



The Supply Chain Company™

Summary

Solution Type:	SCM
Industry:	Transportation / Logistics
Product(s)/Template(s):	i2 Transportation Manager, i2 Transportation Planner(Optimizer) for Manager
Target Audience:	Functional Implementers (Business Lead / i2 Lead) Technical Implementers (Super User / Application Engineer)
Delivery Method:	Instructor-Led Training
Training Approach:	Lecture, Demo, and Hands-on
Duration:	5 days
Version:	6.3

Description

This course provides functional training in Transportation Manager and Transportation Planner (Optimizer) for Manager. It is designed for business leads, implementation team members and “super-users” who desire to have classroom instruction and hands-on experience with system workflows and configuration/implementation issues in a training environment.

Content

This course is composed of the following modules:

- Module 1: Overview & Operational Processing
- Module 2: Financials Processing
- Module 3: Tariffs & Delivery Schedules
- Module 4: Planning with Optimizer / Transportation Planner
- Module 5: Additional Functionality & System Setup

Prerequisites

- Basic PC knowledge and skills, including MS Windows™
- Knowledge and/or experience in the logistics/transportation industry is helpful, but not required.

Course Objectives

On completion of this course, you will be able to:

- Explain the specific business processes and enabling TM/TP functionality

- Explain the value drivers of TM/TP
- Introduce the supporting documentation
- Explain TM terminology
- Apply TM terminology to a business scenario
- Differentiate the data, application servers, and client (web)
- Navigate web interface modules
- Enter shipments via web interface
- Perform load build via web interface
- Perform load processing steps from shipper and carrier perspective
- Setup and perform Controlled Sequential Tendering
- Perform pickup confirmation via web interface
- Perform status updates and delivery confirmation via web interface
- Create and process manifest loads
- Create and adjust A/P and A/R vouchers
- Generate invoice and freight bill records
- Perform freight bill audit
- Generate transactions records for G/L
- Define the different organization and shipping entities and associated required fields
- Explain Container Masters and Container Groups
- Apply Item Masters and Item Groups functionality
- Explain INCO Terms
- Describe tariff structures and steps for tariff creation
- Create and test customer / carrier tariffs
- Explain the importance and use of delivery schedules
- Create and test delivery schedules
- Navigate Transportation Planner user interface
- Configure Transportation Planner in Interactive Optimization as well as Optimizer Server mode for TM
- Explain the major optimization strategies and arguments, plan stacks, variables, and looping
- Create/adjust strategies using the Strategy File Editor
- Differentiate major optimization parameters
- Adjust parameters using the Parameter File Editor
- Explain the use, setup and processing of Continuous Moves
- Explain the use of selected business constraints for Transportation Planner
- Explain the use and shipment requirements for Merge-In-Transit
- Explain the use of accessorial activities / charges (options)
- Explain the purpose of Global Defaults, System Tables, Domain Tables, Status Definition Tables and introduce recommended steps for system setup.

Course Contents

Day 1 Morning- Transportation Manager Overview

- Transportation and Distribution Management Release Six.Three
- Explain specific business processes & enabling TM / TP (Transportation Manager / Transportation Optimizer/Planner) functionality
- Explain value drivers of TM / TP
- Understand industry challenges
- Understand industry & TM based KPIs
- Understand TM terminology

- Apply TM terminology to a business scenario
- Understand the TM Architecture
- Understand the TM Setup Process
- Understand the functionality within Transportation Manager Modules
- Explain the Transportation Manager Workflow

Day 1 Afternoon & Day 2- TM Operational Processing

- Explain TM security levels
- Create TM users & user groups
- Enter shipments
- Perform Load Building
- Perform Load Processing steps from shipper & carrier perspective
- Setup & perform Controlled Sequential Tendering
- Perform pickup confirmation
- Perform status updates & delivery confirmation
- Create & Process manifest loads

Day 3 Morning- Financial Processing

- Explain TM financial terminology
- Explain the TM financial workflow
- Create & adjust A/P & A/R Vouchers
- Generate invoice & freight bill records
- Generate transaction records for G/L
- Review freight bill audit

Day 3 Afternoon & Day 4 Morning - Entity, Tariffs and Delivery Schedules

- Define key entities and the associated required fields
- Explain Container and Container Groups
- Create Item Masters & Item Groups
- Explain tariff structures & steps for tariff creation
- Create & test customer / carrier tariffs
- Explain the importance & use of delivery schedules
- Create & test delivery schedules

Day 4 Afternoon & Day 5- Interactive Optimization using Transportation Planner and Advance Modeling

- Create & test delivery schedules (contd)
- Navigate Transportation Planner user interface
- Configure Transportation Planner in Interactive Optimization and Optimizer Server mode for TM
- Explain the major optimization strategies and arguments, plan stacks, variables, and looping
- Create / adjust strategies using the Strategy File Editor
- Differentiate major optimization parameters
- Configure & test business constraints for optimization