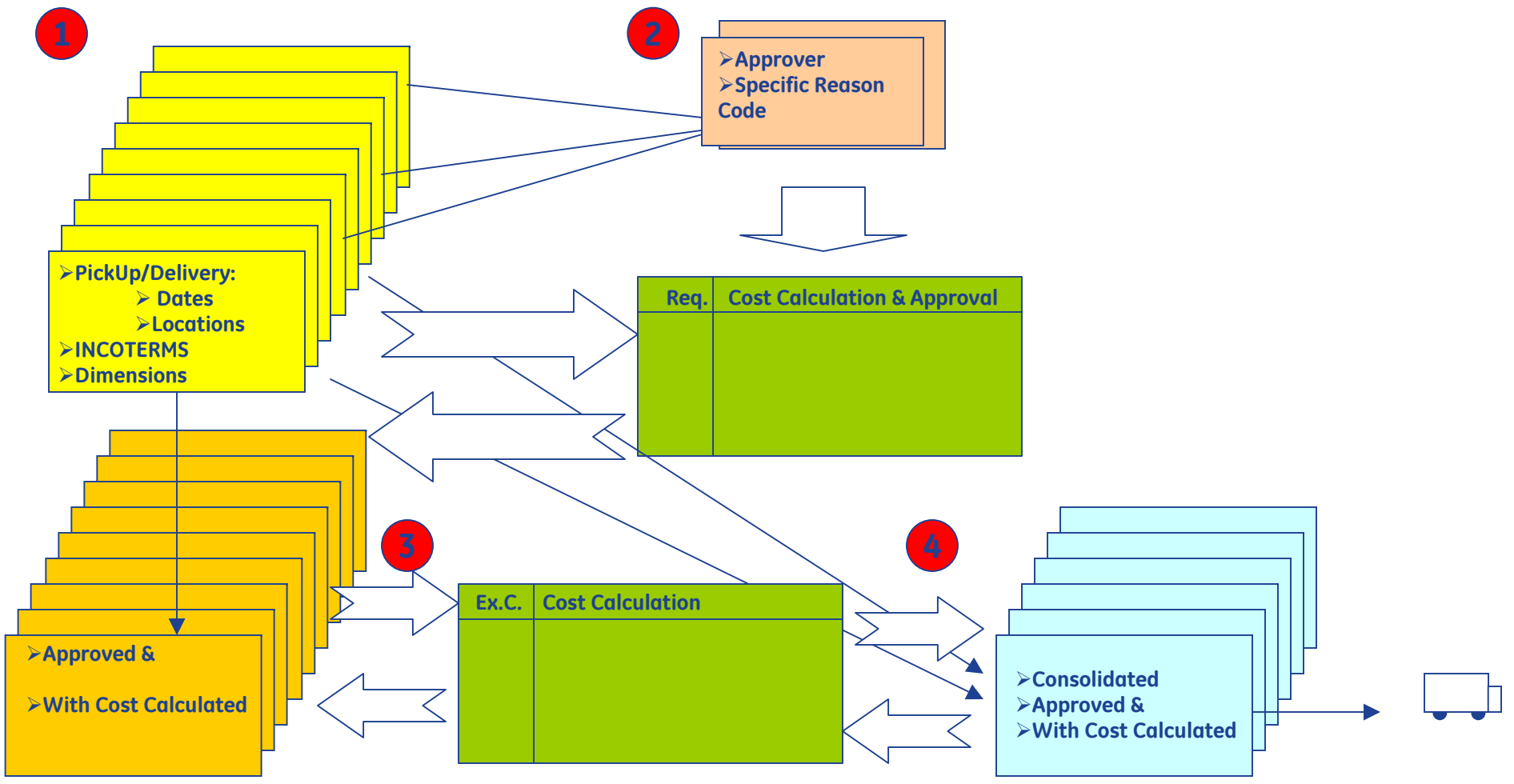
2.0 Process and Solution overview

Process Overview

Data input
Order Releases
Ship Units
Jobs

**1
Order mgt**

**Shipment Creation
Cost Calculation
& Approval process**

**2
Rating &
Routing**

**4
Settlement**

**3
Shipment execution**

**Proof of Delivery
Cost confirm
Ready to be invoicing**

**Shipment
Appointments
& status**
(Pick-up, Delivery, Arrival)

imagination at work

Relations between Key Objects in OTM

ORDER RELEASE

N:1 or 1:1

Approval and Costification Process

JOB

Object used to indentify approver and allow approval process

Consolidation and Costification Process

N:1 or 1:1

N:1 or 1:1

BUY SHIPMENT

SELL SHIPMENT

Object used to costify RFT

N:1 or 1:1

Tender to carrier

OTM Data Structure

Order Releases Definitions (Ship Items)

JOBs Definitions

①

②

> Approver
> Specific Reason Code

> PickUp/Delivery:
> > Dates
> > Locations
> INCOTERMS
> Dimensions

Req.	Cost Calculation & Approval

> Approved &
> With Cost Calculated

③

④

Ex.C.	Cost Calculation

> Consolidated
> Approved &
> With Cost Calculated

Sell Shipments (with Cost)

Buy Shipment (with Consolidated Cost)

OTM Users Relationship

Order Releases Definitions (Ship Items)   **JOBs Definitions**
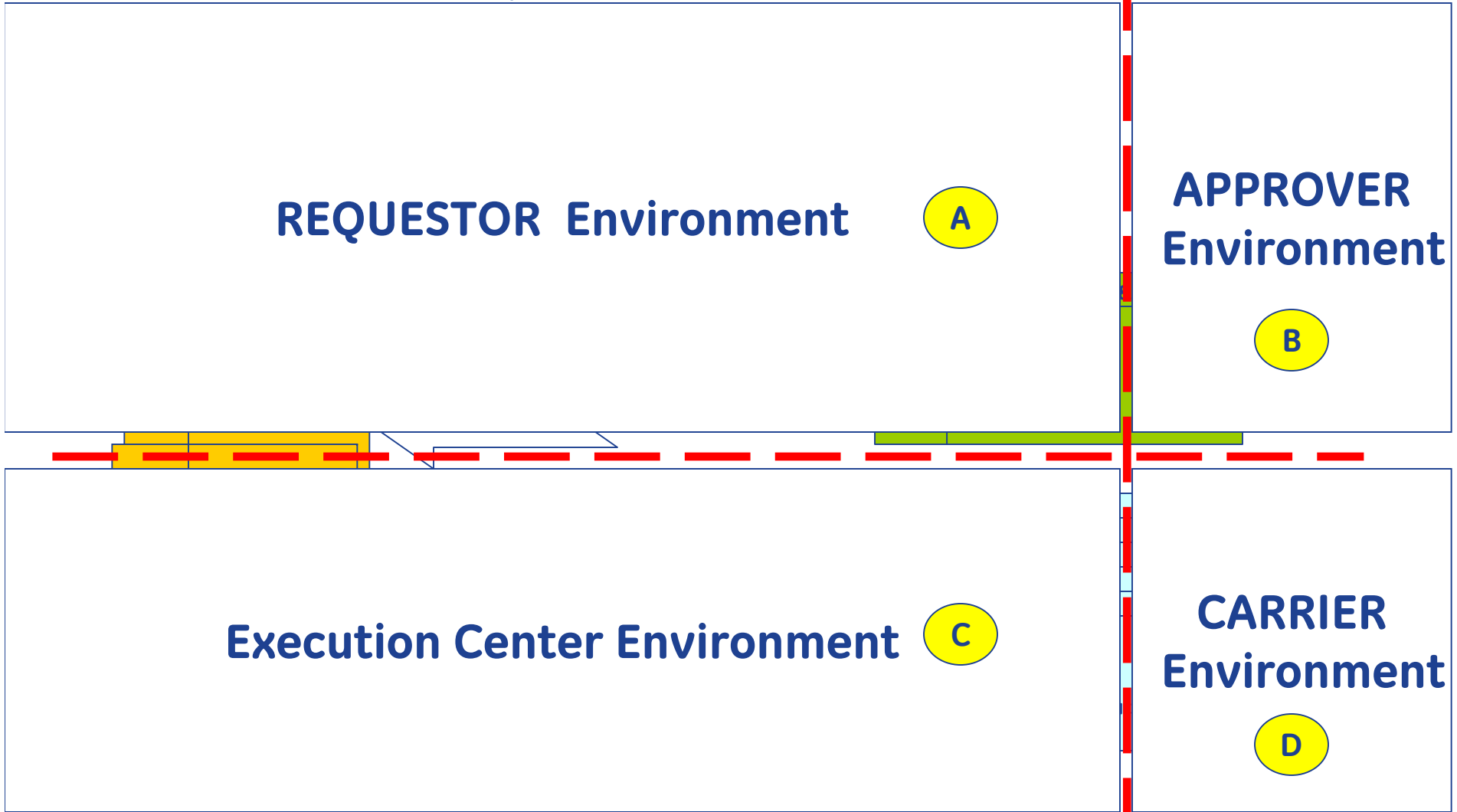
REQUESTOR Environment   (A)

APPROVER Environment

(B)

Execution Center Environment   (C)

CARRIER Environment

(D)

Sell Shipments (with Cost)   **Buy Shipment (with Consolidated Cost)**

OTM Users /Roles Overview

Role	Description
REQUESTOR (GE)	Can create OR(s) in the system and change it's OR(s) only Can create JOB(s) from OR(s) to be sent in APPROVAL/COST Allocation This will create Sell Shipment with cost assigned, managed later by LEC
REQUESTOR (non GE)	Can create OR(s) in the system and change it's OR(s) only Can create JOB(s) from OR(s) to be sent in APPROVAL/COST Allocation This will create Sell Shipment with cost assigned, managed later by LEC
SUPER REQUESTOR	Can create OR(s) and change it and also OR(s) of other requestors Can create JOB(s) from OR(s) to be sent in APPROVAL/COST Allocation Able to view everything in OTM
APPROVER (GE)	Can read all JOB(s) Can approve/refuse only JOB(s) of his/her own competence for : • Standard COST(> 2000E) • Premium Transportation
Logistic Execution Centre (LEC)	Can access only SS created by COSTING Allocation Process of JOB(s); can assign SPOT Cost and create/manage TENDER(s) and create consolidated Buy Shipment to be assigned to CARRIER for Execution
GE Logistic Execution ADMIN (LEC)	Can access only SS created by COSTING Allocation Process of JOB(s); can assign SPOT Cost and create/manage TENDER(s) and create consolidated Buy Shipment to be assigned to CARRIER for Execution Able to confirm buy shipment ready to be invoiced
CARRIER	Can accept TENDER(s) from LEC and update cost and dates, uploading POD, Delivered action Can access / execute only BS of his/her own competence
ADMINISTRATOR	IM role for development and set up system
VIEWER	Able to view everything in OTM Not able to make action in OTM

imagination at work

Requestor's roles

Requestor Responsibility are :

- Manually create / Edit Order Releases with Order transportation request and details

- Manually create / edit LOCATIONs

- Manually create JOBs to associate one or many Order Releases to a JOB for APPROVAL Process

- Select an APPROVER in the list of First Level Approver for a JOB

- Start COST CALCULATION & APPROVAL for Order Release in a JOB

- Verify that APPROVAL Flow is correctly executed

- Provide when required REASON CODE on URGENCY / ALTERNATIVE COST etc.

- Manually REFUSE a job to :

  - Change a FIRST LEVEL APPROVER and RESUBMIT a JOB for APPROVAL

  - Change any detail in any of the associated Order Releases

imagination at work

Requestor's roles

Requestor Responsibility are: (continuation)

- DELETE/RECALL a JOB, delete all associated SELL Shipments to allow case below:

  - Change in any details in any Order Release

  - Cancel the JOB and/or DELETE Order Releases

- Verify at any time JOB Status and Order Release Transportation details

- Verify SELL Shipment and BUY Shipment status

- Talk with Execution Center Team to manage transport details & constrains (outside OTM System)

imagination at work

3.0 OTM Navigation

GE imagination at work

OTM Navigation

Change Role allows to change role. After the change refresh (➔F5) should be executed.

OTM **notification** management

Use browser keys **Back** and **Forward** to navigate; use SAVE your date in creation mode

User name and role
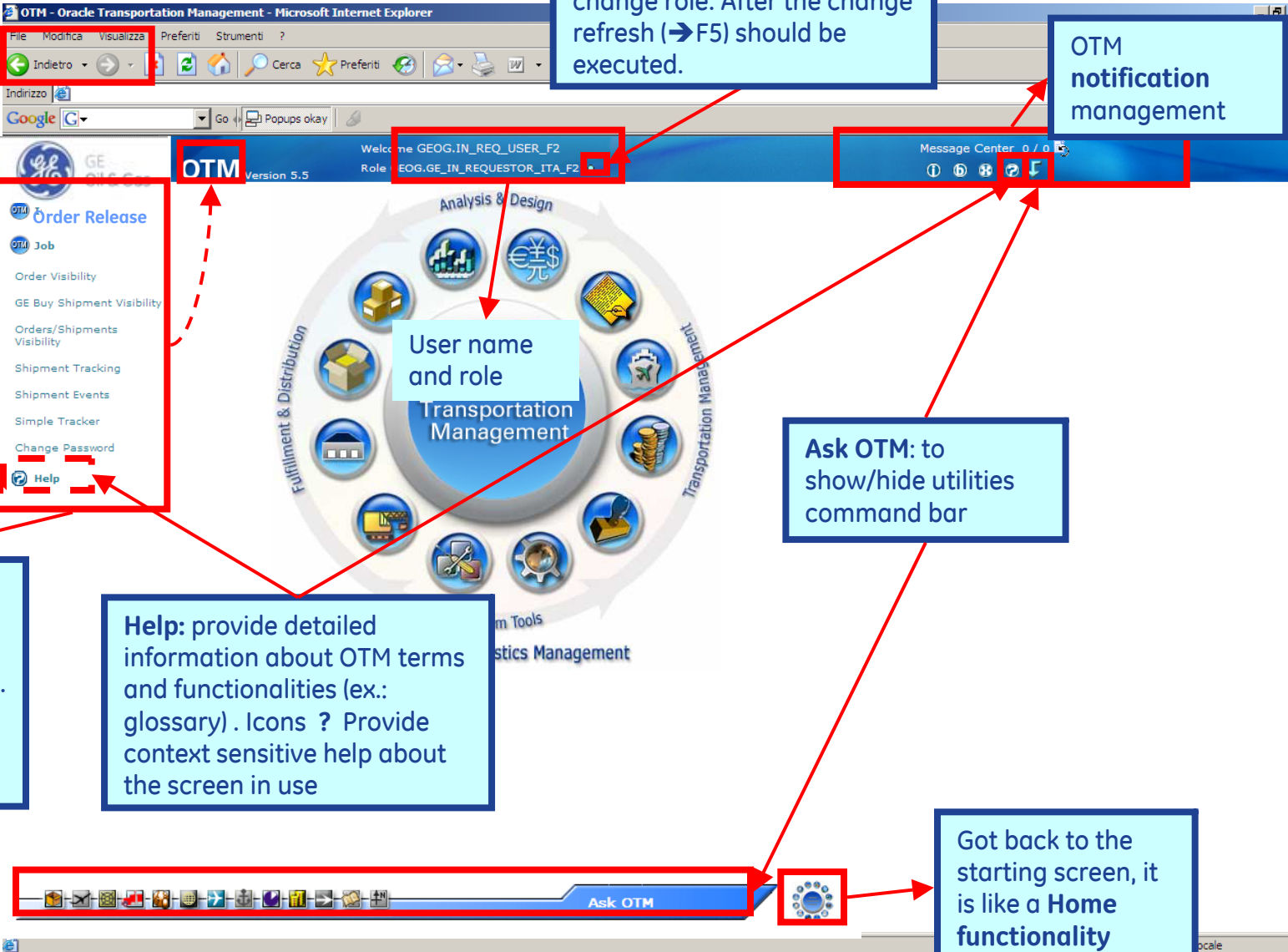
Ask OTM: to show/hide utilities command bar

Application command bar: show user available functions. Can be enabled /disabled clicking on OTM

Help: provide detailed information about OTM terms and functionalities (ex.: glossary) . Icons **?** Provide context sensitive help about the screen in use

Got back to the starting screen, it is like a **Home functionality**

OTM Navigation

It is possible to enter multiple **filters** to better define the search parameters. Please pay attention to all fields in the search screen and in all other tabs.

The **SEARCH Screen** , with specific peculiarities, has the same layout and functionalities for all users and objects.

Search used to start a search command. OTM shows all objects matching the defined filters.

New to create a new object related to the search screen in processing (a new OR in this example)

OTM Navigation

Suggestions about search...

One Of and Not One Of: used to search one or more specific objects. In such case enter different object codes comma separated

Used to run search by Indicator which shows the status of the objects

To search objects by creation date

OTM Navigation

Suggestions about search...

Order Release | **Locations** | **Status**

[ ] | [📅] | Same As [▾]

Total Gross Weight

[ ] | KG [▾] | = [▾]

Total Gross Volume

[ ] | 🟦 CU M [▾] | = [▾]

Total Ship Unit Count

[ ] | = [▾]

> Used to select a **Qualifier** as search key below the search value can be entered

Order Release Reference Number Qualifier

[PROJECT ▴▾]

Order Release Reference Number Value

[ ] | Begins With [▾]

Involved Party Qualifier

[ ] | Begins With [▾]

Involved Party Contact

[ ] | Begins With [▾]

> Used to search by **Involved Party** providing the qualifier and below the value (ex. To find all objects created by a Requestor insert Qualifier ➜ Logistics Contact ➜ the Requestor name)

OTM Navigation

GE Oil & Gas, OTM Requestor

OTM Navigation

Indicator: shows the step/status of the related object

Manage Windows: to work with a single windows; open a new window for each step or keep fix main screen and change working screen only

Export: to export to Excel data of the selected lines

OTM Navigation

Smart Links: selecting an object and then right mouse click to show the list of all related information direct links. For ex.: Related OR, OB or Shipment; Related Remarks; Related Reference Numbers; etc.

		ID	Order Release ...	Indicator	Modify_Attempt	Delete_Attempt	Supplier Name	Source Location ID	De
☐	+	GEOG.729004-2008-07-30-000008	MIXED	🟢			SIE SOLARI SPA	SIE SOLARI SPA 3570	NU
☐	+	GEOG.729004-2008-07-24-000007	INBOUND	🟢			SIE SOLARI SPA	SIE SOLARI SPA 3570	NU
☐	+	GEOG.729004-2008-07-24-000006	INBOUND	🟢			SIE SOLARI SPA	SIE SOLARI SPA 3570	GE
☐	+	GEOG.729004-2008-		🟢			SIE SOLARI SPA	SIE SOLARI SPA 3570	NU
☐	+	GEOG.729004-2008-		🟢			SIE SOLARI SPA	SIE SOLARI SPA 3570	NU
☐	+	GEOG.558044-2008-		🟢			N.C.M. S.R.L. 558044	N.C.M. S.R.L. 7274	NU
☐	+	GEOG.729004-2008-		🟢			SIE SOLARI SPA	SIE SOLARI SPA 3570	GE
☐	+	GEOG.100554-2008-		🟥			BALCKE DURR ITALIAN...	BALCKE DURR ITALIAN...	GE
☐	+	GEOG.100554-2008-		🟥	⬇		BALCKE DURR ITALIAN...	BALCKE DURR ITALIAN...	GE
☐	+	GEOG.729004-2008-		⚪			SIE SOLARI SPA	SIE SOLARI SPA 3570	NU
☐	+	GEOG.729004-2008-		⚪			SIE SOLARI SPA	SIE SOLARI SPA 3570	NU
☐	+	GEOG.937134-2008-		⚪			HILLIARD CO.	HILLIARD CO. 2978	NU
☐	+	GEOG.937134-2008-		⚪			HILLIARD CO.	HILLIARD CO. 2978	NU
☐	+	GEOG.937754-2008-		⚪			BRUSH HMA B.V. 937754	BRUSH HMA B.V. 2986	NU
☐	+	GEOG.729004-2008-		⚪			SIE SOLARI SPA	SIE SOLARI SPA 3570	==
☐	+	GEOG.729004-2008-07-31-000010	INBOUND	⚪			SIE SOLARI SPA	SIE SOLARI SPA 3570	==
☐	+	GEOG.517984-2008-08-05-000001	INBOUND	⚪			ELETTROMECCANICA ...	ELETTROMECCANICA ...	NU
☐	+	GEOG.100554-2008-07-27-000026	INBOUND	⚪	⬇		BALCKE DURR ITALIAN...	BALCKE DURR ITALIAN...	GE
☐	+	GEOG.100554-2008-07-27-000025	INBOUND	⚪	⬇		BALCKE DURR ITALIAN...	BALCKE DURR ITALIAN...	GE
☐	+	GEOG.100554-2008-07-24-000006	INBOUND	⚪	⬇		BALCKE DURR ITALIAN...	BALCKE DURR ITALIAN...	GE
☐	+	GEOG.100554-2008-07-22-000005	INBOUND	⚪	⬇		BALCKE DURR ITALIAN...	BALCKE DURR ITALIAN...	GE
☐	+	GEOG.937754-2008-09-15-000002	INBOUND	⚪			BRUSH HMA B.V. 937754	BRUSH HMA B.V. 2986	NU

Smart Links ? ☒
GEOG.729004-2008-07-24-000006
Edit
Export
View

Documents
Full Audit
Related Buy Shipments
Track and Trace
View Related Jobs
View Related Reference Numbers
View Related Remarks

New **View** **Edit** **Actions**

Message Center 0 / 0

Replace Current Window

Search Criteria

Pages 1 | Selected Page: 0 Total: 0

Order Re

OTM

New Query | **Refine Query** | **Export** | **Lists** | **Saved Query:** | **Execute Query**

Total

OTM Navigation

Indicator and Status

- Order Releases:

WHITE ➔ New: OR created but not the Buy Shipment

GREEN ➔ Planned-Final: Buy Shipment has been created

GREEN ➔ Executed-Final: Buy Shipment has been tendered

Yellow ➔ Planned-Unassign: OR deleted from Buy Shipment

RED ➔ Planned-Failed: planning error (date, Location, Incoterms, etc)

- Buy Shipment:

WHITE ➔ Not Started: created Buy Shipment but Tender not yet executed

Yellow ➔ Tendered: Tender executed waiting for carrier answer

GREEN ➔ Accepted: Tender executed and also carrier Accept

RED ➔ Withdrawn: Tender retired from LEC

RED ➔ No Resources: Tender executed but Decline from carrier

imagination at work

OTM Navigation

OTM Navigation

A specific counter is shown when an EDIT command is used on many selected objects; this counter enable to move between other objects via **Previous** and **Next** button without the need to exit back and forward each time.

Smart Links: click on this icon to show a list of direct link to related information. The list will be different based on the object under execution.

Close Smart Links

Help inside Smart Links

OTM Navigation

Reference Numbers: in this section the field **Reference Number Qualifier** contains a list of additional information that will be added automatically during the process while others are manually added by the Requestor. This list of additional information is different object by object.

⊟ Reference Numbers		
Reference Number	* **Reference Number Qualifier**	Save
	[▼] V	
01/08/2007	CONTRACTUAL DATE	🖉 🗑
N/A	ITEM_DESCRIPTION	🖉 🗑
1102198	JOB NUMBER	🖉 🗑
439442397	PO	🖉 🗑
001	PO SHIPMENT ID	🖉 🗑
01/08/2007	READY TO SHIP DATE	🖉 🗑

Save : to save changes on data ;
Delete : to delete the corresponding line;
Edit : to edit the related fields value

OTM Navigation

Underlined values are active fields that if selected enable to open the related object.

* Source Location ID

FONDERIE SABIEM SPA 0000020

Field marked as ***** are mandatory for OTM (they are not all the mandatory field for the process);

those marked with ***** flags fields that if compiled make qualifier mandatory.

Show a **list of values** to populate the field

v: to show details of the associated field

* Involved Party Contact

Communication Method

* Involved Party Qualifier

This icon has 4 functions:
f (find): to run a search;
v (view): to see the detail of the value in the field;
l (list): to see the complete list of values usable for the field. If a character is entered the list is limited to the values starting with that character. Also if entering some characters (at least 3) shows the list of corresponding element , except if the list is too heavy;
n (new): to add new value to the list of value of the corresponding field (Administrator functionality only)

Plan From Location ID

0000020

OTM Navigation

When in **Edit** mode it is required to execute a **Save** of each single form modified to save changes.
Where available , the **Finished** command should be used to save & close the screen, differently changed data will not be saved.

GE Oil & Gas, OTM Requestor

OTM Navigation

Select All: to select all lines

SAVE: to save data entered/modified in the list screen

UNDO: to undo changes, if not yet saved

Clicking on any column name OTM **sorts** data in ascending or descending order based on that field values.

Mass Update: to apply a change on all selected lines with a single command.
To change a single field on a single line user can click on that field and enter the value. In any case a SAVE should be executed at the end to save the changes.

9.0 OTM Report Portal

OTM Report Portal

This command provides at any time detailed information about all the possible REQUESTOR objects, like :

- JOBs

- Sell Shipments

- Buy Shipments

providing information about the contents, the status of the object, who is in charge of the objects in case of JOBs etc.

These information are always the most updated based on various transaction that can be applied to various objects.

For each object the user can enter any part of the ID to identify the final object to be analyzed. Next screen shows the main screen used to select the objects for which data should be retrieved.

After data are shown they can also be exported to excel file.

OTM Report Portal

OTM Report Portal

OTM Report Portal - JOB

Job Report

Please, fill in the Job ID and push the Send button.

Job ID: 4616

Reset   Send

Transportation

Sell Ship

Buy Shi

Job Report

Job:	-ORDER-04616
Job creation date:	03-FEB-2009
Job requestor SSO:	105027684
Job requestor name:	ANDREA BARDELLI
Job first level approver:	NO01-APPROVER1
Job first level approver name:	NO01-APPROVER1 NO01-APPROVER1
Current approver group:	
Current approver description:	
Status:	Need rework from Exec.Center
Owner:	Exec. Center
Job approval history:	Not available

Order release	Early pickup date	Late delivery date	Shipment	Type	Shipment owner	Shipment creation date
20090203-000092	04-FEB-2009	18-FEB-2009	0109863	SELL		03-FEB-2009
20090203-000095	09-FEB-2009	17-FEB-2009	0109863	SELL		03-FEB-2009

Export | Home

imagin

OTM Report Portal - JOB

Job Report

Job:	-ORDER-04616
Job creation date:	03-FEB-2009
Job requestor SSO:	105027684
Job requestor name:	ANDREA BARDELLI
Job first level approver:	NO01-APPROVER1
Job first level approver name:	NO01-APPROVER1 NO01-APPROVER1
Current approver group:	
Current approver description:	
Status:	Need rework from Exec.Center
Owner:	Exec. Center
Job approval history:	Not available

Order release	Early pickup date	Late delivery date	Shipment	Type	Shipment owner	Shipment creation date
20090203-000092	04-FEB-2009	18-FEB-2009	0109863	SELL		03-FEB-2009
20090203-000095	09-FEB-2009	17-FEB-2009	0109863	SELL		03-FEB-2009

Export **Home**

	A	B	C	D	E	F	G	H	I	J
	Job	Job creation date	Job requesto	Job requestor name	Job first level approver	Job first level approver name	Current	Curre	Status	Owner
	-ORDER-04616	03-FEB-2009	105027684	ANDREA BARDELLI	NO01-APPROVER1	NO01-APPROVER1 NO01-APPROVER1			Need rewc	Exec. Cen
	-ORDER-04616	03-FEB-2009	105027684	ANDREA BARDELLI	NO01-APPROVER1	NO01-APPROVER1 NO01-APPROVER1			Need rewc	Exec. Cen

imagination at work

OTM Report Portal – Sell Shipment

Sell Shipment Report

Please, fill in the Sell Shipment ID and push the Send button.

Sell Shipment ID: 0113812

Reset   Send

Export | Home

Sell Shipment Report

Sell shipment:	0113812
Sell shipment owner:	
Sell shipment owner name:	
Sell shipment status:	SHIPMENT_APPROVAL_APPROVED
Source location:	H.E.G. SRL 32561
Source location city:	MARESCA PT - ITALY
Dest. location:	NUOVO PIGNONE FIRENZE, 32884
Dest. location city:	FIRENZE - ITALY

Job	Job requestor	Job requestor name	Job first level approver	Job first level approver name	Order release	Early pickup date	Late delivery date
-ORDER-06410	PAOFE	PAOLA P FERRARI	105705624	LEONARDO LIGGI	101433-2008-12-16-000078	16-DEC-2008	23-DEC-2008

Export | Home

imagination at work

OTM Report Portal – BUY Shipment

Buy Shipment Report

Please, fill in the Buy Shipment ID and push the Send button.

Buy Shipment ID: `0113843`

[Reset] [Send]

Buy Shipment Report

Buy shipment:	0113843
Buy shipment owner:	
Buy shipment owner name:	
Buy shipment status:	SECURE RESOURCES_ACCEPTED
Buy shipment approval status:	SHIPMENT_APPROVAL_APPROVED
Source location:	H.E.G. SRL 32561 - MARESCA PT - ITALY
Dest. location:	NUOVO PIGNONE FIRENZE. 32884 - FIRENZE - ITALY
Pickup appointment:	16-DEC-2008 11:10 CET
Delivery appointment:	23-DEC-2008 11:10 CET
Pickup:	16-DEC-2008
Delivered:	
Arrived:	

Job	Job requestor	Job requestor name	Job first level approver	Job first level approver name	Order release	Early pickup date	Late delivery date
-ORDER-06410	PAOFE	PAOLA P FERRARI	105705624	LEONARDO LIGGI	101433-2008-12-16-000078	16-DEC-2008	23-DEC-2008

imagination at work

OTM Report Portal – Secondary Charge Shipment

Buy Shipment Report

Please, fill in the Buy Shipment ID and push the Send button.

Buy Shipment ID: **SERVPROV.100012**

[Reset] [Send]

ORACLE

OTM Version 5.5

Welcome OGVG.CBALDUCCI
Role OGVG.REQUESTOR_VG •

Message Center 0 / 0

Order Release

Location Manager

OTM Job

GE Jobs
GE Jobs Approved
GE Jobs Not Approved
GE Jobs Refused
OTM Report Portal

Change Password

Help

Contacts

BPEL_DEV_VG

OTM Report Result
Analysis & Design

Export | Home

Buy Shipment Report

Buy shipment:	SERVPROV.0100012
Buy shipment type:	SECONDARY CHARGE (ORIGINAL SHIPMENT: 0109967)
Buy shipment owner:	
Buy shipment owner name:	
Buy shipment status:	SECURE RESOURCES_ACCEPTED
Buy shipment approval status:	
Source location:	NUOVO PIGNONE FI RICASOLI ARE GLS2519 - FIRENZE - ITALY
Dest. location:	NUOVO PIGNONE MASSA AREA COSM GLS2525 - MASSA CARRARA - ITALY
Pickup appointment:	
Delivery appointment:	
Pickup:	
Delivered:	
Arrived:	

Job	Job requestor	Job requestor name	Job first level approver	Job first level approver name	Order release	Early pickup date	Late delivery date
-ORDER-04669	500787639	GRAZIELLA LA SPINA	DK01-APPROVER1	DK01-APPROVER1 DK01-APPROVER1	20090209-000192	10-FEB-2009	24-FEB-2009

Export | Home