Accelerating Essity's Digital Transformation

PLANNED SHIPMENT REPORTS

Audience: Essity Suppliers

Direct Materials

essity

Planned Shipment Reports - Introduction

Ariba platform allows to extract planned deliveries data using different extraction methods. This training material provides the instruction how to download a desired shipment report using 3 different options, depends on the need:

1 Planned Shipment Report (short term horizon)	2 1st Planned Shipment Report (long term horizon)	3 2nd Planned Shipment Report (long term horizon)
• Can be extracted from the Home Page • Contains the planned deliveries for 14 days (the schedule lines with „Firm" Commitment Level on the Scheduling Agreement)	• Can be extracted from the Home Page • Can contain the planned deliveries for longer horizon than 14 days (the schedule lines with „Firm" „Trade off" and „Forecast" Commitment Level on the Scheduling Agreement)	• Can be extracted from the top Menu Bar • Contains Schedule Line details with the Commitment level information (Firm, Tradeoff), Order status etc.

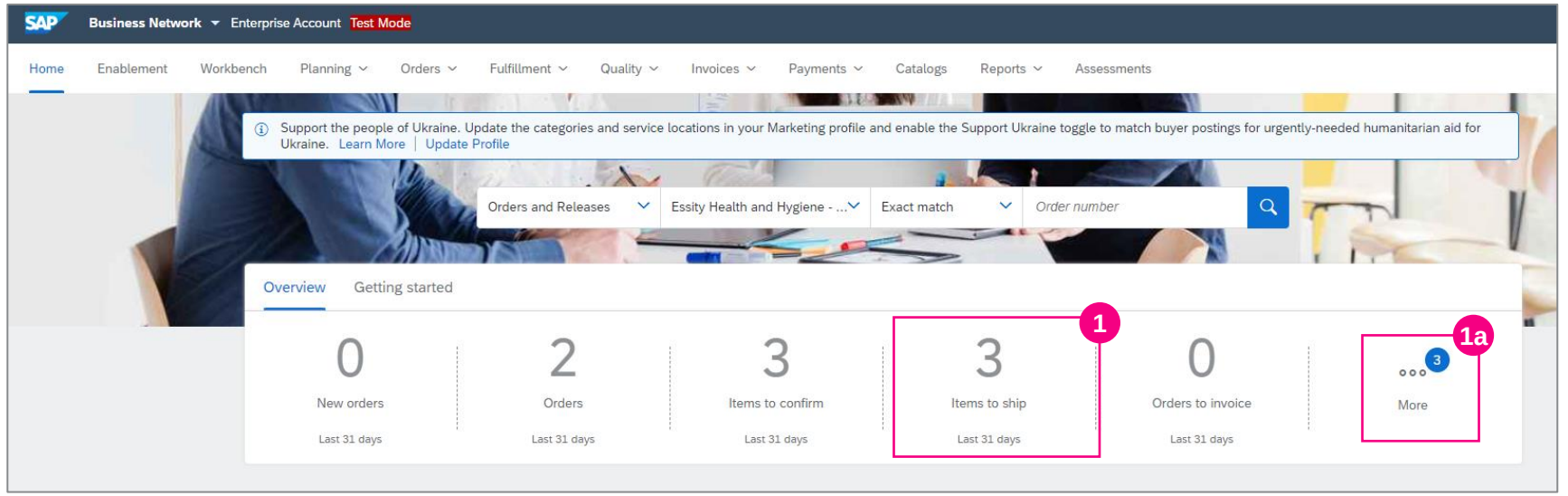
Planned Shipment

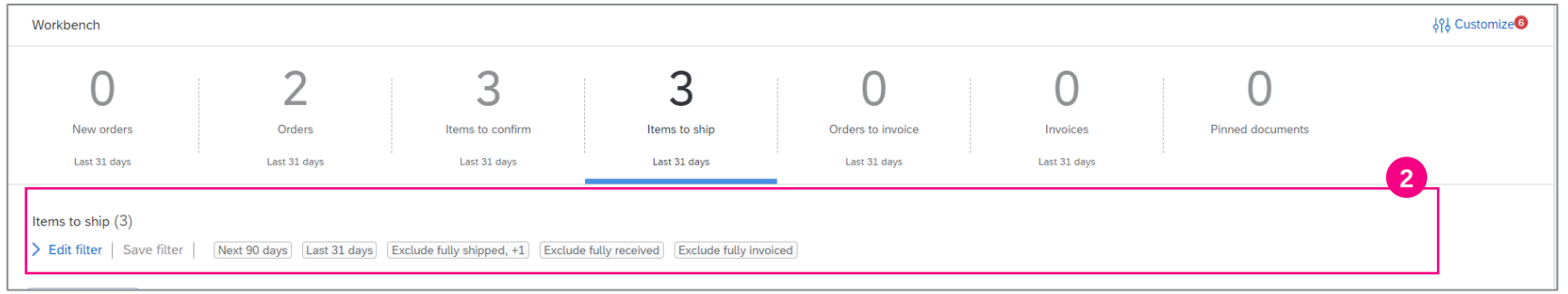
Topic

1. **Planned Shipment Report (short term horizon)**
   - 1st Planned Shipment Report (long term horizon)
   - 2nd Planned Shipment Report (long term horizon)

Planned Shipment

Planned Shipment Report - short term horizon (1/3)





The summary of the planned shipment data can be extracted directly from the Home page. This report shows only the quantities in Firmed Orders section on the planning collaboration page – SMI view.

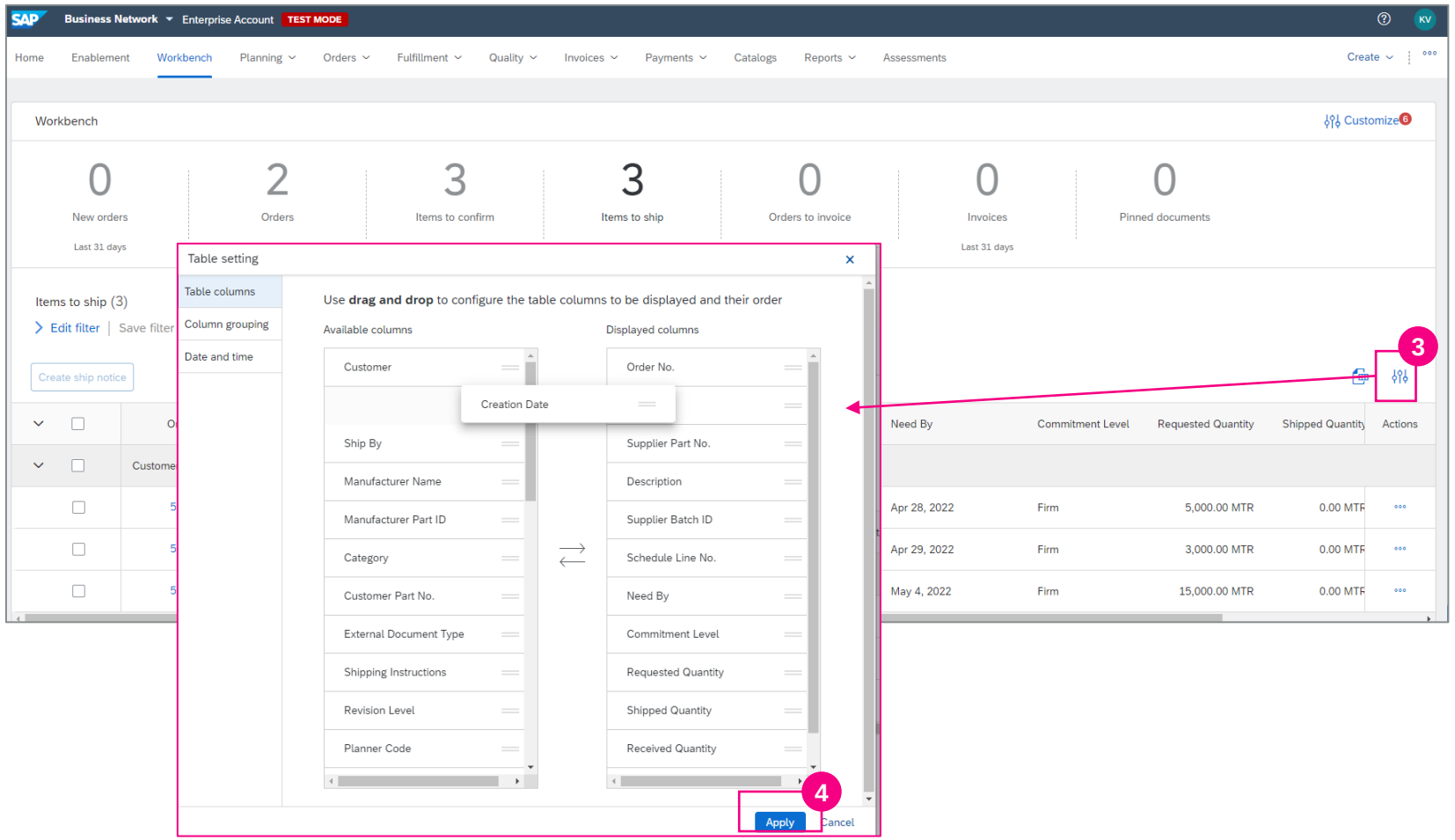
1 Select **Items to Ship** part.

1a If this part is not displayed - click on the “More” section.

2 If you keep assigned filter criteria (Excluded Shipping Not allowed **as ticked**), the report will only contain the Firmed Orders with Commitment Level „Firm” displayed on respective Scheduling Agreement, meaning the shipments for next 14 days will be displayed.

Planned Shipment

Planned Shipment Report - short term horizon (2/3)

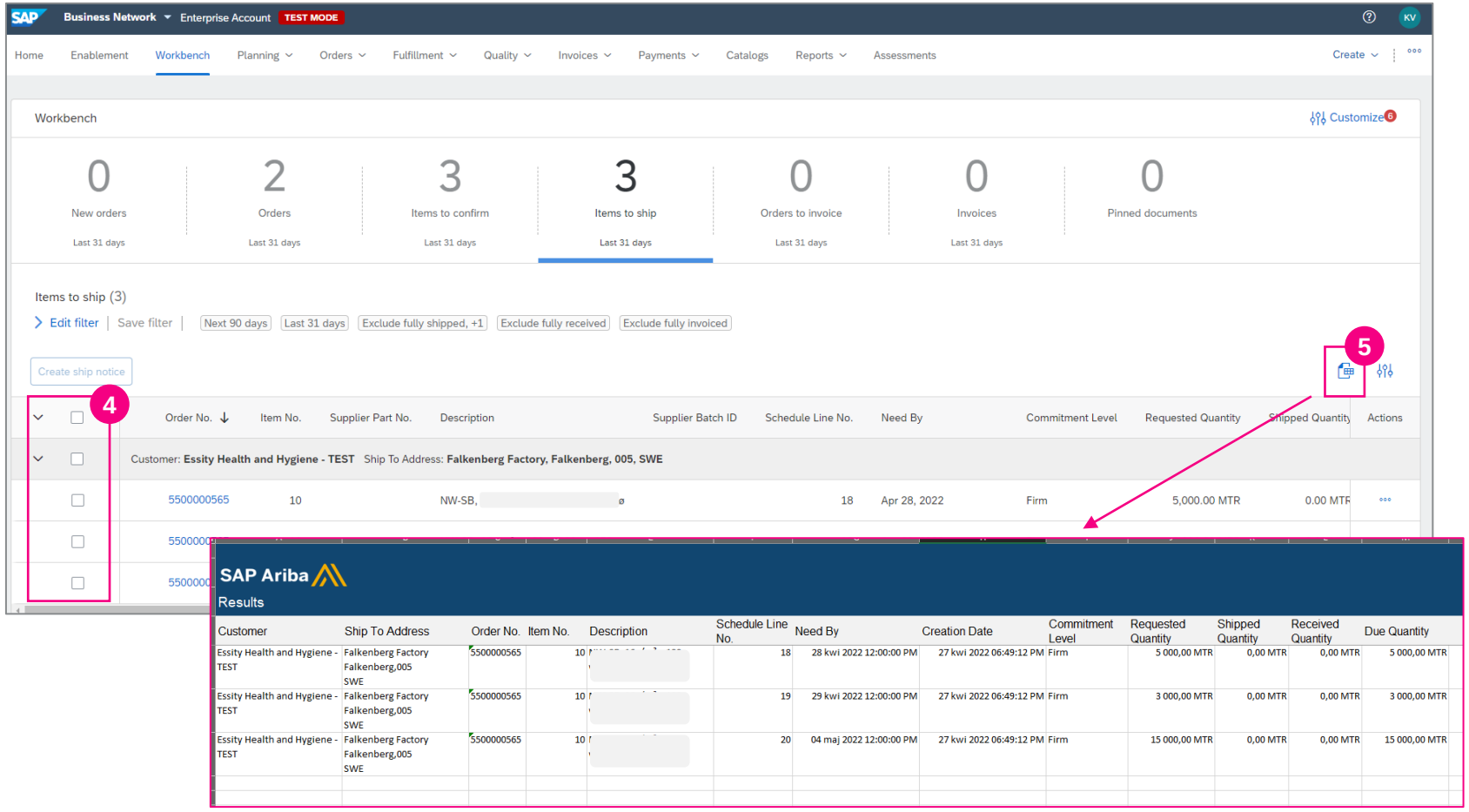


3 The table can be customized. You can add more relevant columns (i.e. Customer Part ID) or delete the existing ones by using drag and drop option.

4 Click **Apply**

Planned Shipment

Planned Shipment Report - short term horizon (3/3)



4 Checked the exact lines

5 Click **Export** button. The excel file will be downloaded and will contain planned deliveries for next 14 days. The report contains also: assigned Scheduling Agreement, Schedule Line No., Commitment Level, Requested Quantity, Shipped Quantity, Received Quantity or Due Quanttity.

Planned Shipment

Topic

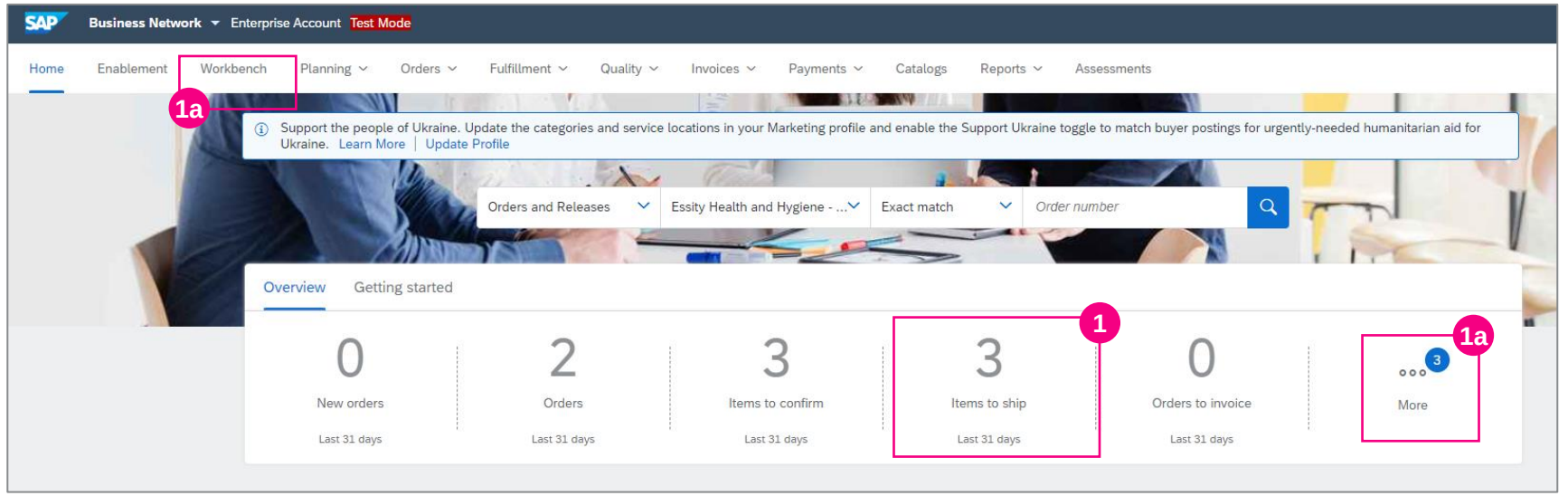
Planned Shipment Report (short term horizon)

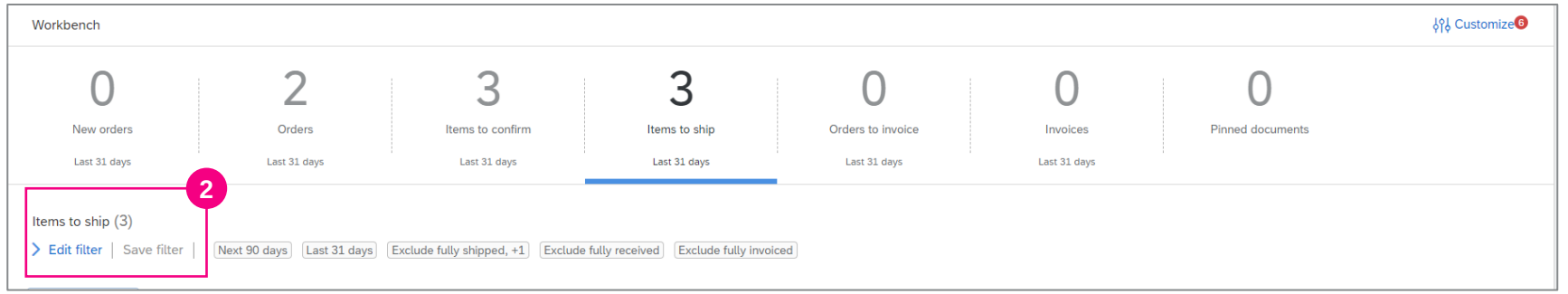
2 **1st Planned Shipment Report (long term horizon)**

2nd Planned Shipment Report (long term horizon)

Planned Shipment

1st Planned Shipment Report -long term horizon (1/4)





The summary of the planned shipment data can be extracted directly from the Home page. This report shows only the quantities in Firmed Orders section on the planning collaboration page – SMI view.

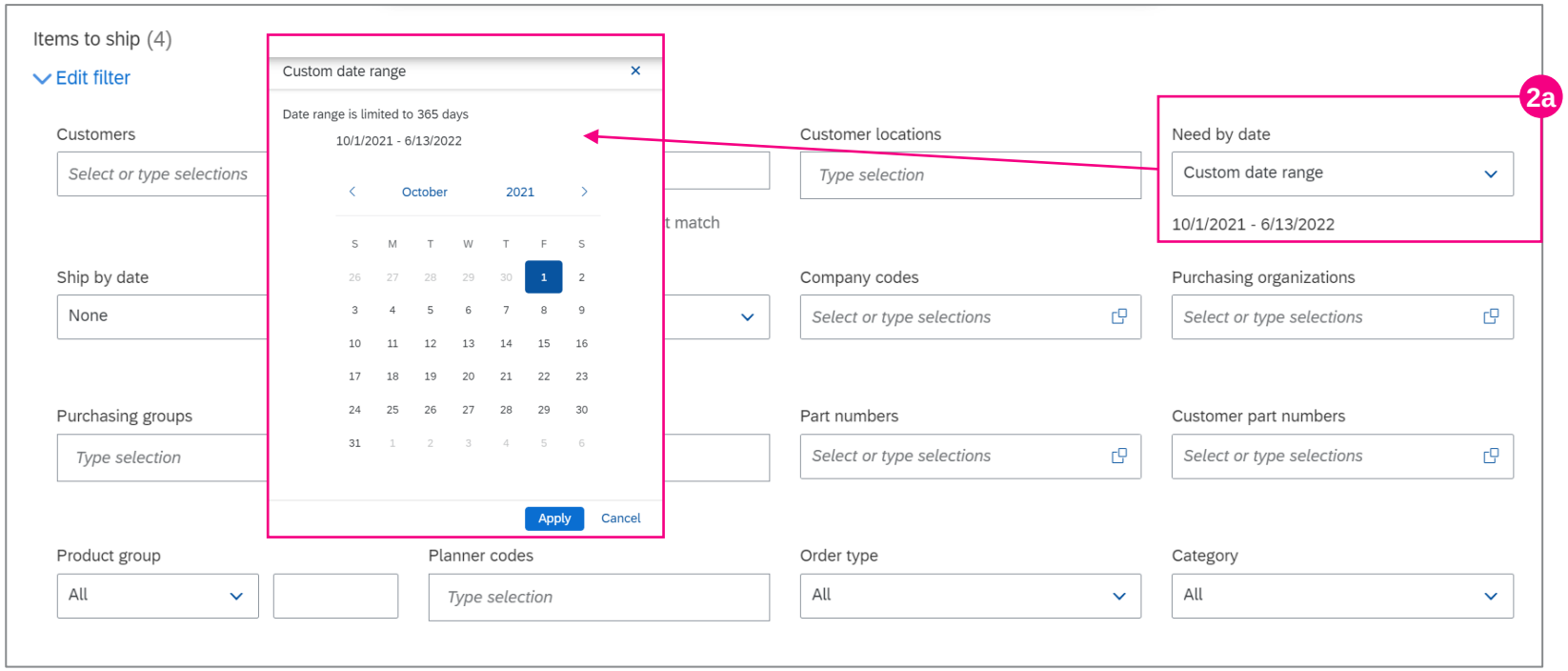
1 Select **Items to Ship** part.

1a If this part is not displayed - click on the “More” section or select this page in Workbench tab.

2 Edit filter in Items to Ship in order to select specific searching criteria.

Planned Shipment

1st Planned Shipment Report -long term horizon (2/4)



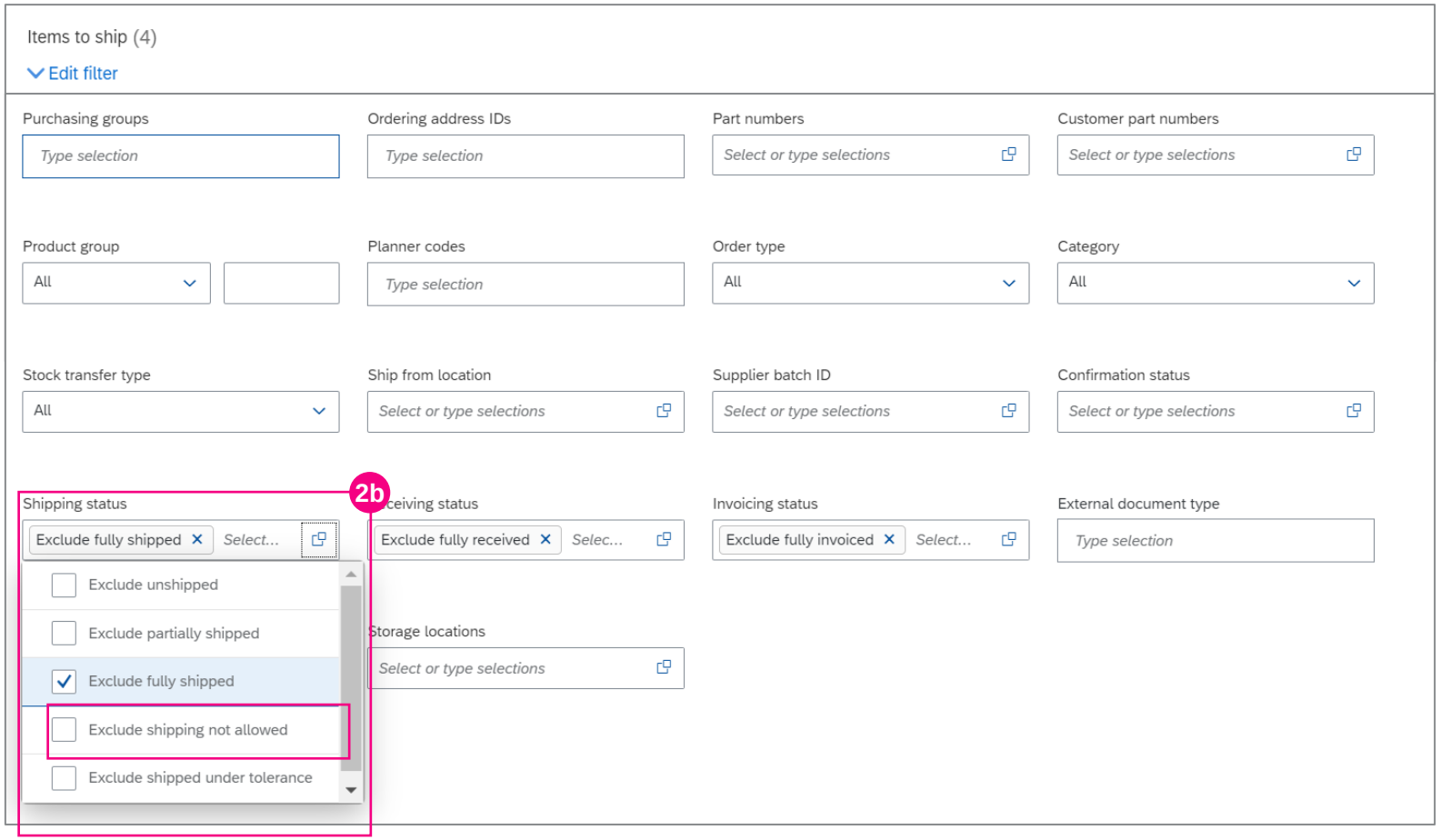
2a For long term horizon please use **custom date range** in Need by Date.

Select the exact period and click apply. Date range is limited to 365 days

After applying the filters this section will show not only the Firmed Orders but also Tradeoff (planned shipments for longer horizon than 14 days) or Forecast (planned shipments for longer horizon than 30 days).

Planned Shipment

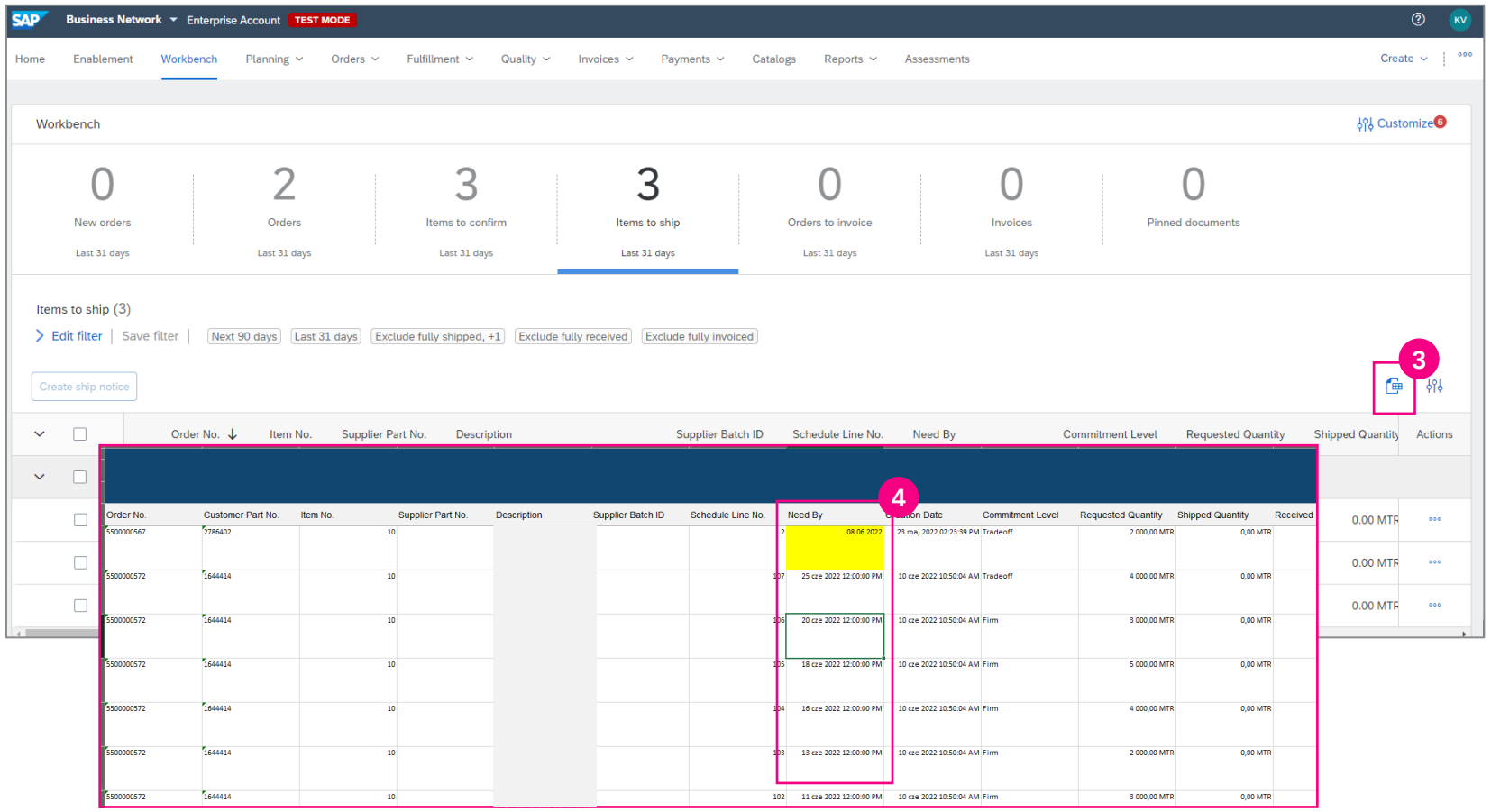
1st Planned Shipment Report -long term horizon (3/4)



2b Untick **Exclude shipping not allowed** in Shipping status.

Planned Shipment

1st Planned Shipment Report -long term horizon (4/4)



3 Click Export button without selecting the rows to download the file. The report shows the planned deliveries for certain horizon of time.

4 *In this report there is inconvenient date format but that can be easily formatted.*

Planned Shipment

Topic

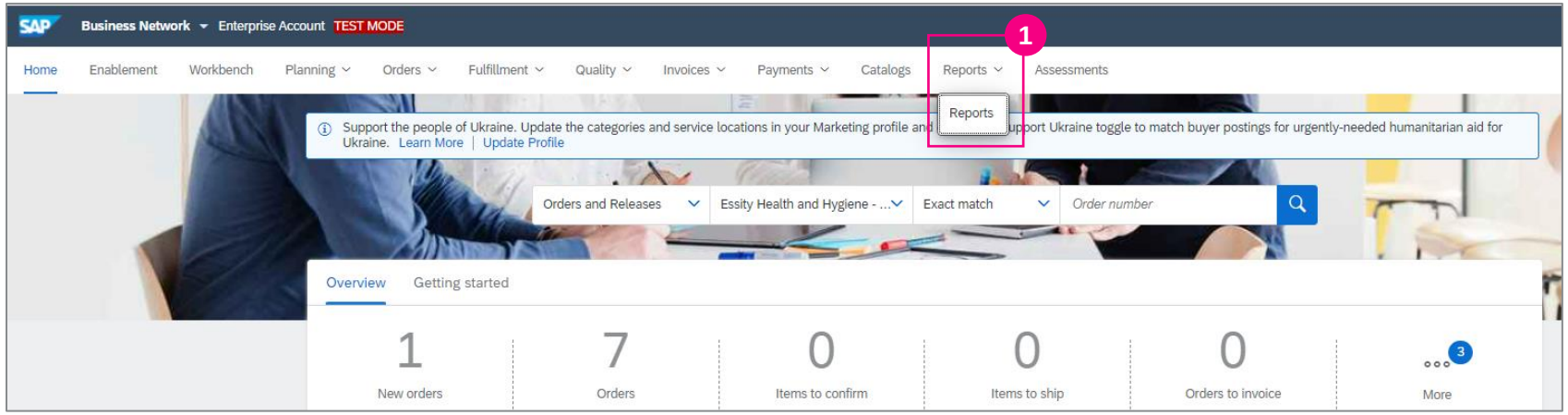
Planned Shipment Report (short term horizon)

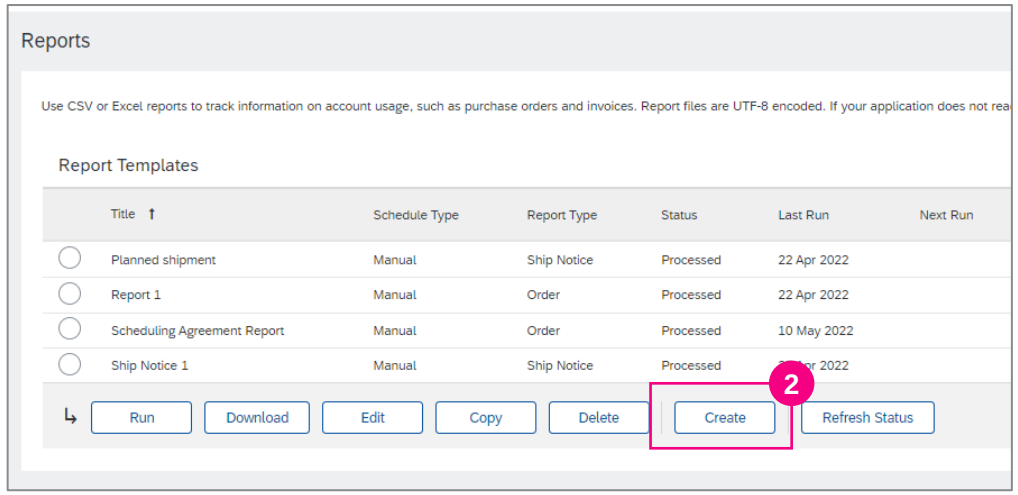
1st Planned Shipment Report (long term horizon)

3 **2nd Planned Shipment Report (long term horizon)**

Planned Shipment

2nd Planned Shipment Report -long term horizon (1/5)



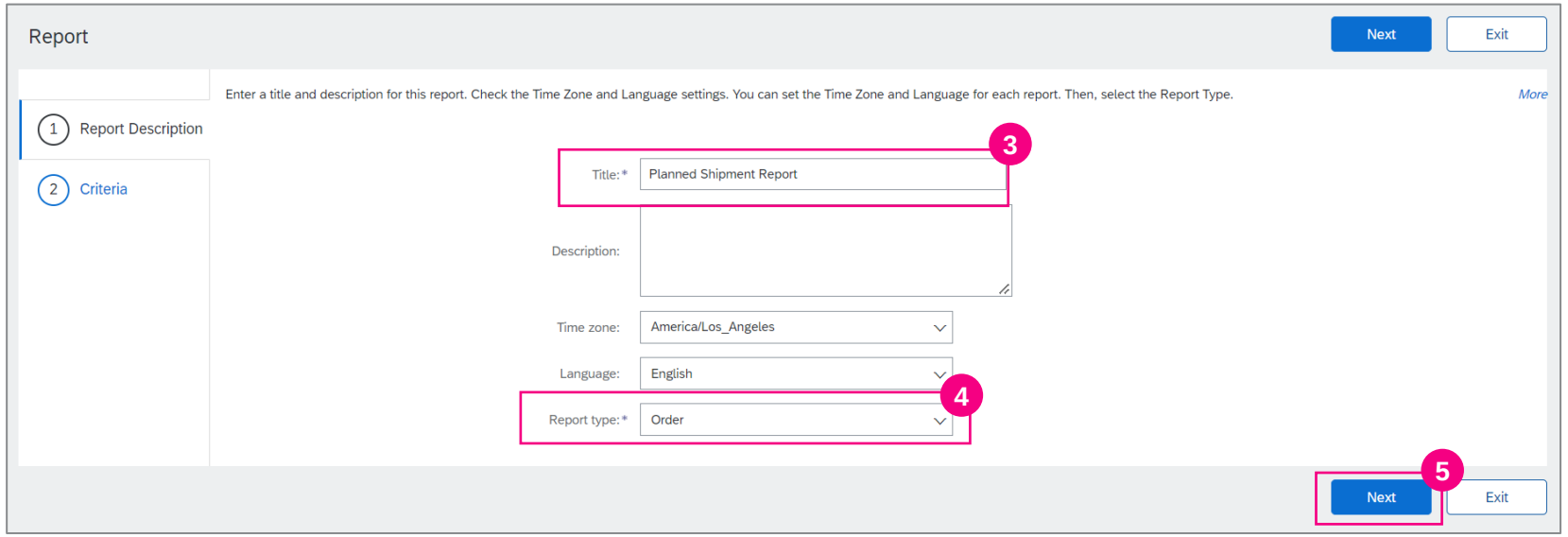


1. Planned Shipment Report for longer horizon can be extracted in a different way as well, please go to **Reports.**

2. And then select **Create** button

Planned Shipment

2nd Planned Shipment Report -long term horizon (2/5)



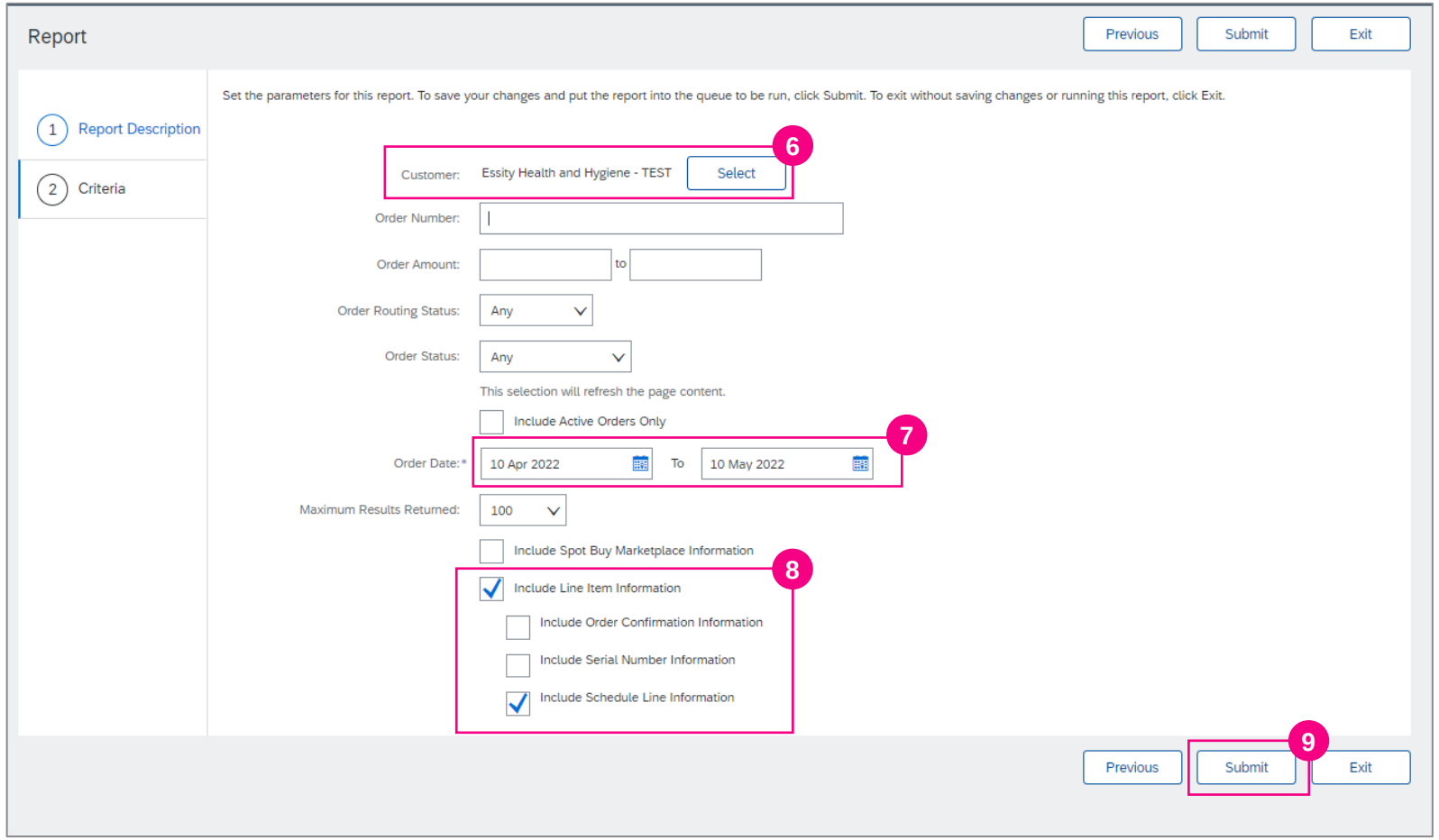
3 In the following page insert the **unique Title** that will help you find a file

4 Select **Order** from a dropdown list as a report type

5 Click on **Next** button

Planned Shipment

2nd Planned Shipment Report -long term horizon (3/5)



6 Select the **customer name.**

7 Then please select the **time period** for which you would like to download a report.

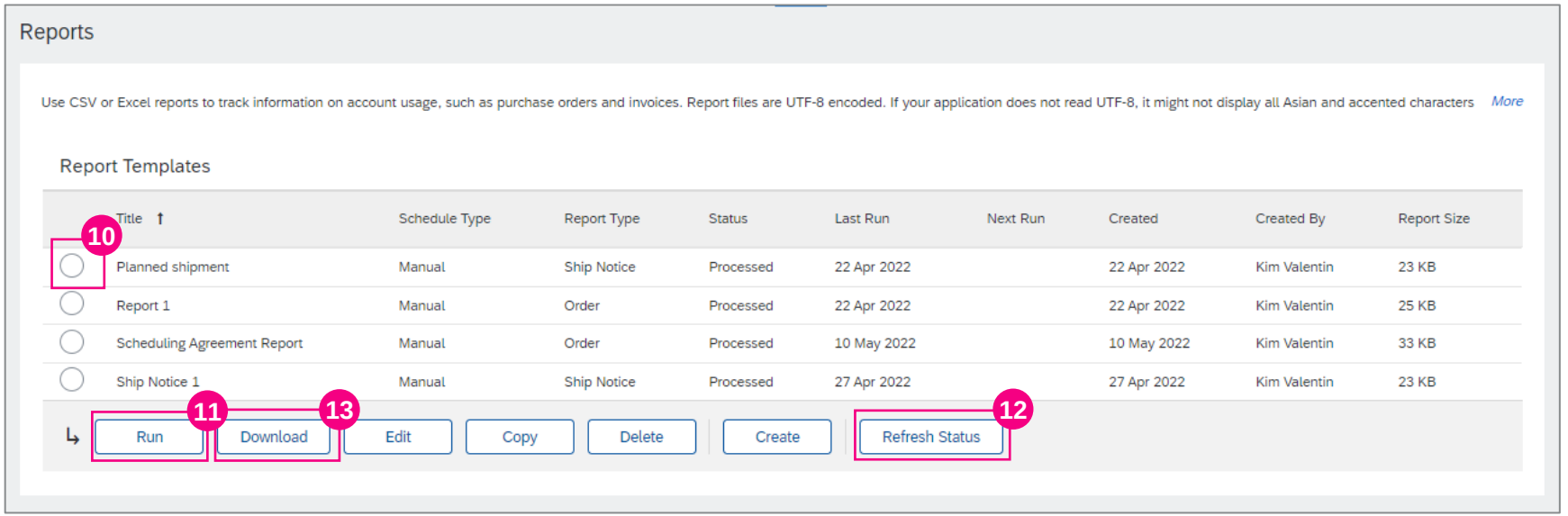
8 In criteria check the box for “Include Line Item Information” and then “Include Schedule Line Information”.

Optionally you can check “Include Active Orders” so that obsolete orders are discorded.

9 Click on **Submit** button.

Planned Shipment

2nd Planned Shipment Report -long term horizon (4/5)



When the processing process will be done then the file will be reflected in **Reports** section with **Processed** status.

10 Choose the desired report from the title line by clicking on the circle button on the left.

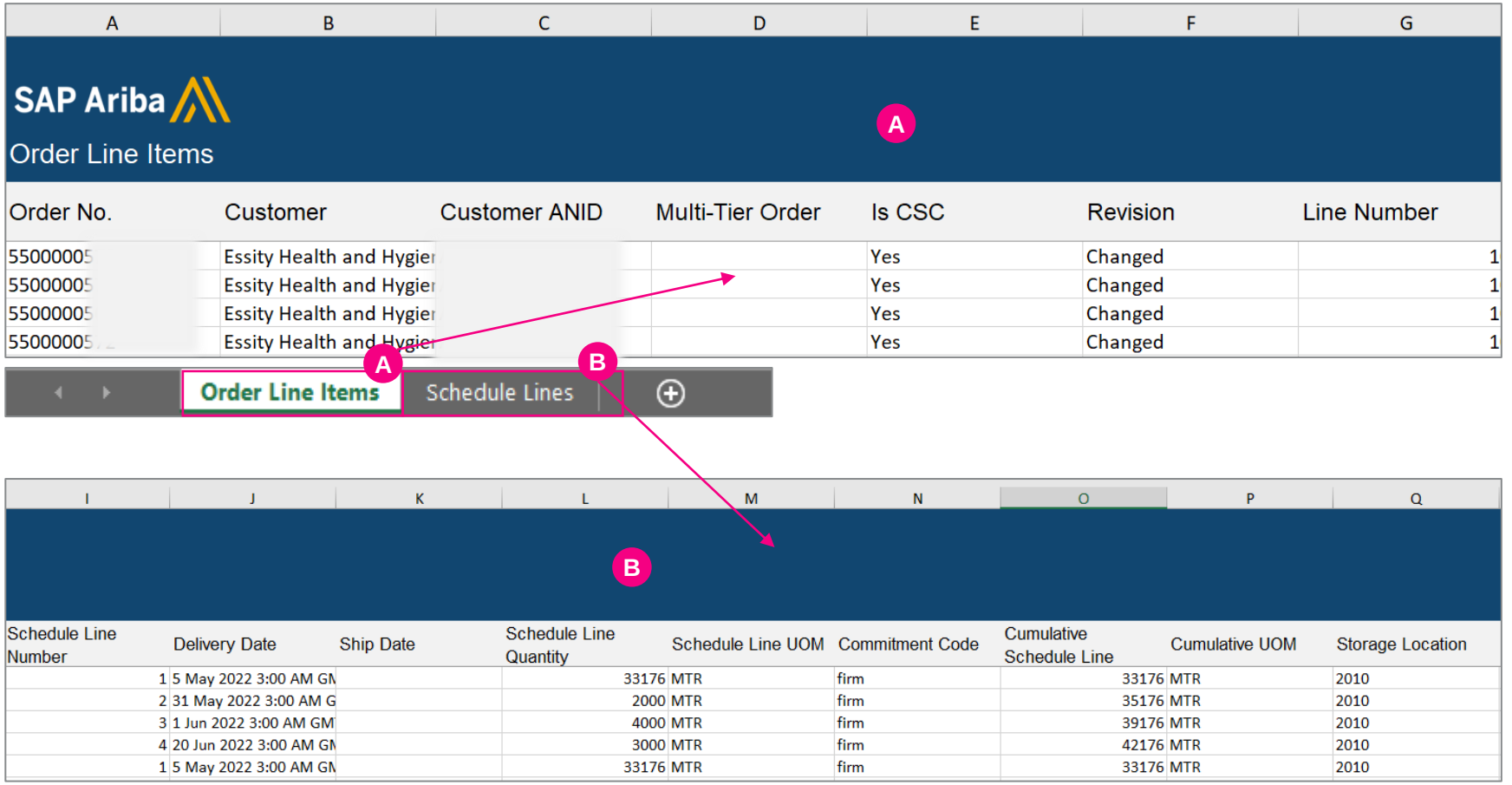
11 Click **Run** button.

12 If the status in in the Queue you can click **Refresh Status** to view the most recent status.

13 **Download button** in order to download the file to Excel.

Planned Shipment

2nd Planned Shipment Report -long term horizon (5/5)



A In the first sheet of the excel report you will be able to view **Order Line Items,** which include for example: Order number, Customer, Customer ANID, Line Number, Quantity, Unit of Measure, Material number, Needed by date, Currency, Order Status, Routing status, Ship to status, Payment Terms and many other attributes.

B In the second sheet of the excel report you will be able to view **Schedule Lines.**

Which include for example: Order Status, Line Number, Part Number, Delivery Date, **Commitment Code**, Cumulative Schedule Line, Cumulative UoM, Storage Location.

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