



MEETING MINUTES

State of Louisiana ERP Project

Blueprint Workshop – Warehouse Management Planning and Monitoring

Session: LOG-WM-001

When: 10/29/08

Location: DOTD Bldg, East Wing, 5th Floor, Room 501

Attendees:

No.	Name	Agency	Invited?	Day 1	Day 2	Comments
1.	Anderson, Shannon	DPS	Y	N	n/a	
2.	Ardoin, Diane	DOTD	Y	N	n/a	
3.	Bickham, Thomas	DOC	Y	N	n/a	optional attendee
4.	Bielkiewicz, Erin	DPS	Y	N	n/a	optional attendee
5.	Boyd, David	EPR Team	Y	N	n/a	optional attendee
6.	Braud, Sylvia	ERP Team	Y	N	n/a	optional attendee
7.	Breaux, Margaret	DOTD	Y	N	n/a	
8.	Cali, Dom	ERP Team	Y	N	n/a	optional attendee
9.	Denham, Brad	ERP Team	Y	N	n/a	
10.	Dutt, Dev	ERP Team	Y	Y	n/a	
11.	Elliott, Sterrie	ERP Team	Y	Y	n/a	
12.	Evans, Karen	Veterans	Y	N	n/a	
13.	Gerhart, Steve	ERP Team	Y	N	n/a	optional attendee
14.	Greenfield, Bruce	ERP Team	Y	Y	n/a	optional attendee
15.	Guedry, Mary	LDWF	Y	N	n/a	
16.	Hayes, Robert	ERP Team	Y	N	n/a	optional attendee
17.	Humm, Lori	ERP Team	Y	N	n/a	optional attendee
18.	Jarreau, Mary	DOTD	Y	Y	n/a	
19.	Kees, Wynette	LDWF	Y	N	n/a	optional attendee
20.	Ladhur, Jack	ERP Team	Y	N	n/a	
21.	Lawrence, Bernadette	DOTD	Y	N	n/a	
22.	Leerhoy, Michael	ERP Team	Y	Y	n/a	
23.	Maranto, Cynthia	ERP Team	Y	Y	n/a	
24.	Nolan, Debbie	DVA	Y	N	n/a	
25.	Olivier, Herbert	ERP Team	Y	Y	n/a	
26.	Pierce, Karen	ERP Team	Y	Y	n/a	
27.	Roberts, Ginger	ERP Team	Y	Y	n/a	optional attendee
28.	Rogers, Belinda	ERP Team	Y	Y	n/a	briefly present
29.	Roubique, Margaret	DOC	Y	N	n/a	

30.	Shelton, Chrishel	ERP Team	N	Y	n/a	
31.	Sloper, Sondra	DVA/DHH	Y	N	n/a	
32.	Taylor, Danny	DPS	Y	N	n/a	
33.	Templet, Marty	DOC	Y	Y	n/a	
34.	Trahan, Sandy	ERP Team	Y	Y	n/a	optional attendee
35.	Trivedi, Mandar	ERP Team	Y	Y	n/a	

<i>Agenda Item and Notes</i>	<i>Owner(s)</i>	<i>Action Items & Assignments</i>	<i>Comments / Follow-up</i>
1. Logistics, Ground Rules, & Introductions	Karen Pierce	•	
2. Workshop Objectives <ul style="list-style-type: none"> • Monitoring Transfer Requirements • Inbound Delivery Monitor • Outbound Delivery Monitor • Generate Pick List with items listed for picking from multiple locations • Combining multiple Storage Units into a single Storage Unit 	Karen Pierce	•	
3. Project Overview/Timeline	Karen Pierce	•	
4. Business Process Review <ul style="list-style-type: none"> -SAP Terms Glossary -Process improvement opportunities -SAP concepts & functionality -Leading practices -Enterprise readiness Challenges 	Mike Leerhoy Dev Dutt	•	Handouts: PowerPoint slides IM/WM Tentative Blueprint Schedule
5. Action Items		<ul style="list-style-type: none"> • Discuss open PO list with Procurement – can a search be done by storage location? • Discuss with Procurement how the monitoring of past due PO items will be handled • Discuss with Procurement where repeated shipping/ delivery instructions can be stored on non-sales shipments • Agencies to provide listings of putaway and pick strategies • Decision needs to be 	← This item added as result of an

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		<p>made on how the outbound delivery should be created (automatically or manually)</p> <ul style="list-style-type: none"> • Decision needs to be made on when the outbound delivery will be created (immediately upon approval of request or within a certain period of time before the planned issue date) • Discuss with Finance and Procurement the inventory integration of P-Card goods receipts (GR to inventory done without reference) • Can SRM allow the ATP (available to promise) check done before approvals are done? (Mike Leerhoy to discuss with Adam LaTour.) 	<p>IM/WM Core Team meeting held 11/14/08 9:00am to discuss outbound deliveries.</p> <p>← This item added as result of an IM/WM Core Team meeting held 11/14/08 9:00am to discuss outbound deliveries.</p> <p>← This item added as result of an IM/WM Core Team meeting held 11/14/08 1:30pm to discuss the flow of Goods Receipts and Goods Issues.</p> <p>← This item added as result of an IM/WM Core Team meeting held 11/14/08 1:30pm to discuss the flow of Goods Receipts and Goods Issues.</p>
6. Key Decisions		<ul style="list-style-type: none"> • 	
7. Organizational Impact		<ul style="list-style-type: none"> • Training – For unplanned issues, the verbally obtained approvals have to be entered manually in the text field of the material document by the issuing warehouse clerk. (These requests are not done through SRM, thus electronic approvals are not done.) 	<p>← This item added as result of an IM/WM Core Team meeting held 11/14/08 1:30pm to discuss the flow of Goods Receipts and Goods Issues.</p>
8. Parking Lot		<ul style="list-style-type: none"> • 	
9. FRICE-W <ul style="list-style-type: none"> - Forms - Reports - Interfaces - Conversions - Enhancements - Workflow 		<ul style="list-style-type: none"> • (E) – Need to trigger a WM picking based on reservations to accommodate projects and PM work orders. • (E) – Need to copy reservations into outbound deliveries and delete the reservations including a couple of custom tables for status mgmt and mapping of cost centers to customer masters. 	<p>← This item added as result of IM/WM Core Team meetings held 11/14&20/08 to discuss the flow of Goods Receipts and Goods Issues.</p> <p>← This item expanded upon as result of IM/WM Core Team meeting held 11/20/08 to discuss the shipping functionalities.</p>

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10. Integration Points		•	

11. Discussion

Karen – In opening statements, introduced new team members – Chrishel Shelton/State team configurer; Bruce Greenfield/Enterprise Readiness-IBM. Reviewed the tentative IM/WM blueprint scheduled noting that LOG-IM-001 could possibly be only 1 day instead of 2 days. Also noted that the LOG-MO-001 session is on Mobile Solutions and that Mobile Solutions is not a WM module, but that Dev Dutt is working on the Mobile Solutions module to make sure our needs are met.

AS-IS

Karen – For DPS, combined deliveries are currently not systems based process. We get requests in from different areas, we group the requests, package them for a specific office, and deliver to a location where neighboring Motor Vehicle offices drive in to pick up from that location.

Sterrie – DOTD receives requests but we don't group the deliveries. We pick separately, package separately, and only deliver to Headquarters. All others pick up from us.

Karen – For a capacity check, DPS does a visual inspection to see what the capacity is of each bin. To get this info into the current system, our warehouse person fills out a form listing the bin areas where pallets are being placed, and then the info is put into the system. This is a manual process.

Sterrie – DOTD has a report that shows the min/max and on hand levels of items that need to be ordered. The min and max are determined by usage and available space. The report is run every weekend and sent to us. We also do a spot check before placing items in the bin.

MONITORING TRANSFER REQUIREMENTS

Dev - Before we putaway, we make a plan, i.e. to pick this many items to place in this bin. The plan could be long term, short term, or immediate. Sometimes when we check the bins there are no items there, but items should be there. This all can be monitored in SAP.

Dev - Items can be manually received; a Transfer Requirement is not required.

Mandar – Can you distinguish when a TR is required in warehouse?

Dev - Each movement type, i.e. 101, can be configured so that when the movement type is done, a TR is automatically created.

Karen – If the purchase is made on a PO, the TR is automatically created. If purchase is made on a P-Card, the TR is not automatic so you would have to manually create a TR. If you move items around in the warehouse, i.e. aisle/bin to aisle/bin, do you have to manually create a TR?

Dev – No. A TR is not required for warehouse movements. Only a Transfer Order is required to move items from bin to bin in the warehouse.

Mandar – Is the TO for an inside warehouse movement created by the Warehouse Supervisor or can it be created by other warehouse personnel?

Dev - It depends on the profile of the warehouse person. If the profile allows the warehouse person to do this transaction, then they can create the TO.

Karen – The TR is automatically created only if predetermined placement is known for the item, right?

Dev – Correct, but a dynamic bin can be used as the predetermined placement. An example of a dynamic bin is the interim storage location or unloading dock.

Mandar/Marty – Will the TR give a reference, i.e. PO#, etc? Can we reference the license plate number of the delivering truck on the TR?

Dev – The TR will automatically reference the PO, or system will prompt you to enter your reference number.

Marty – Trucks are used for transfers from Angola to DCI. We currently (in Protégé) identify which truck is delivering by entering the license plate number.

Dev – In SAP, a TR list can be generated to show the status of each TR. The list is generated based on selection criteria.

Karen – I am leery of the drop down boxes in SAP. Will these drop lists give all options available for the entire state?

Dev – You can generate the TR list by different searches. It can be based on material, plant, item/bin location, etc.

Karen – So if I search for my plant, will it only show the TRs for my plant?

Dev – You can use more than one search criteria to narrow the list.

Marty – So the more search criteria you put in, the smaller the list of items on the drop down.

Dev – Yes.

Dev – The TO can be created in the foreground by selecting a TR from the TR list. The system will ask for specific information to create the TO. A TO created in the background will take the system defaults and will not be seen on the screen.

Sterrie - So in the foreground, you see the information that will be on the TO; in background you don't.

Dev – Yes.

Karen – If you have a PO for multiple items, is each item given a separate TR?

Dev – Usually there is only one TR for multiple items. But if you want multiple TRs, i.e. for two partial deliveries, you can do 2 TRs.

Karen – Nowhere on the TR list does it show the specific materials/items that are on the TR listed. Is there a quick way to see all the TRs that are for your plant only, without having to drill down on each TR on the list to see which items are on the TR? I'm more interested in what items I'm waiting for instead of what TRs I have. We need the description of the item to be on the list.

Sterrie – I agree because we have 100 items on some of our POs.

Mike – Are you looking for a list of PO items that are due in or a list of items that you are waiting to put in the warehouse? If it's a list of PO items that are due in, then the open PO list is where you would get this information.

Karen – I'm looking for open PO items. Can I get a list of open PO items for my storage location?

Mike – I believe the open PO list can be per storage location.

Karen – I thought the TR was automatically generated after the PO is created.

Mike - The TR is not triggered until the goods receipt is done, so items not yet received will not have a TR. Thus, they will not appear on the TR list.

Sterrie – The TR is letting you know that the item is here and you need to do something with it.

Karen – We need an Action item to talk with Procurement regarding open POs for warehouses. Will the available search criteria include a search by storage location?

INBOUND DELIVERY MONITORING

Karen – If a PO has delivery terms of 30 days, can you set up an inbound delivery as soon as the PO is created and have the system notify you if the delivery is not received in 30 days?

Mike – In reality, this would be done via a list of past due POs. You can pull this list on demand.

Karen – Add to Action Items to also talk to Procurement about past due POs.

OUTBOUND DELIVERY MONITORING

Karen – If you create an outbound delivery, do you still have to create a TR?

Mike – The outbound delivery will automatically create a TR for WM materials. Inventory Management will use another list – the Delivery Due List.

Mike – There are two scenarios where outbound deliveries are needed: 1) if sales processes are put into place; 2) if Warehouse Management is applied. Outbound deliveries are not needed for IM only applications.

GENERATE PICK LIST

Sterrie – Can you reference multiple serial numbers for the same material?

Dev – Yes.

Dev – Packaging instructions come in from the material master record (MMR).

Karen – Are the packaging instructions entered on the warehouse view screens of the MMR?

Dev – There is an indicator that can be selected on the MMR to let you know that the material has special packaging.

Karen – So the indicator only shows that it has to be packaged special, but doesn't give specific packaging instructions?

Dev – You can manually include special packaging instructions on the pick list.

Dev – As soon as items are picked, the TO is automatically confirmed.

Karen – What if you don't use a barcode reader? You would have to print out a pick list or something.

Dev – That would be the TO.

Karen – Once you either manually complete the TO or put it on the RF gun, does it print out the packing list?

Dev – Yes.

Dev – If you see that you don't have all of the items listed on the TR in inventory, you have to backorder items by adjusting the TR.

Sterrie – If you have to backorder, do the backorder items use the same TR?

Dev – No. It will be a new TR.

Karen – In IM, if 50 tires are requested, but you only have 20, will it create a backorder for the 30 that we don't have?

Mike – Yes.

Mandar – Can you have a partial TO?

Dev – No. A new TO will be created for the backordered items.

Dev – The Packing List can reference the customer's PO number, or you can reference whatever number you want to.

Karen – If you have specific shipping instructions for a deliver to address, do you have to key them in every time?

Dev – Yes.

Karen – In our current system we can store delivery instructions.

Dev – The delivery instructions are maintained in the Customer master.

Karen – We haven't discussed customers yet.

Dev – Customer masters are part of the Sales/Distribution module.

Action Item – Discuss with Procurement where repeated shipping/delivery instructions can be stored on non-sales shipments.

COMBINING MULTIPLE STORE UNITS

Dev – Once a storage unit number is created, you only have to scan the storage unit to move it, not each item within the SU.

Karen – If you combine storage units, how do you maintain FIFO for each item?

Dev – When you pick the combined storage unit, it will give a list of items in the SU, so you can check the expiration dates from the list. If you try to ship a SU that has a material that has expired, the system will warn you that an item is expired.

Karen – So we should be careful when putting items in a SU, making note of the expiration dates.

Mandar – If you are not using expiration dates, can you have a strategy using FIFO?

Dev – Yes. It will be triggered from the TR dates.

Karen – When do we need these strategies?

Dev – It will be needed for configuration.

Karen – Can strategies be warehouse and plant specific?

Dev – Yes.

Karen – Need to add an Action Item – Agencies to provide listing of putaway and pick strategies.

Karen – Can the layout of the combined storage unit list show the material description instead of just the material number?

Dev – Yes. You can change the layout of the list.

Karen – Should this be an Action Item?

Cindy – It is an option for each user. Each user can choose their own layout.

Herbert – Can you go back to slide 34? If there is not enough capacity in a bin, will the system show that before you make the entry on this screen?

Dev – No. It will only tell you after you enter the bin number.

Herbert – If you can't combine the storage units that you've selected, will it give you an error message?

Dev – Yes. It will not give you the revised list (slide 35).

WM MONITORING TOOLS – WAREHOUSE ACTIVITY MONITOR (WAM)

Dev – WAM assists in an overall view of work processes in the warehouse, i.e. unconfirmed TOs, open TOs, negative stocks, etc. Each of these views can be drilled down to see further breakdown of storage types, movements, etc.

WM MONITORING TOOLS – RF ACTIVITY MONITOR

Dev - The RF Activity Monitor assigns tasks to Operators. Each Operator can view a list of their tasks on the RF device. The tasks can be for different areas or movement types.

Mandar – Can priorities be set as to which TOs should be picked first?

Dev – You can manually assign priorities on the task list via the “TO priority” column (slide 41).

Sterrie – Can you assign multiple tasks to one person?

Dev – Yes. The tasks will be lined up by priority in the gun and can be seen when the Operator logs in.

Sterrie – The column with the time is when the task was assigned?

Dev – It shows the time of when it was last scanned, so this time could be when the task was assigned if there was no activity since then, or it could be the time that the task was completed.

Karen – The TR priority must be entered and not set by strategy?

Dev – Yes.

Karen – Even though it has a priority, the user can pick and choose which ones to work?

Dev – Yes.

WM MONITORING TOOLS – 2 STEP PICK MONITOR

Dev - 2 step picking is available, but not good behavior. More than one delivery is combined for picking. The items for the deliveries are picked by more than one Operator, and then put into an interim location where they are separated into the separate deliveries.

Karen – This takes extra work to split the items up again. We will more than likely use more of the RF activity monitor.

WM MONITORING TOOLS – WAVE PICKING MONITOR

Dev – A wave pick consists of a group of deliveries that are to be processed at roughly the same time. Deliveries are grouped together so they can be processed collectively.

Mandar – What does the system do if I pick without Warehouse Management?

Dev – It will only show delivery numbers.

Karen – Let me try to understand this. The end user does a request for items. The request becomes a reservation. How do I tie the reservation to a wave pick?

Dev – You create an outbound delivery. With development, the reservation could be copied into an outbound delivery.

FRICE-W – (E) Enhancement – Need to copy reservations into outbound deliveries.

Karen – The outbound delivery would create the TO. How do I get it to group into Wave pick?

Dev – You would group based on the delivery due date, i.e. Mondays deliveries grouped into group 1, Tuesdays deliveries grouped into group 2.

Karen – So you set up the group on the outbound delivery?

Dev – Yes. You can assign multiple deliveries into one group.

Karen – Every month I know I have to deliver to 9 cities. Can I use the same group number over and over every month or do I have to have set up a new group every time I ship to these cities?

Dev – The group number can be automatically assigned or you can manually assign a group no.

Karen – OK, so I get a request – the outbound delivery is created – the TR is created – I assign outbound deliveries to a group - schedule the pick date – create TO or multiple TOs by my outbound delivery – if I want to use wave picking, I go to the wave, identify the group to be used in that wave. Sounds like a lot of steps.

Dev – Basically, this is a monitoring tool. It doesn't have to be used. It is your decision. You do not have to use the group stage.

CLOSING

Karen – We've identified 3 Action Items. Are there any specific things that we need to do or work on?

Mandar – We need to start to think of our processes to see what we need to make SAP work for us. It will take some time to get this information together, but it needs to be done.

Karen – OK, start thinking about and writing down any putaway/pick strategies that you may have. Marty, if you have any, we need to know so we are sure it is covered in our system for when you do go live.

Dev – Once storage types are determined, I will build a slide to propose which strategies should be used for each site.

Sterrie – Do we have a deadline on the Action Item for providing our strategies?

Mike – The warehouse structure is really the key. We need the warehouse structure before strategies can be defined.

Karen – So the main thing we need to know now is what our storage types, storage sections, etc. are.

Dev – It would be helpful if you could draw a layout of your warehouse.