

Oil & Gas Global Supply Chain

OTM – VG
UK & Norway & Denmark

Approver User Manual



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GE imagination at work

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1.0 Acronyms and key Terms



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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.



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.



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

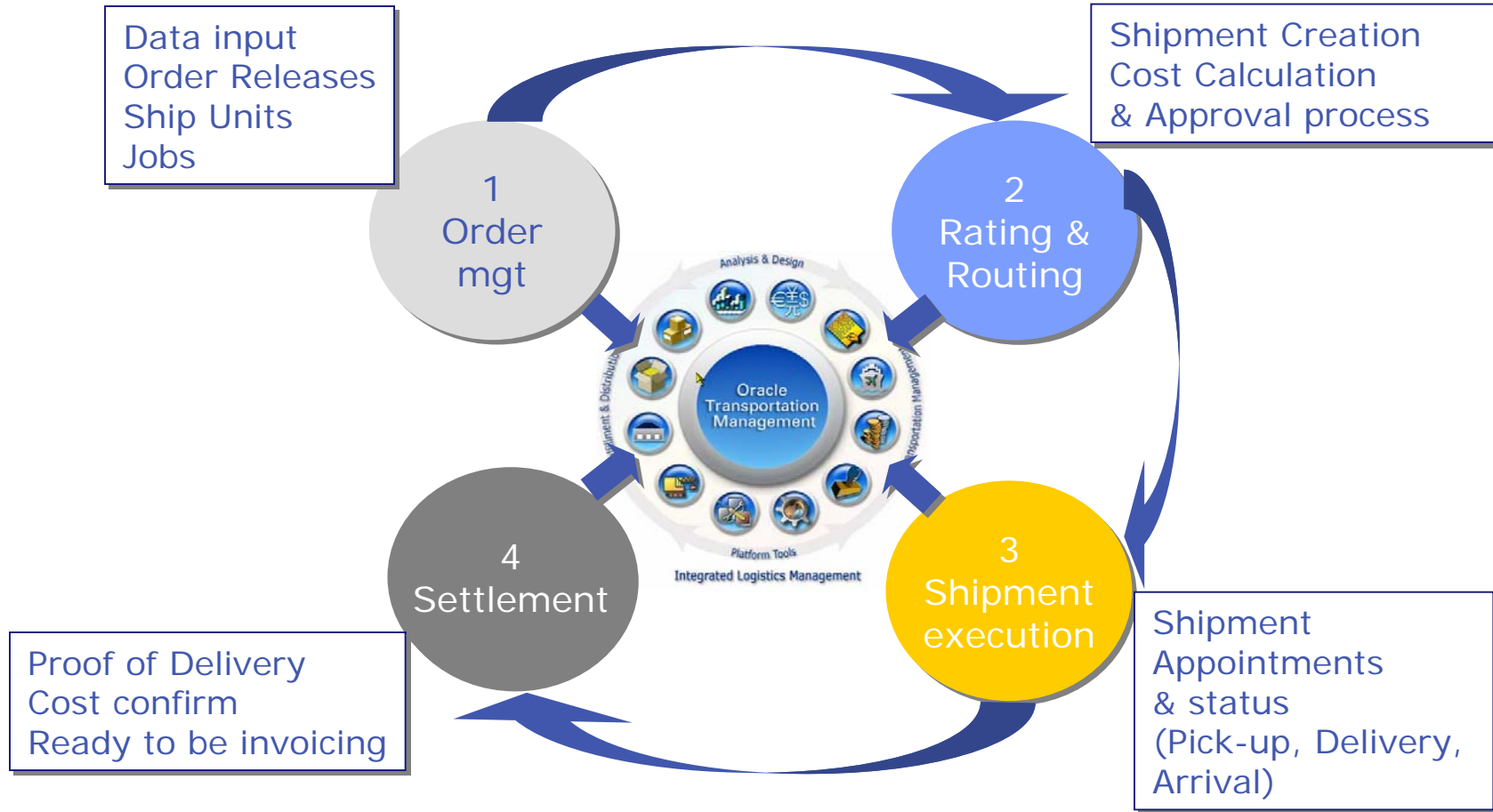
- **INBOUND**: shipment from external location to VG plant
- **OUTBOUND**: shipment from internal location to external (customer)
- **FARM-OUT**: subcontract work on material (from plant to supplier and vice versa)

2.0 Process and Solution overview

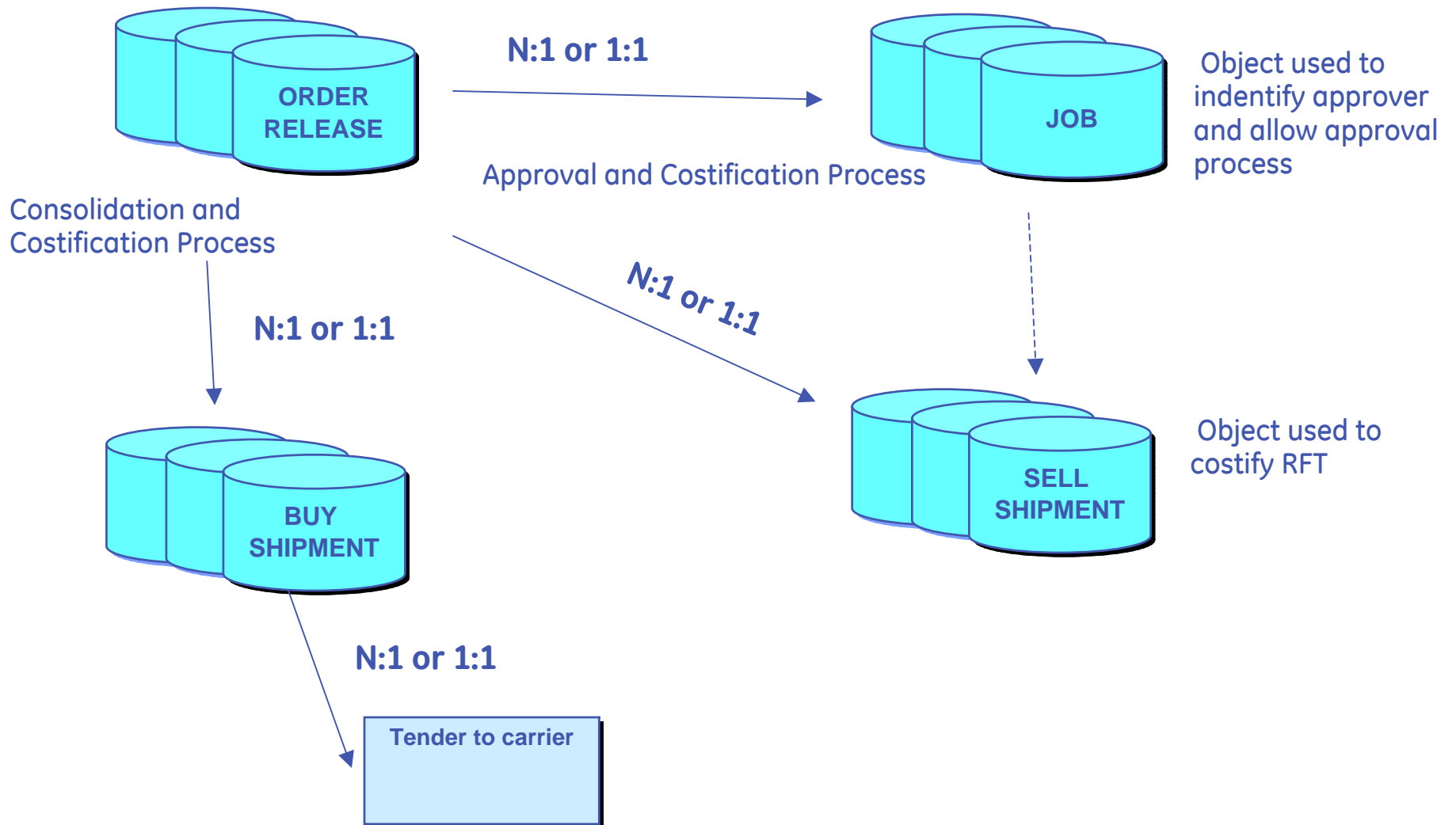


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Process Overview



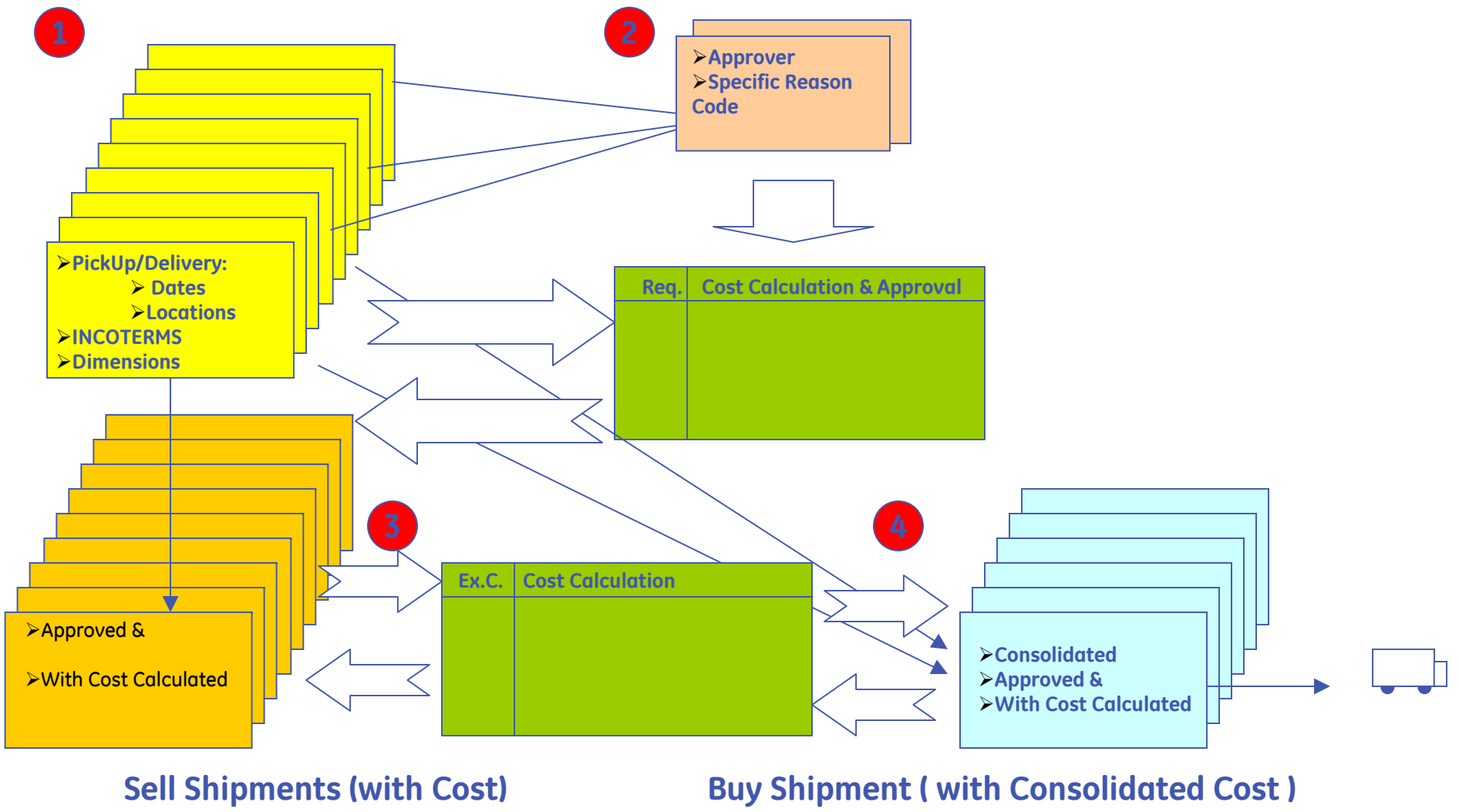
Relations between Key Objects in OTM



OTM Data Structure

Order Releases Definitions (Ship Items)

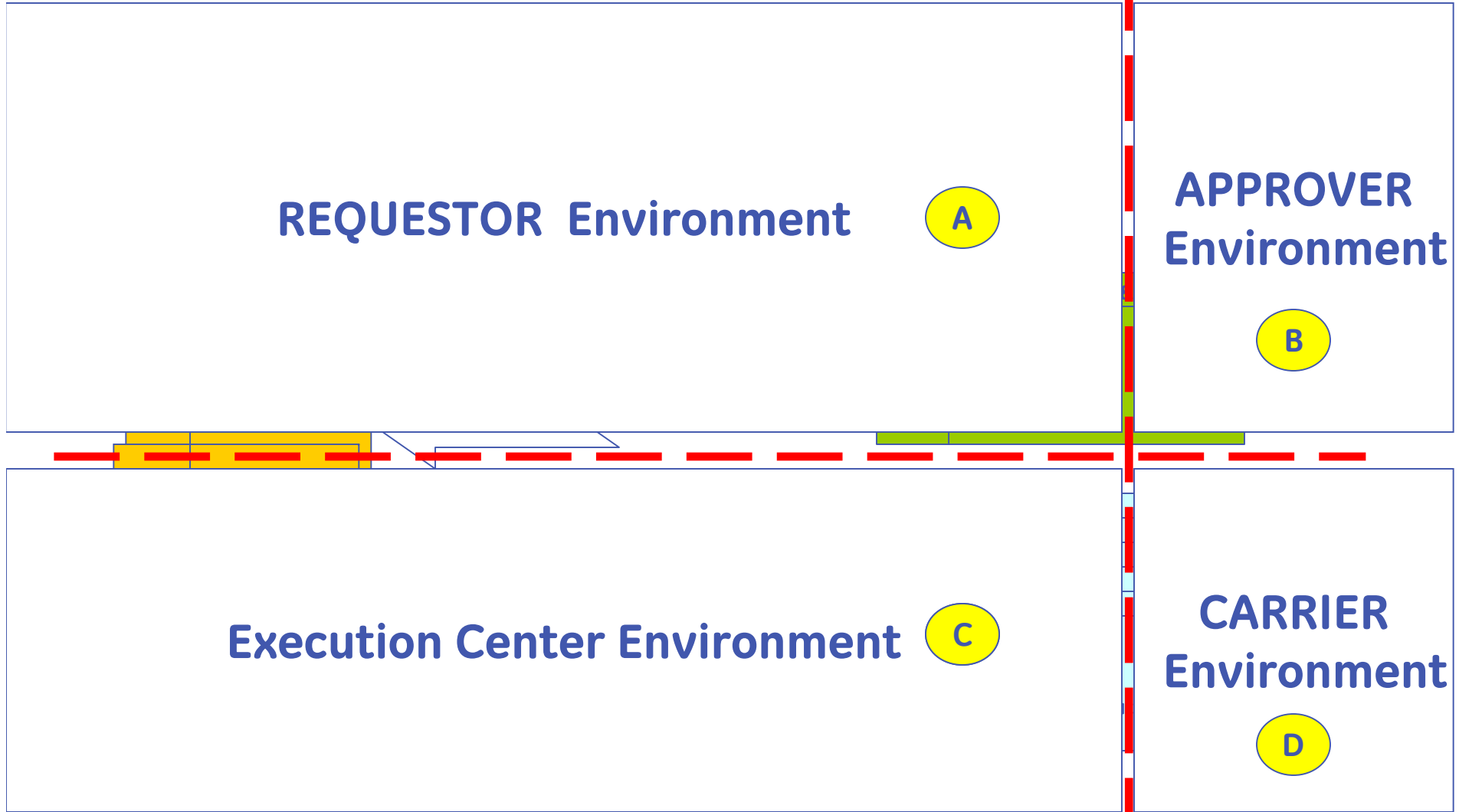
JOBs Definitions



OTM Users Relationship

Order Releases Definitions (Ship Items)

JOBs Definitions



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

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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 : <ul style="list-style-type: none"> • 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

3.0 Approval process



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Job Management

A Job is a set of Order Releases, created by the Requestor, to be costified and to be send to cost approval process.

The requestor can assemble, in a single Job, Order Release with different location, date and Incoterm.

After the Job has been created, the requestor should submit it to the approver who will accept or refuse its cost and other controls will be applied (if required).The full process will be explained in this chapter.

Costs assignment & Approvals

For each Job costs will be assigned (from OTM with a standard values or from the Execution Center if a std cost it is not applicable); if that cost is under 2.000 euros it will be self approved, otherwise it requires to be approved from one or more approver.

A Job can be submitted for two different types of approval:

- Job: transport cost based on approver's DOA level
- Premium: extracosts/urgency approval

The approval process is started by the requestor when he/she request cost assignment to the Job via Action named Bulk Plan - Sell.

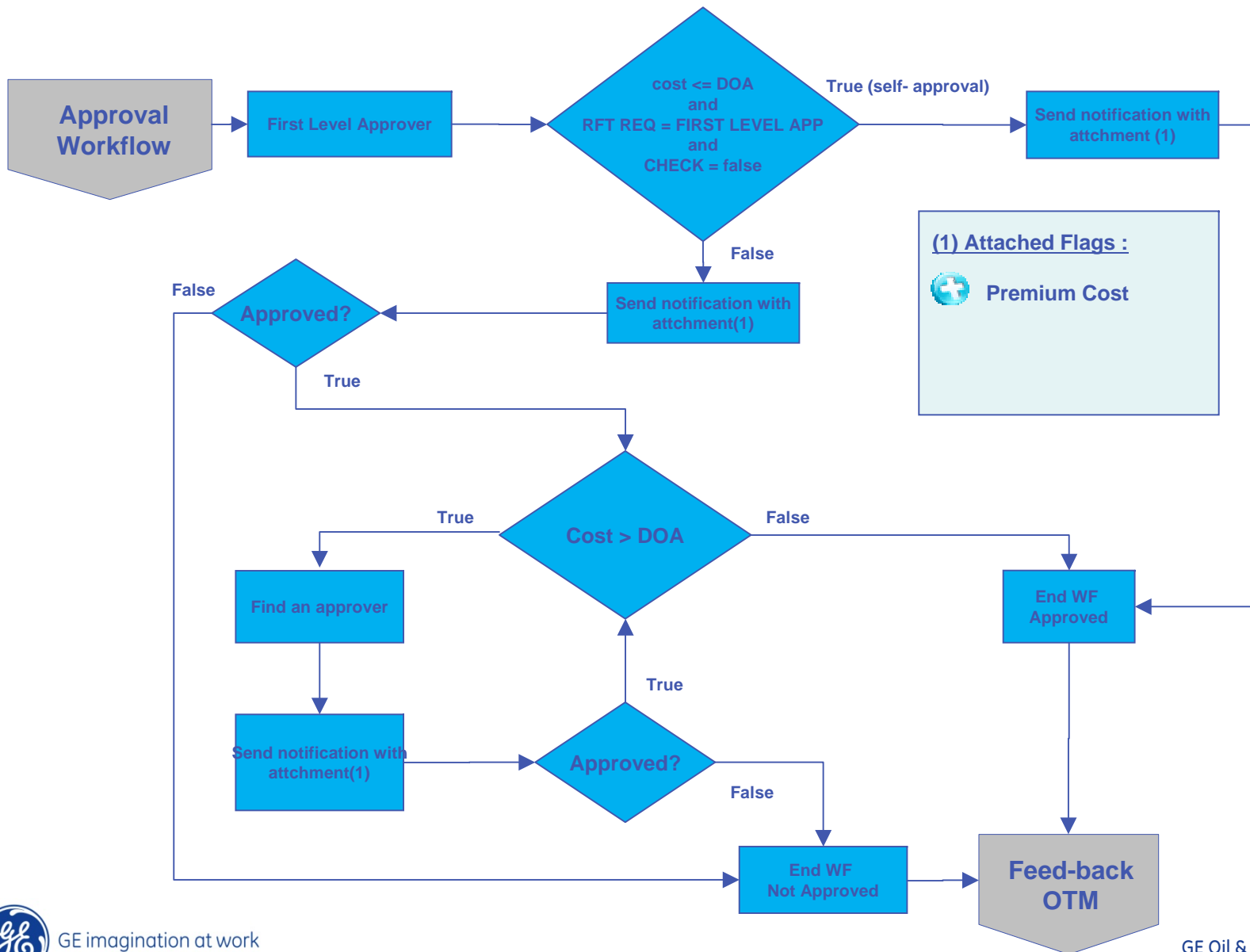
In case of "self approval" the Approver receives a notification via mail.

Costs assignment & Approvals

From its creation till the approval process, a Job will be in one of the following status (`JOB_APPROVAL_STATUS`) :

- **JOB_APPROVAL_NEW** : job has been created but requestor did not yet started the cost assignment process
- **JOB_APPROVAL_TO_REVIEW** : the job has been submitted to the cost assignment process but OTM was not able to assign costs. In this case the Execution Center will assign the cost to the Job.
- **JOB_APPROVAL_IN_APPROVAL** : the job has been submitted to the cost assignment process form requestor and it is waiting for approval
- **JOB_APPROVAL_APPROVED** : the job has been approved by approver.
- **JOB_APPROVAL_REFUSED** : the job has been refused by approver

Approval Process



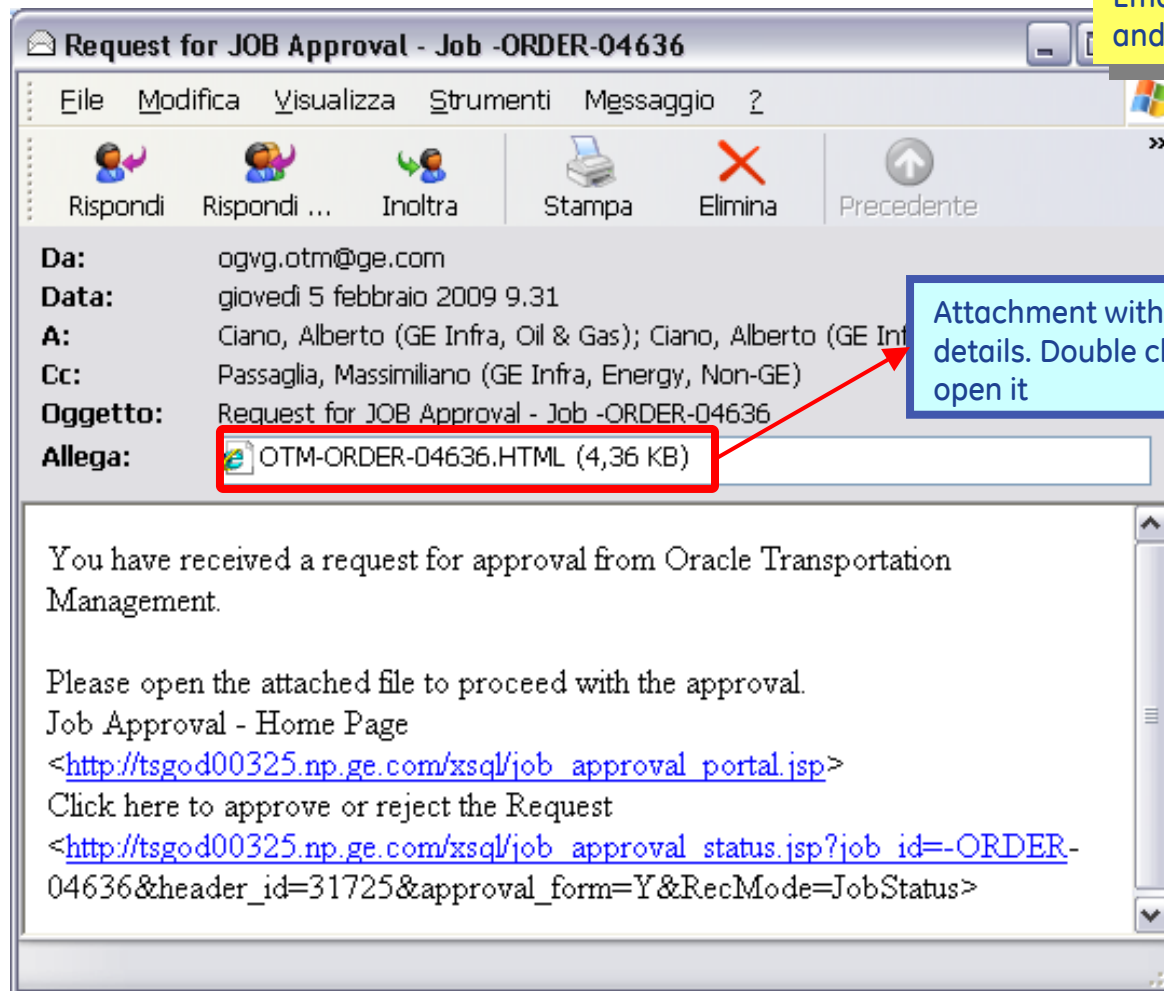
(1) Attached Flags :

- Premium Cost

Job Approval

Note

Email sent by OTM to requestor and approver.



Job Approval

Note

E mail attachment sent to the approver.

OTM Request for Cost Approval

JOB Number:-ORDER-04636

JOB Amount: **7,500.00 EUR**

JOB Type: INBOUND

Requestor: SCRAGG ADAM

Request Date: 05-FEB-09

Total Job transportation cost to be approved

Customer	Order Release	Weight	Dimension	Project	Pickup Date	Delivery Date	Price	Sell Shipment
VETCO AIBEL	20090204-000151	KG 2,500.00	H W L	906325-04.02	18-FEB-09	25-FEB-09	7,500.00 EUR	0109907

Shipments Informations

Sell Shipment	From	To	Rate Type	Ship Unit	Price	Alternative
0109907	VETCOGRAY SPELHAUGEN	VETCO AIBEL	ALLYN_SPOT	2	7500	

Click

to approve or reject the Request.

To be selected to approve/refuse the JOB



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Job Approval

Selecting the "CLICK" button on the attachment, a new page pops up...

BPEL_QA_VG



OTM JOB Approval Status



JOB Status

Please Approve or reject the JOB

SSO	105702599
Job ID	-ORDER-04636
Premium Reason	- Not Selected -
Free note	

Approve Reject

Note
Scroll down the page to see all information about transportation request.

In case of Premium the approver can modify the reason entered by Requestor

Please, scroll down to see details

To approve the Job

To refuse the Job

... after this action OTM gives confirmation of action execution.



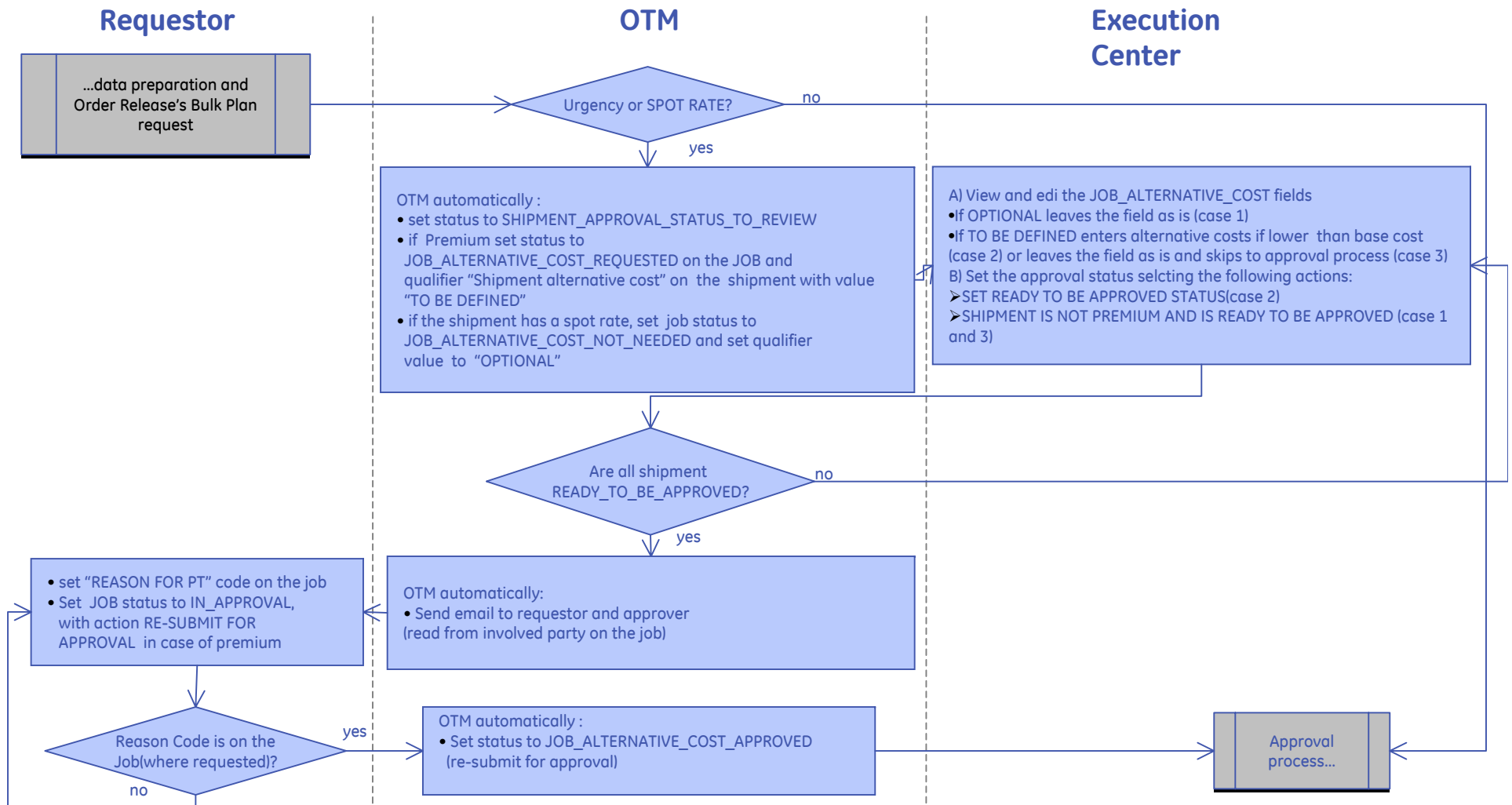
3.1 Premium



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Premium process

Note
Premium rates to be defined during rates analysis



Premium

Note

Attachment of email sent to requestor and approver.

JOB Number:-ORDER-04626

JOB Amount: **5,000.00 EUR**

JOB Type: INBOUND

Requestor: HALAND ARILD

Request Date: 04-FEB-09


Customer	Order Release	Weight	Dimension	Project	Pickup Date	Delivery Date	Price	Sell Shipment
VETCOGRAY SPELHAUGEN	20090204-000125	KG 2,501.00	H W L	906197-09.02	04-FEB-09	05-FEB-09	2,500.00 EUR	0109889
VETCOGRAY SPELHAUGEN	20090204-000125	KG 2,501.00	H W L	906197-09.02	04-FEB-09	05-FEB-09	2,500.00 EUR	0109889

Shipments Informations

Sell Shipment	From	To	Rate Type	Ship Unit	Price	Alternative
0109889	FERGUSON NORGE	VETCOGRAY SPELHAUGEN	ALLYN_SPOT	1	5000	

Cost entered by Execution Center

Warranty

 Premium Rate

Click

to approve or reject the Request.

Button visible to approver only

Reason Code for Urgent RFT entered by the Requestor

Show Job with approval request for Premium



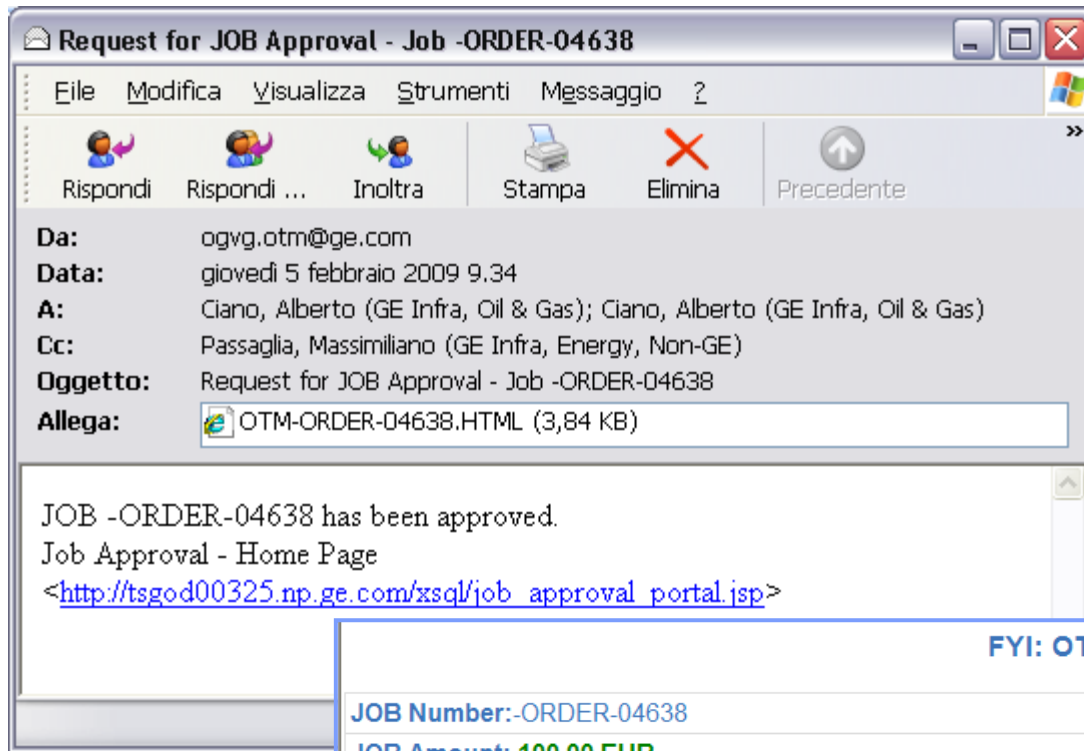
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3.2 “Self-Approval”



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Self-Approval



The Approver receives only a notification via mail.

FYI: OTM Request								
JOB Number: -ORDER-04638								
JOB Amount: 100.00 EUR								
JOB Type: OUTBOUND								
Requestor: COSTA DINALVA								
Request Date: 05-FEB-09								
Customer	Order Release	Weight	Dimension	Project	Pickup Date	Delivery Date	Price	Sell Shipment
VALLOUREC	20090204-000154	KG 8.00	H W L	SHIPPING INV. BJ02	05-FEB-09	06-FEB-09	100.00 EUR	0109908
Shipments Informations								
Sell Shipment	From	To	Rate Type	Ship Unit	Price	Alternative		
0109908	VETCO GRAY FRANCE	VALLOUREC	ALLYN_SPOT	1	100			

4.0 Out of Office Function

Out of Office Function

- The “Out of Office” function allows an existing APPROVER to define a temporary substitute to enable the Job Approval process to take place also if the requestor is out of office.
- The Out of Office request can be started only by a valid OTM APPROVER.
- Any other user type will receive an error message if she/he is not a valid APPROVER.
- The selected substitute will be added to the approval path of the requestor, so inheriting its DOA and Job Limits Amount.
- The requestor will continue to receive notification from JOB Approval process to remain updated about what is going on during his/her absence.



Note

The Out of Office process can be requested only by a valid APPROVER inside OTM.

Out of Office Request

If the user is a valid APPROVER she/he can have access to this admin page. This page shows main information as shown below:

Welcome **Pax Pax** (105024712)
You are member of the following group(s)

Type	Group Description	DOA	Limit Amount	Substitute
Inventory Manager	C02			
First Level Approver	Saurino, Antonio	5,000.00		

Fill in the SSO related to the approver that will be your substitute

Substitute

[Home](#)

Enter the SSO ID of the APPROVER that will substitute the requestor

Out of Office Request

If the SSO ID provided is related to a valid APPROVER the next screen will show detailed information about the selected substitute.



[Home](#)

Here you can find some details about the user you have chose as substitute.
Please check it before proceed with the request.

Requestor	105024712
SSO	123456789
First Name	Max
Last Name	Max
Email address	massimiliano.passaglia@ge.com

[Home](#)

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La pagina sul server http://tsgoq00326.og.ge.com ...

Are you sure?

Out of Office Request

Substitution request is then processed and if no problem is found the following confirmation message is provided.

This means the nominated APPORVER is a registered CONTACT inside OTM and an email is sent to her/him to inform about the nomination.

OTM JOB Approval - Out of Office 002

[Home](#)

Your request has been executed

[Home](#)

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Transportation Management

Platform Tools

Fulfillment & Transportation

Integrated Logistics Management

Out of Office Request

.At this point the connected user looks like "OUT OF OFFICE"

In the column "Substitute" the substitute previously defined is highlighted.

Welcome **Pax Pax** (105024712)
You are member of the following group(s)

Type	Group Description	DOA	Limit Amount	Substitute
First Level Approver	Saurino, Antonio	5,000.00		Max, Max massimiliano.passaglia@ge.com

At the moment You're out of office

Switch off the Out Of Office

[Home](#)

New Approver Creation

If the provided SSO it is not a registered CONTACT inside OTM the next step is to request an OTM account using the OTM Access Request workflow.

The screenshot shows a web interface with a white background and a thin border. In the top right corner, there is a blue link labeled "Home". Centered in the upper half of the page is a red text message: "Attention! The given user does not have a valid OTM account." Below this message, there is a paragraph of blue text: "Before proceed you have to request to create a valid Account into OTM. Please use the following link to request an access to the OTM tool". Underneath the text is a blue link labeled "OTM Access Request" which is enclosed in a red rectangular box. To the right of the box is a yellow circle containing the number "1". At the bottom center of the page, there is another blue link labeled "Home".

New Approver Creation

If the provided SSO it is not an APPROVER but it is a registered CONTACT inside OTM the next screen is provided to display information of the new APPROVER that will be created.

An email will be sent to the selected APPROVER to inform her/him about the Approver nomination process.

Home

Needs to create a new approver

Requestor	501364373
SSO	501513479
First Name	<input type="text"/>
Last Name	<input type="text"/>
Email address	<input type="text"/>
<input type="button" value="Reset"/> <input type="button" value="Go"/>	

Home

Disable the Out of Office

Requestor User is seen as in Out of Office. Column "Substitute" display the current substitute.

To disable the Out of Office the requestor need to select Go button.

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OTM JOB Approval - Out of Office

[Home](#)

Welcome **Pax Pax** (105024712)
You are member of the following group(s)

Type	Group Description	DOA	Limit Amount	Substitute
First Level Approver	Saurino, Antonio	5,000.00		Max, Max massimiliano.passaglia@ge.com

At the moment You're out of office
Switch off the "Out Of Office" **1**

[Home](#)

Analysis & Design

OTM JOB Approval - Out of Office 002

[Home](#)

Your request has been executed

[Home](#)