One Network Enterprises

NEO 3.5 New Feature Guide

Published
29 March, 2022

1 Revision History

Version	Release Date	Author	Comments
1.8	29 Mar 2022	Tech Docs	Added the following pages for SMRO asset enhancements for PDS-46279: • "Search Asset Meter Reading(see page 233)" • "Search Asset Meter Configurations(see page 234)" • "Search Asset Attribute Reading(see page 232)" • "Search Asset Attribute Configurations(see page 231)" General edits for grammar and clarity. Updates to "Printing Shipping Instructions Before Submitting(see page 48)". Added "Assign Problems to Users in Partner Organizations(see page 144)." Added "Accepting and Rejecting Vendor Changes to Order Lines(see page 169)." Added "Adding Tools to Tasks on Work Orders(see page 235)." Changed a Manufacturing section name from "Order Forecast Accuracy" to "Production Order Forecast Accuracy(see page 131)." Added the following pages to the Production Order Forecast Accuracy section: • Configure the Order Forecast Accuracy Engine via Integration(see page 131) • Configure the Production Order Forecast Accuracy Engine via UI(see page 135) • Run the Production Order Forecast Accuracy Engine(see page 137) • Viewing and Editing Production Order Forecast Accuracy Configurations(see page 139) • Viewing the Production Order Forecast Accuracy Report(see page 141)

Version	Release Date	Author	Comments
1.7	25 Feb 2022	Tech Docs	Added the "Configuring Per Container Rates for Road Transportation" section for PDS-40818. Added the "Onboarding Email Templates for Trading Partners(see page 4)" section for CMD-1115.
1.6	23 Feb 2022	Tech Docs	Added the "Asset Management" section for PDS-46281.
1.5	18 Feb 2022	Tech Docs	Added the "Working with Partner Performance Report" section for PDS-42316. Added the "Configuring Time Based Workflow to Automatically Close Enhanced Orders" section for PDS-45449.
1.4	16 Feb 2022	Tech Docs	Added "Order Brokering Workbench" section for PDS-44563.
1.3	15 Feb 2022	Tech Docs	Added the 'Working with Problems' section for PDS-44032. Added the "Viewing Custom Analytic Widgets in the Workbench" section for PLT-25737. Added the "Self-Initiated Onboarding for Trading Partners" section for CMD-1115.
1.2	14 Feb 2022	Tech Docs	Moved two pages under Administration under their appropriate sections (TMS>Scheduling and OMS). General edits for grammar and clarity.
1.1	14 Feb 2022	Tech Docs	Moved the "Using the Demand Promotion and Demand Exclusion Feature(see page 162)" page from the NEO 3.5 Release Notes to the NEO 3.5 New Feature Guide.
1.0	09 Feb 2022	Tech Docs	Initial Draft Release for UAT

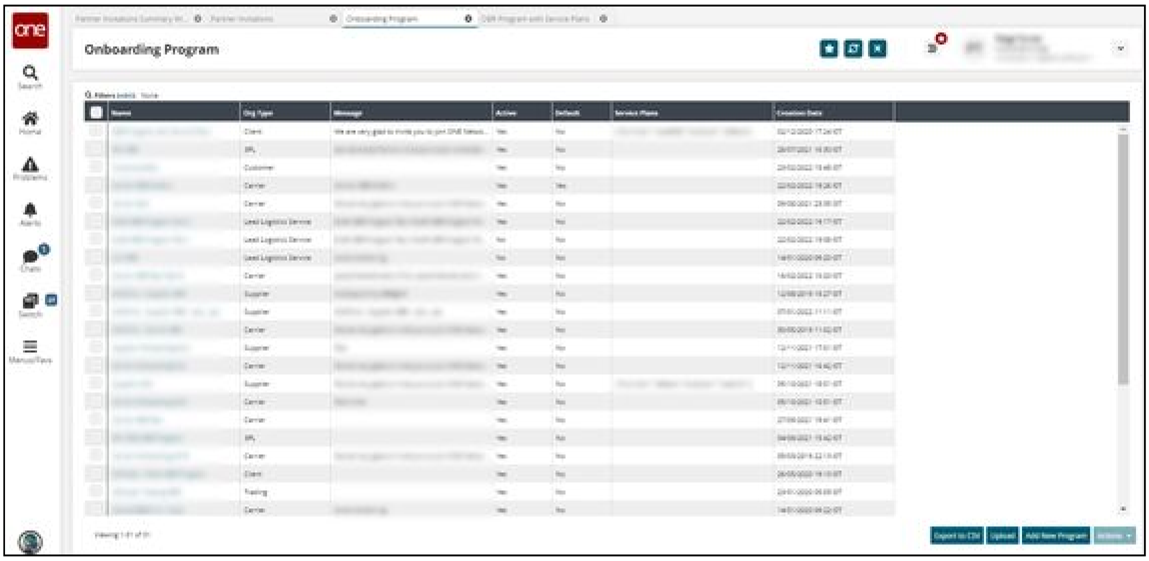
2 Enhancements And New Features

2.1 Onboarding Email Templates For Trading Partners

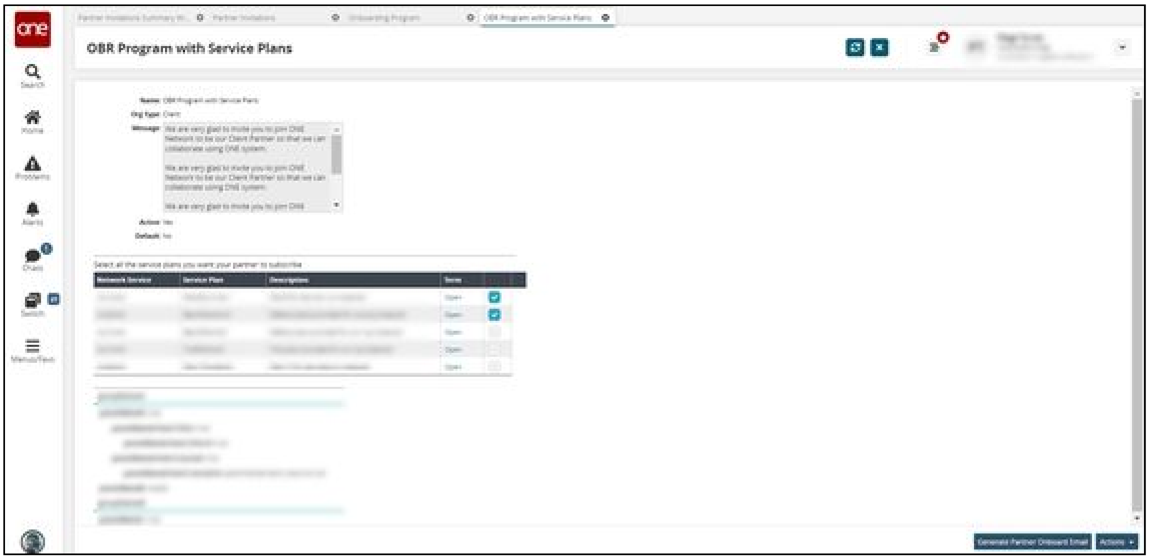
ONE offers a self-initiated onboarding process for trading partners. This enhancement allows a partner to initiate onboarding by sending an email invitation that guides them through a specific onboarding program based on their business and the customer they are associated with.

Complete the following steps to send an onboarding email to partners:

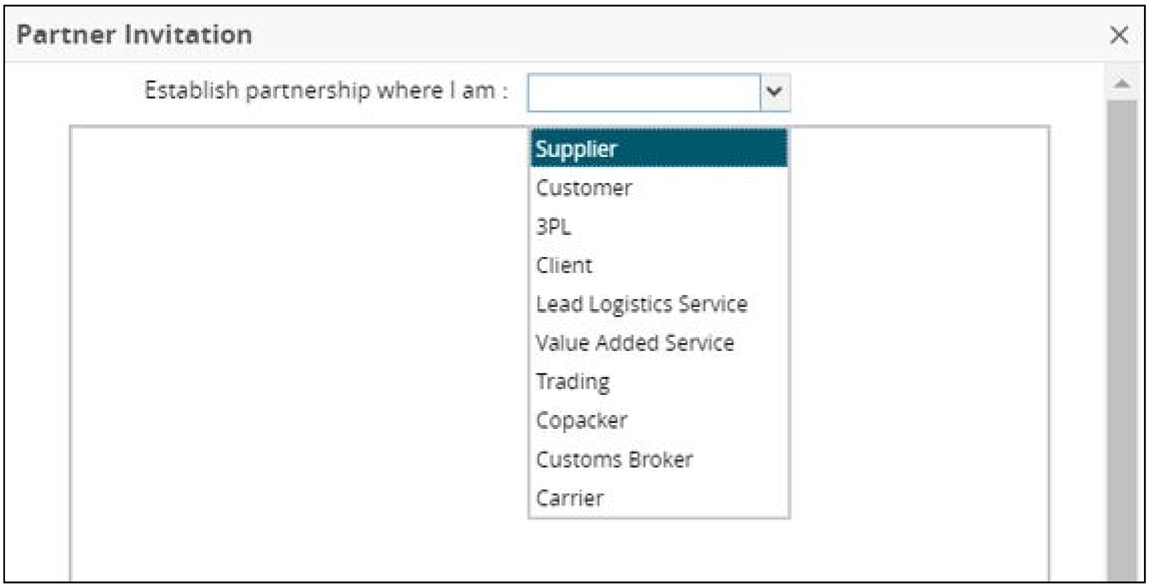
1. Log in to the ONE system.
2. Click **Menu/Favs > Admin > Onboarding Program**.
   The Onboarding Program screen displays all current programs.



3. In the **Name** column, click the name of a program.
   The program details screen displays.



4. Click the **Generate Partner Onboard Email** button.
   The Partner Invitation popup window displays.
5. In the **Establish partnership where I am** field, select the type of organization from the dropdown menu.
   A pre-formatted email template displays in the text box below. Please note that the text will be different for each organization type.



6. Copy the content displayed in the **Partner Invitation** popup window.
7. Paste the copied content in your email application and send it to the partner email address(es).

See the "Trading Partner Self-Onboarding Process" section in the current version of the *Release Notes* for more information.

2.2 Cross-Module Enhancements

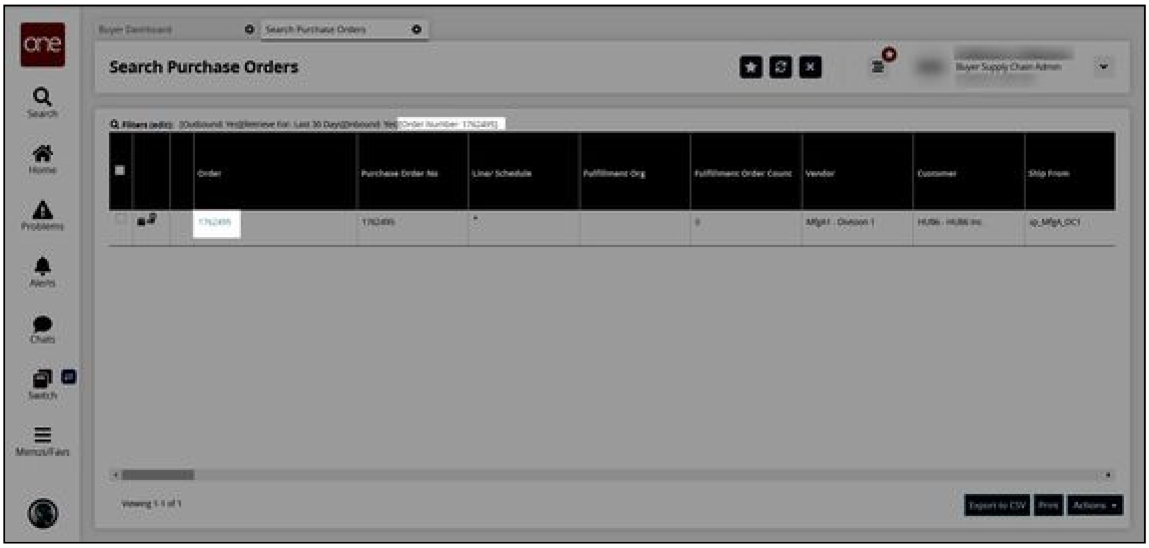
2.2.1 Adding Kit Item Components to an Order

Complete the following steps to add kit item components to an order:

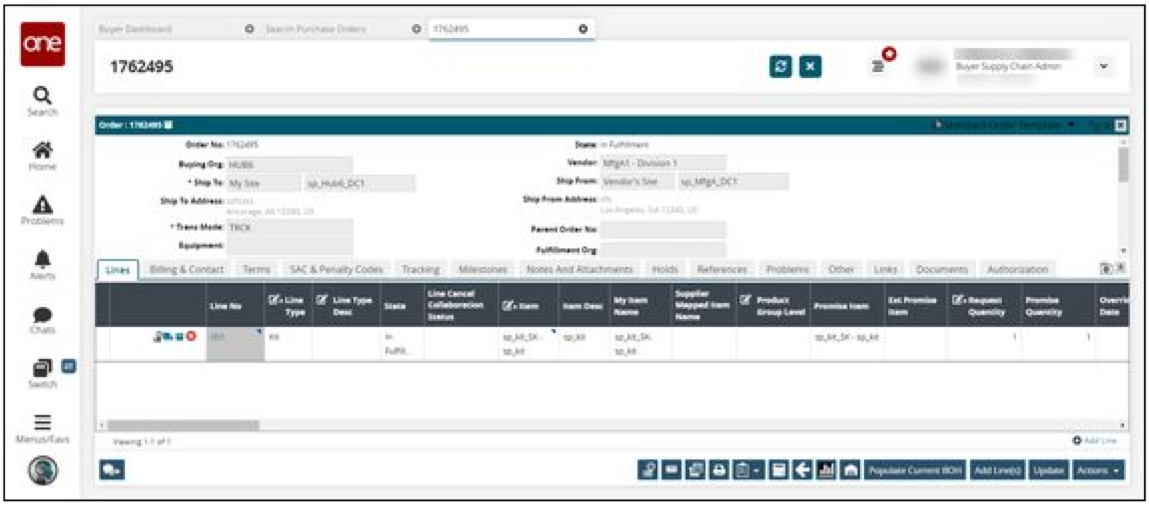
1. Log in to the ONE system.
2. Use the global search or the menu to locate the purchase order (PO), deployment order (DO), or sales order (SO) to which you want to add a kit item component. See the relevant section of *Online Help* for more information: "Global Search," "Searching Purchase Orders," "Searching Deployment Orders," and/or "Searching Sales Orders."

> The example below uses a purchase order, but the same steps can be followed on a deployment order or sales order.

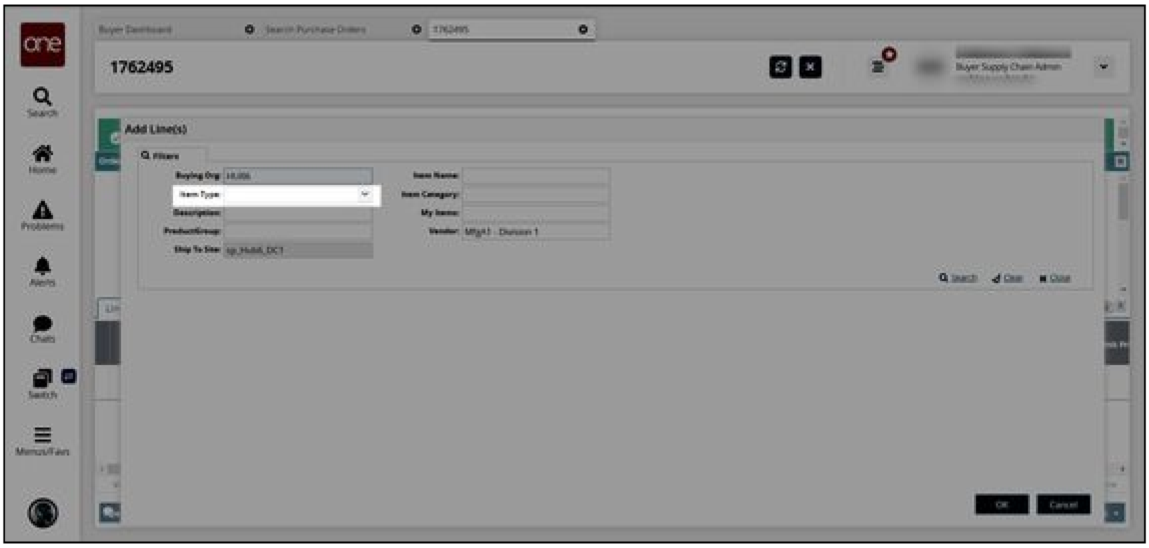
3. In this example, we searched for order #1762495.
   The search results appear.



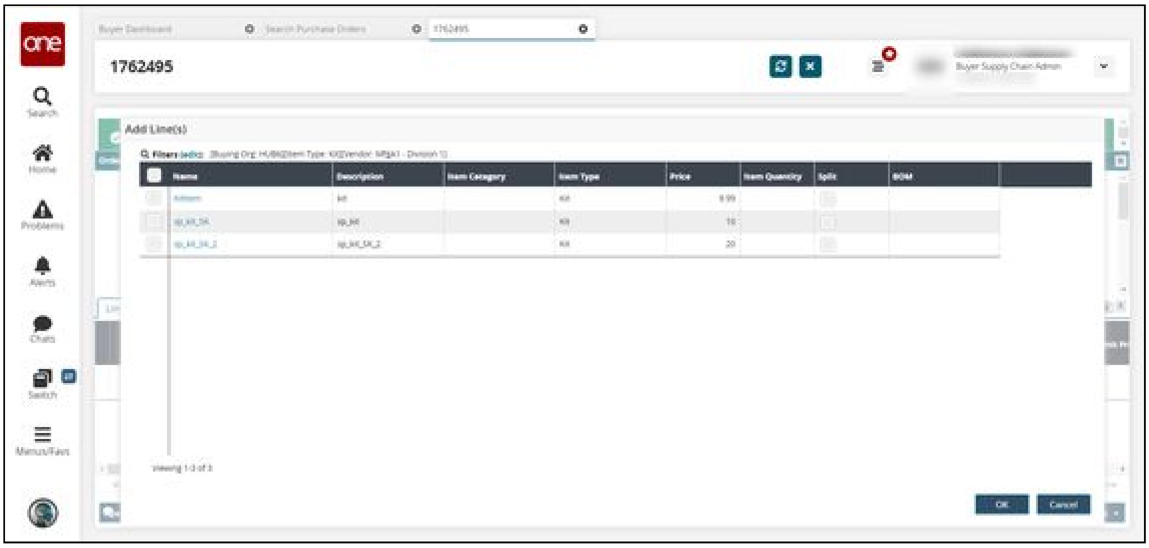
4. In the **Order** column, click the order number link to display the order details in a new tab.



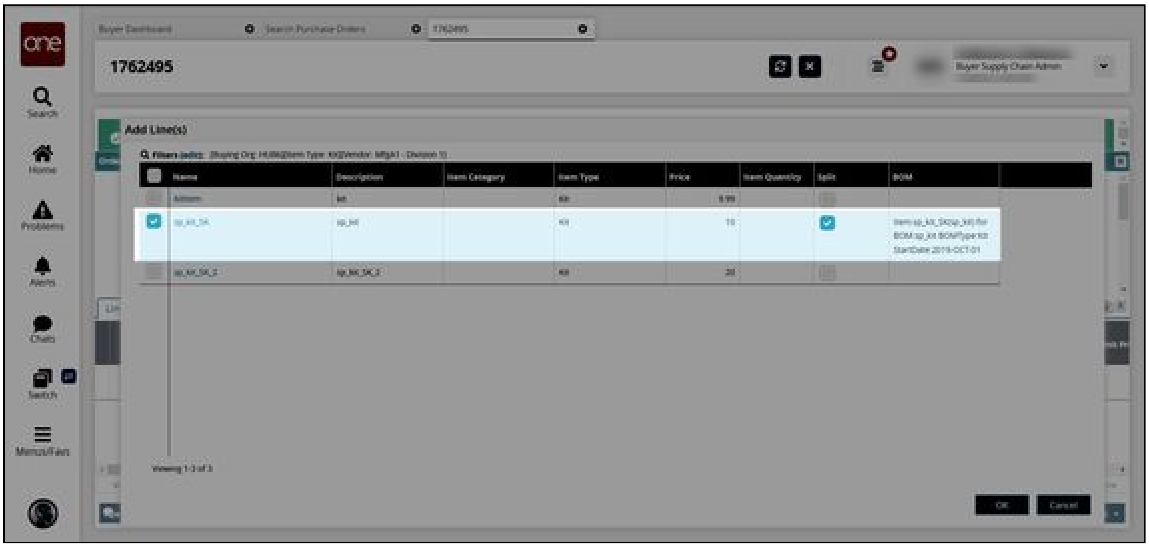
5. Click the **Add Line(s)** button.
   The Add Line(s) popup window appears with the filter fields displayed.



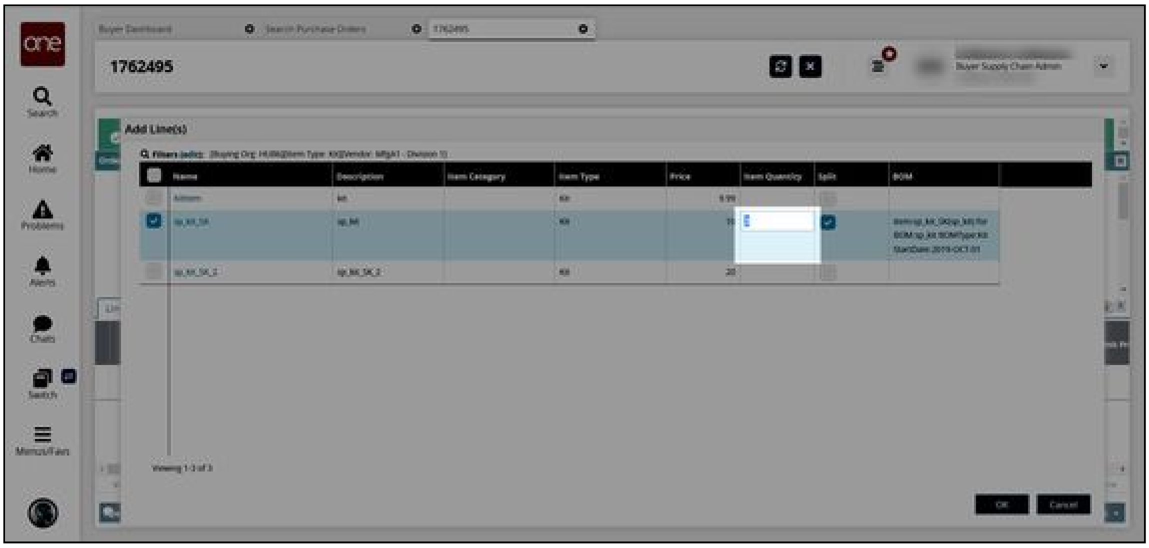
6. In the **Item Type** field, select Kit from the dropdown list.
7. Click the **Search** link.
   The available kit items display.



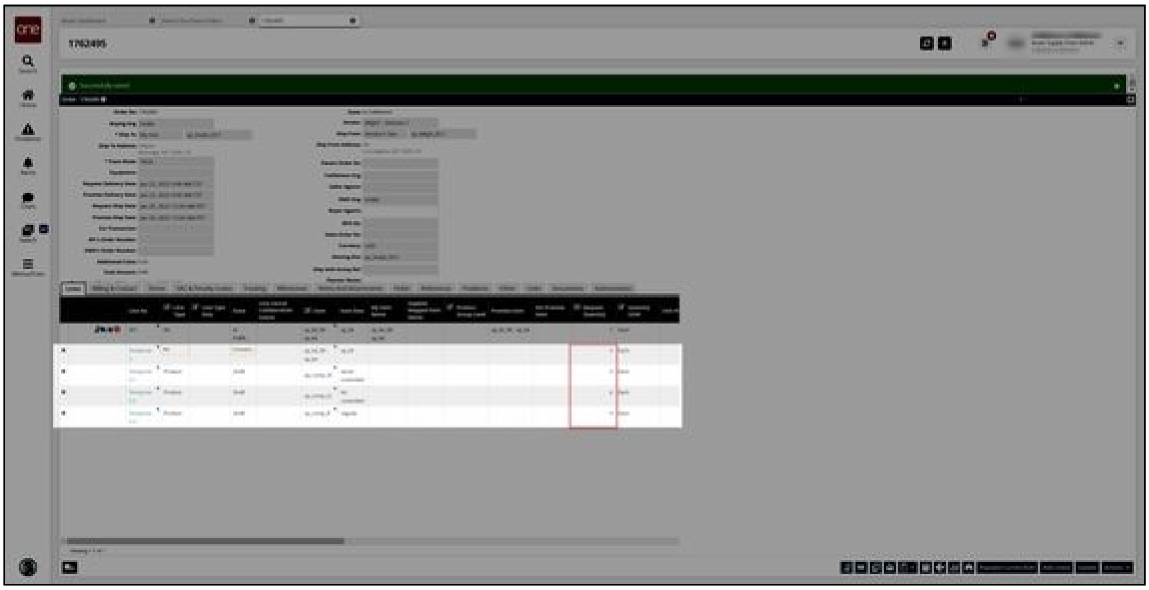
8. In the **Split** column, click the checkbox for the kit item you wish to split into components.



9. In the **Item Quantity** column, enter the kit quantity. Note this is not the component quantity. The component quantity will be calculated using kit quantity * BOM component quantity.
For this example, we entered a quantity of 3.



10. Click **OK**.
    The order details update with the kit and its components added with the component quantity updated to reflect the kit quantity * BOM quantity calculation, and a green success message appears.



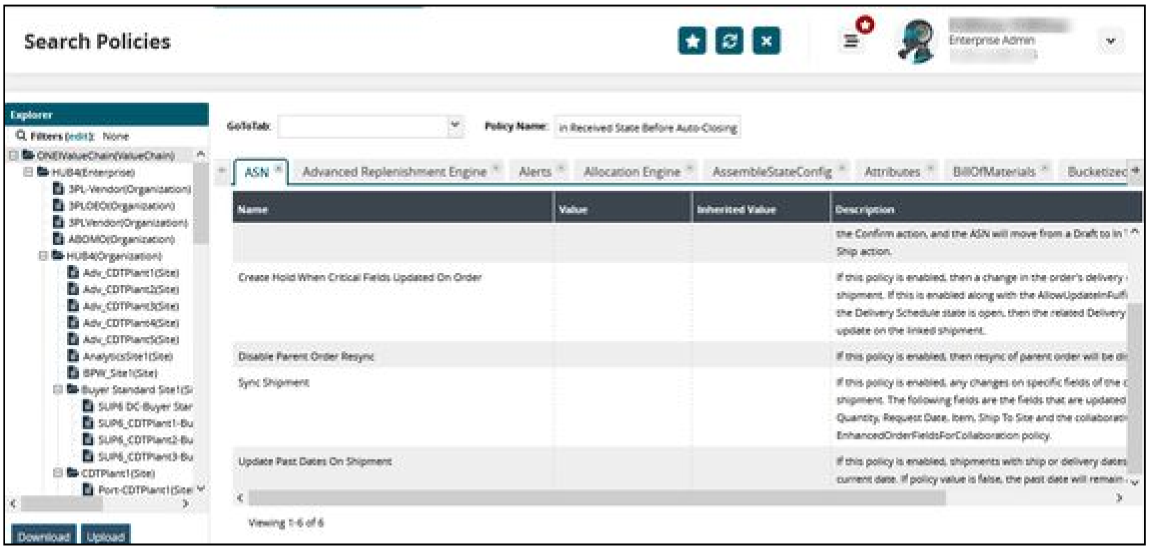
See the "Add Kit Item Components to an Order Detail" section in the current version of the *Release Notes* for more information.

2.2.2 Configuring Time-Based Workflow to Automatically Close Enhanced Orders

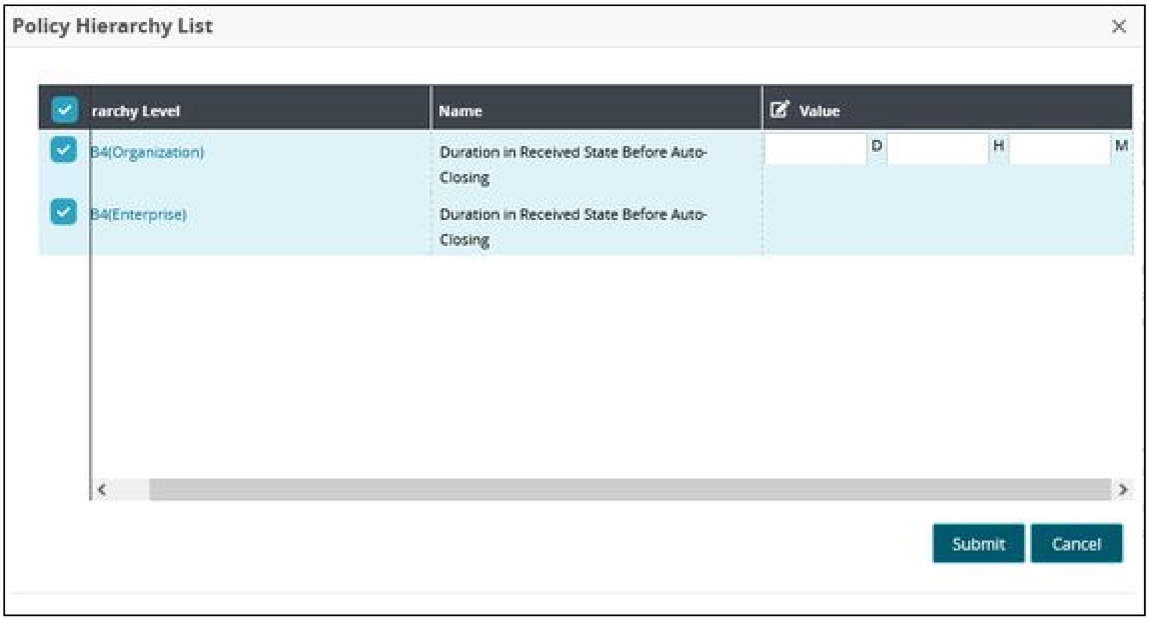
This topic describes how to configure the time-based workflow to automatically close enhanced orders that are in the Received state.

Complete the following steps to configure the time-based workflow:

1. Log in to the ONE system as an enterprise admin.
2. Click **Menus/Favs** > **Administration** > **Search Policies**.
   The Search Policies screen appears.



3. In the **Policy Name** field, type the policy name (Duration in Received State Before Auto-Closing) and select the policy from the auto-complete options.
   The Policy Hierarchy List pop-up window displays.



4. In the **Policy Hierarchy List** pop-up window, select the organizations to enable and configure the policy.
5. Click **Update**.
   The pop-up window updates to show editable fields.
6. For the **Value** field, enter the duration in a number of days, hours, and minutes after which the enhanced orders in the Received state will be automatically closed.

7. Click **Submit**.
   A green success message displays.
8. Click the **X** on the pop-up windows to close.

See the "Automatically Close Enhanced Orders in the Received State" section in the current version of the *Release Notes* for more information.

2.3 Logistics And Transportation Management

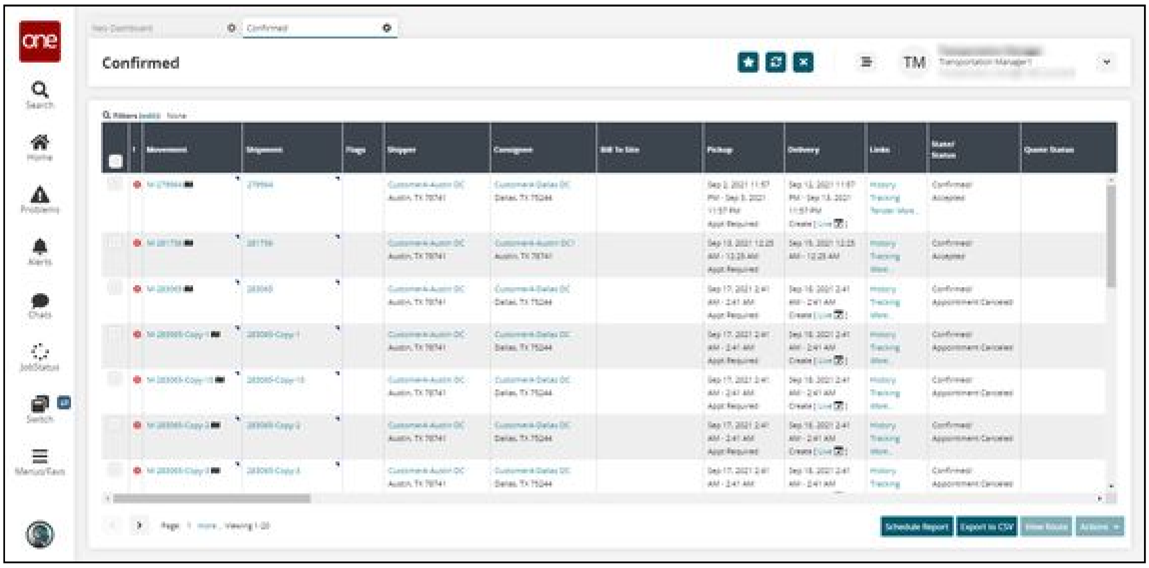
2.3.1 Execution

2.3.1.1 Copy Carriers when Confirming Multiple Movements

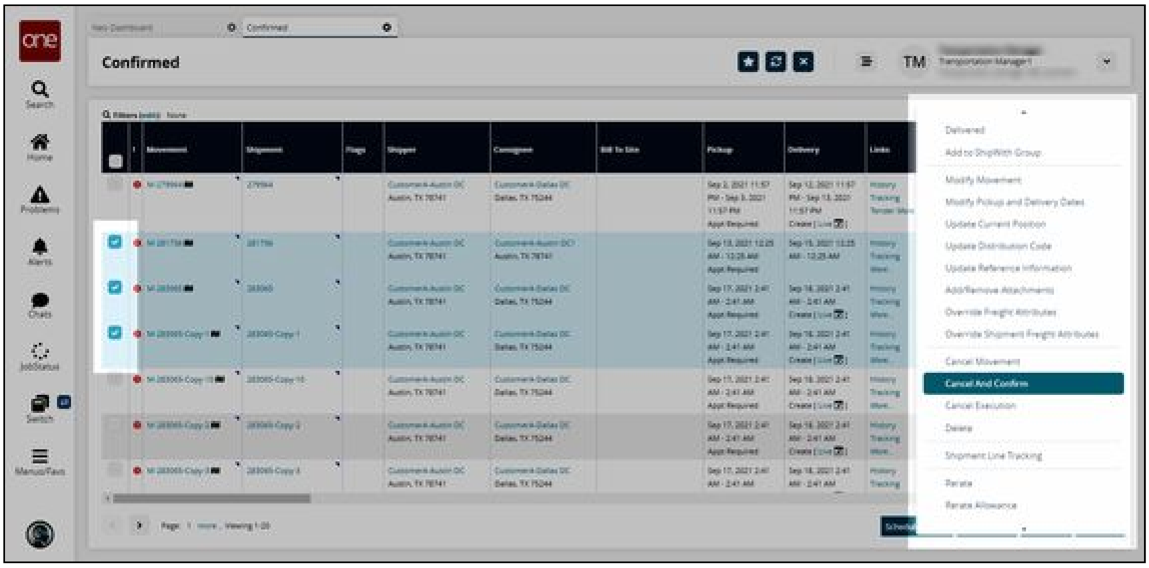
Users can copy carrier information when canceling or confirming multiple movements. When working with movements, after selecting the Cancel and Confirm action or the Save to Confirmed action, the "Apply cell value to all" option is available; clicking this option copies the carrier from that row to all other rows selected in the popup. This feature enables users to quickly and easily confirm or cancel multiple movements to the same carrier.

Complete the following steps to copy carriers when confirming multiple movements:

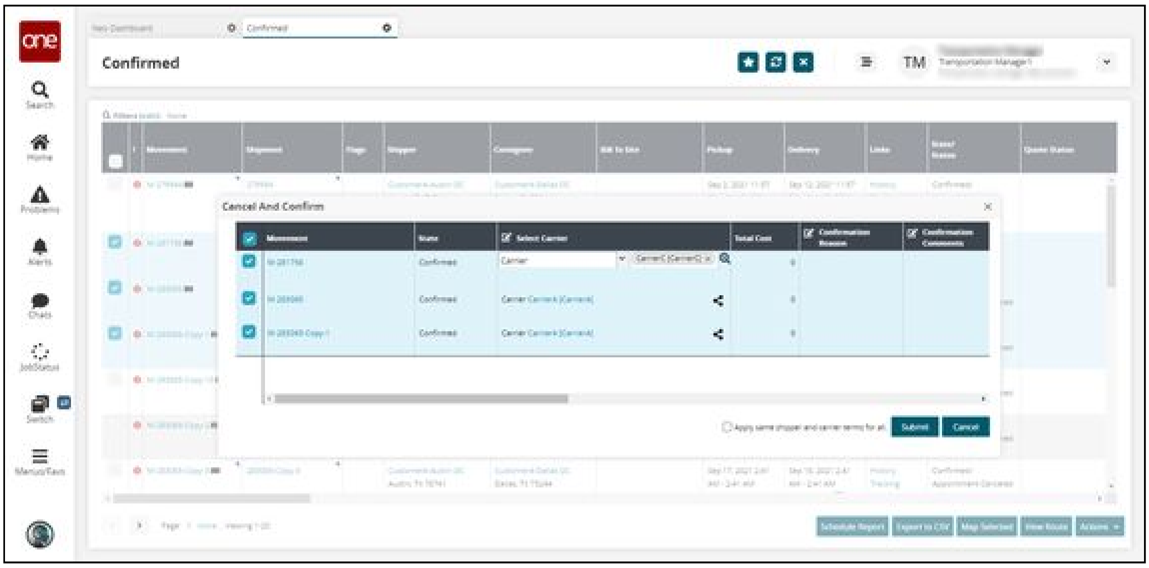
1. Log in to the ONE system.
2. Select **Menu/Favs > Transportation > Confirmed**.
   The Confirmed screen appears.



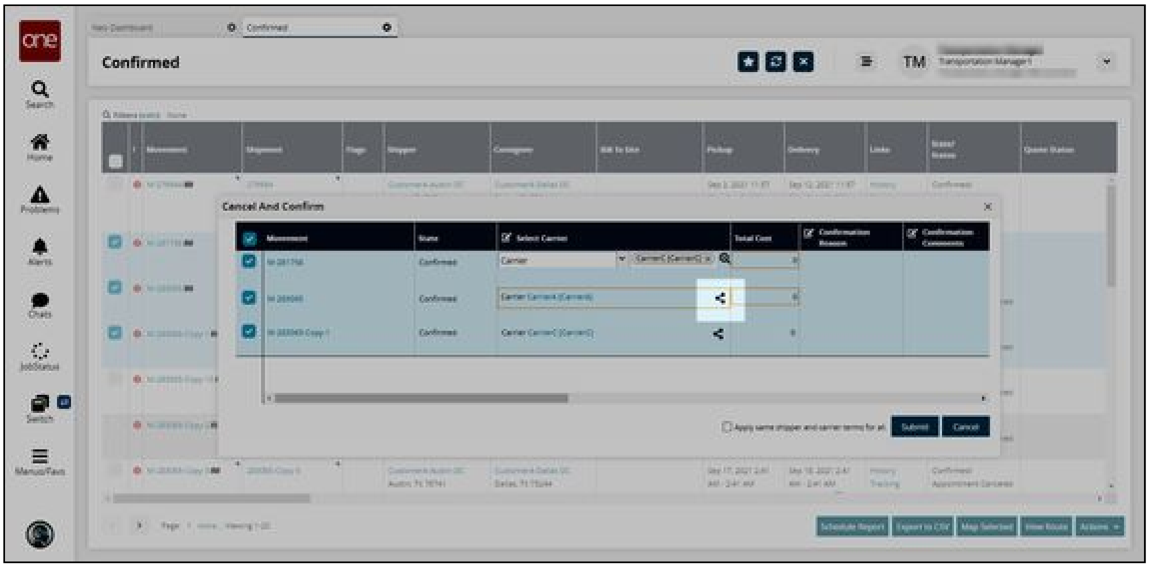
3. Select multiple movement checkboxes and then click the **Actions** button.
4. Click either **Save to Confirmed** or **Cancel and Confirm**.



The selected popup appears. In this example, the Cancel and Confirm popup.



5. Click the **Apply cell value to all** icon.
   Clicking this icon on any given row copies that row's carrier to all other rows.



6. Click **Submit**.
   A success message appears.

> If the user deselects a row in the popup and clicks the icon, all rows will show the carrier change. However, when they click the Submit button, the carrier change only saves to movements that remained selected.

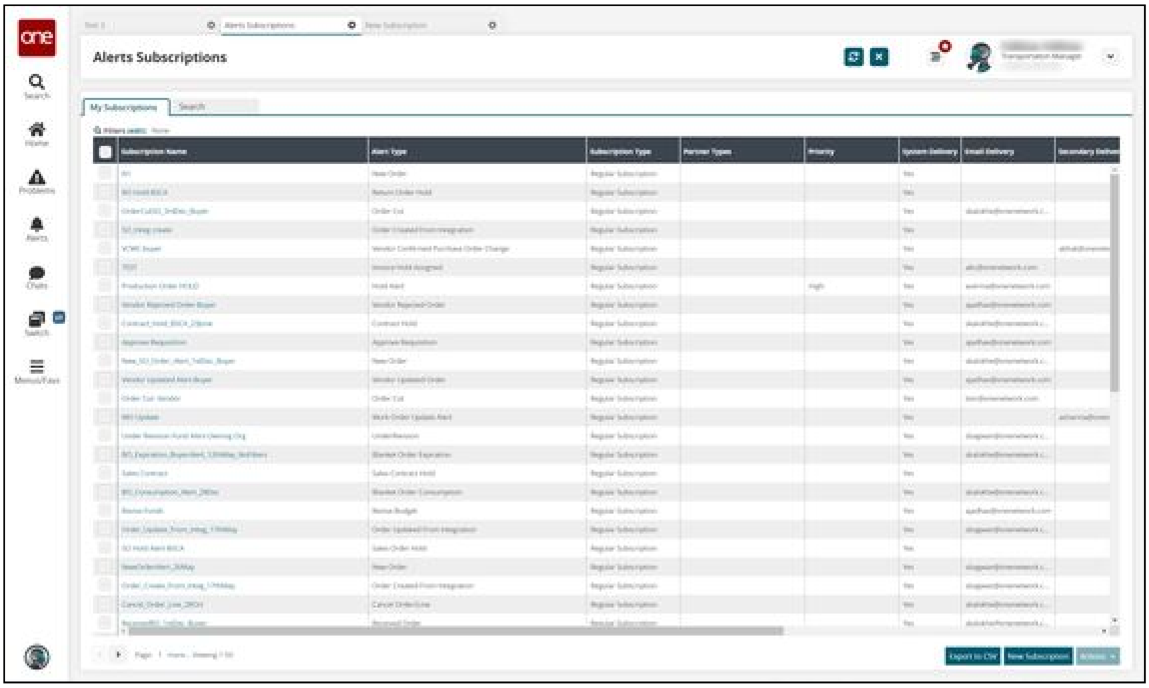
See the ".Copy Carriers when Confirming Multiple Movements vNEO_3.5(see page 11)" section in the current version of the *Release Notes* for more information.

2.3.1.2 Creating an Alert for Contract Rate Expiration

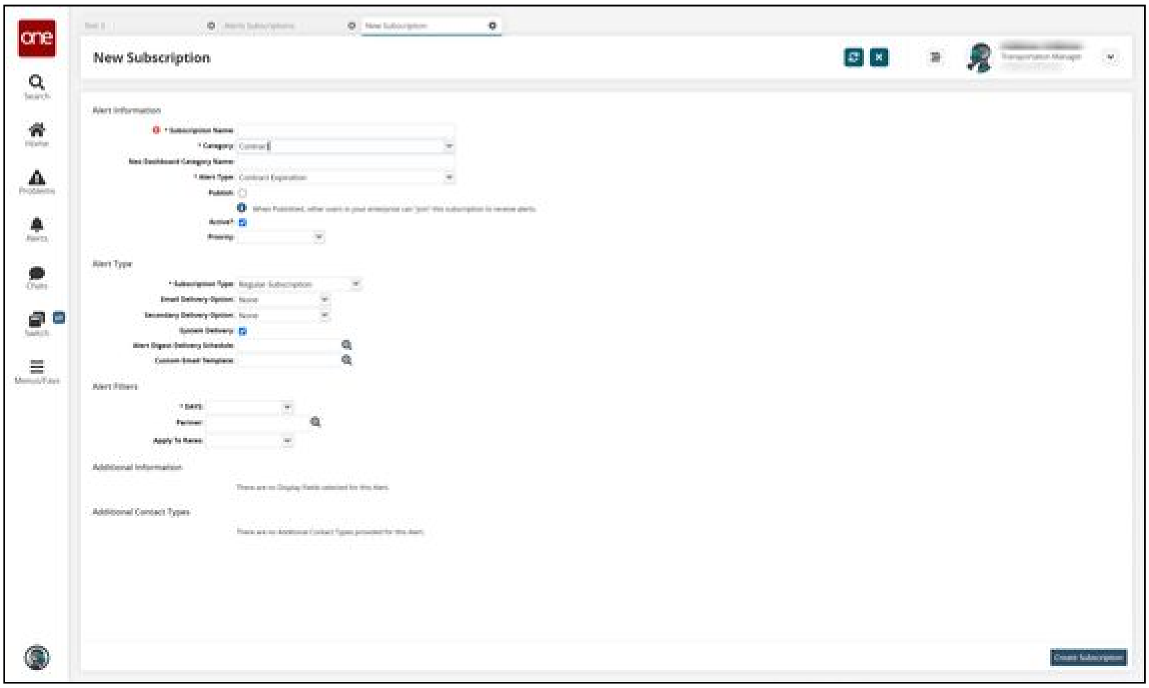
Users can create an alert subscription that will notify them when a contract rate is expiring.

Complete the following steps to create an alert for contract rate expiration:

1. Log in to the ONE system.
2. Click **Menu/Favs > Tools > Alert Subscriptions**.
   The Alert Subscriptions screen appears.



3. Click the **New Subscription** button.
   The New Subscription screen appears.



4. In the **Category** field, select **Contract** from the dropdown list. Selecting Contract makes new fields visible in the Alert Filters section.
5. In the **Alert Type** field, select **Contract Expiration** from the dropdown list.
6. Under the **Alert Filters** section, in the **DAYS** field, select the number of days prior to expiration you want to receive an alert.
7. In the **Partner** field, click the picker tool to select a specific partner if desired.
8. In the **Apply to Rates** field, select **Yes** from the dropdown list.

9. Complete other fields on this screen as necessary. Fields with an asterisk (*) are required. See the "Creating Alert Subscriptions" section of *Online Help* for information about the fields.

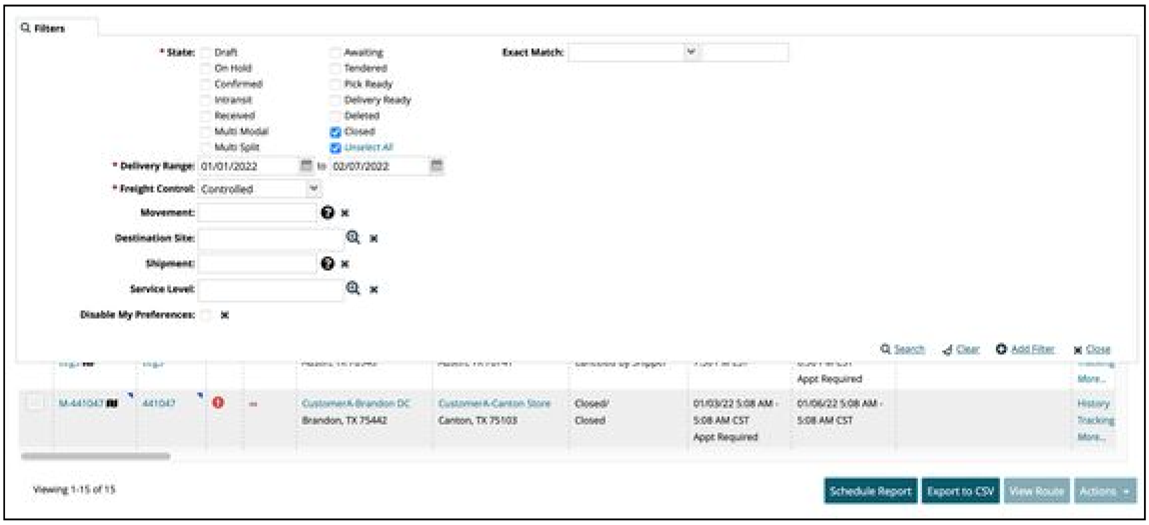
See the "New Alert for Contract Rate Expiration" section in the current version of the *Release Notes* for more information.

2.3.1.3 Overriding Freight Attributes on Closed Shipments

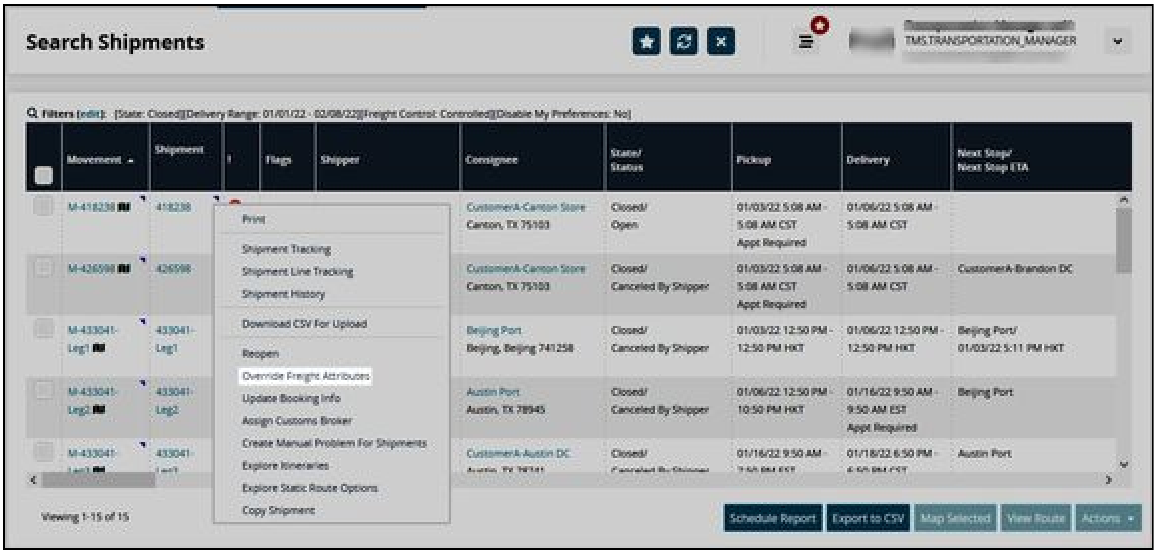
Shippers can now update freight attributes on a shipment even after the shipment is closed in the system.

To update freight attributes on a closed shipment:

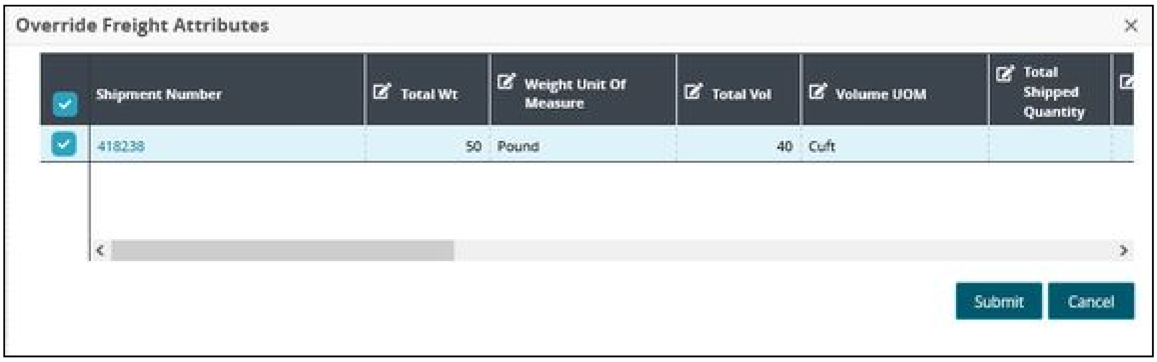
1. Log in to the ONE system.
2. Navigate to **Menus/Favs** > **Transportation** > **Search Shipments**.
   The Search Shipments screen appears with the filters menu open.
3. In the filters menu, select the **Closed** state.
4. Enter a delivery date range.
5. The **Freight Control** field is set to **Controlled** by default. Select **Non Controlled** to search for non-controlled shipments.



6. Click the **Search** link.
   The search results appear.
7. Locate the shipment you are reopening, and click the blue triangle in the upper-right corner of the Shipment (number) cell.
   A context menu appears.



8. Select **Override Freight Attributes** from the context menu.
   The Override Freight Attributes pop-up window displays:



9. Update the desired fields.
10. Click the **Submit** button.

See the "Override Freight Attributes for Closed Shipments" section in the current version of the *Release Notes* for more information.

2.3.1.4 Preserving Shipment Sequence for Static Route Movements

Some movements follow static routes, transportation routes that are commonly traveled and fixed. For these movements, movement stops are always displayed in the stop sequence of the static route. When shipments are consolidated into a static route movement, the following applies:

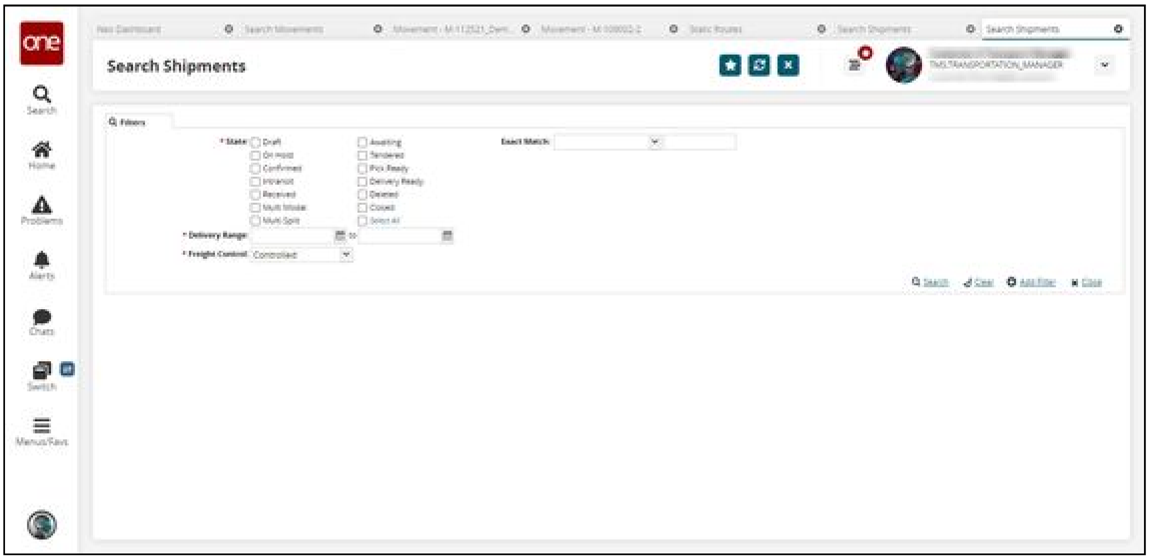
- If the shipment stop matches a stop on the static route, then the shipment is added to the movement and placed in the sequence at its matching stop.
- If the shipment stop does not match a stop on the static route, then the shipment is added to the movement and placed in the sequence next to a stop with the shortest distance with that non-static route stop. Note that a non-matching stop

is not necessarily placed the shortest distance from a static route stop; it may be placed next to another non-matching stop that was added previously.

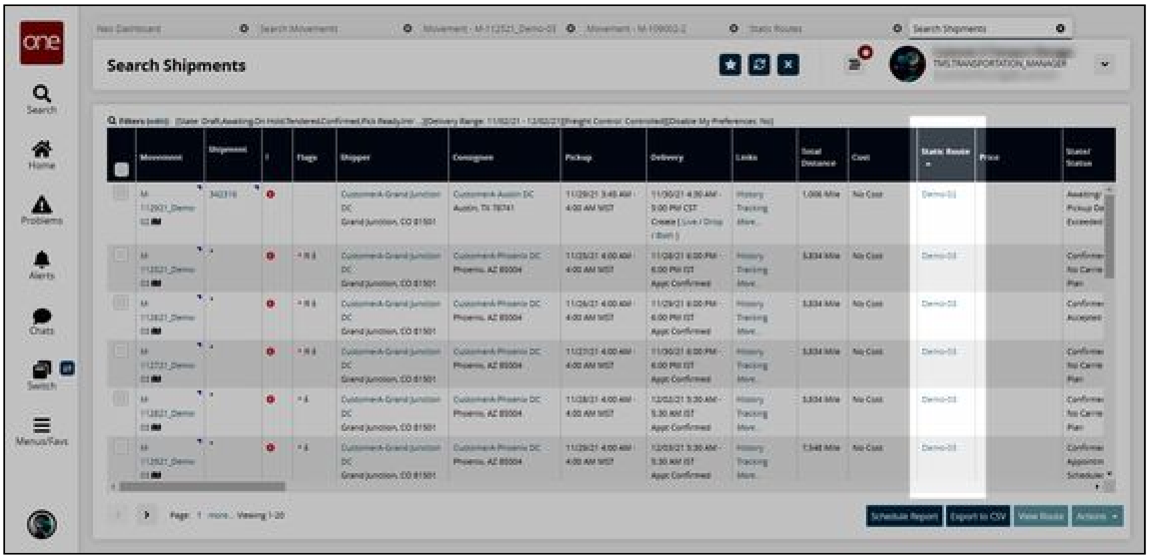
For example, if a static route movement exists with a stop sequence of Los Angeles to Dallas to New York City, these three stops will never be rearranged with respect to one another. When a new shipment is consolidated into the movement with a stop in Las Vegas, it is placed in the sequence next to the stop the shortest distance away (Los Angeles), but the overall order of the "tentpole" stops remains constant.

Complete the following steps to view the stop order for a static route movement and add additional stops:

1. Log in to the ONE system.
2. Click **Menu/Favs > Transportation > Search Shipments**.
   The Search Shipments screen appears with the filters visible.

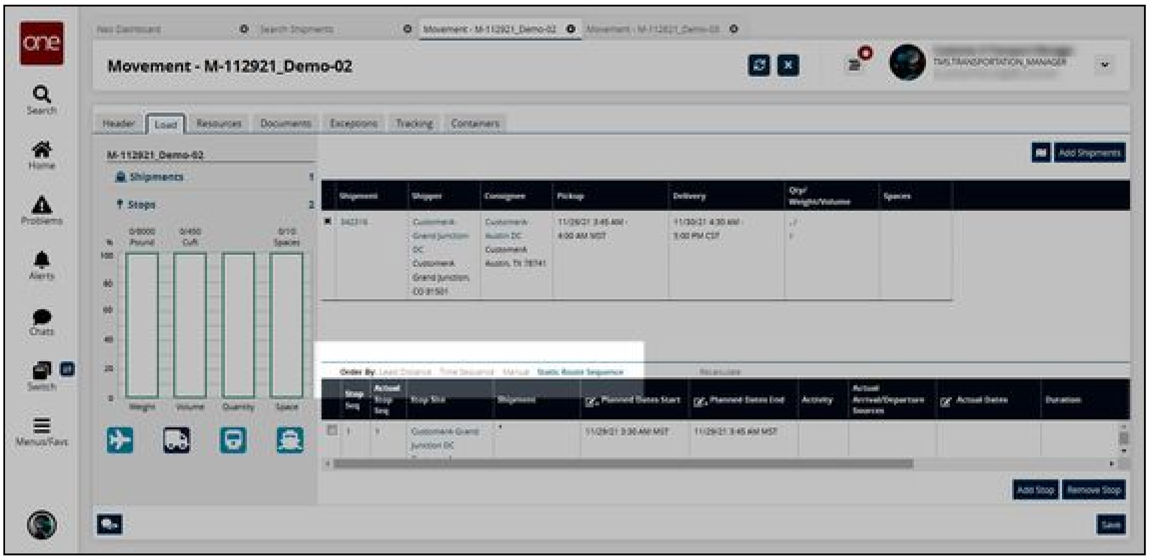


3. Select the desired filter parameters and click **Search**. See the "Searching Shipments" section in the *Online Help* for more information.
   The search results appear.
4. Sort the **Static Route** column to view movements that follow static routes.

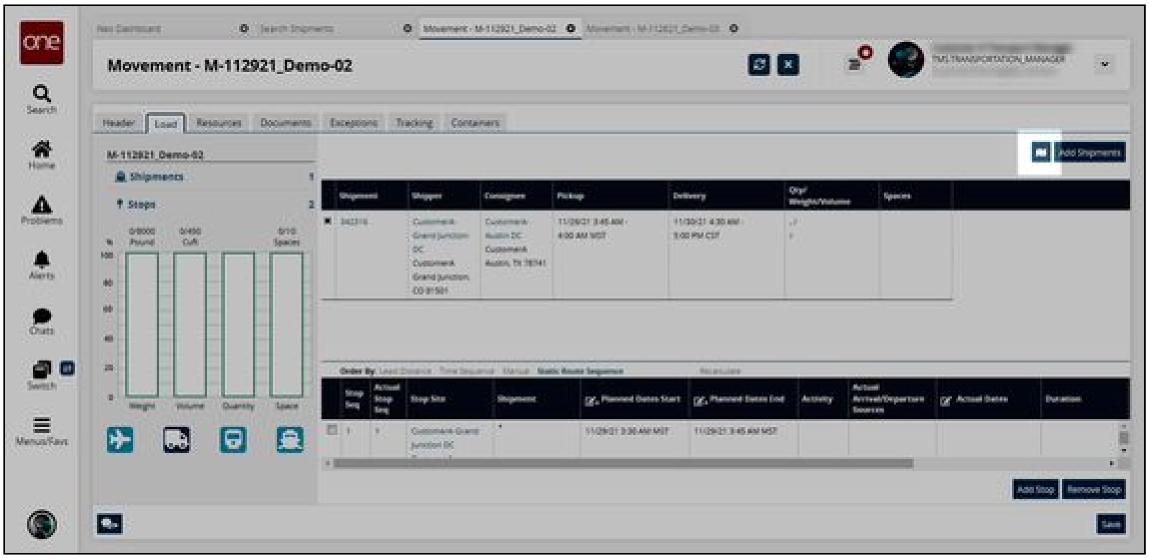


5. In the **Movement** column, click a link for a static route movement.
   The movement details screen appears.
6. Click the **Load** tab.

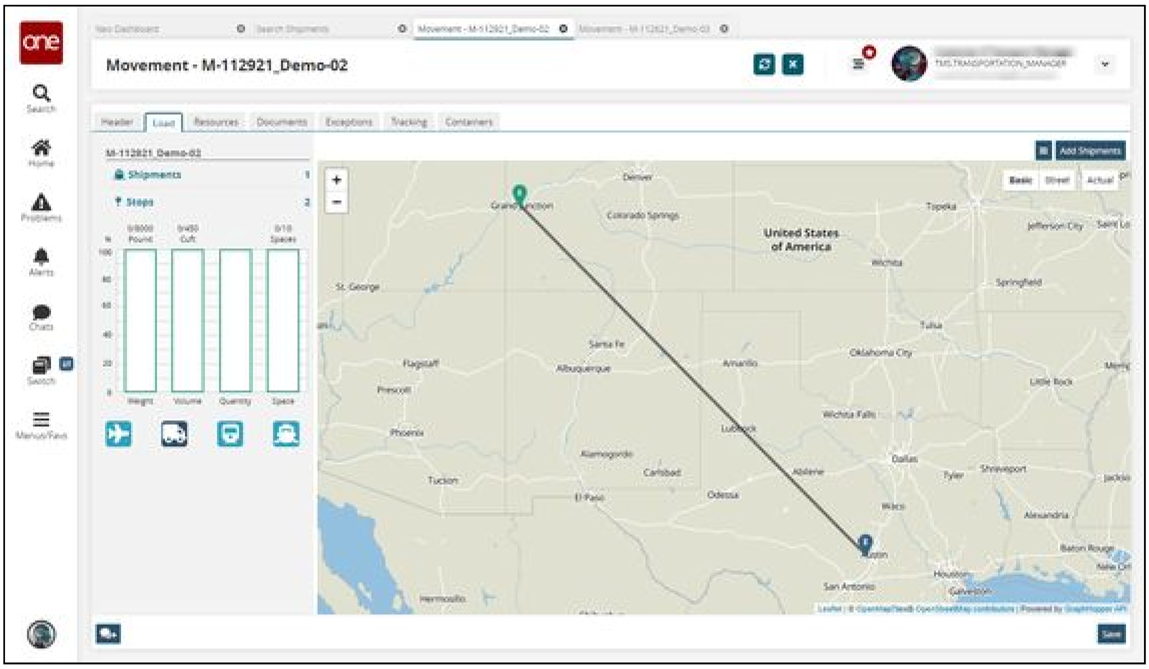
> Note the Static Route Sequence option is permanently selected as the Order By option and the other three options are greyed out and not selectable. This is the expected behavior for static route movements. For non-static route movements, the reverse is true; the Static Route Sequence option is greyed out and not selectable and the Least Distance, Time Sequence, and Manual options are all available.



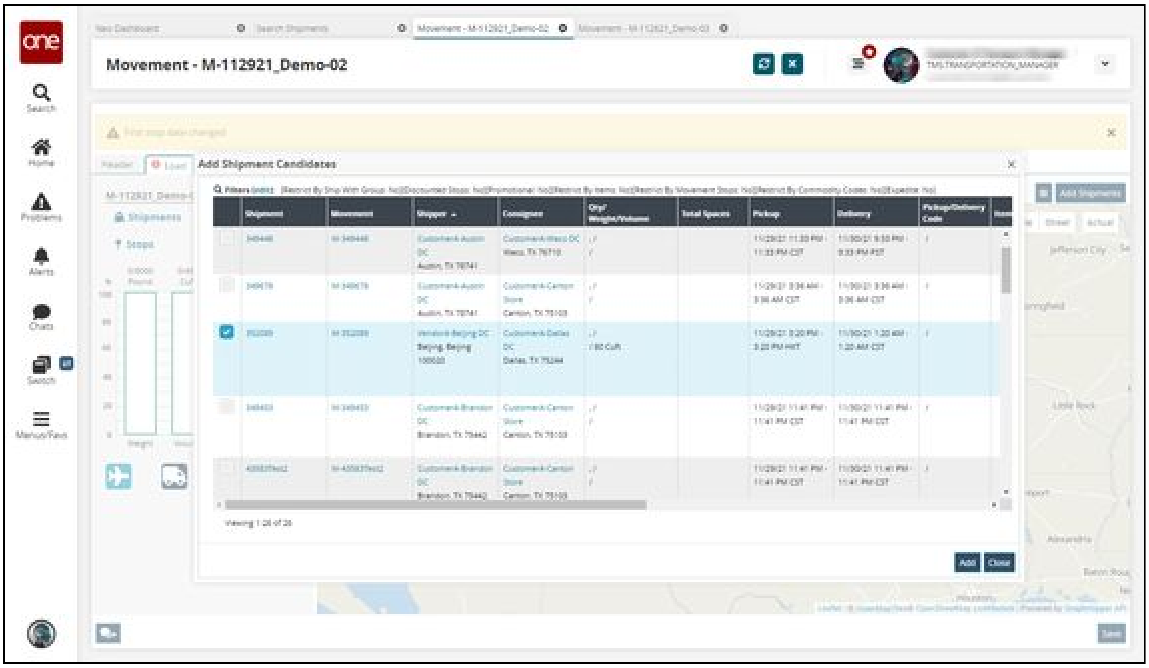
7. Click the map icon to view a map of the movement.



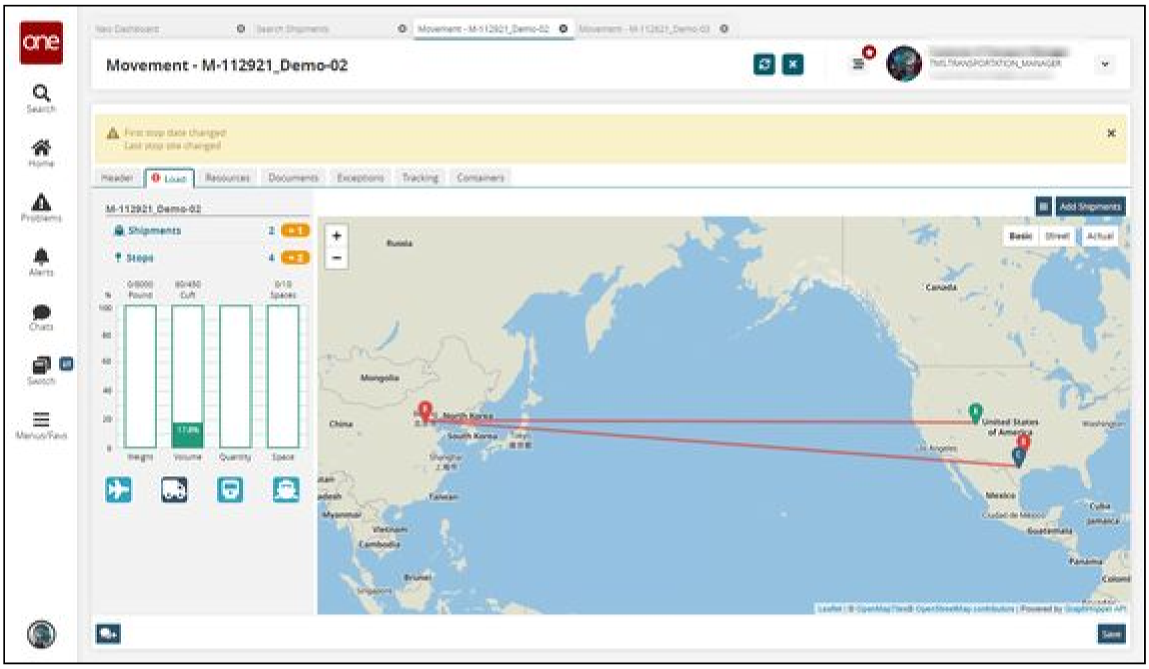
The map appears. This static route movement is set between Grand Junction, CO and Austin, TX.



8. Click the **Add Shipments** button to consolidate shipments into this movement. The Add Shipment Candidates popup appears.



9. Select a shipment and then click **Add**.
   The map updates.



Note that the route of the static route movement is now Boulder to Beijing to Austin to Dallas. This is an impractical example, but it illustrates how the system behaves. The sequence of the original static route (Boulder to Austin) is preserved. Beijing is geographically closest to Boulder and was therefore placed next in the sequence. Continuing this logic, Austin is the next closest site and then Dallas.

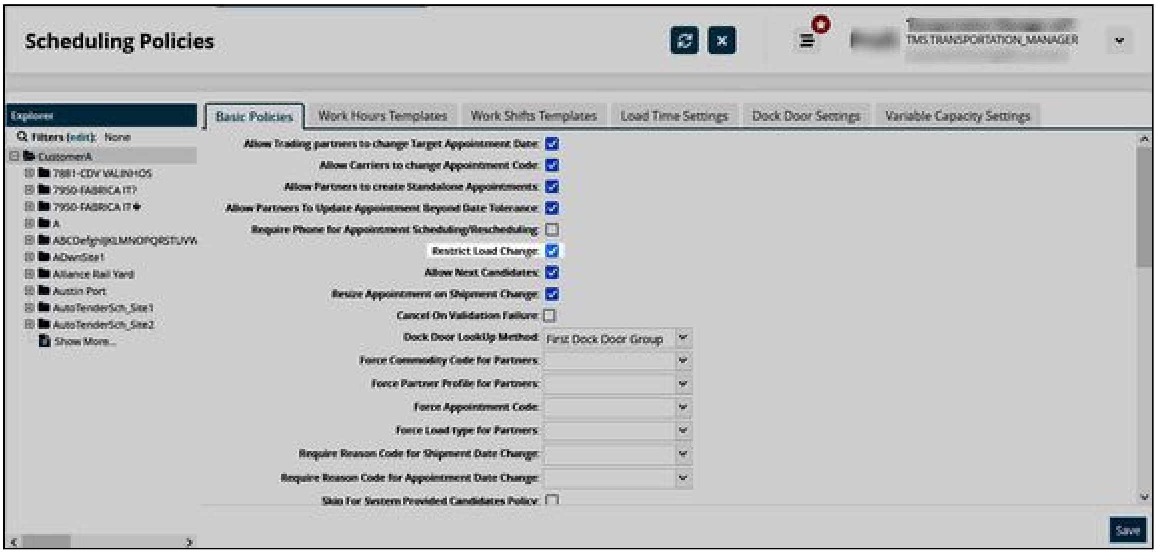
See the "Shipment Sequence for Static Route Movements Matches Static Route" section in the current version of the *Release Notes* for more information.

2.3.1.5 Restricting Load Changes in Scheduled Shipments

Users can restrict changes to shipment loads after the shipment is confirmed, and an appointment is in place for it. The restrictions can be enforced either at the organization level or at the site level.

Complete the following steps to restrict Shipment Load Change at the Organization level:

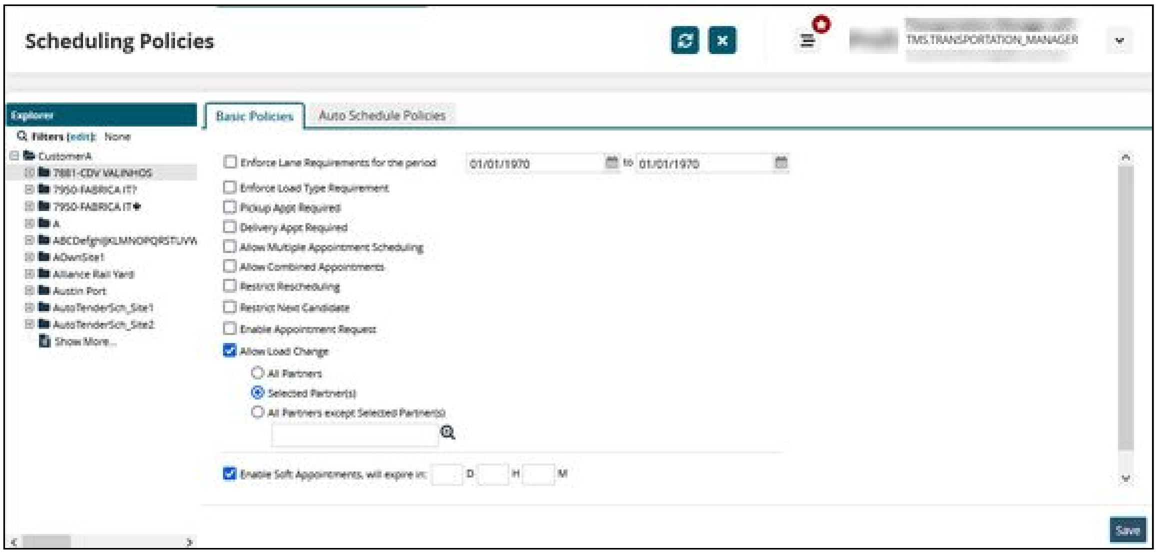
1. Log in to the application as a Transportation Manager.
2. Click **Menus/Favs** > **Scheduling** > **Scheduling Policies**.
   The Scheduling Policies screen appears.
3. Click the organization name.
   The organization-level scheduling policies appear.



4. On the **Basic Policies** tab, select the **Restrict Load Change** policy check box to enable it.
5. Click the **Save** button.
   The policy will apply to all sites within the selected organization except those sites where site-level load restrictions apply.

Complete the following steps to restrict Shipment Load Change at the site level:

1. Log in to the application as a Transportation Manager.
2. Click **Menus/Favs** > **Scheduling** > **Scheduling Policies**.
3. Click the desired site name.
   The site-level scheduling policies appear.



4. Select the **Allow Load Change** policy check box to configure the following load change restrictions for the site:

Field	Description
All Partners	Allow all partners to make load changes.
Selected Partner(s)	Allow only the selected partners to make load changes. To specify partners, type partner names in the field below or use the picker tool to select partners.
All Partners except Selected Partner(s)	Allow all partners except the selected ones to make load changes. To specify partners, type partner names in the field below or use the picker tool to select partners.

5. Click the **Save** button.

See the "Policies to Restrict Shipment Load Changes" section in the current version of the *Release Notes* for more information.

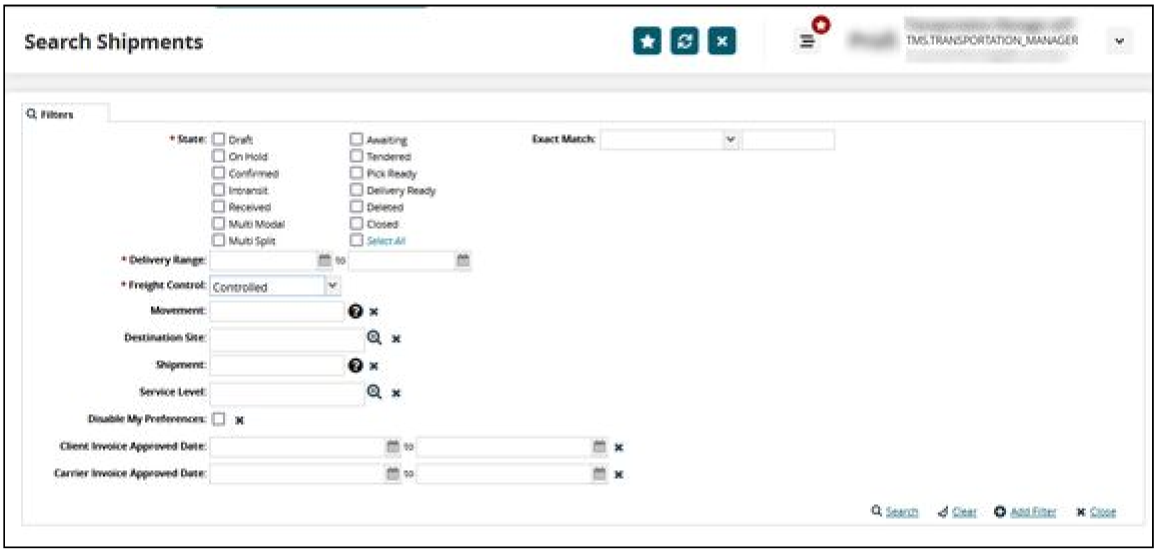
2.3.1.6 Searching Shipments Within an Invoice Date Range

Users can search all shipments with client or carrier invoice approvals within a specific date range to see all the invoiced jobs for business analytics.

Complete the following steps to search shipments with approved invoices within the specified date range:

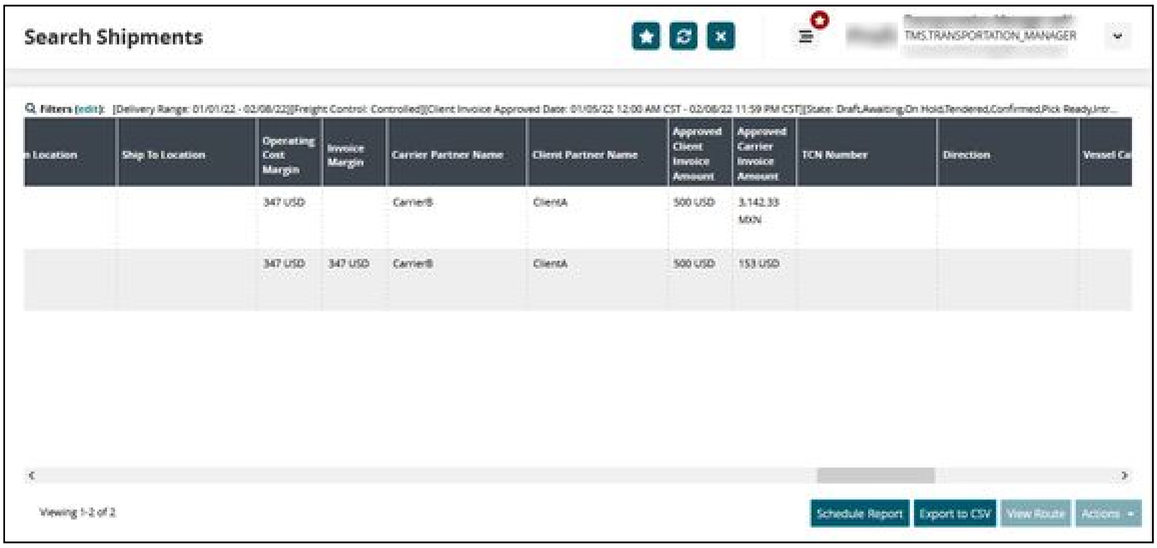
1. Log in to the ONE system as a Transportation Manager.

2. Click **Menus/Favs** > **Transportation** > **Search Shipments**.
   The Search Shipment screen with filters appears.



> **Note**
>
> If you do not see the **Client Invoice Approved Date** and **Carrier Invoice Approved Date** filters, click the **Add Filter** link and select these filters to display them in the Filters section.

3. Enter values for the mandatory fields like **State**, **Delivery Range**, and **Freight Control**. For more information on searching shipments and using the filter fields, see the "Searching Shipments" section in the current version of *Online Help*.
4. In the **Client Invoice Approved Date** fields, enter the client invoice approval date range to search for shipments with approved client invoices.
5. In the **Carrier Invoice Approved Date** fields, enter the carrier invoice approval date range to search for shipments with approved carrier invoices.
6. Click **Search**.
   The Search Shipments report appears with relevant shipments.



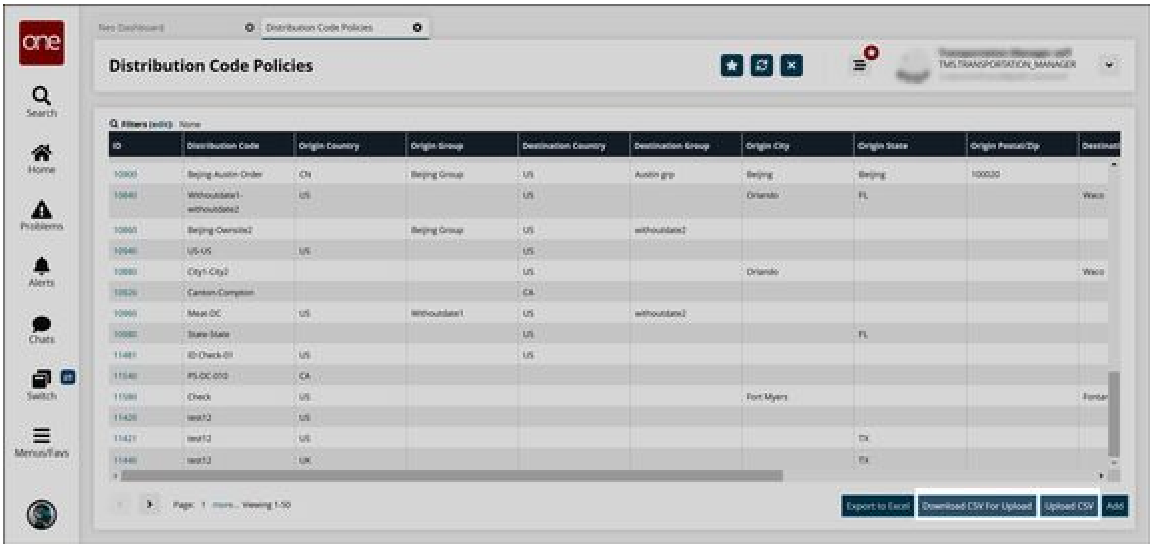
See the "Filter Shipments by Invoice Approval Date Range" section in the current version of the *Release Notes* for more information.

2.3.1.7 Uploading Distribution Code Policies through CSV File

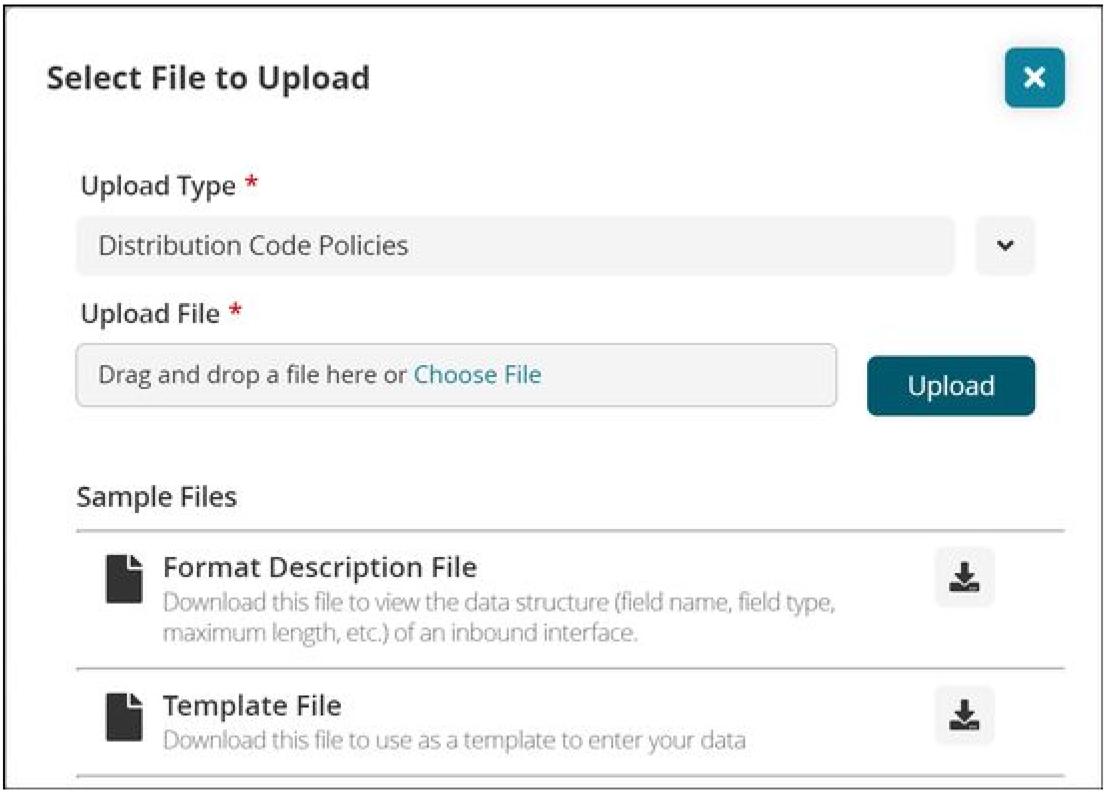
Users can update the existing Distribution Code policies through CSV files on the Distribution Code policies screen.

Complete the following steps to upload Distribution Code policies through a CSV file:

1. Log in to the ONE system.
2. Click **Menus/Favs** > **Financials** > **Distribution Code Policies**.
   The Distribution Code Policies screen appears with a list of records.



3. Click **Download CSV For Upload** to download the existing policies in the CSV format.
   The CSV file starts downloading to your computer.
4. After the download is complete, edit the CSV file as desired.
5. Click the **Upload CSV** button to upload the updated CSV file.
   The dialog box appears to upload the file.
6. Click the **Choose File** link to select the CSV file.
7. Click **Upload** to upload the file.



A success message appears.

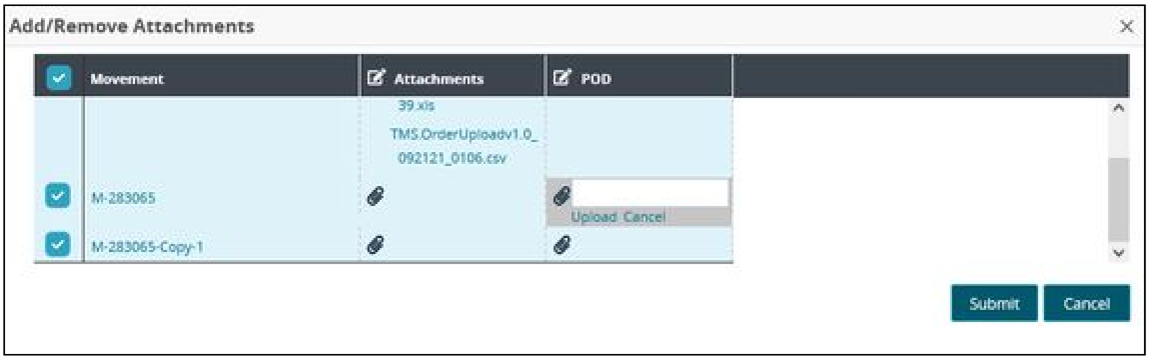
See the "Distribution Code Policy CSV Upload and Download" section in the current version of the *Release Notes* for more information.

2.3.1.8 Uploading Proof of Delivery to Multiple Movements

This topic describes how users can upload one or more proof of delivery (POD) documents for multiple movements at one time. The Add/Remove Attachments window can be accessed from the Actions menu on several screens like Search Movements, Search Shipments, and all shipment state reports (except Draft). In this topic, we will use the Confirmed Shipment state report as an example.

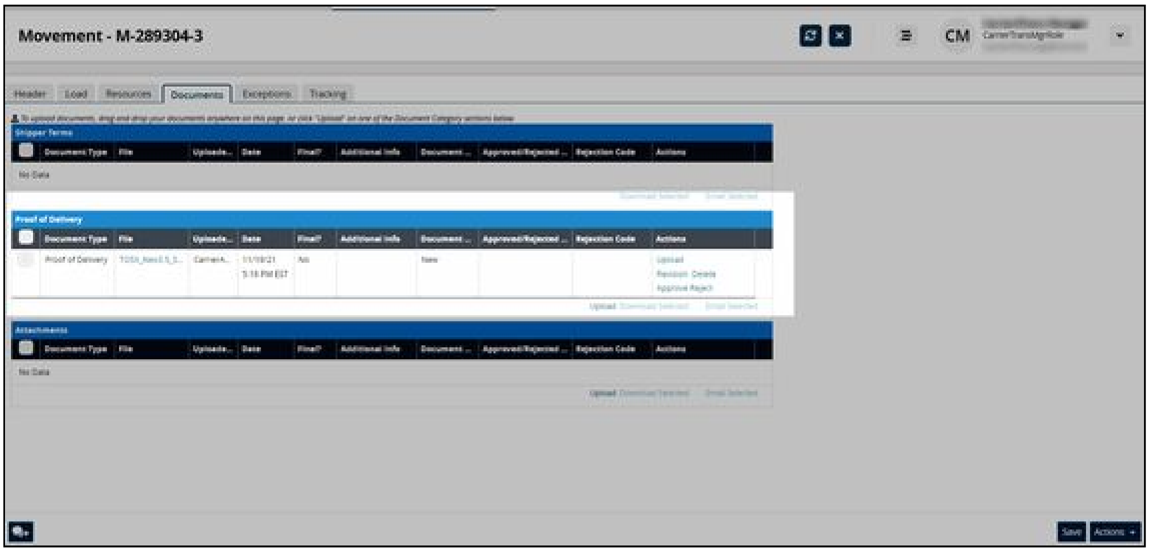
Complete the following steps to upload POD for multiple movements:

1. Log in to the ONE system.
2. Select **Menu/Favs > Transportation > Confirmed**.
   The Confirmed screen appears.
3. Select multiple movements and then click **Actions > Add/Remove Attachments**.
   The Add/Remove Attachments popup appears.



4. Scroll down to the movement record and click in the **POD** column.
5. Click **Upload** and attach a document from your computer.
   Documents for multiple movements can be added within this popup. Multiple POD documents can also be added to one movement.
6. Click **Submit**.
   A success message appears.
7. Click the **Close and Refresh** button.
   The Confirmed screen updates.

> The uploaded POD document also appears under the Documents tab on the Movement Details page.



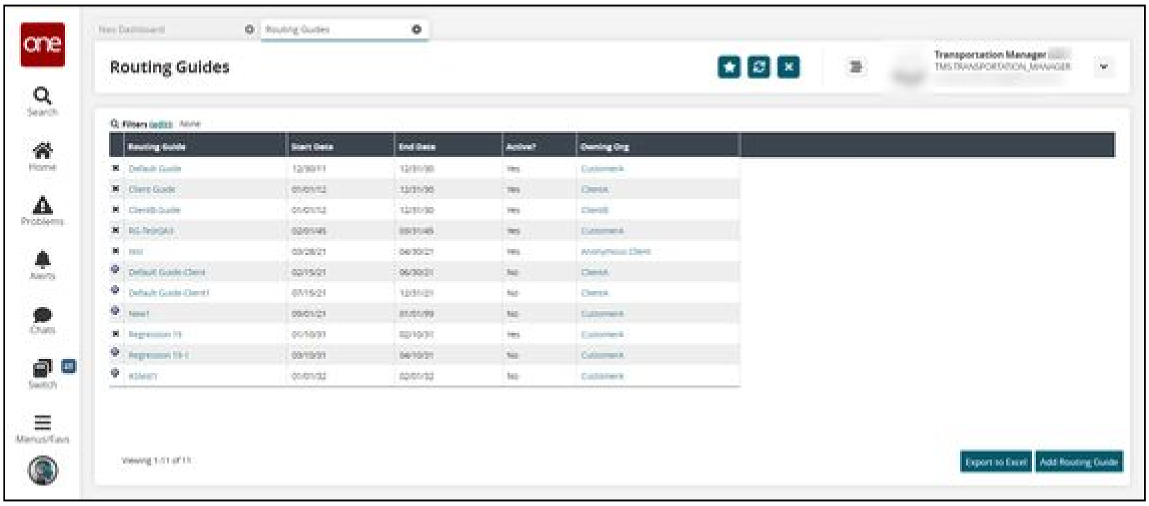
See the "Uploading Proof of Delivery for Multiple Movements" section in the current version of the *Release Notes* for more information.

2.3.1.9 Viewing Audit Trail for Routes and Route Carriers

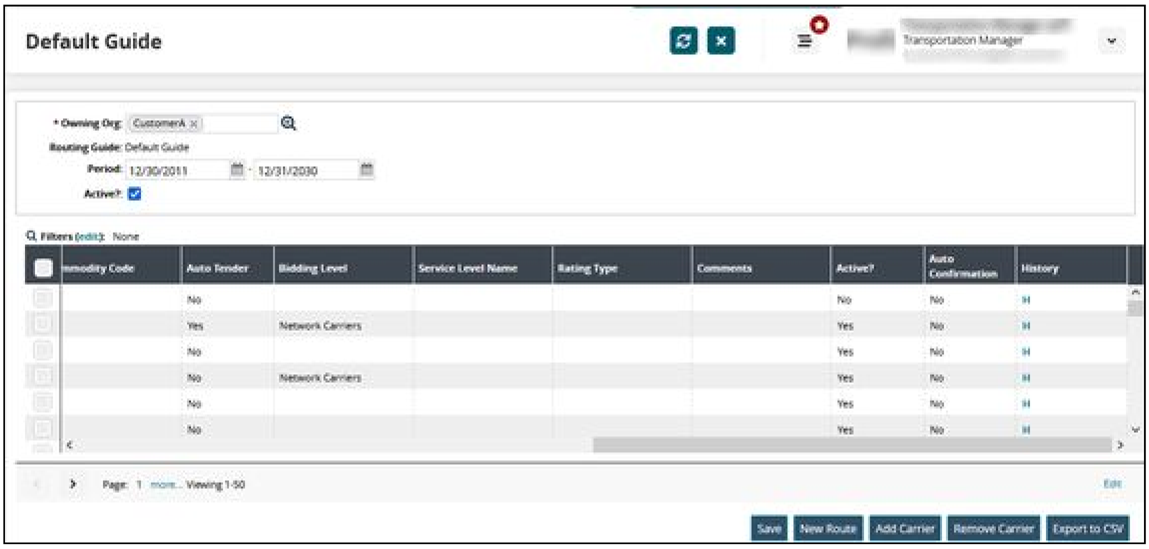
Users can view audit trails for routes under a routing guide and view carriers associated with the selected route.

Complete the following steps to view route and routing guide history:

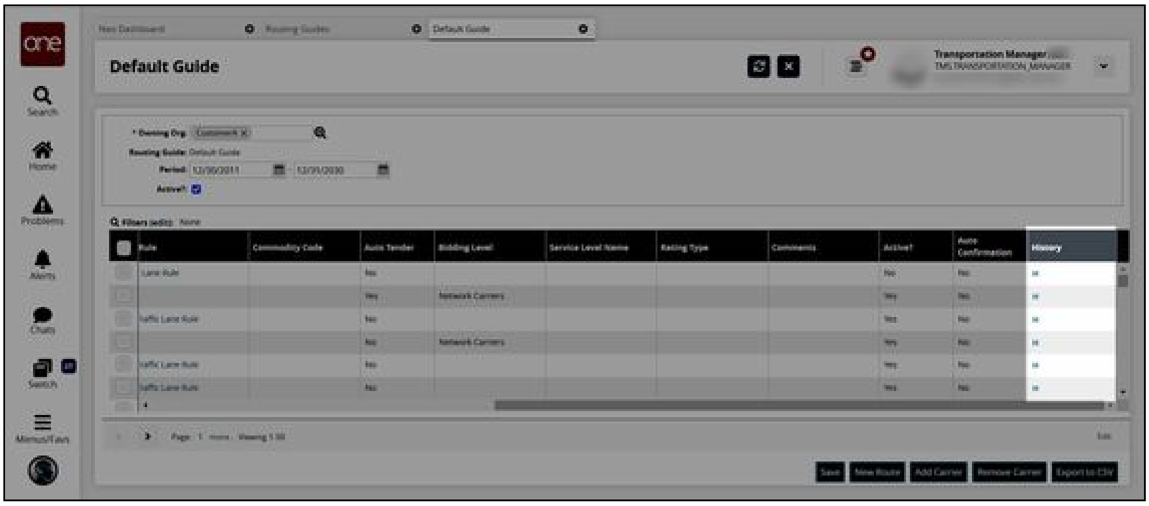
1. Log in to the ONE system as a Transportation Manager.
2. Click **Menus/Favs** > **Contract Management** > **Routing Guides**.
   The Routing Guides screen displays.



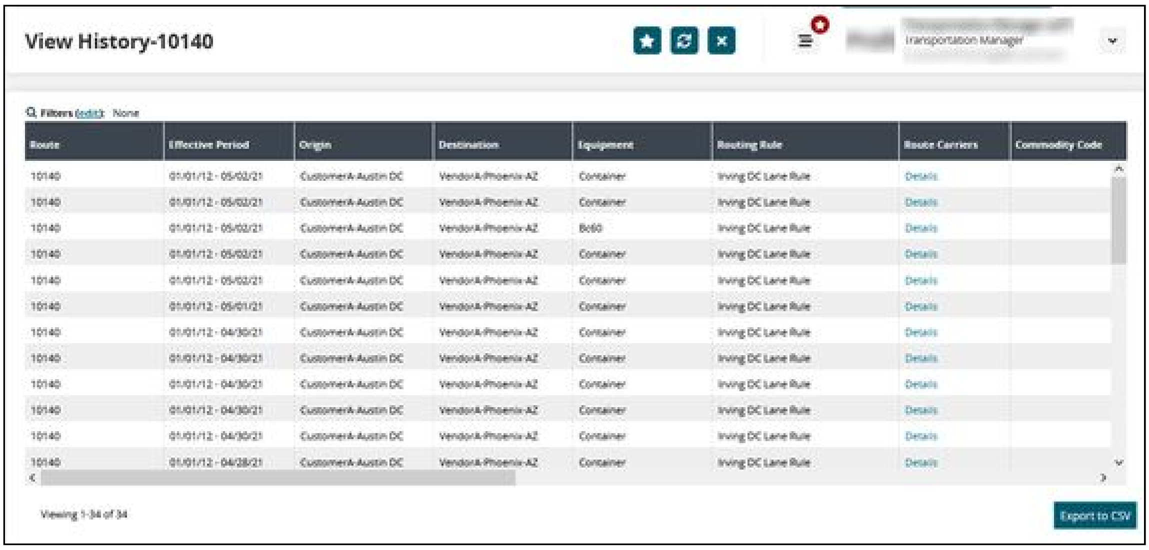
3. in the **Routing Guide** column, click a routing guide name link.
   The Routing Guide details screen appears.



4. Scroll to the right and click the **H** link under the **History** column.



The route history appears.



5. Click the **Export to CSV** button to download the list in Excel format.
6. In the **Route Carriers** column, click a details link to view the route carrier details.

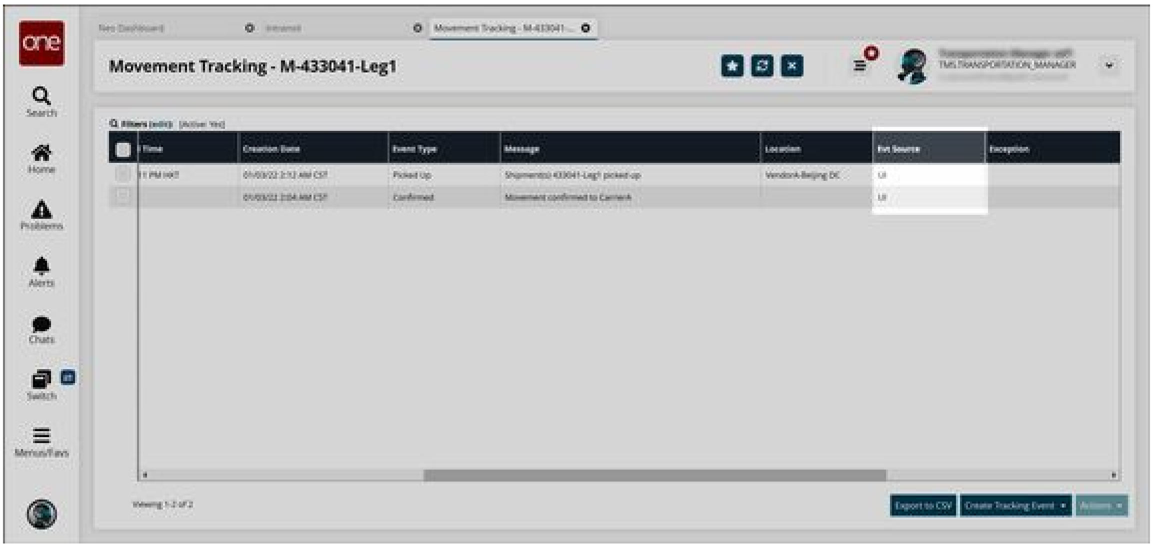
See the "Audit Trails for Routes and Route Carriers" section in the current version of the *Release Notes* for more information.

2.3.1.10 Viewing Event Source of Shipment or Movement

Users can view the event source of the tracking event triggered on the shipment/movement on the tracking screens.

Complete the following steps to view the event source of the shipment/movement action:

1. Log in to the ONE system.
2. Search the desired shipment using the global search option or using one of the shipment state reports.
   The search result appears.
3. To view the movement tracking screen click the triangle icon under the Movement column, and click the **Movement Tracking** option. To view the shipment tracking screen, click the triangle icon under the Shipment column and click the **Shipment Tracking** option. In the example below, we are looking at movement tracking.
   The Movement Tracking screen appears.



4. View the event sources under the **Evt Source** column.

See the "Ability to View the Source of a Movement/Shipment Event" section in the current version of the *Release Notes* for more information.

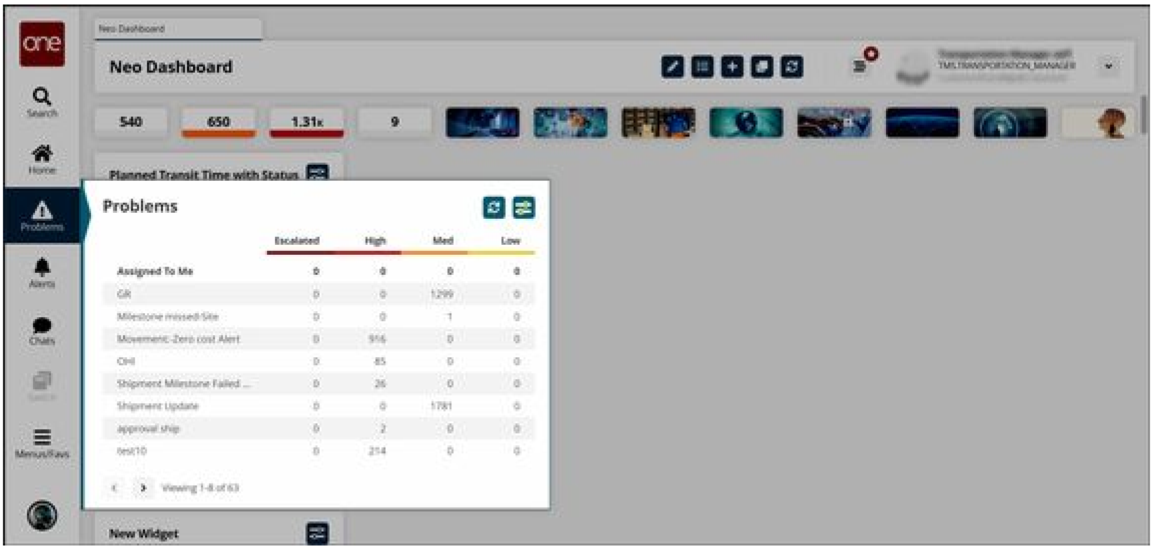
2.3.1.11 Working with Problems

Viewing Shipment Problem Details

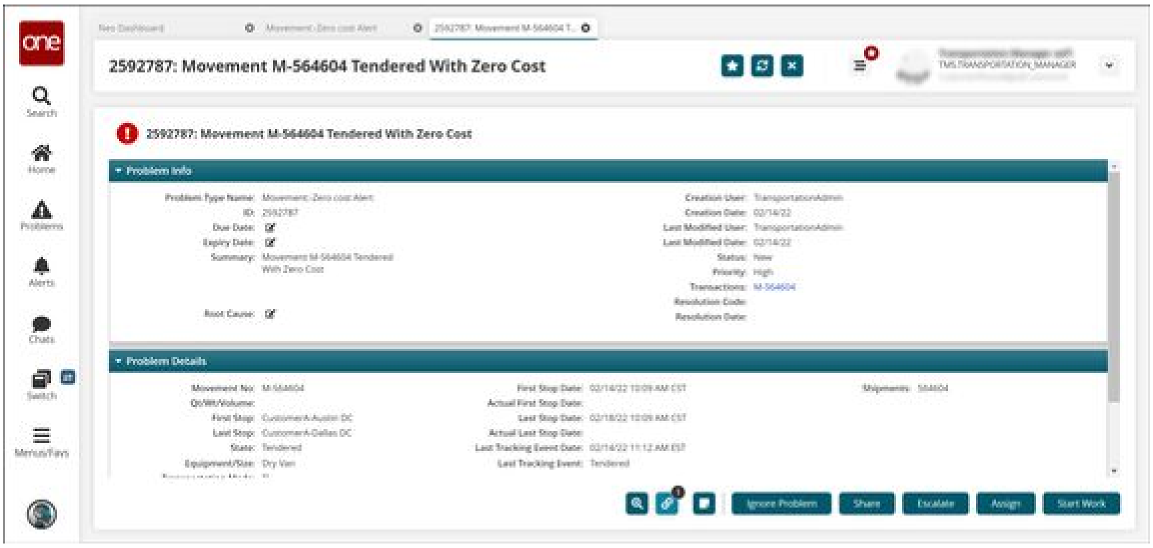
Users can access the problems details screen of the shipment using two options, using the Problems icon on the Dashboard screen and through the shipment details screen. This section describes both procedures to access the problem details screen.

Option 1: Using the Problems icon
Complete the following steps to view problem details of a shipment:

1. Log in to the ONE system.
2. Click **Problems** in the left sidebar.
   The Problems slide-out displays with a list of shipment-related problems categorized by severity (Escalated, High, Med, and Low).



3. Click the count link under a category to open the report screen.
   The problem report screen appears.
4. Click the problem name link.
   The problem details screen appears.

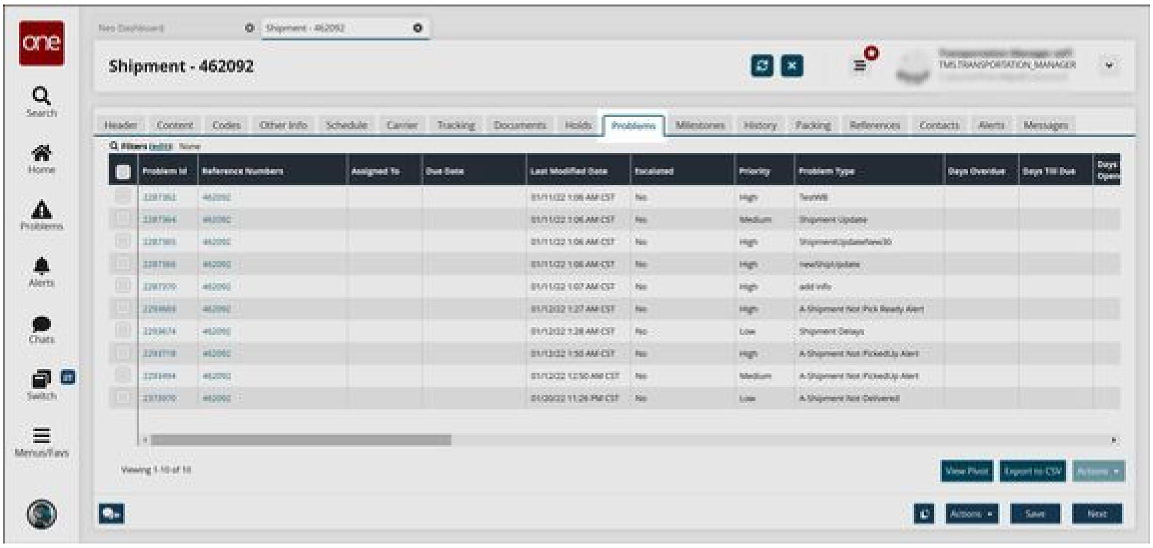


Option 2: Using the Shipment details screen

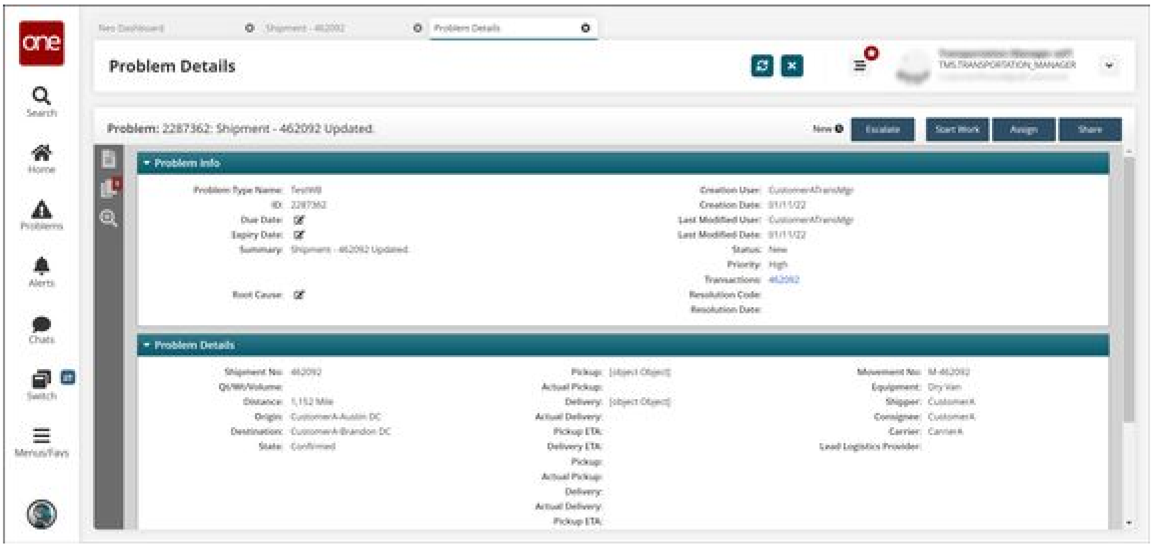
Complete the following steps to view problem details of a shipment:

1. Log in to the ONE system.
2. Search the desired shipment using the global search method.
   The search result screen appears.
3. Click the shipment number link to view the details.
   The Shipment details screen appears.

4. Click the **Problems** tab.
   A list of problems appears.



5. Click the **Problem ID** link to view details.
   The problem details screen appears.



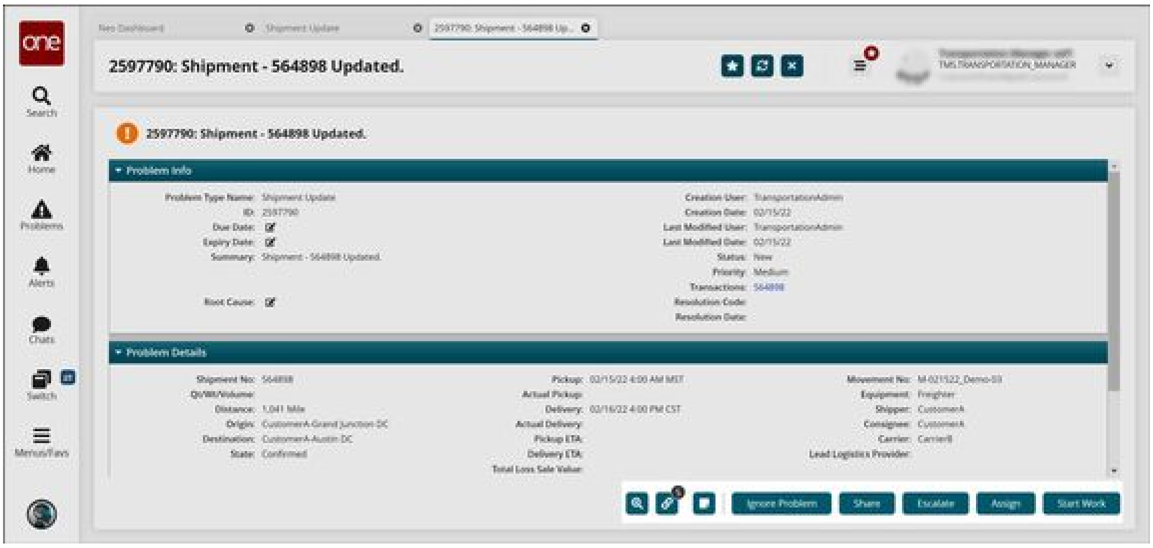
See the "Enhancements to the Problem Details Screen" section in the current version of the *Release Notes* for more information.

Working with Shipment Problems

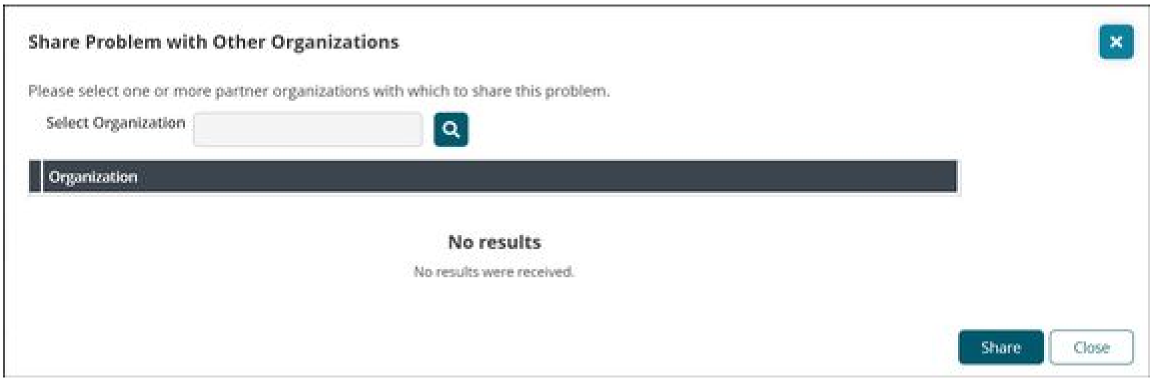
Users can perform various actions on problems such as Share, Escalate, Start Work, and Assign. This section describes each action in detail.

Complete the following steps to perform actions on the shipment problems:

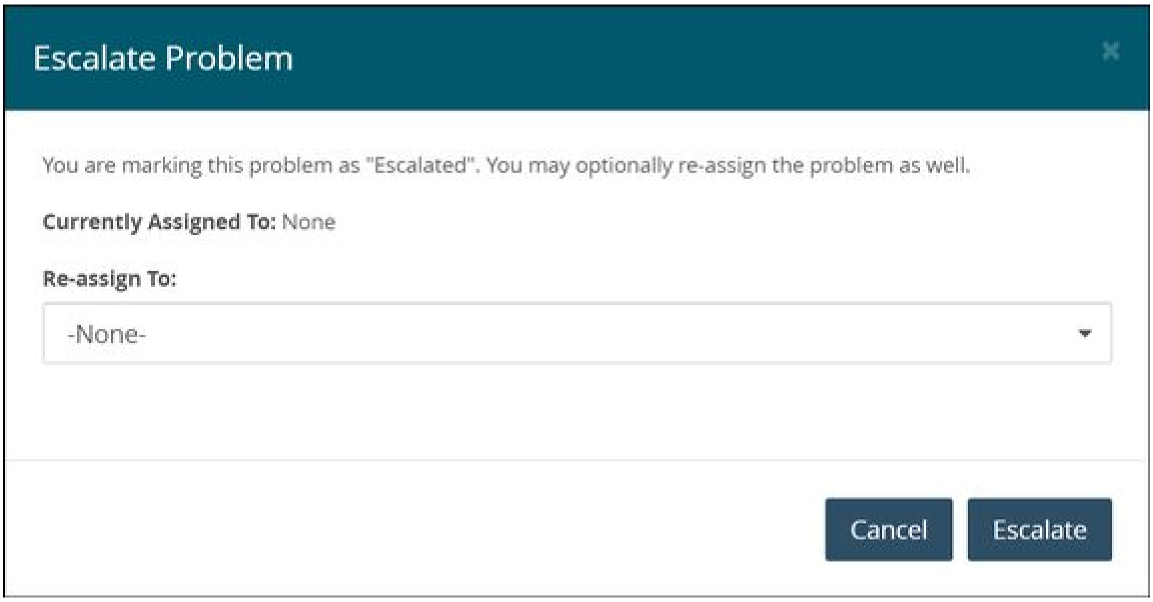
1. Log in to the ONE system.
2. Open the problem details screen using the procedure described in the Viewing Shipment Problem Details (see page 29)section.
   The Problem details screen appears.



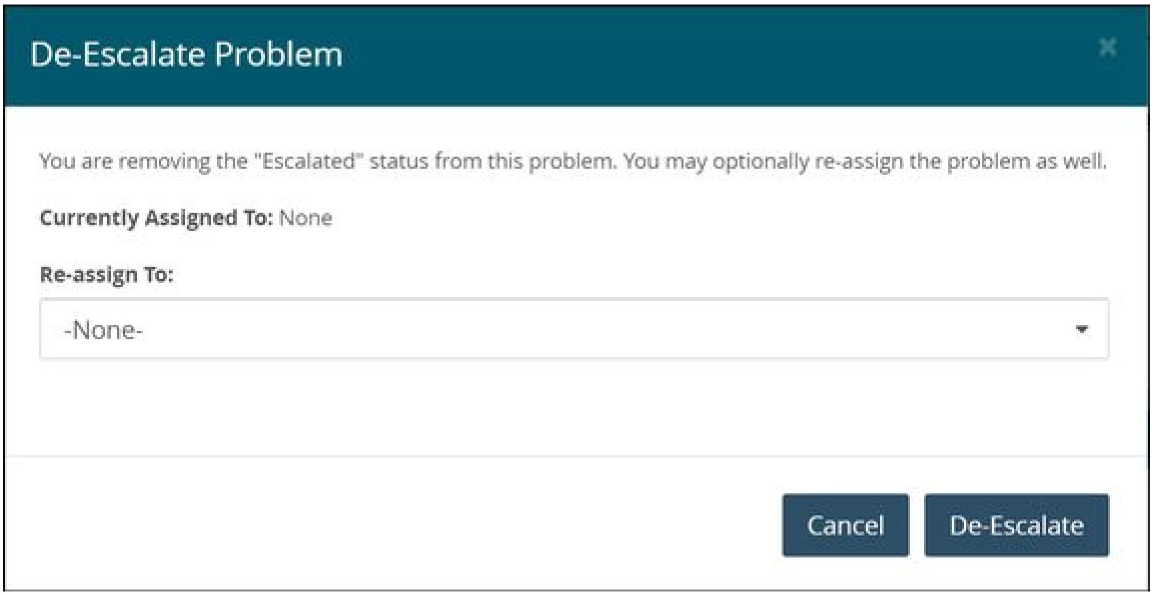
3. Click the **Audit** button ( ) to view the audit trail of the problem.
4. To close the problem, click **Ignore Problem**.
5. Click the **Share** button to share the problem with other organizations.
   The Share Problem with Other Organizations pop-up window appears.



6. Select the desired organizations using the picker tool.
7. Click **Share**.
   The Collaboration section appears for each organization on the Problem details screen.
8. Click **Escalate** to escalate the problem.
   The Escalate Problem pop-up window appears.

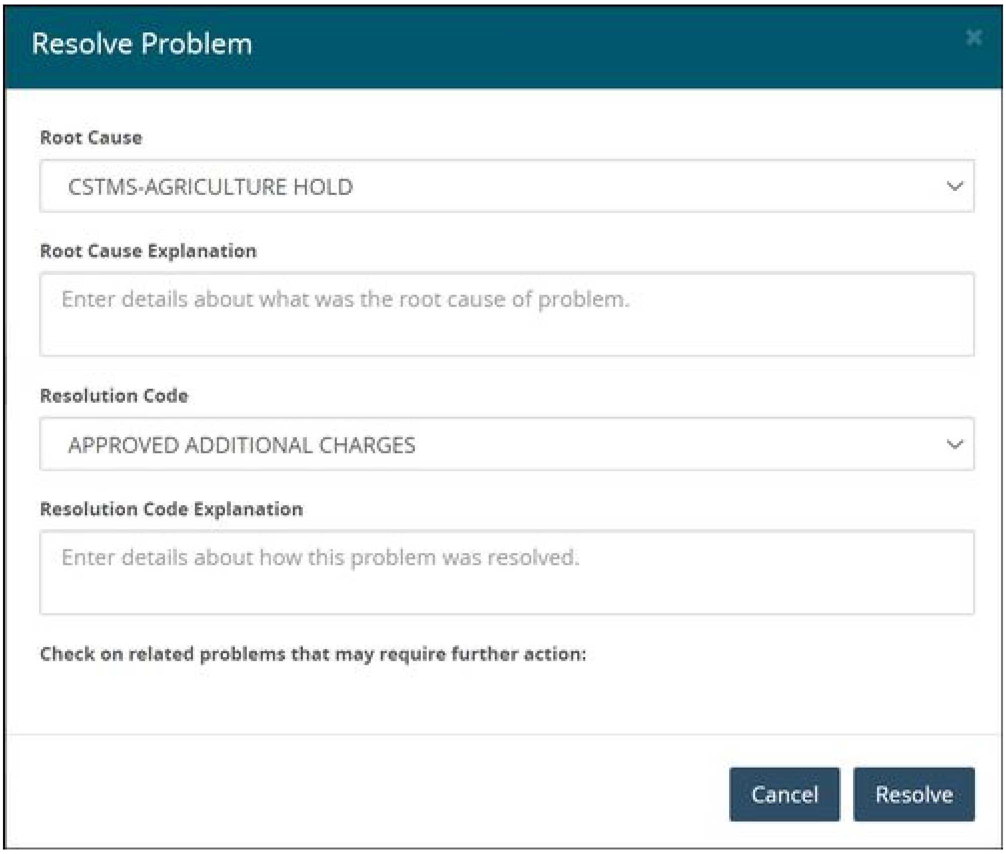


9. Optionally, re-assign the problem to another user by selecting their username from the dropdown list.
10. Click **Escalate**.
11. Click **De-Escalate** to cancel the escalation process.
    The De-Escalate Problem pop-up window appears.



12. Optionally, re-assign the problem to another user by selecting their username from the dropdown list.
13. Click **De-Escalate**.
14. Click **Assign** to assign the problem to the desired user.
    The Assign Problem pop-up window appears.

15. Select the desired user from the dropdown list.
16. Click **Assign**.
    The Problem details page updates with the new information.
17. Click **Start Work** to start working on the problem.
18. Click **Resolve** to resolve the problem.
    The Resolve Problem pop-up window appears.



19. For the **Root Cause** and **Resolution Code** fields, select the desired values from the dropdown list.

20. Enter description of the root cause and resolution code in the **Root Cause Explanation** and **Resolution Code Explanation** fields.
21. Click **Resolve**.
    The Problem updates.

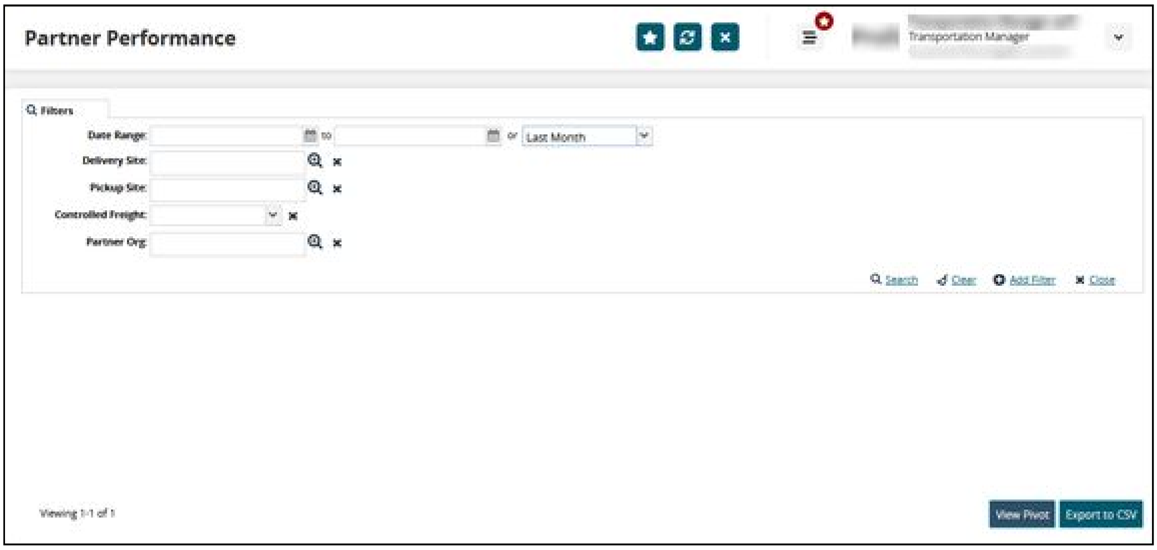
See the "Enhancements to the Problem Details Screen" section in the current version of the *Release Notes* for more information.

2.3.1.12 Viewing Partner Performance Report

Transportation users can view the past performance of carrier partners in the Partner Performance Report.

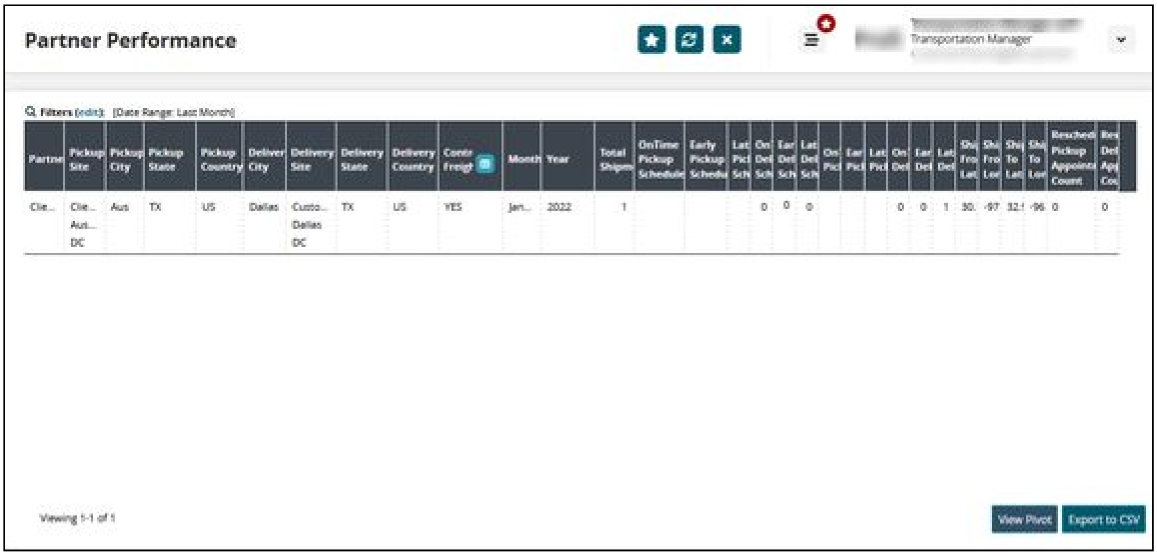
Complete the following steps to access the report:

1. Log in to the ONE system as a Transportation Manager.
2. Click **Menus/Favs** > **Reports** > **Analyze** > **Partner Performance**.
   The Partner Performance screen displays.



> **Tip**
>
> If the Filters section does not display by default, click the **Filters** link to open it.

3. Fill in fields for the desired filters and click **Search** to search for partner performance details.
   The report displays past performance details.



4. Click **View Pivot** to view the report as a chart.
5. Click **Export to CSV** to download the report as a CSV file.

See the "Display Rescheduled Appointment Count on Partner Performance Report" section in the current version of the *Release Notes* for more information.

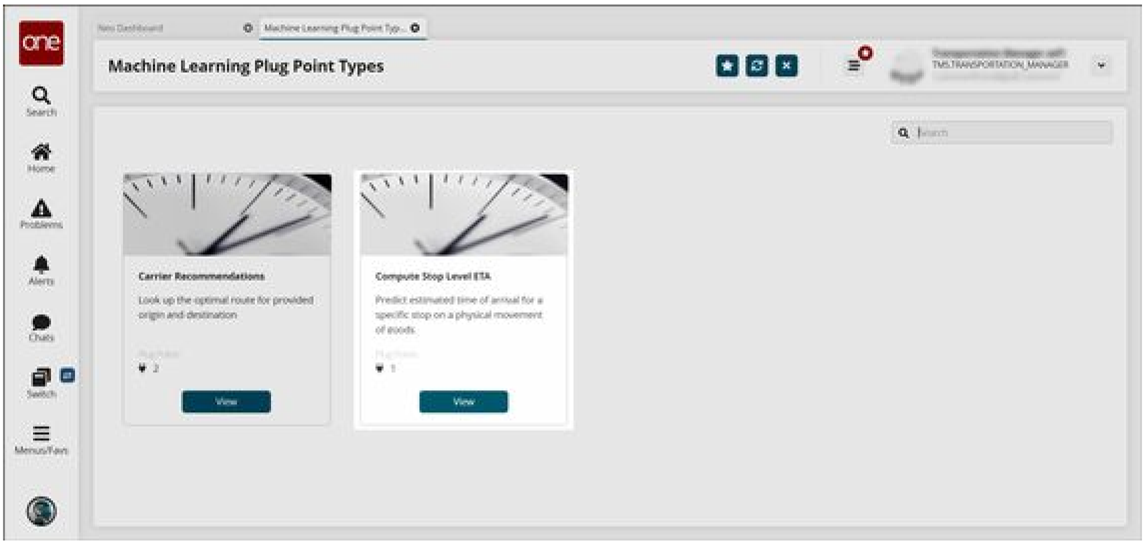
2.3.1.13 Configuring Machine Learning Plug Point Types

Configuring Stop Level ETA based on Machine Learning

Users can configure a plug point to compute stop-level ETA (Estimated Time of Arrival) based on machine learning. See the **Machine Learning Models** section after the following instructions for steps around using Machine Learning Models.

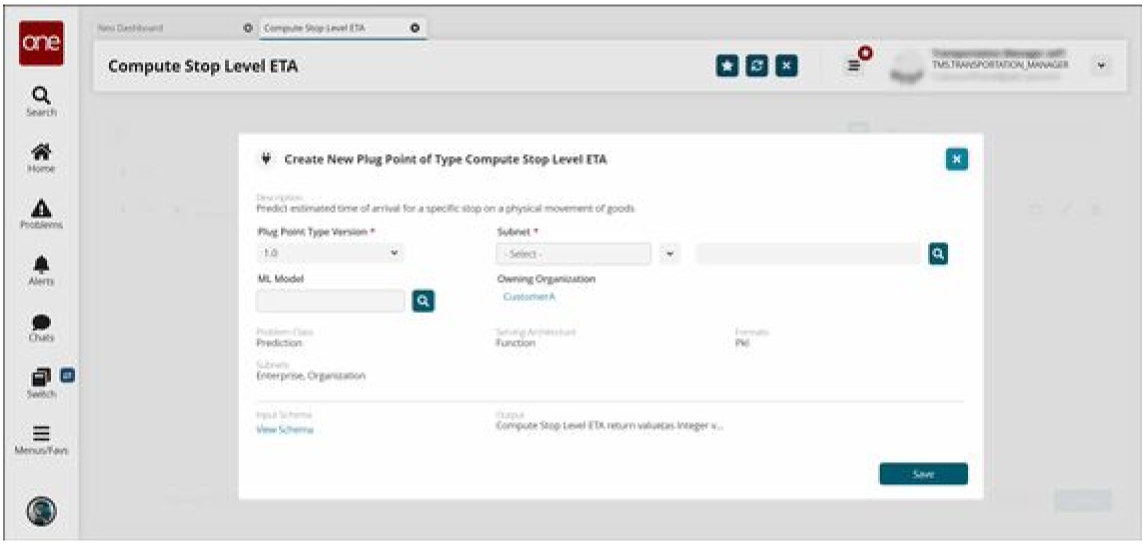
Complete the following steps to configure stop-level ETA based on machine learning:

1. Log in to the ONE system.
2. Click **Menus/Favs** > **Tools** > **Machine Learning** > **Machine Learning Plug Point Types**.



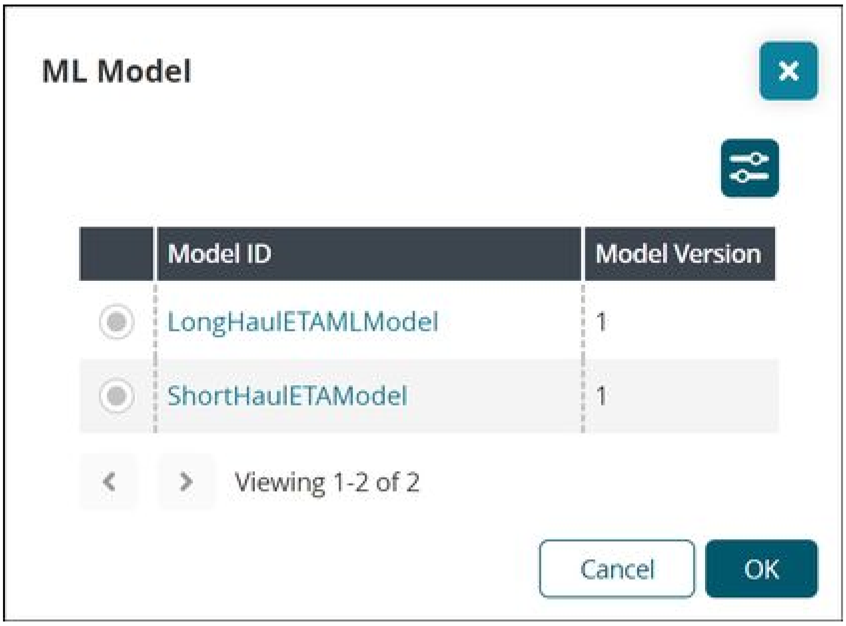
The Machine Learning Plug Point Types screen appears.

3. On the **Compute Stop Level ETA** card, click **View**.
   The Compute Stop Level ETA Recommendations screen appears.
4. Click **Create** to create a new plug point to compute stop-level ETA.



The Create New Plug Point of Type Carrier Recommendations pop-up screen appears.

5. For the **Plug Point Type Version** field, select the desired value from the drop-down list.
6. For the **Subnet** field, select the desired value from the drop-down list. The available options are **Enterprise** and **Organization**.
7. Click the search icon () to select the Enterprise or Organization.
   A pop-up screen appears.
8. Select the desired value and click **OK**.
9. Click the search icon () to select a value for the ML Model field.



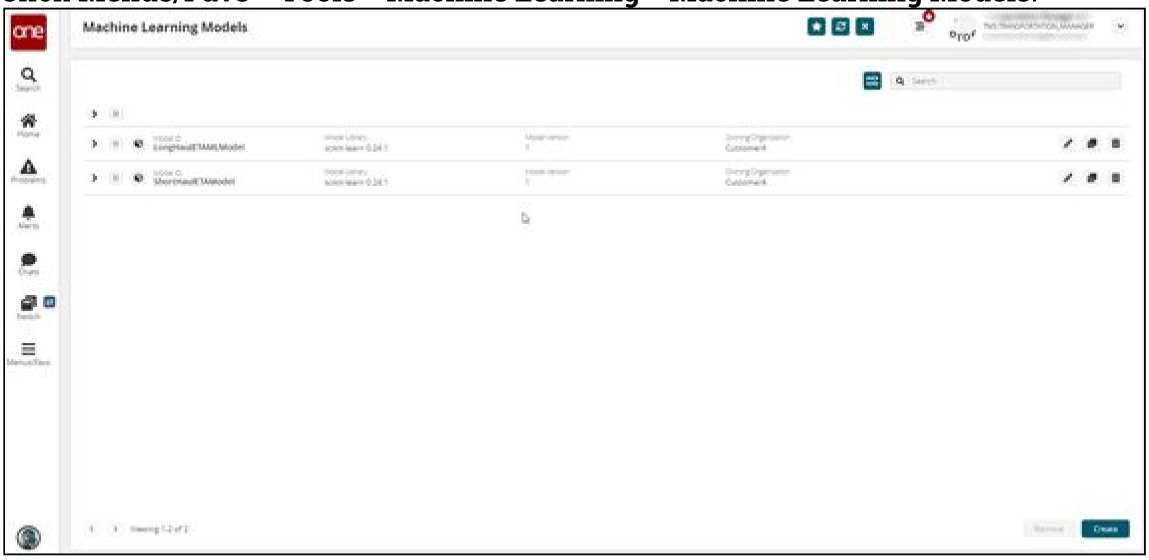
A pop-up screen appears.

10. Select the desired value and click **OK**.
11. Click the **View Schema** link to view the input schema.
12. Click **Save**.
    A success message appears.

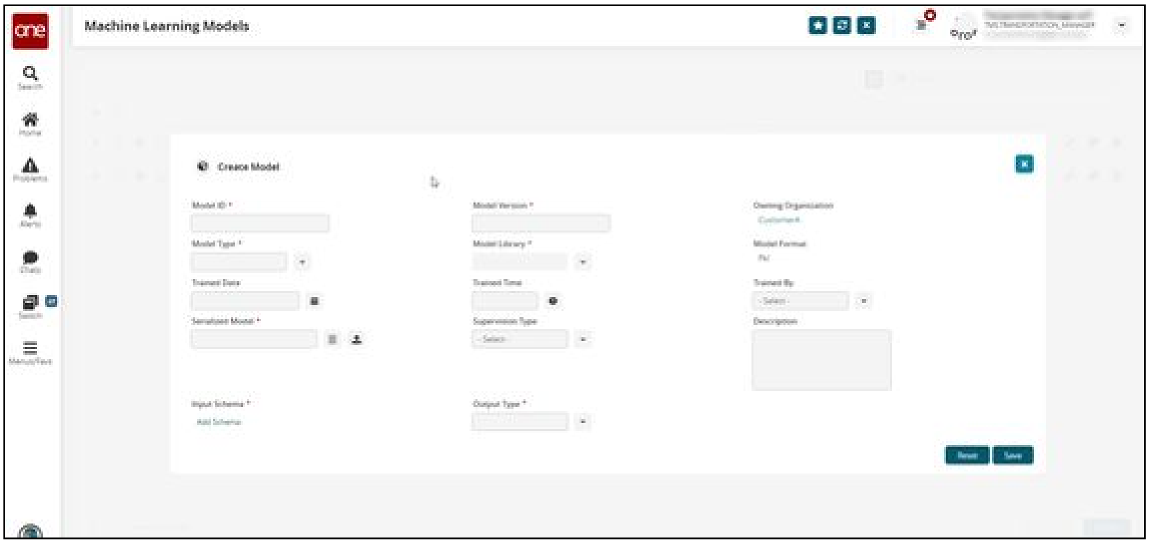
Machine Learning Models

Complete the following steps to configure stop-level ETA for Machine Learning Models:

1. Log in to the ONE system.
2. Click **Menus/Favs** > **Tools** > **Machine Learning** > **Machine Learning Models**.



3. Click **Create.**
   The Create Model pop-up screen appears.



4. Fill out the following fields. **Fields with an asterisk (*) are required.**

Field	Description
*Model ID	The model ID or name.
*Model Version	The model version (must be a numerical value).
Owning Organization	The owning organization user.
*Model Type	Select **Gradient Boosted Ensemble** or **Random Forest Ensemble** using the dropdown menu.
*Model Library	Select the model library using the dropdown menu.
Model Format	The model format.
Trained Date	Click the calendar icon to choose the Trained Date.
Trained Time	Click the clock icon to choose the Trained Time.
Trained By	Select the Trained By value using the dropdown menu.
*Serialized Model	Select the upload icon to upload the serialized model file.
Supervision Type	Select **Interactive**, **Self-Supervised**, **Semi-Supervised**, **Supervised**, or **Unsupervised** using the dropdown menu.

Field	Description
Description	Input a description of the model.
*Input Scheme	Click the View/Edit Schema to input a schema.
*Output Type	Select **Boolean**, **Float**, **Integer**, or **String** from the dropdown menu.

5. Click **Save**.

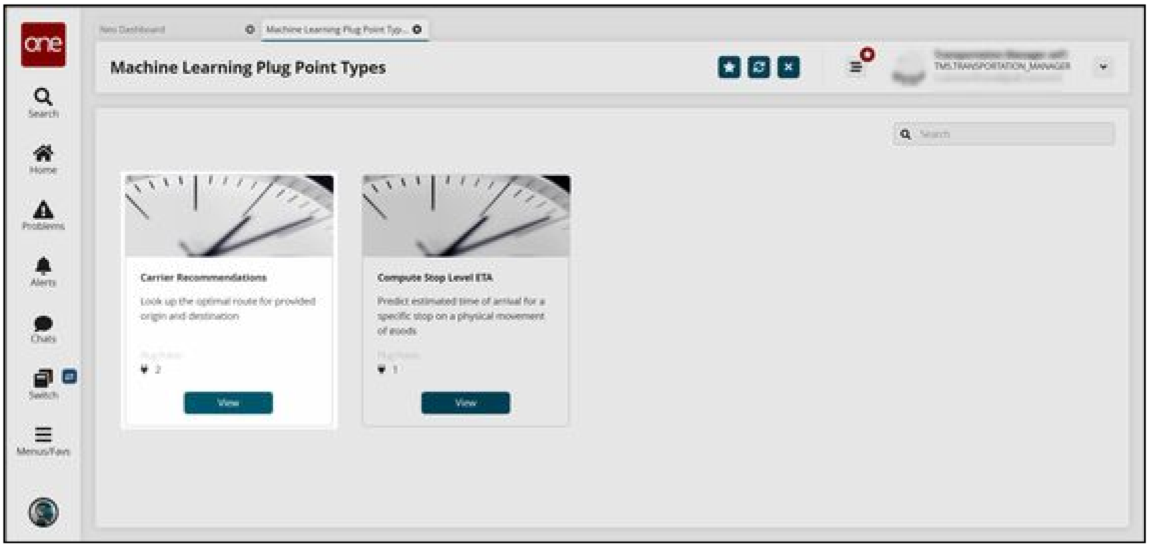
See the "ETA for Every Stop Based on Machine Learning" section in the current version of the *Release Notes* for more information.

Configuring Carrier Recommendations Based on Machine Learning

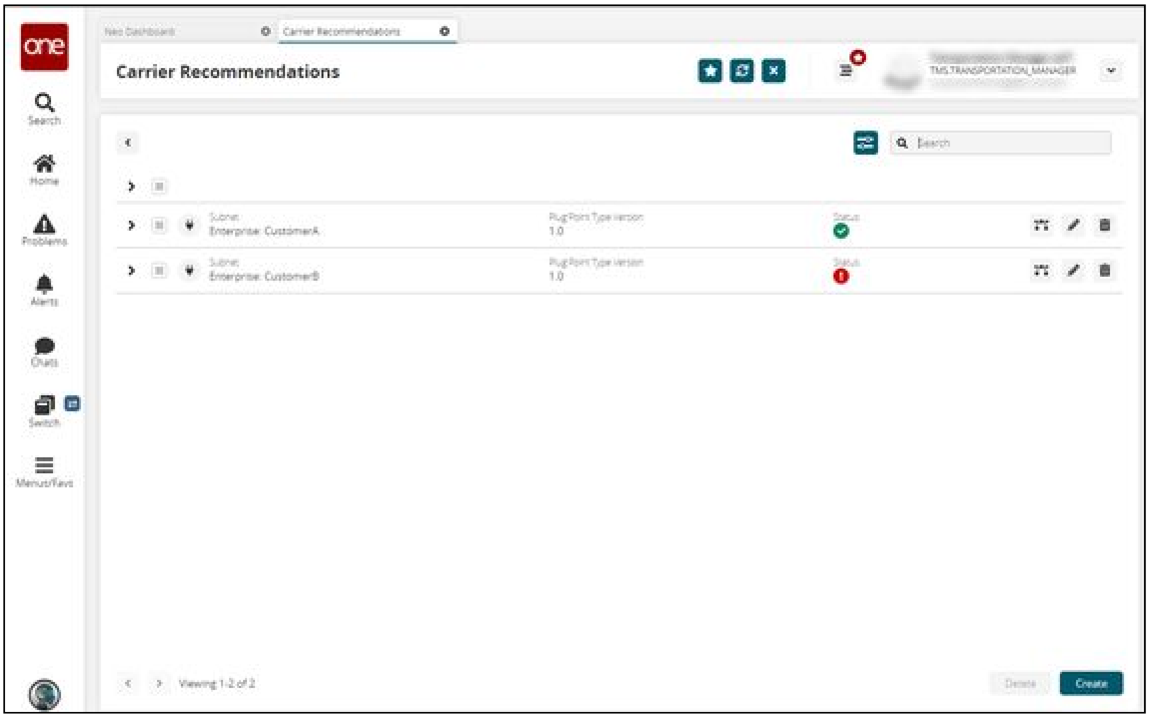
Users can configure a plug point to receive carrier recommendations based on machine learning.

Complete the following steps to configure machine learning-based carrier recommendations:

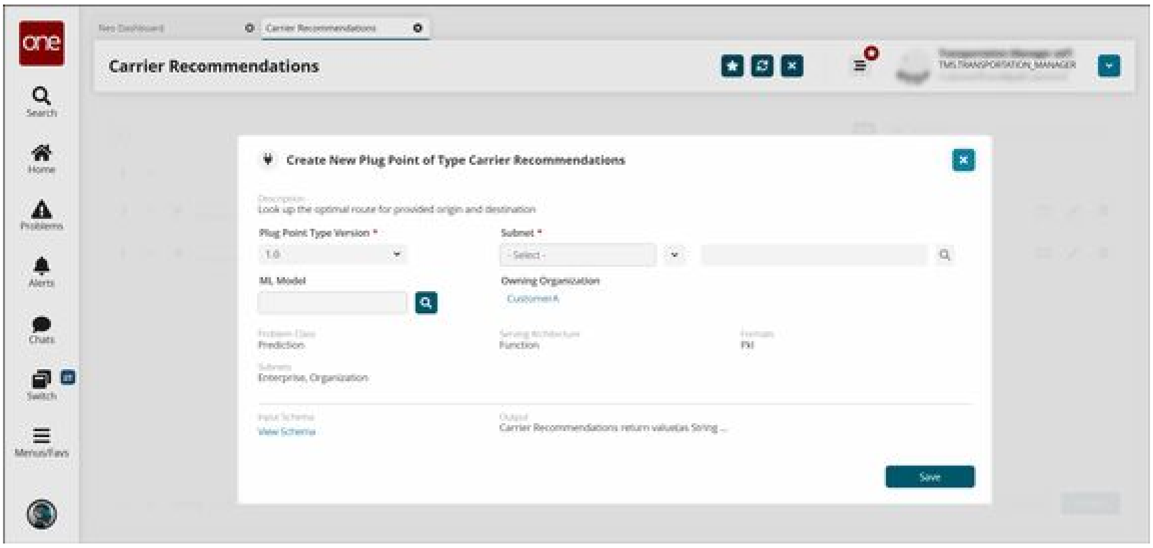
1. Log in to the ONE system.
2. Click **Menus/Favs** > **Tools** > **Machine Learning** > **Machine Learning Plug Point Types**.
   The Machine Learning Plug Point Types screen appears.



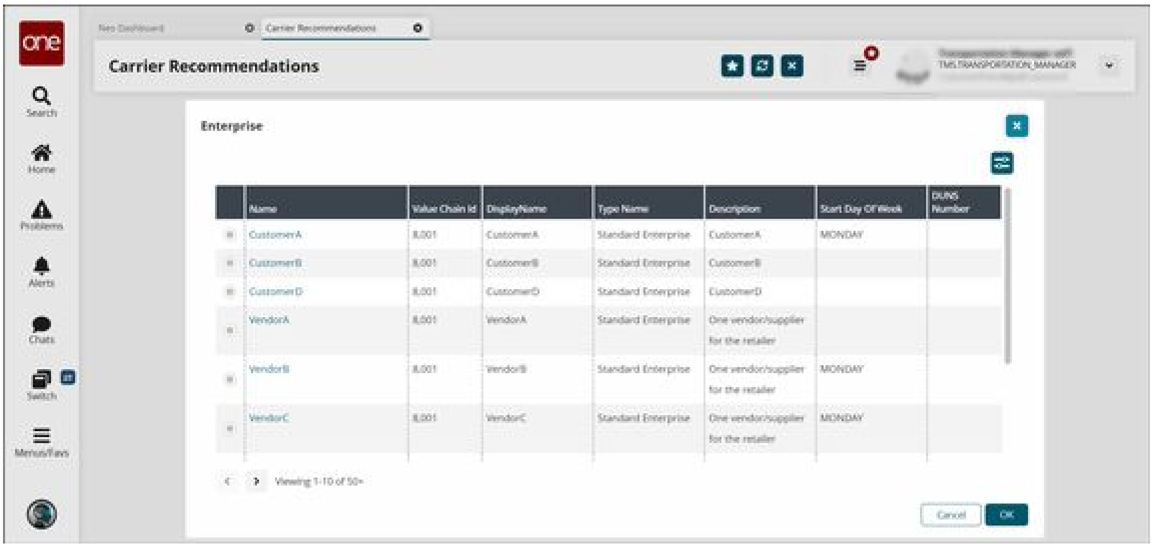
3. On the **Carrier Recommendations** card, click **View**.
   The Carrier Recommendations screen appears.



4. Click the **Create** button to create a new plug point.
   The Create New Plug Point of Type Carrier Recommendations pop-up screen appears.



5. For the ***Plug Point Type Version** field, select the desired value from the drop-down list. Fields with an asterisk (*) are required.
6. For the **Subnet** field, select the desired value from the drop-down list.
   The available options are **Enterprise** and **Organization**.
7. Click the search icon to select the enterprise or organization.
   A pop-up screen appears based on the selection.



8. Select the desired value and click **OK**.
9. Click the search icon to select a value for the **ML Model** field.
   A pop-up screen appears.
10. Select the desired value and click **OK**.
11. Click the **View Schema** link to view the input schema.
12. Click **Save**.
    A success message appears.

See the "Carrier Recommendations Based on Machine Learning" section in the current version of the *Release Notes* for more information.

2.3.2 Global Trade

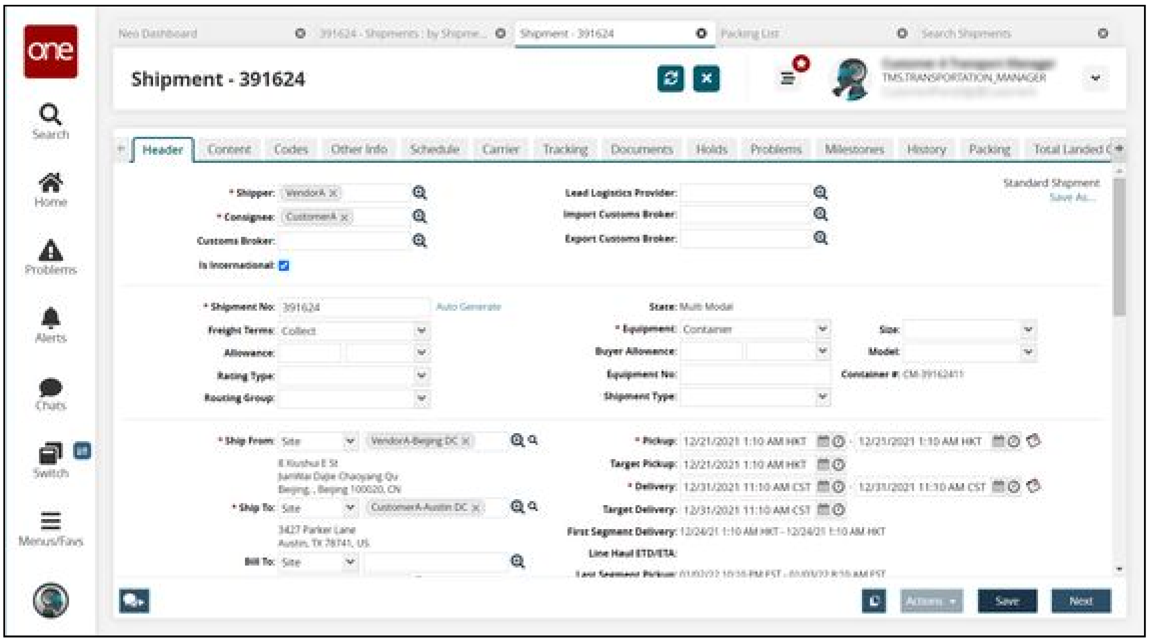
2.3.2.1 Auto-Generating a Packing List and a Packing Line Number

Users can manually create or use the auto-generation link to create packing list and packing list line numbers.

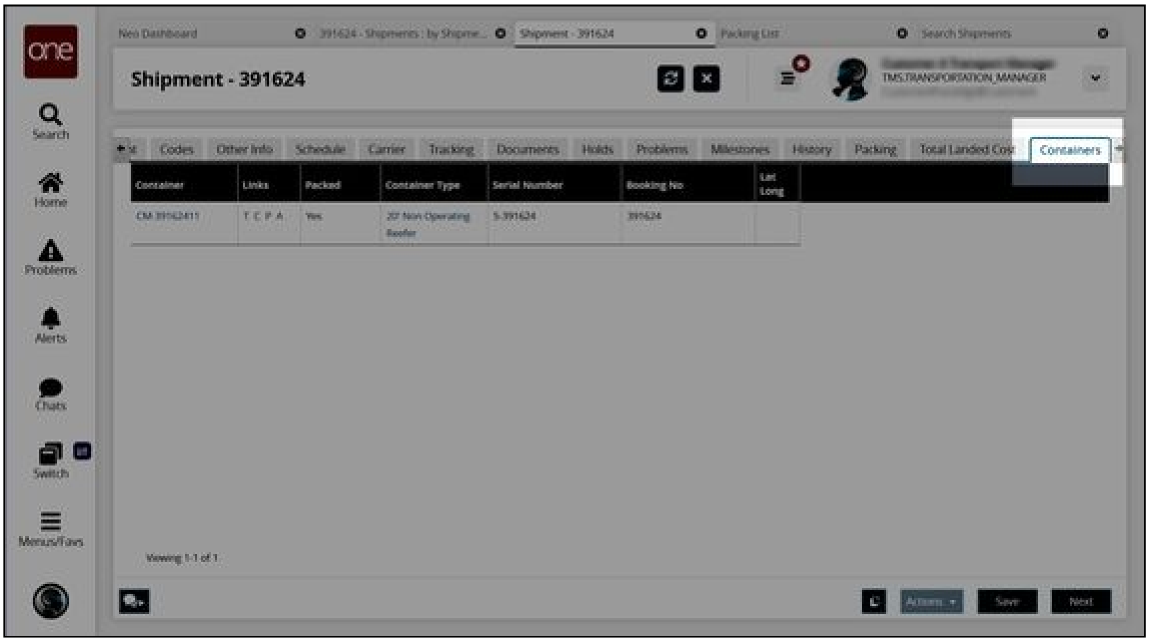
Complete the following steps to auto-generate a packing list number:

1. Log in to the ONE system.
2. Click **Menu/Favs > Transportation > Search Shipments.**
   The Search Shipments screen displays.
3. Use the filter fields to locate the shipment for which you want to generate a packing list number and click the link for that shipment number in the **Shipment** column. See the "Searching Shipments" section of *Online Help* for more information. Alternatively, locate the specific shipment using the large **Search** icon above the **Home** icon on the left side of your screen.

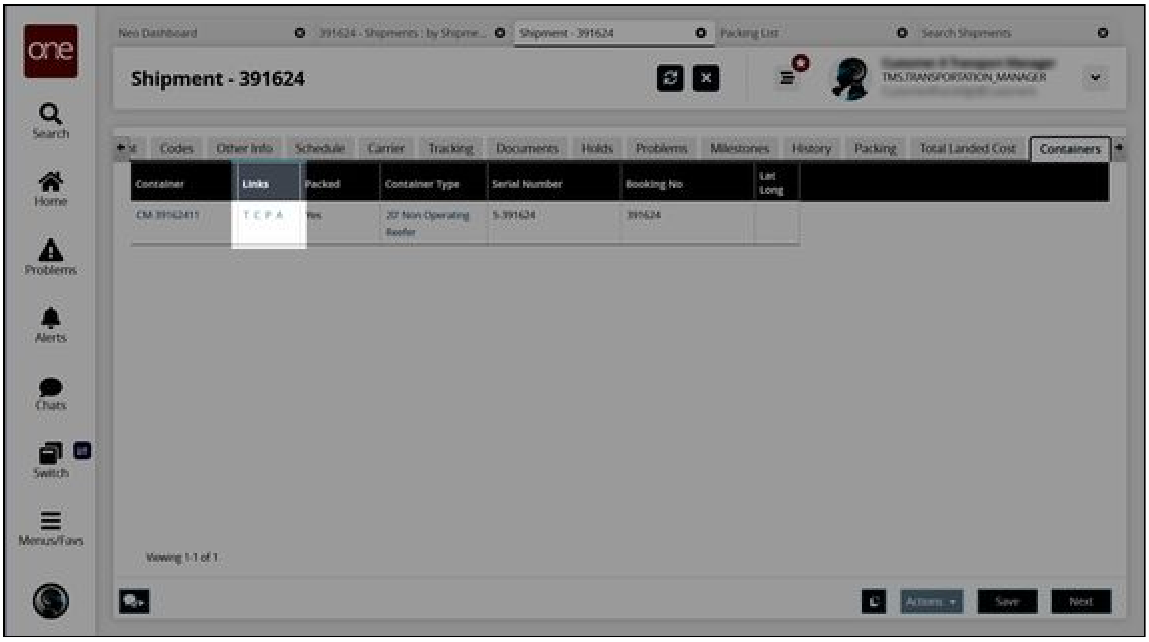
The shipment detail screen for the selected shipment appears in a new tab.



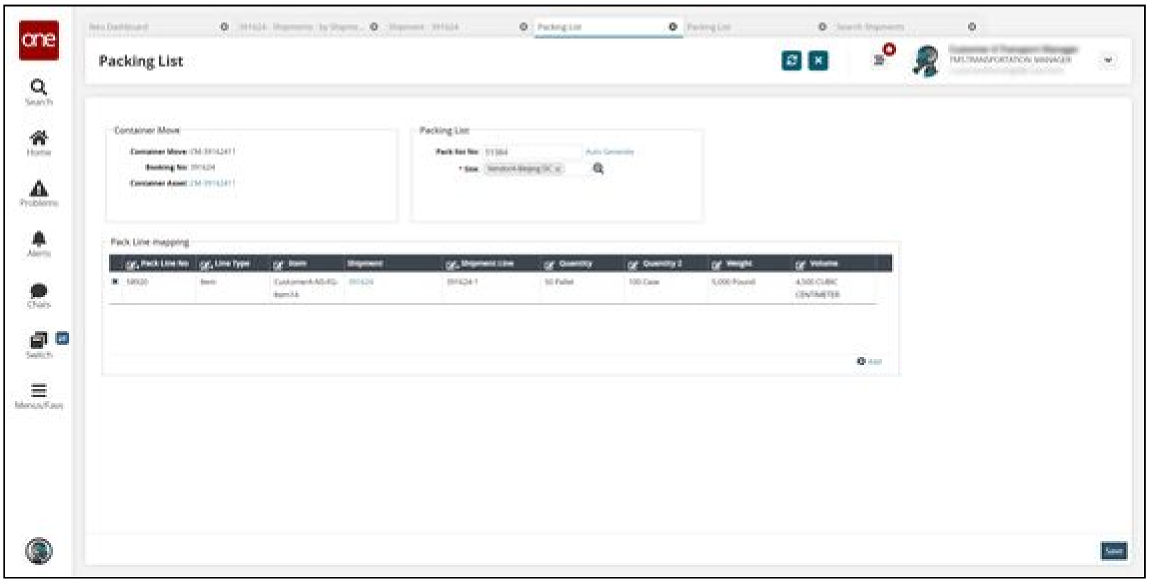
4. Click the **Containers** tab.



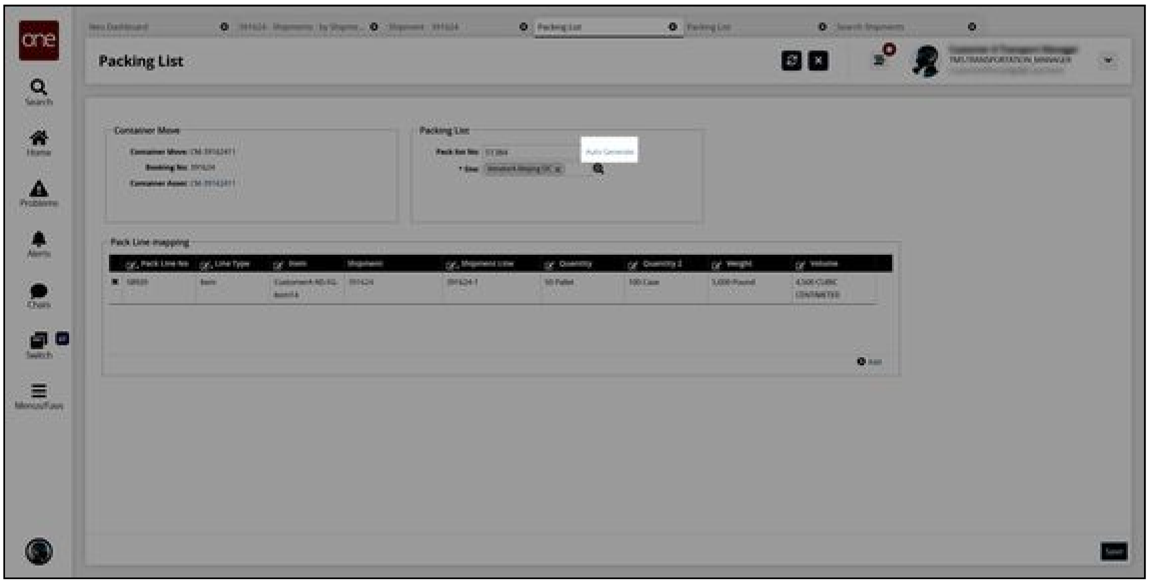
5. In the **Links** column, click the **P** link for each container that needs a packing list. A packing list can be created for each container in the list.



The Packing List appears in a new tab.

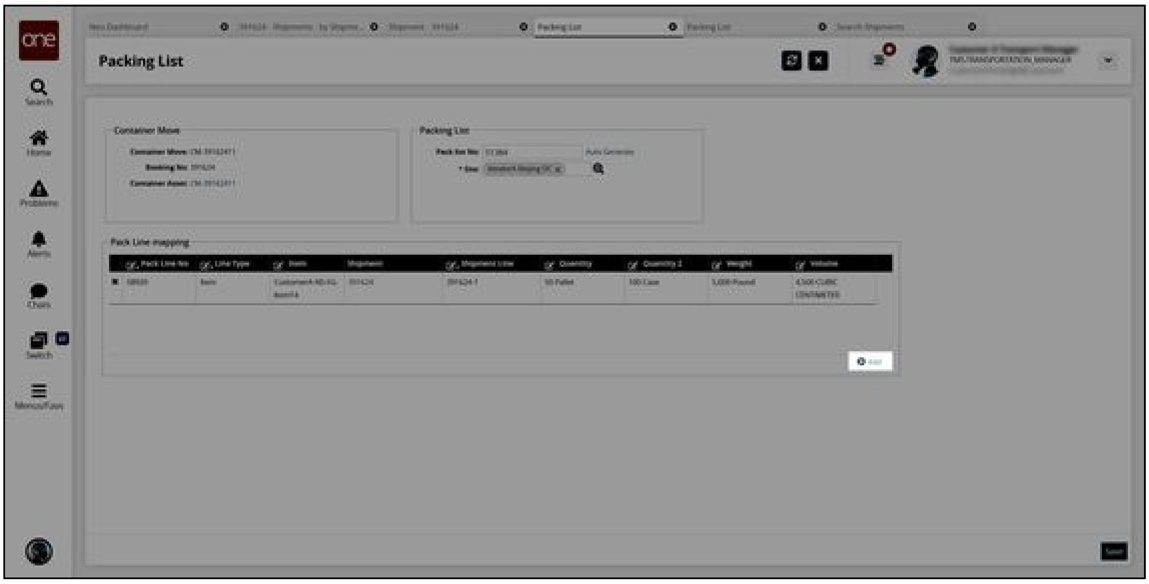


6. In the **Packing List** section, click the **Auto Generate** link next to the **Pack List No** field to auto-generate a packing list number.

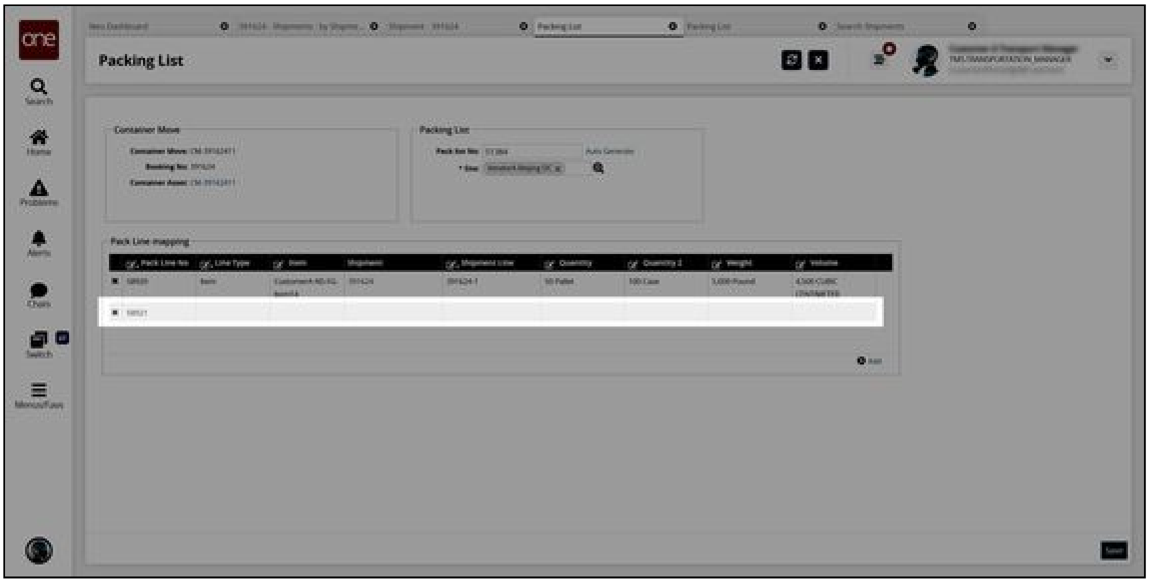


Complete the following steps to auto-generate a packing line number:

1. From the packing list details screen, in the Pack Line Mapping section, click the +Add link.



A new Packing Line appears with the packing line number auto-generated in the Pack Line No. column.



See the "Container Packing List Enhancements" section in the current version of the *Release Notes* for more information.

2.3.2.2 Configuring Per Container Rates for Road Transportation

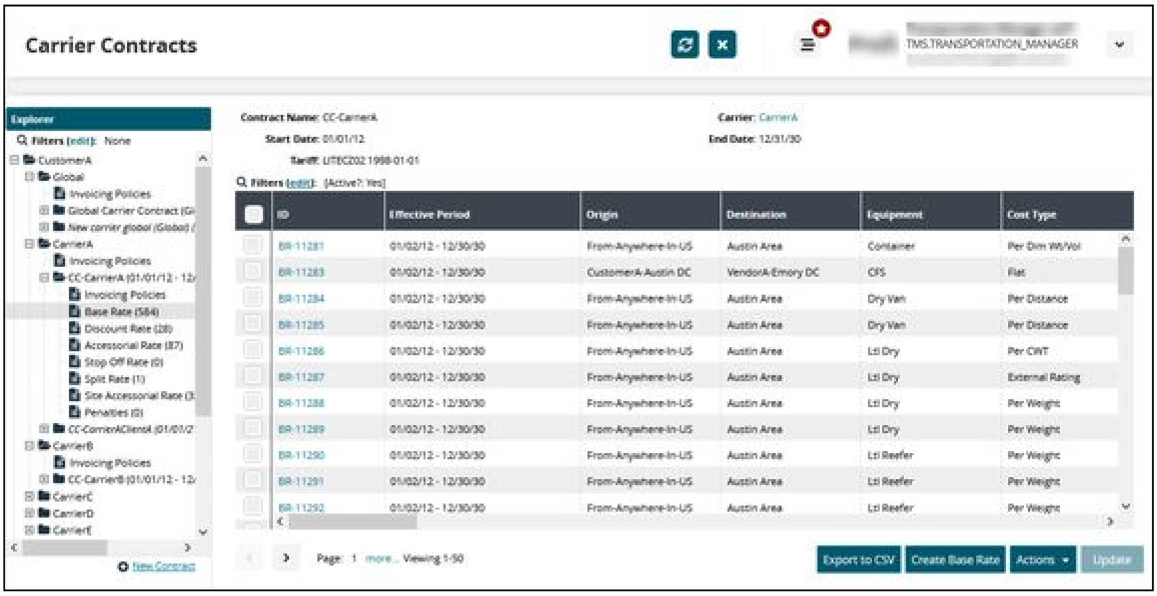
This topic describes how to configure rates for road transportation based on container types.

Complete the following steps to define rates per container.

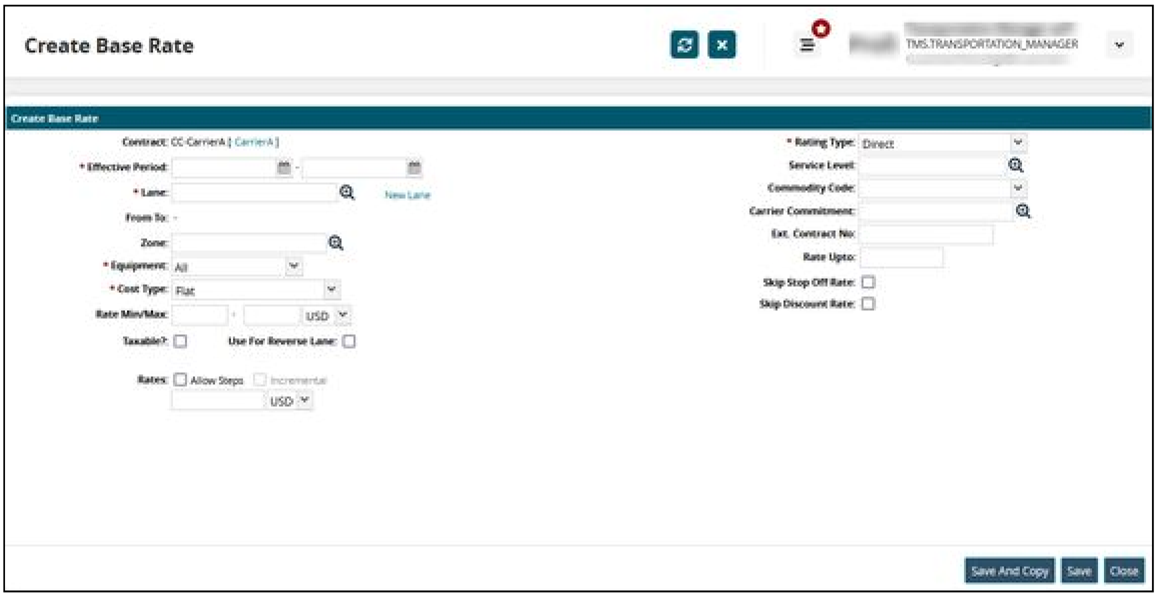
1. Log in to the ONE system as a Transportation Manager.
2. Click **Menus/Favs** > **Contract Management** > **Carrier Contracts**.
   The Carrier Contracts screen appears.

3. Select the desired organization and click the Expand icon of the desired carrier to view information such as policies, rates, penalties.

4. Click **Base Rate**.
   The list of existing base rates appears.



5. Click **Create Base Rate** to add a new base rate to the contract.



6. Complete the fields described in the table below. Fields with an asterisk (*) are required.

Field	Description
Contract	This field displays the selected carrier contract name.
*Effective Period	Enter the start and end date for the new base rate.

Field	Description
*Lane	Use the picker tool to select an existing lane or click the New Lane link and enter origin and destination to create a new lane.
From To	This field is auto-populated with the origin and destination for the selected lane.
*Equipment	Select Truck from the dropdown list.
*Cost Type	Select Per Container from the dropdown list.
Rates	 A. Use the picker tool to select a container type. B. In the Rate column, enter the amount and select the applicable currency from the dropdown list. C. Click the Add link to add more Per Container rates.
*Rating Type	Select a rating type from the dropdown list.

7. Click **Save & Copy** to save the base rate and duplicate it.
8. Click **Save** to save the base rate.
9. Click **Close** to close the screen.

See the "Enabled Per Container Rating for Road Transportation" section in the current version of the *Release Notes* for more information.

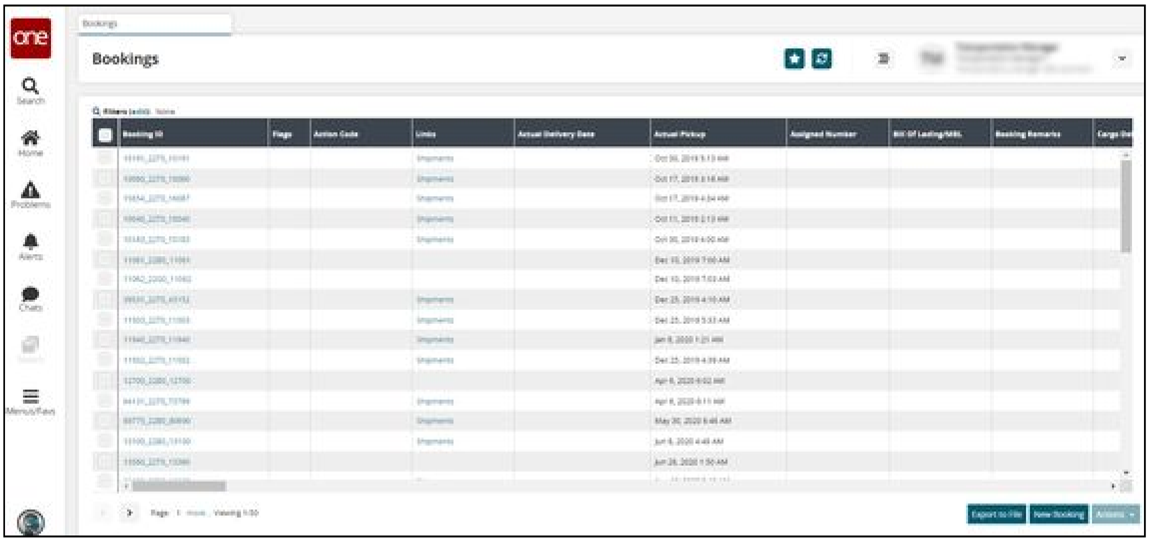
2.3.2.3 Printing Shipping Instructions Before Submitting

Users can review shipping instruction details for bookings before officially submitting those shipping instructions. On the Bookings screen, users can select the Print Shipping Instructions actions for bookings in the Pending SI Submission state. A PDF file is printed and downloaded to the user's computer; this PDF is formatted to mirror the format used by carriers and contains various information such as booking reference number, route information, and a packing list, among other fields. If the shipping instructions are satisfactory, they can be submitted.

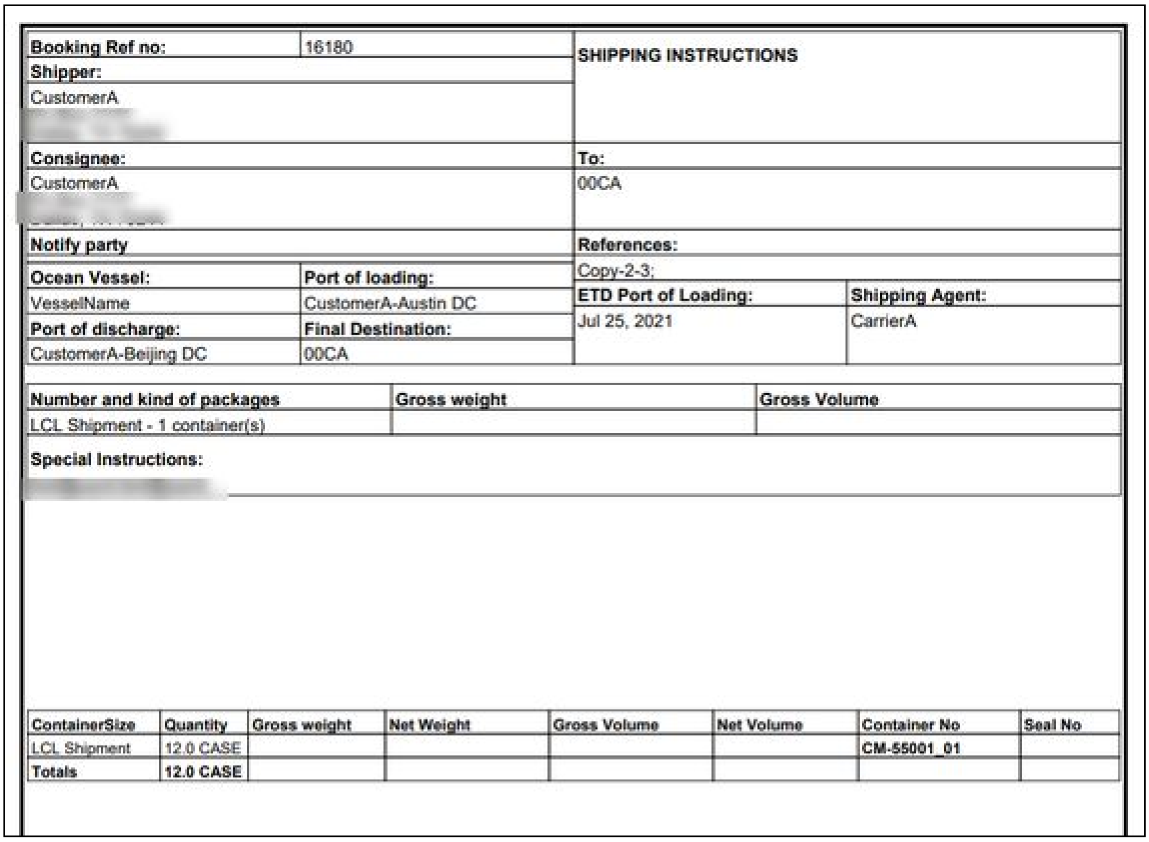
Complete the following steps to print shipping instructions:

1. Log in to the ONE system.

2. Click **Menu/Favs > Transportation > Bookings**.
   The Bookings screen appears.



3. Select the **Filters (edit)** link.
   The Filters menu appears.
4. In the **State** field, select **Pending Shipping Instructions Submission.**
5. Click the **Search** link.
   The search results appear.
6. Select a booking ID by clicking the checkbox beside it.
7. Click **Actions > Print Shipping Instructions.**
   The PDF file is downloaded to your computer.



Booking Ref no:	16180	**SHIPPING INSTRUCTIONS**	
Shipper: CustomerA			
Consignee: CustomerA		**To:** 00CA	
Notify party		**References:** Copy-2-3;	
Ocean Vessel: VesselName	**Port of loading:** CustomerA-Austin DC	**ETD Port of Loading:** Jul 25, 2021	**Shipping Agent:** CarrierA
Port of discharge: CustomerA-Beijing DC	**Final Destination:** 00CA		

Number and kind of packages	Gross weight	Gross Volume
LCL Shipment - 1 container(s)		

Special Instructions:

ContainerSize	Quantity	Gross weight	Net Weight	Gross Volume	Net Volume	Container No	Seal No
LCL Shipment	12.0 CASE					CM-55001_01	
Totals	12.0 CASE						

See the "Print Shipping Instructions for Bookings Before Submitting" section in the current version of the *Release Notes* for more information.

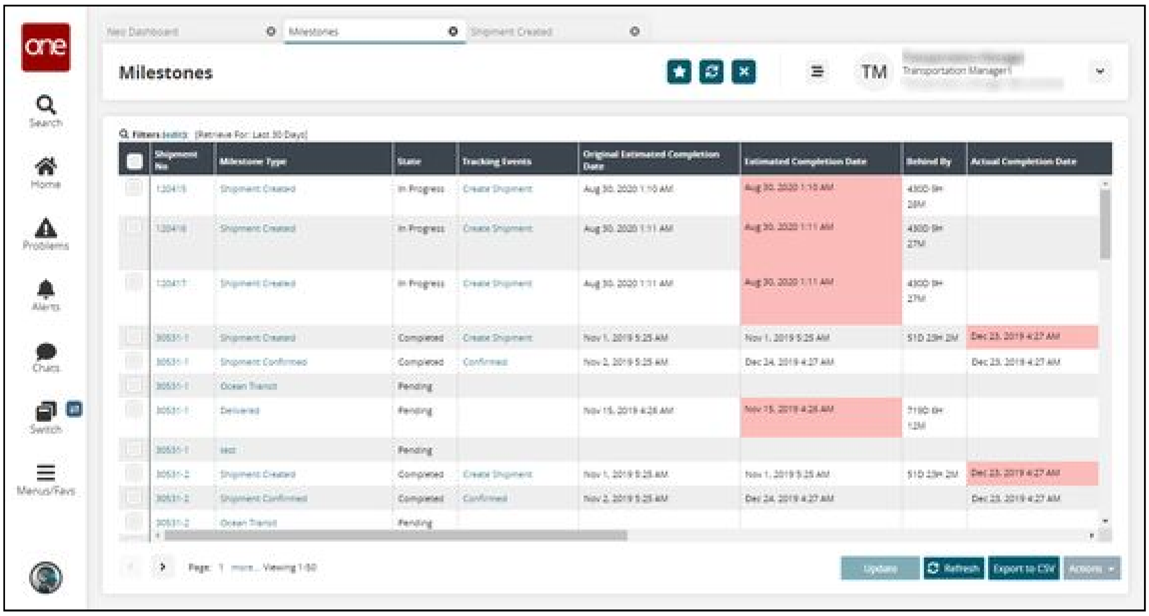
2.3.3 Reports

2.3.3.1 Using the Milestones Report

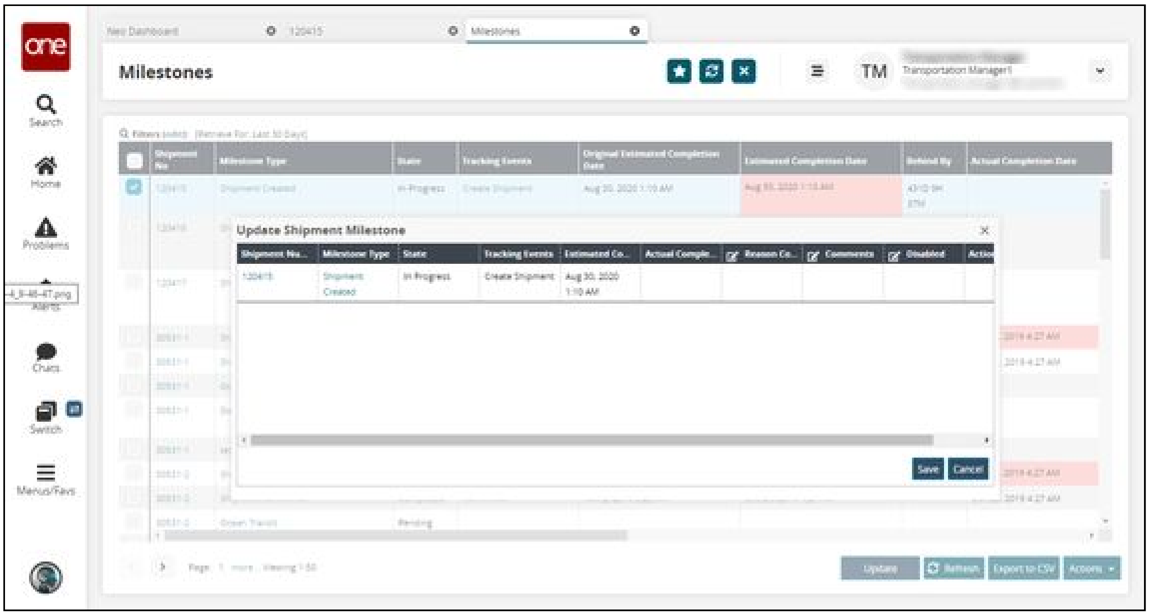
The Milestones report allows users to see all milestones they have permission to view. The Milestone report has many useful columns: the Shipment No column provides links to the corresponding shipment details; the Milestone Type column provides links to milestone type details; and the Responsible Organization column. This Responsible Organization field indicates the organization that is responsible for fulfilling the milestone conditions and is populated based on the responsible organization defined as part of the tracking event that triggered the milestone computation.

Complete the following steps to use the Milestones report:

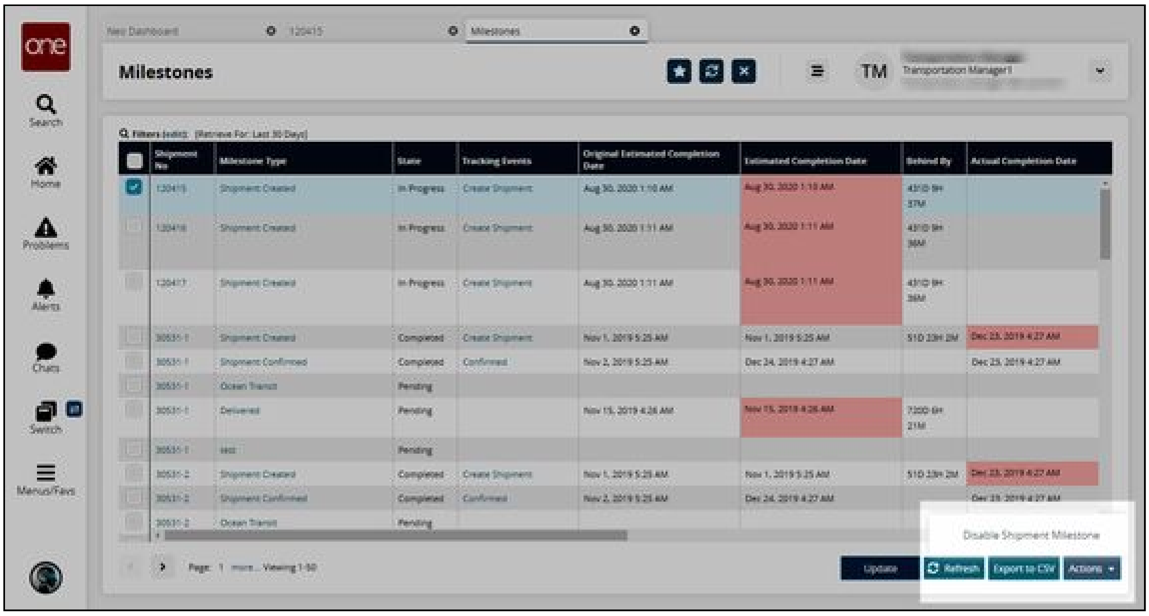
1. Log in to the ONE system.
2. Select **Menu/Favs > Transportation > Shipment Milestones > Milestones**.
   The Milestones report appears.



3. Select a checkbox and then click **Update** to update a milestone.
   The Update Shipment Milestone popup appears.



4. Update the fields as necessary; fields with a pencil icon can be edited.
5. Click **Save** to save your changes.
   A success message appears.
6. Click **Close and Refresh** to update the report.
7. Click the **Refresh** button to update the report at any time.
8. Click the **Export to CSV** button to export the report to a CSV file.
9. Select a checkbox and then click **Actions** to perform any available actions.



See the "Enhancements to Milestone Visibility and Responsibility" section in the current version of the *Release Notes* for more information.

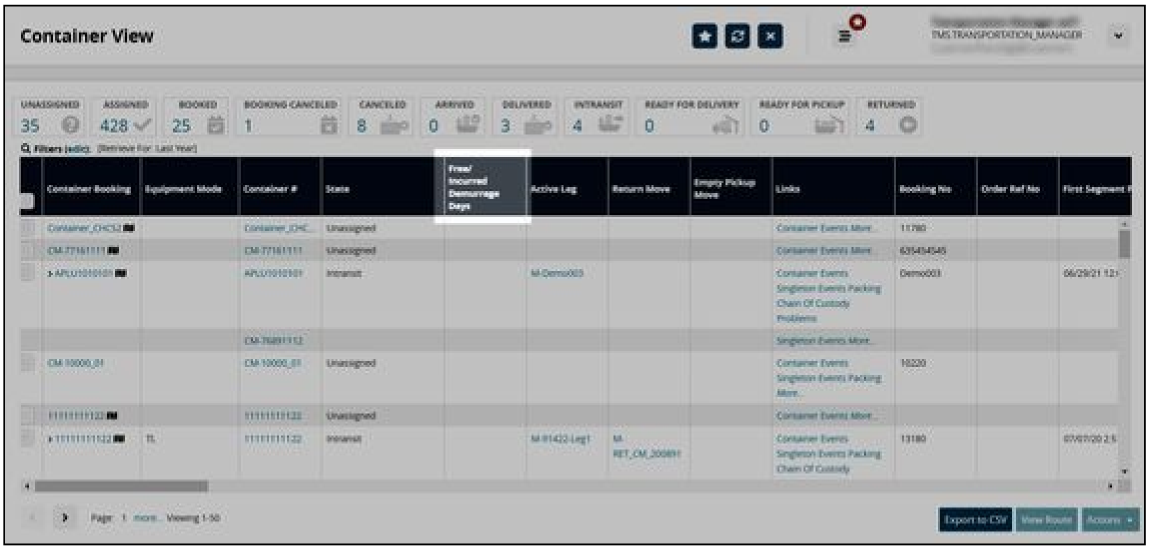
2.3.3.2 Viewing Enhanced Reports for Detention, Demurrage, and DETMUR Details

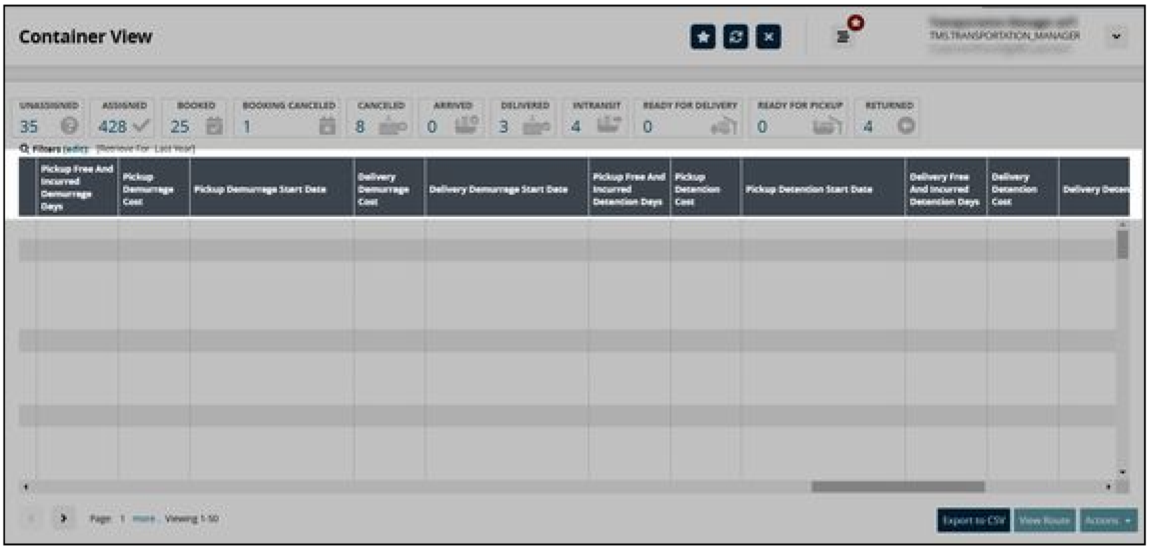
Detention, demurrage, and the combination of the two, DETMUR, are offered under client-specific Value Added Service (VAS) provider contracts. The accessorial costs for VAS rates will be factored under a separate cost-head on detail screens and reports. These three costs are now found in the following reports:

- Container View Report
- Network Analysis Report

Complete the following steps to view new columns in the Container View report:

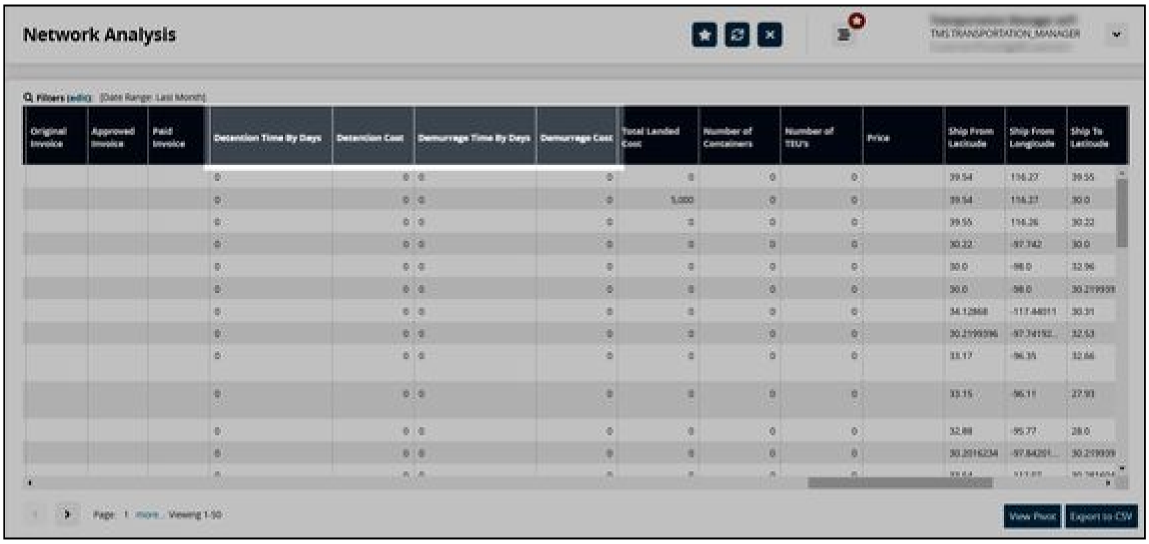
1. Log in to the ONE system.
2. Click **Menu/Favs > Transportation > Container View.**
   The Container View screen displays new columns for detention, demurrage, and DETMUR.





Complete the following steps to view new columns in the Network Analysis report:

1. Log in to the ONE system.
2. Click **Menu/Favs > Reports > Analysis > Network Analysis.**
   The Network Analysis report displays.



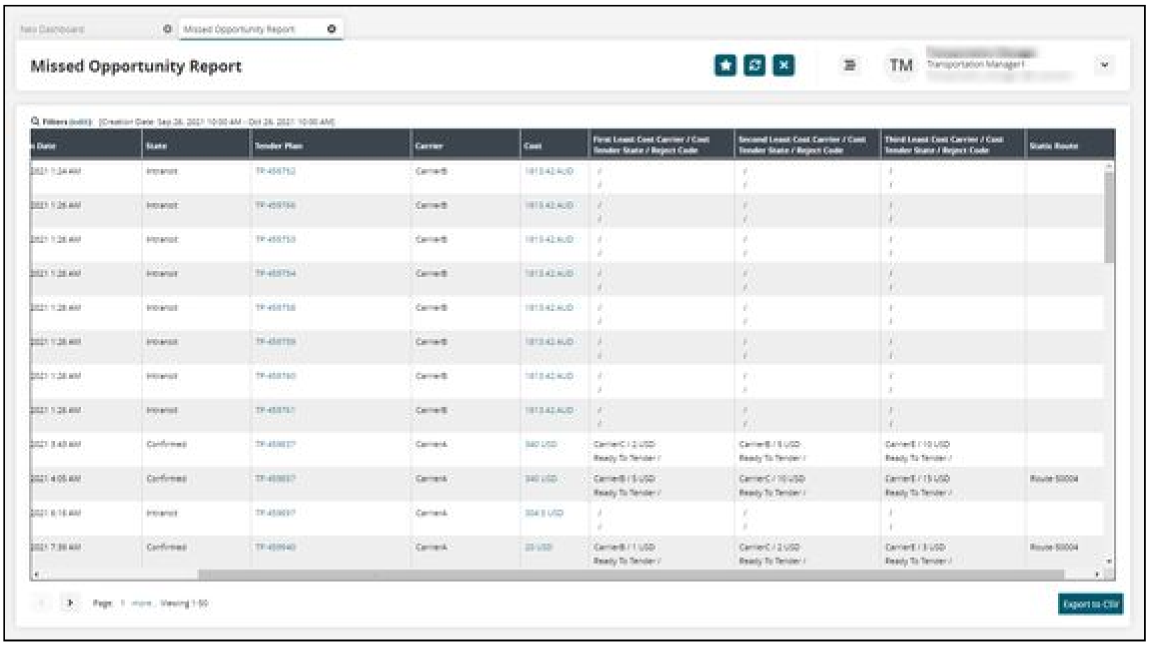
See the "Support for Detention and Demurrage Computations for Value Added Service Providers" section in the current version of the *Release Notes* for more information.

2.3.3.3 Missed Opportunity Report

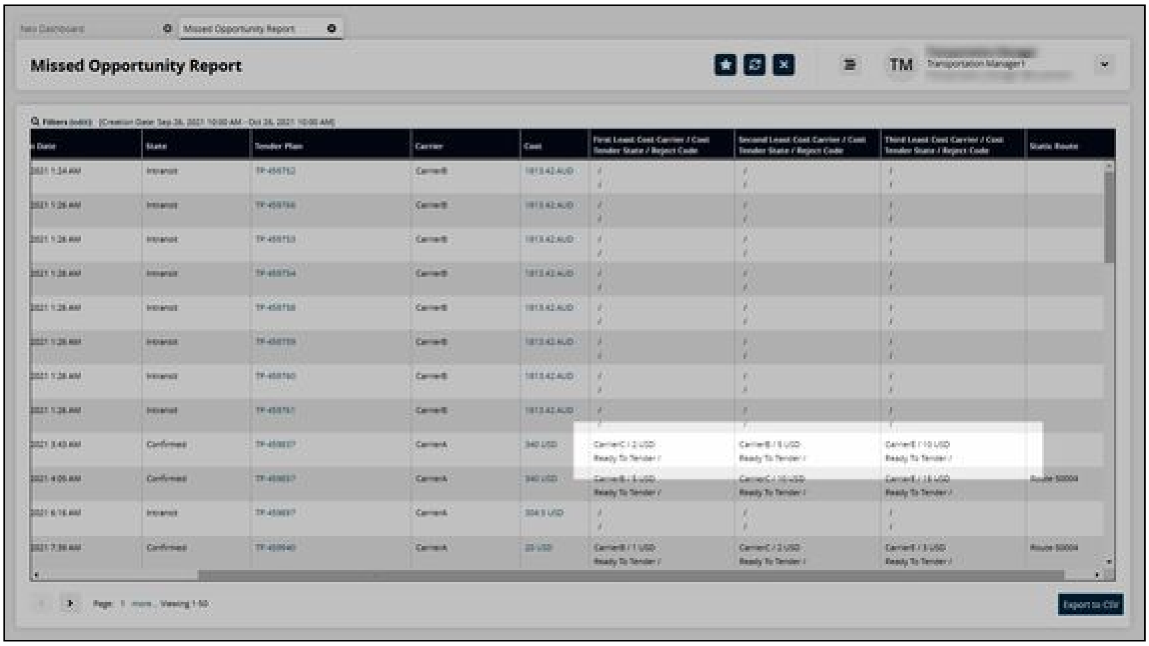
The Missed Opportunity report shows all movements with Confirmed and later states with defined carrier costs and is intended to help users determine why and when they could have spent less on shipping costs. For each movement, the report includes the chosen carrier, cost, and most importantly, information about the three lowest-cost carriers for that movement. For each of the three cheapest carriers shown, the report provides the carrier name, the cost difference, the tender state, and a reject reason if provided.

Complete the following steps to use the Missed Opportunity report:

1. Log in to the ONE system.
2. Select **Menu/Favs > Reports > Missed Opportunity Report**.
   The Missed Opportunity Report screen appears.



3. Click the **Filters (edit)** link to apply search criteria to reduce the number of entries shown.
   The Filters menu appears.
4. To add more search filters, click the **Add Filter** link, and then click one or more filter options from the **Add Filter** list.
5. Fill out the filters as desired and click the **Search** link.
   The search results appear. Note the **First Least Cost Carrier, Second Least Cost Carrier,** and **Third Least Cost Carrier** columns. These columns show the three least cost alternative carriers and the difference in price from the actual cost of the shipping of the movement.



6. Click the **Export to CSV** button to export the report to a CSV file.

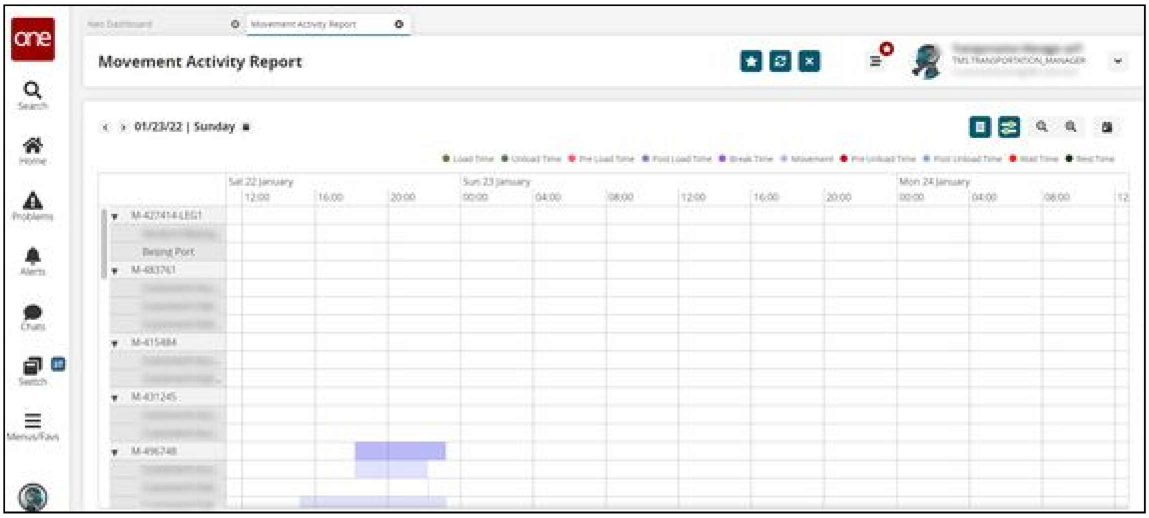
See the "New Missed Opportunity Report" section in the current release of the *Release Notes* for more information.

2.3.3.4 Viewing the Movement Activity Report

The Movement Activity report provides a view of movement lifecycles so users can easily see activities and expected and/or non-expected outcomes. For example, the report can show if the unloading time at a site is longer than expected. In this case, the planning user might need an alternative way to deliver a shipment to that site by consolidating that shipment with another movement. The report helps users see where the movement can be optimized.

Complete the following steps to view and use the Movement Activity Report:

1. Log in to the ONE system.
2. Click **Menu/Favs > Report > Movement Activity Report**.
   The Movement Activity Report displays. Movements are displayed in time blocks shaded in colors according to the legend across the top of the timeline.



3. Click the arrows or the calendar icon to change the dates for the timeline view.
4. Click the **Summaries** button to view summaries of movement activities.
5. Click the **Filter Options** button to apply filters to the data.
6. Click the **Zoom-In** and **Zoom-Out** buttons to adjust the calendar timeline view.
7. Click the **Reset zoom** button to return to the original timeline view.

See the "New Movement Activity Report" section in the current version of the *Release Notes* for more information.

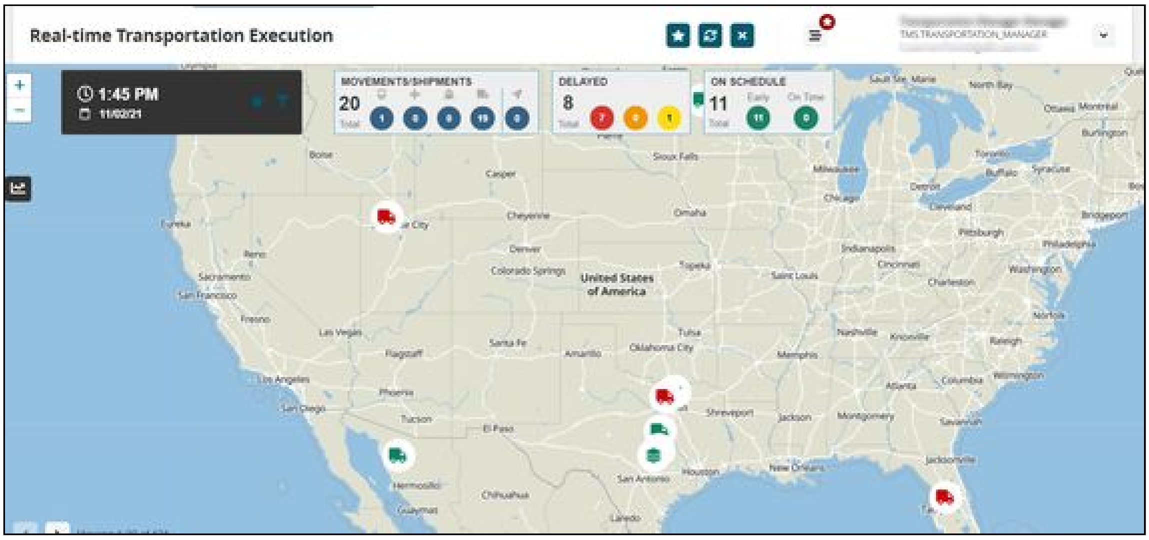
2.3.4 Scheduling

2.3.4.1 Rescheduling an Appointment for Delayed Movements and Shipments from the RTTEP

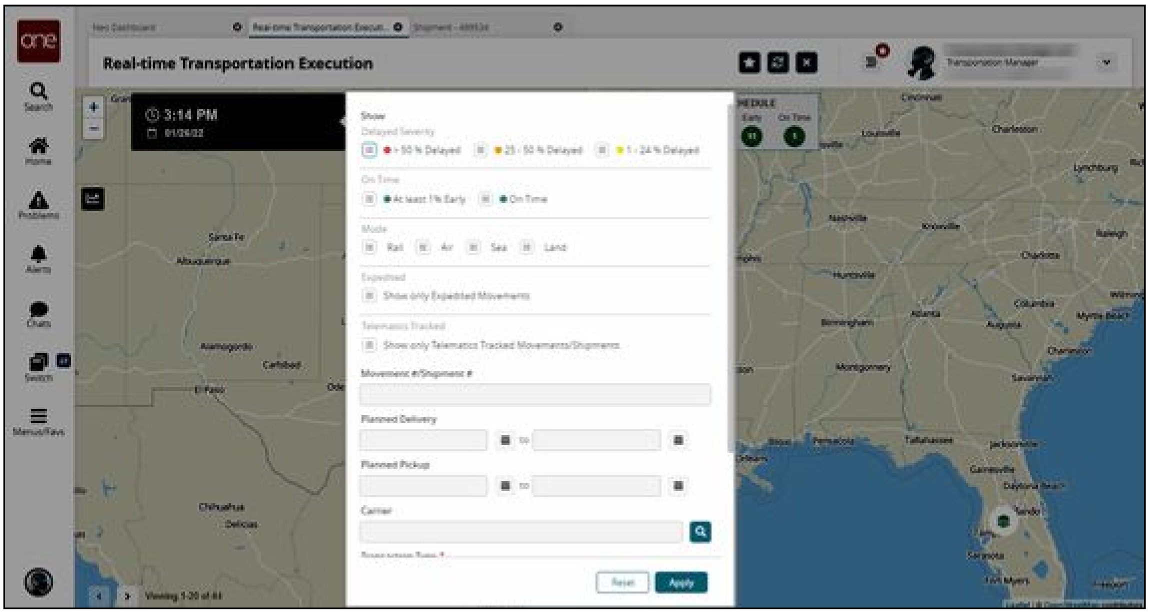
When movements and shipments are in jeopardy of delayed delivery, users can reschedule delivery appointments from the Real-time Transportation Execution page (RTTEP).

Complete the following steps to reschedule an appointment from the RTTEP:

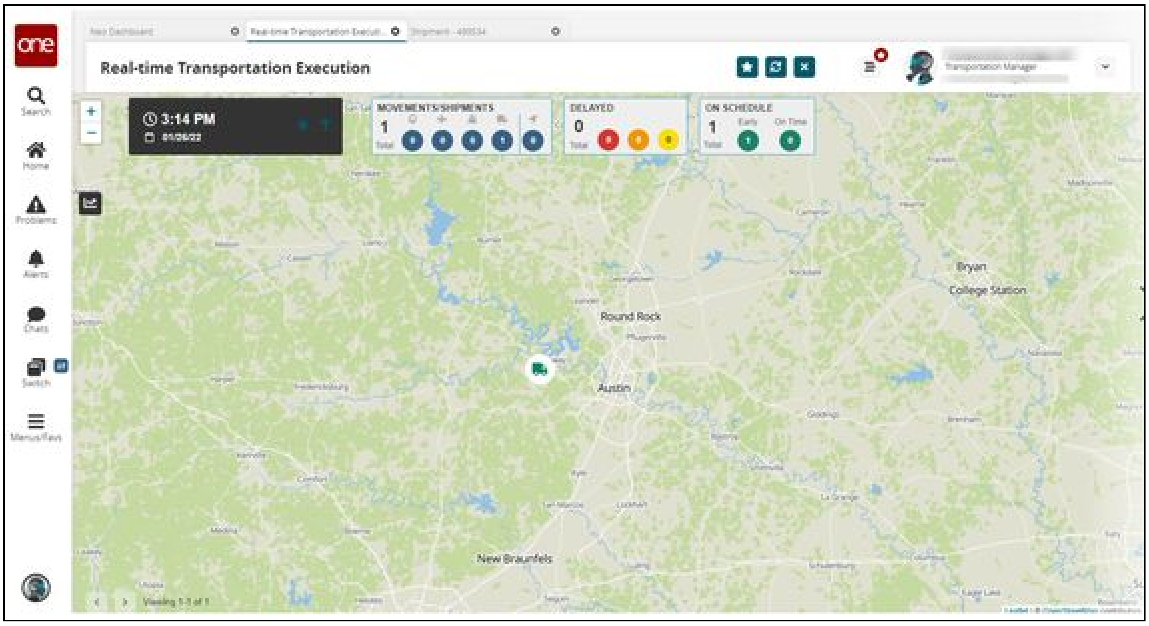
1. Log in to the ONE system.
2. Click **Menu/Favs > Transportation > Real-time Transportation Execution**.
   The Real-time Transportation Execution page displays.



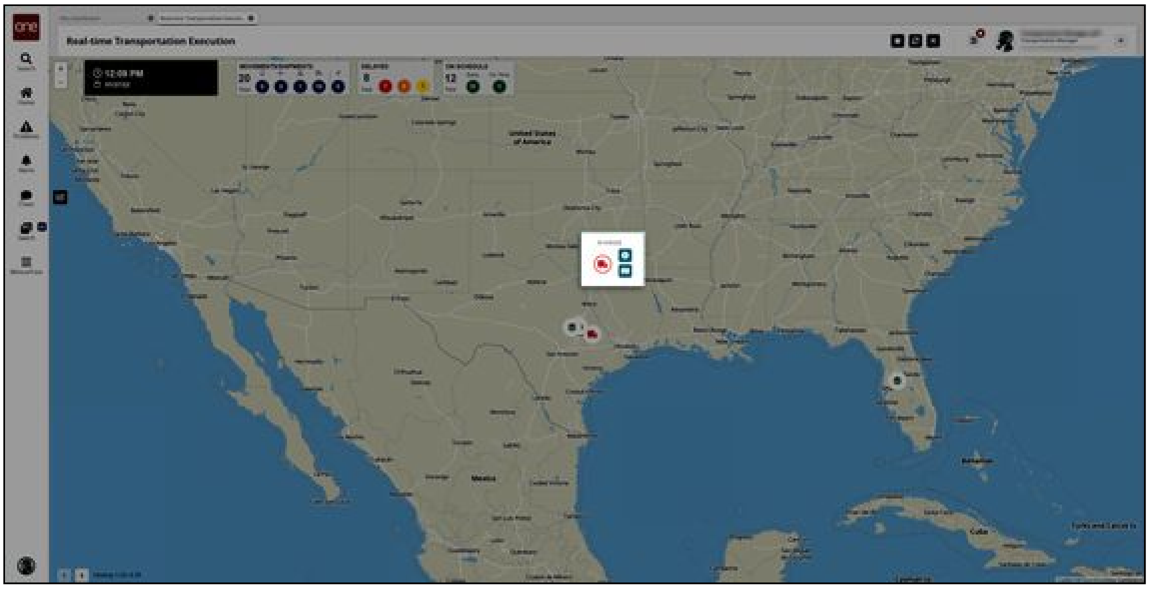
3. Click the filter icon to display the filters.



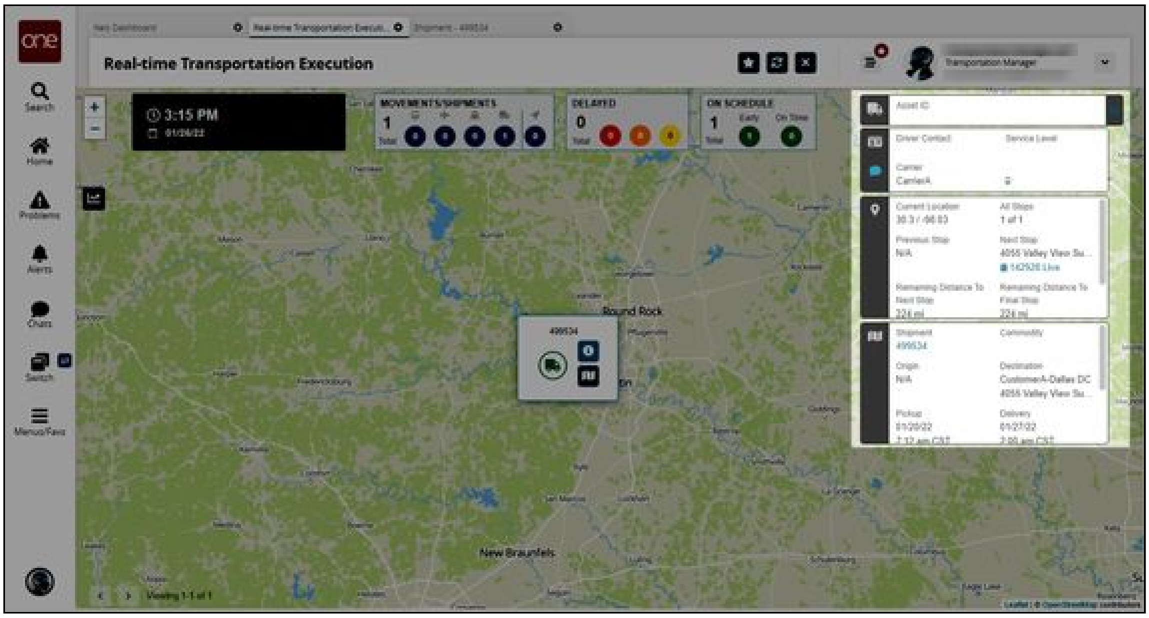
4. In the **Movement #/Shipment #** field, enter the movement or shipment number for which you want to reschedule an appointment.
5. Click the **Apply** button.
   The desired Movement or Shipment icon displays.



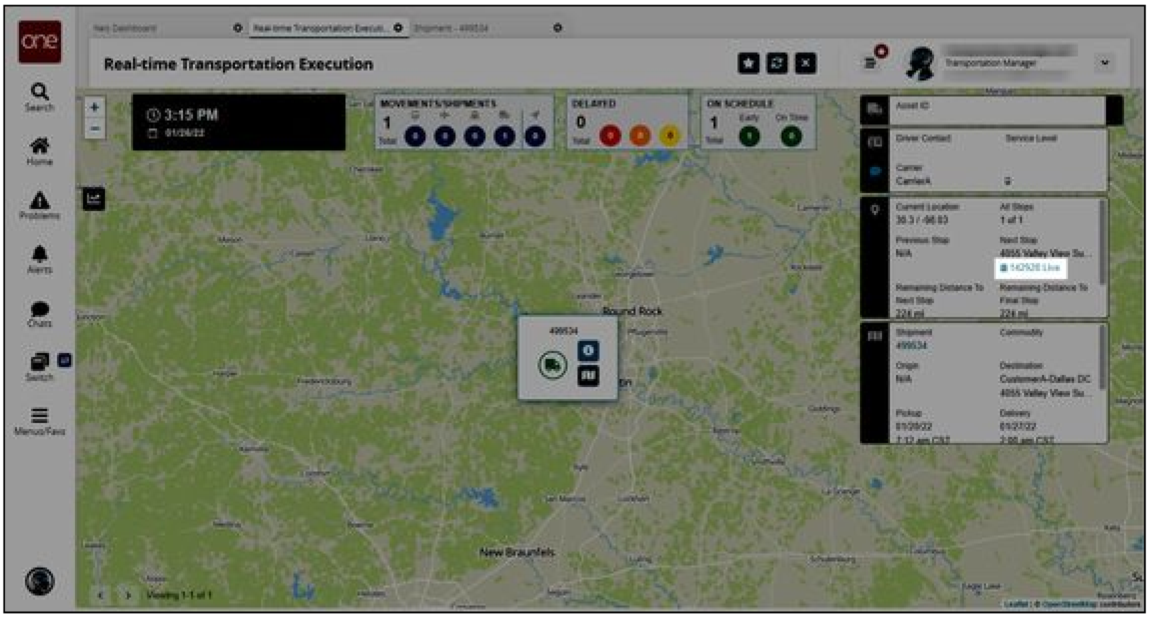
6. Click the **Movement** or **Shipment** icon.
   The Movement or Shipment popup window appears.



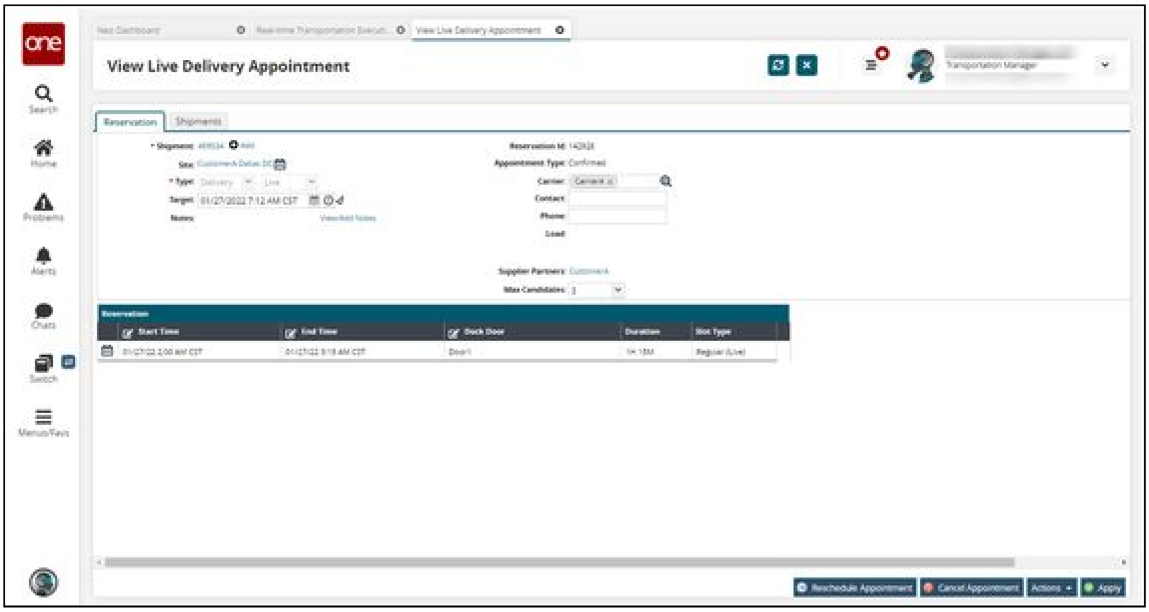
7. Click the **Info** button for the movement or shipment.
   The Movement or Shipment info appears in a slideout to the right.



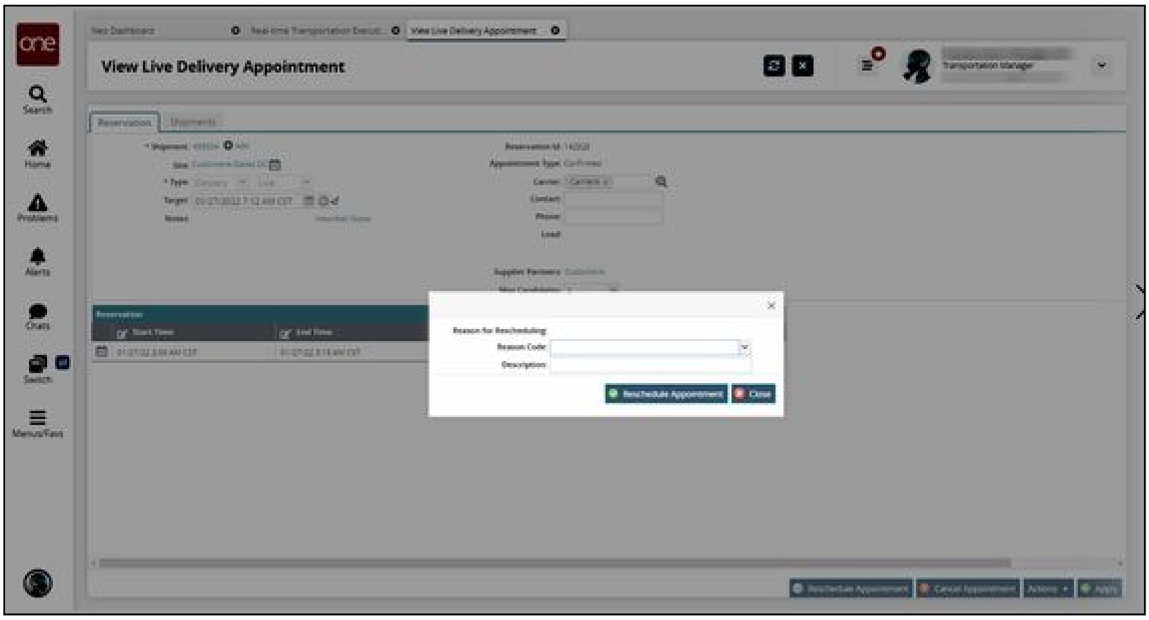
8. In the Movement or Shipment slideout, click the **Live** link in the **Next Stop** section.



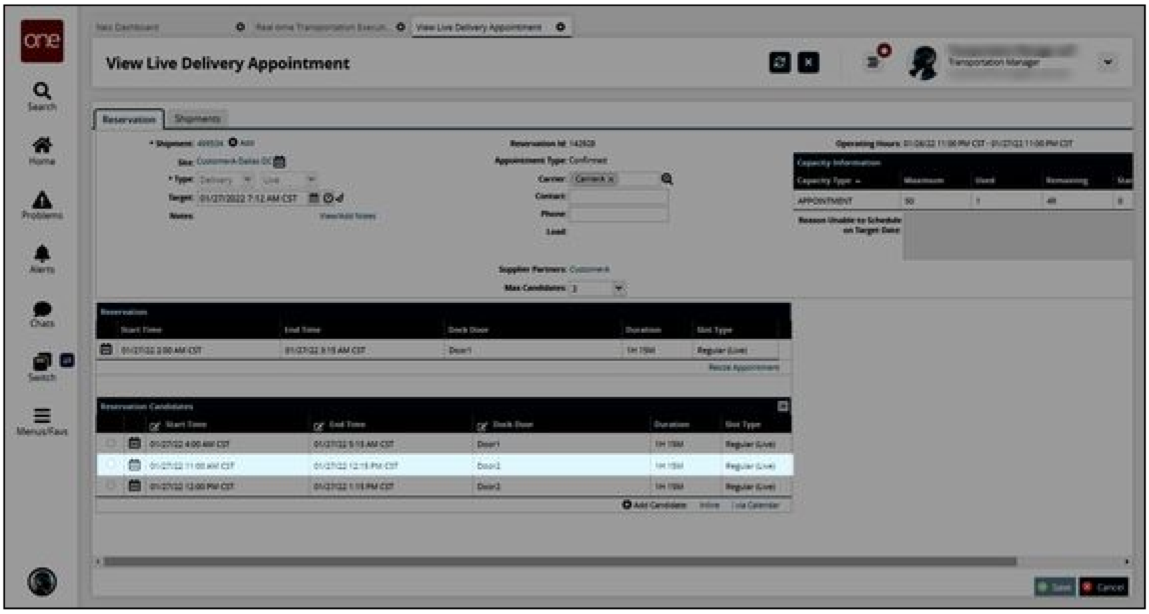
The View Live Delivery Appointment screen displays.



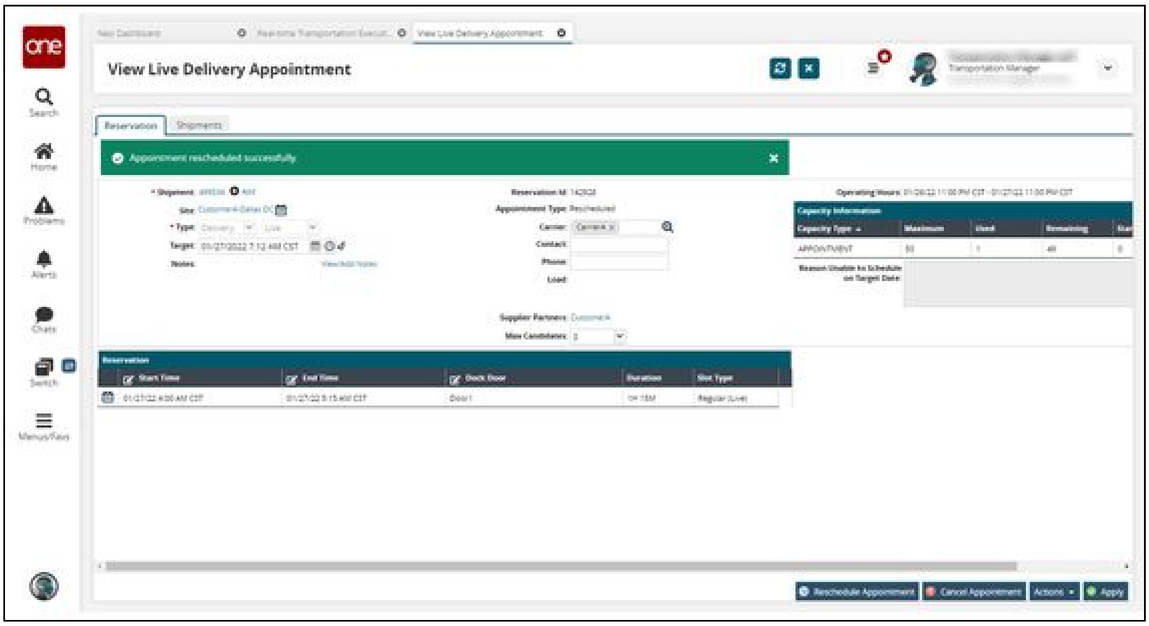
9. Click the **Reschedule Appointment** button.
   The Reason for Rescheduling popup window displays.



10. In the **Reason Code** field, select the reason for rescheduling from the dropdown list.
11. In the **Description** field, enter a description if desired.
12. Click the **Reschedule Appointment** button.
    The new reservation appears in the Reservation section on the View Live Delivery Appointment screen.



13. In the **Reservation Candidates** section, click the button beside an appointment.
14. Click the **Save** button.
    A success message appears, and the appointment is rescheduled.



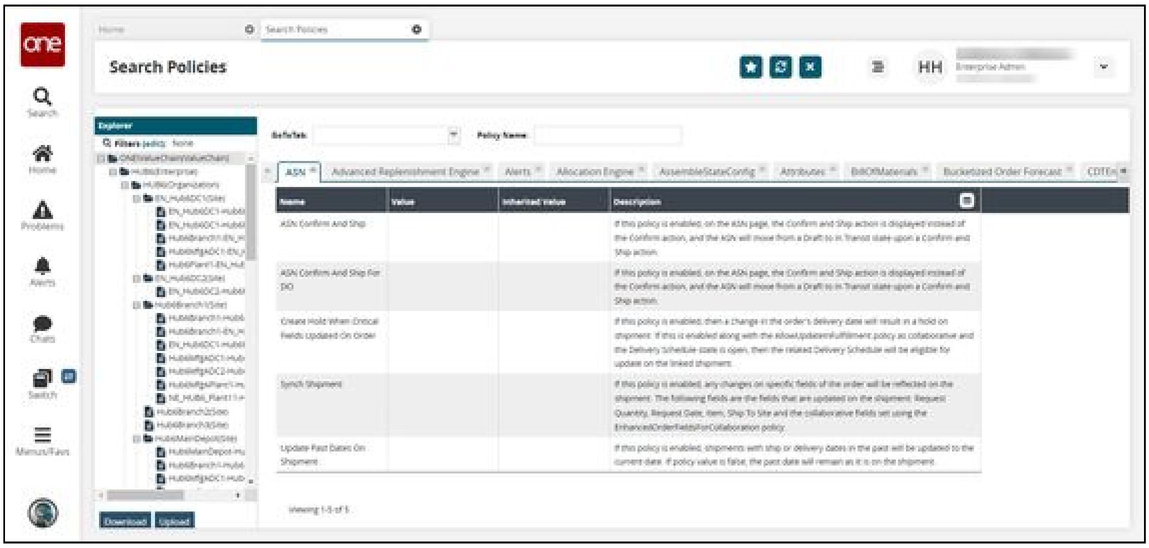
See the "Additional Scheduling Support on the Real-time Transportation Execution Page" section in the current version of the *Release Notes* for more information.

2.3.4.2 Setting the Allow Partial Reservations Policy

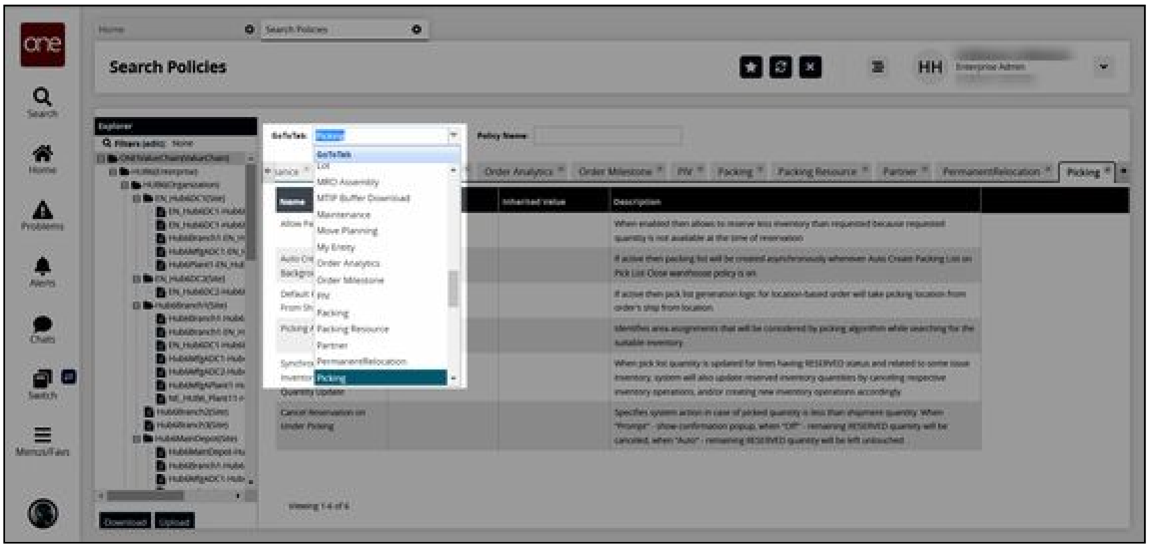
Complete the following steps to set the Allow Partial Reservations policy:

1. Log in to the ONE system.

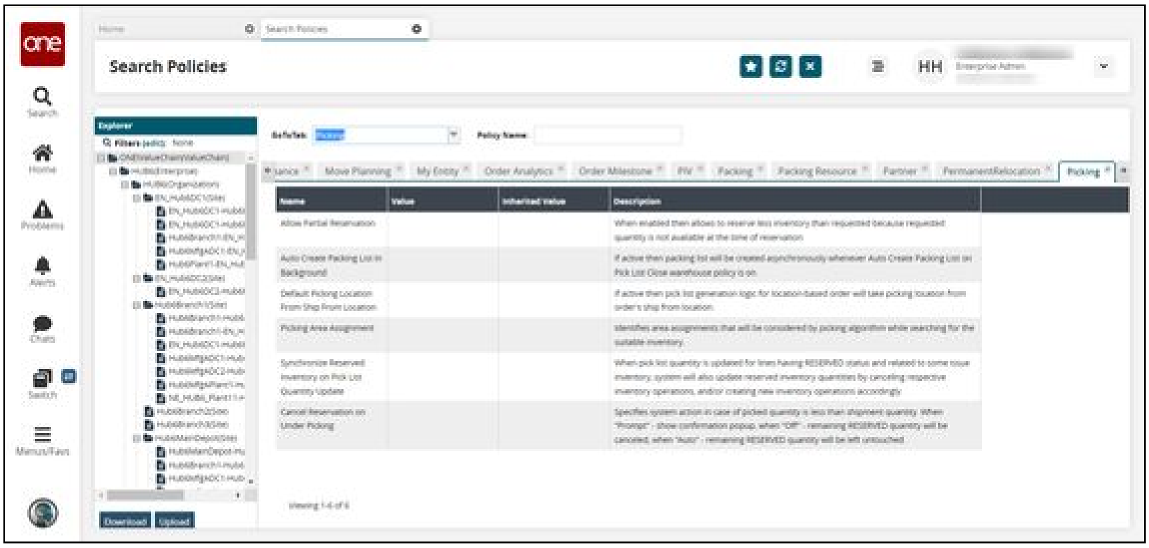
2. Click **Menu/Favs > Administration > Search Policies**.
   The Search Policies screen appears.



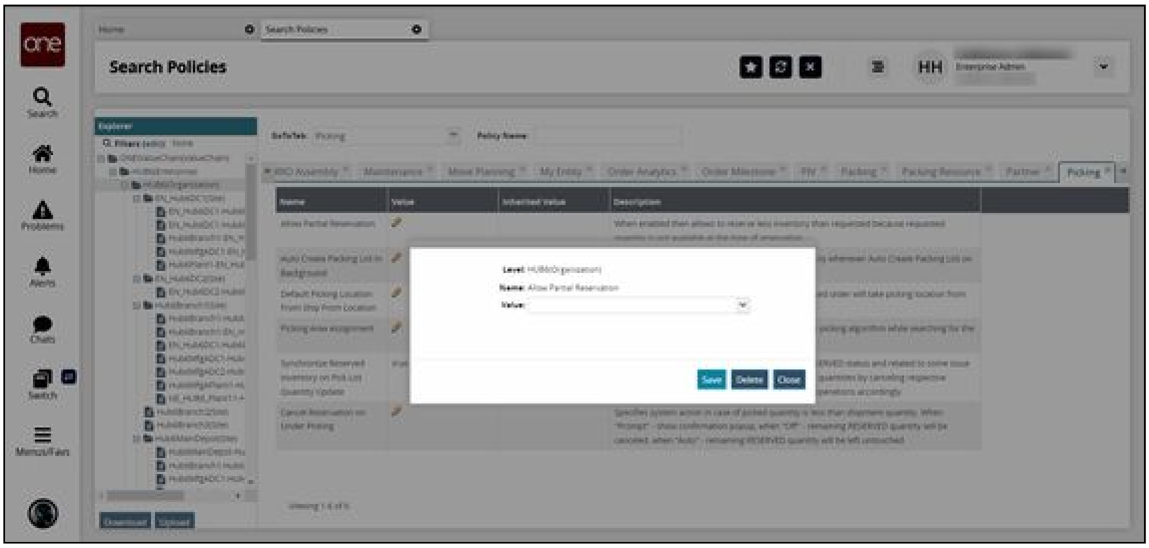
3. In the **Explorer** pane on the left, scroll to locate and click the name of the entity for whom you want to set the Allow Partial Reservations policy. You can also click the **Filters (edit)** link to search for the desired organization.
4. In the **GoToTab** dropdown list, select **Picking**.



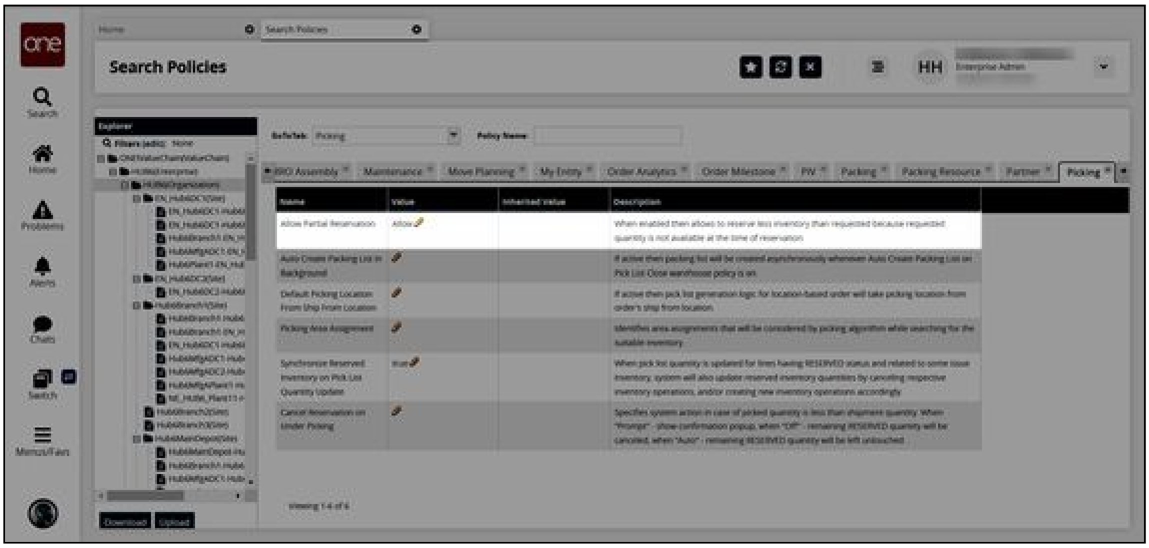
The Picking policies tab appears.



5. In the **Value** column, click the pencil icon beside **Allow Partial Reservation**.
   A popup window appears.



6. In the **Value** field, select **Allow** or **Deny** from the dropdown list.
7. Click the **Save** button.
   The screen refreshes with the value for the Allow Partial Reservations policy updated.

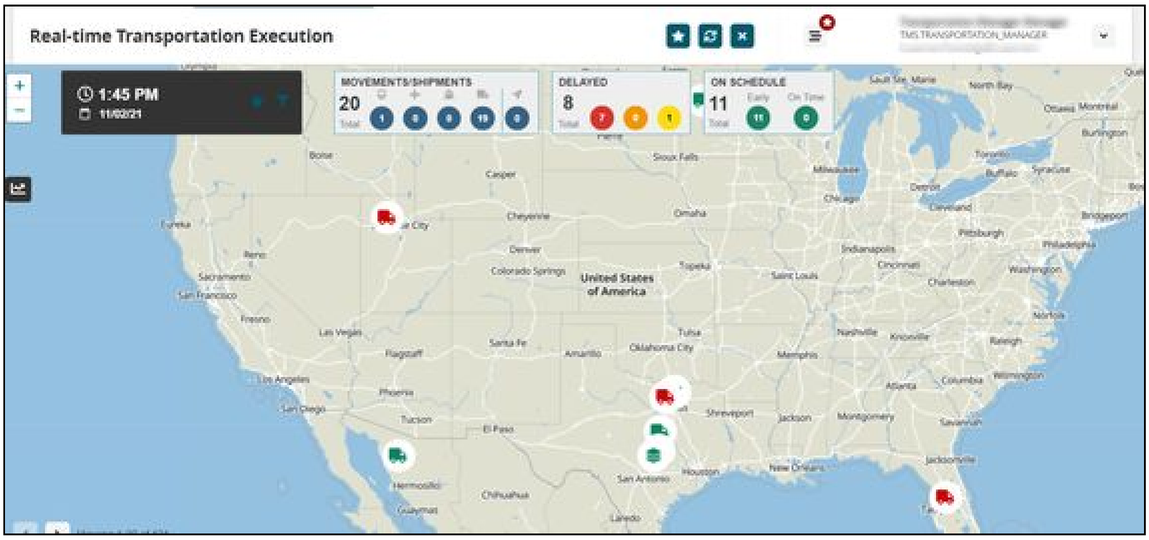


See the "New Picking Policy Allows Partial Reservation of Inventory" section in the current version of the *Release Notes* for more information.

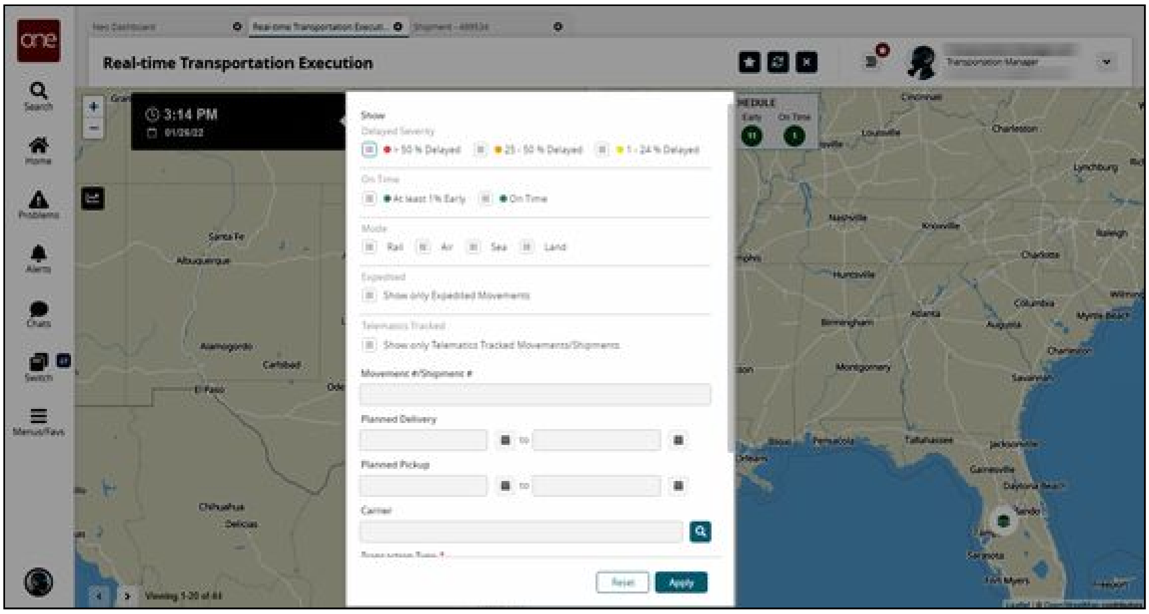
2.3.4.3 Viewing Movement and Shipment Details from the RTTEP

Complete the following steps to view Movement and Shipment detail screens from the Real-time Transportation Execution page (RTTEP):

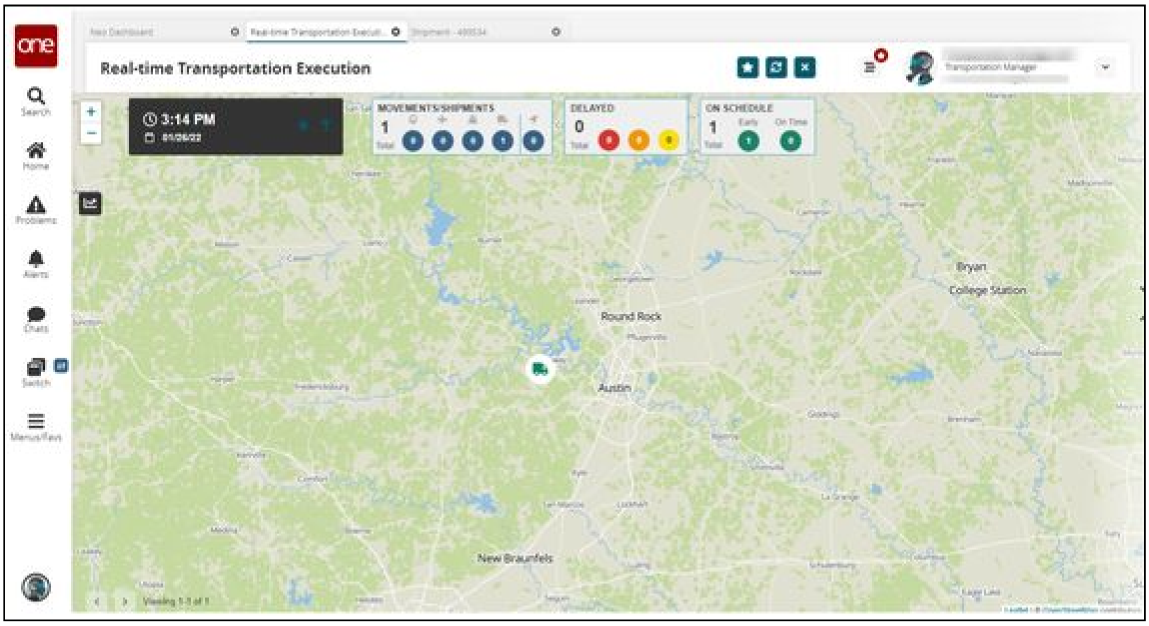
1. Log in to the ONE system.
2. Click **Menu/Favs > Transportation > Real-time Transportation Execution**.
   The Real-time Transportation Execution page displays.



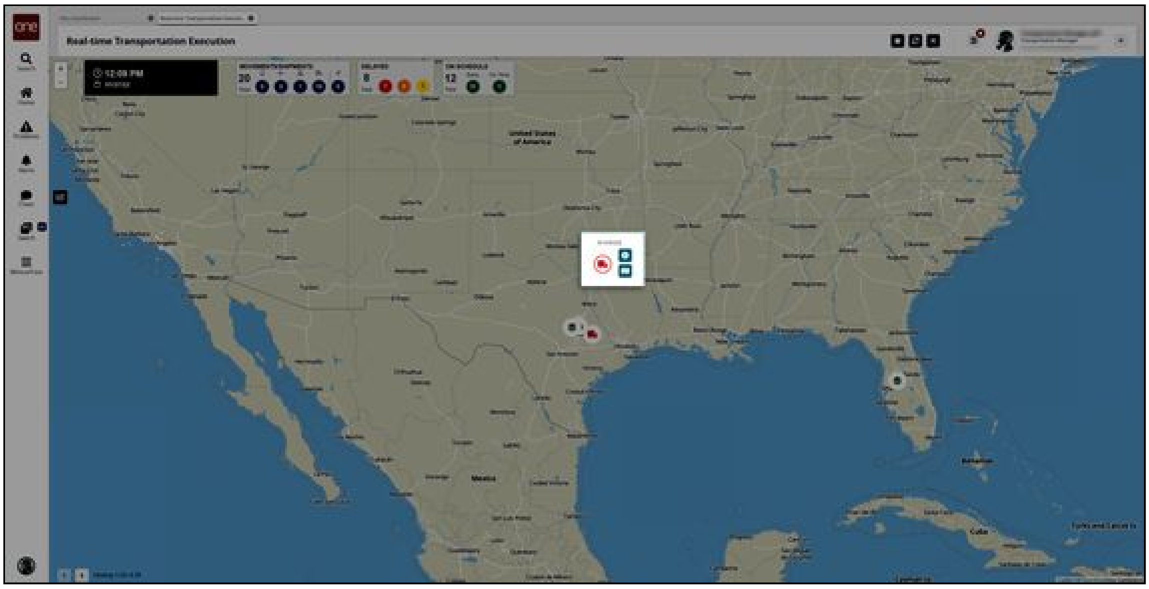
3. Click the filter icon to display the filters.



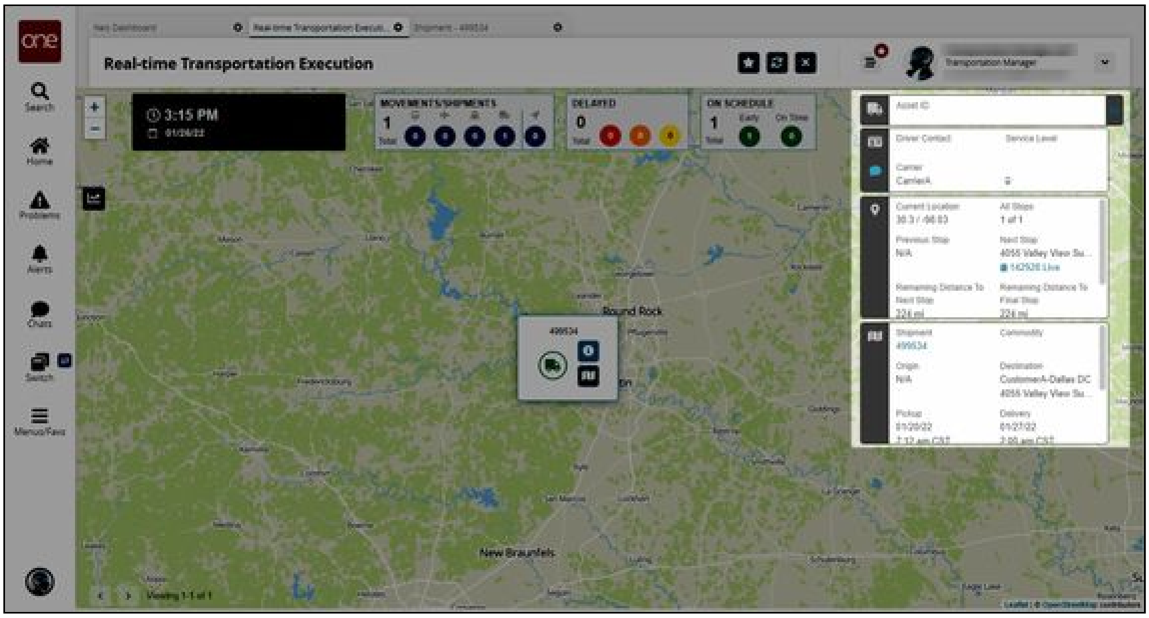
4. In the **Movement #/Shipment #** filter field, enter the desired movement or shipment number.
5. Click the **Apply** button.
   The desired Movement or Shipment icon displays.



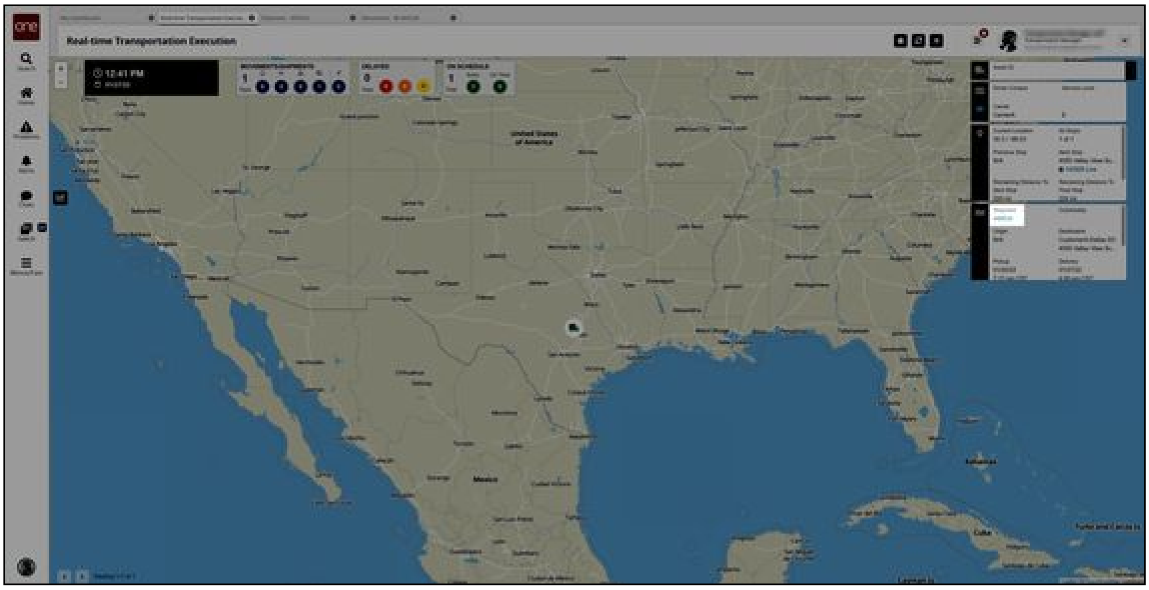
6. Click the **Movement** or **Shipment** icon.
   The Movement or Shipment popup window appears.



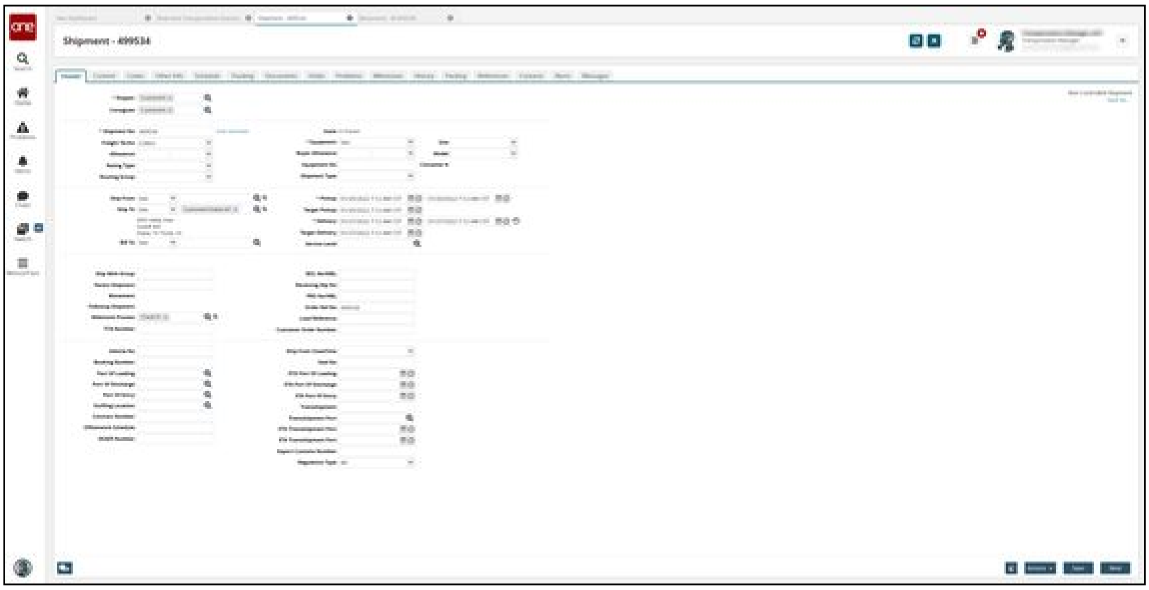
7. In the **Movement** or **Shipment** popup window, click the **Info** button for the movement or shipment.
   The Movement or Shipment info appears in a slideout to the right. For this example, we've used a shipment.



8. In the slideout, click the **Shipment** or **Movement** link.



The shipment detail screen appears in a new tab.

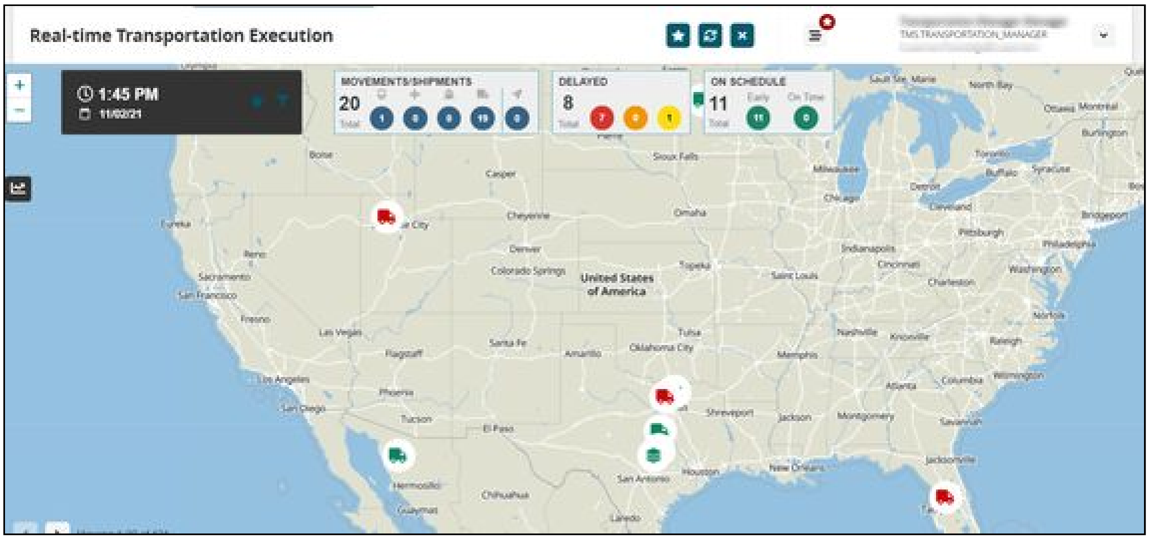


See the "Additional Scheduling Support on the Real-time Transportation Execution Page" section in the current version of the *Release Notes* for more information.

2.3.4.4 Viewing Movement or Shipment Problems from the RTTEP

Complete the following steps to view movement or shipment problems from the Real-time Transportation Execution page (RTTEP):

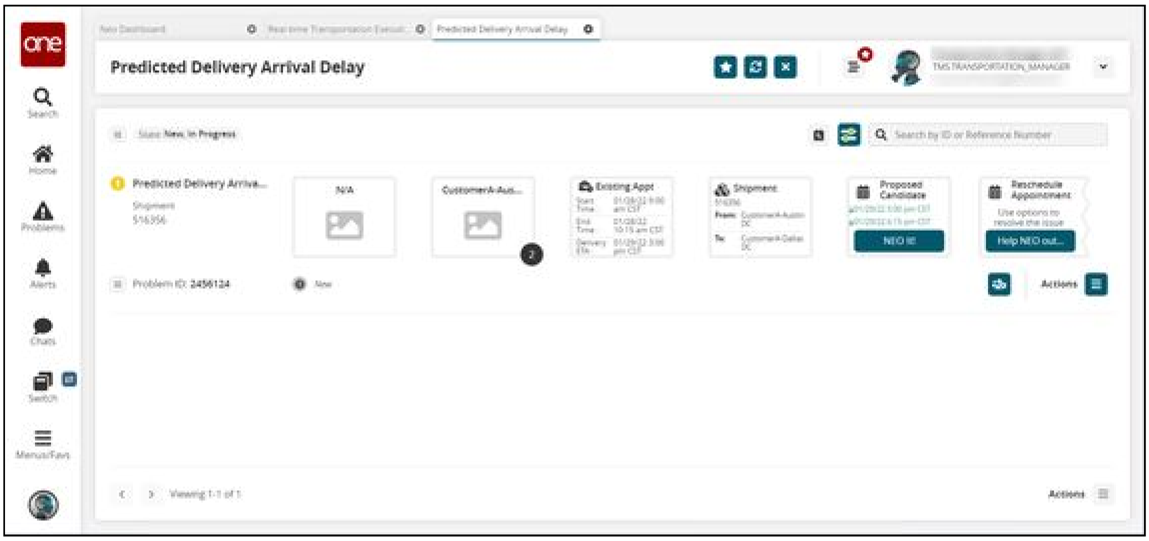
1. Log in to the ONE system.
2. Click **Menu/Favs > Transportation > Real-time Transportation Execution**.
   The RTTEP appears.



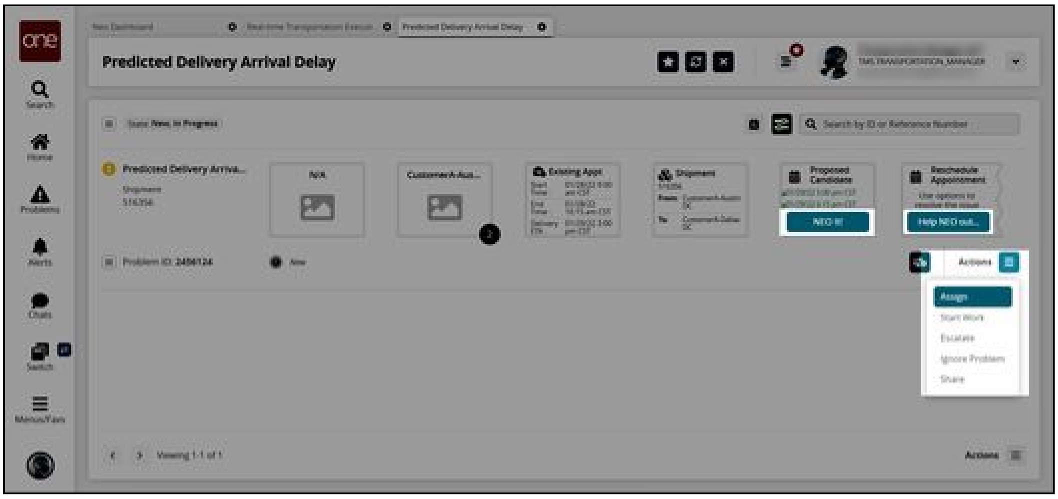
3. Click the desired movement or shipment icon or click the filter icon to search for a specific movement or shipment. See the "Tracking Movements on the Real-Time Transportation Execution Page" section in *Online Help* for more information on using the filters to search for a shipment or movement.
   The selected movement or shipment popup window displays.

If the movement or shipment has a problem, the problem icon displays.

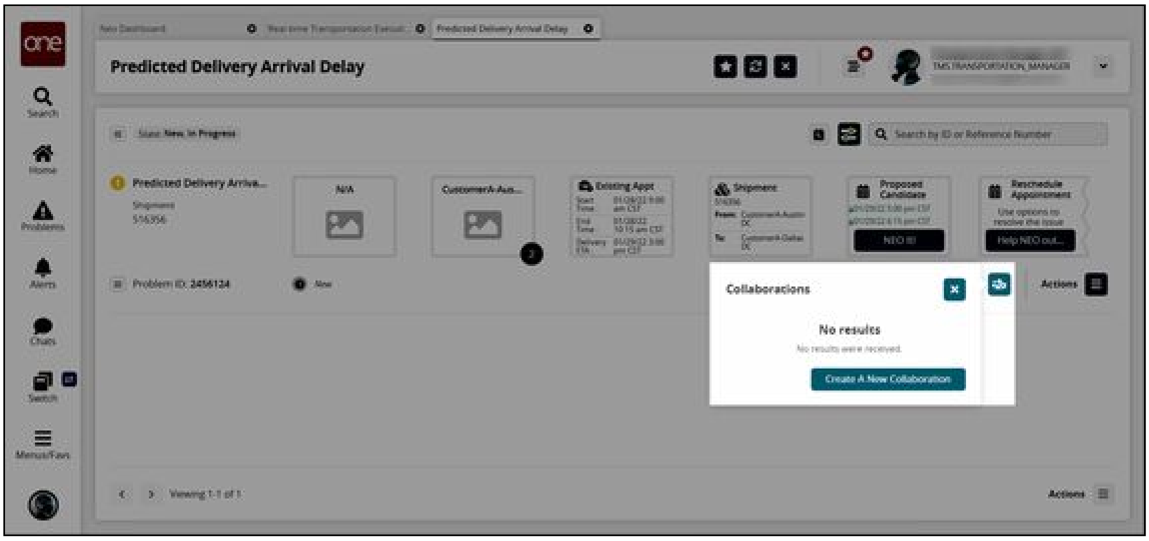
4. Click the problem icon.
   The Predicted Delivery Arrival Delay screen displays the problem with the selected shipment or movement.



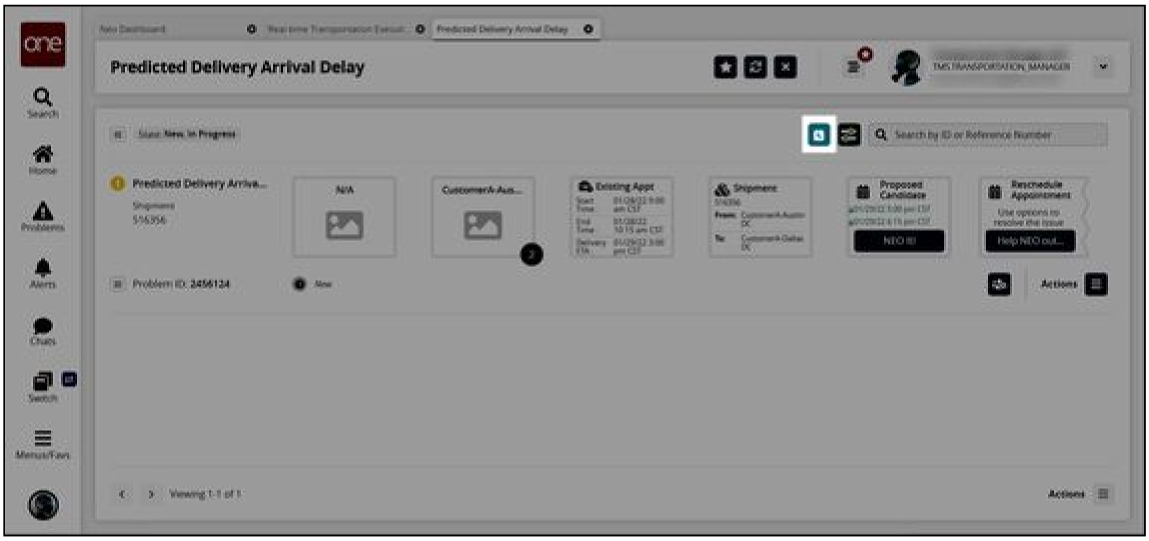
5. From the **Predicted Delivery Arrival Delay** screen, you can complete the following actions:
   A. Click the **NEO It!** button to use NEO to resolve the problem.
   B. Click the **Help NEO Out** button to view the options to manually resolve the problem.
   C. Click the **Actions** icon to view other options.



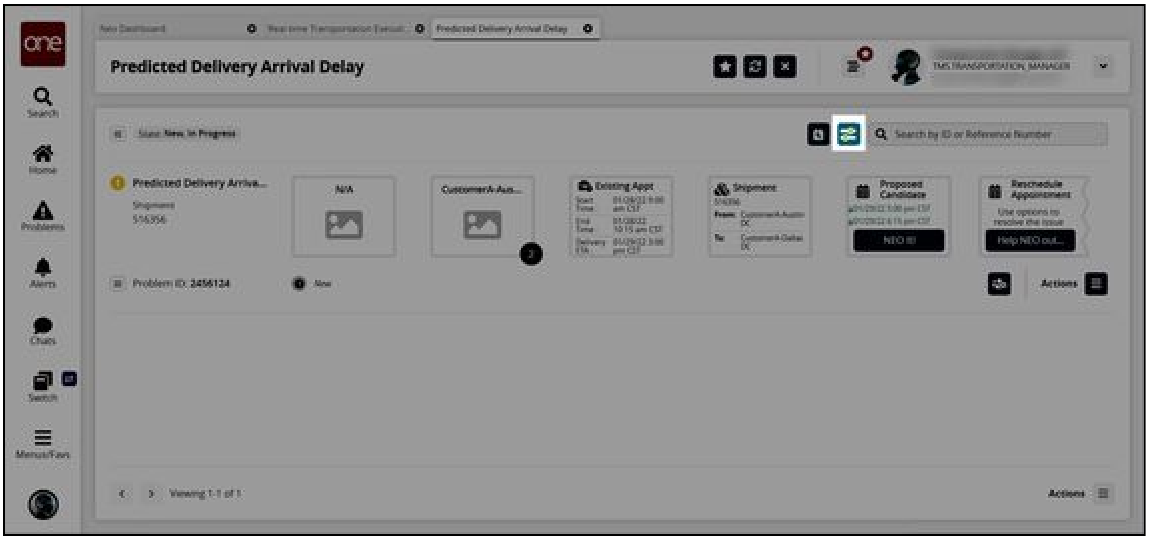
6. Click the collaboration icon to view the collaborations associated with this problem or to create a new collaboration.



7. Click the Create Hyperbot icon to create a hyperbot for this problem.



8. If multiple problems appear on the **Predicted Delivery Arrival Delay** page, click the **Filter Options** icon to display the filter fields that are used to locate a specific problem or limit the problems shown on the page to specific criteria.



See the "Additional Scheduling Support on the Real-Time Transportation Execution Page" section in the current version of the *Release Notes* for more information.

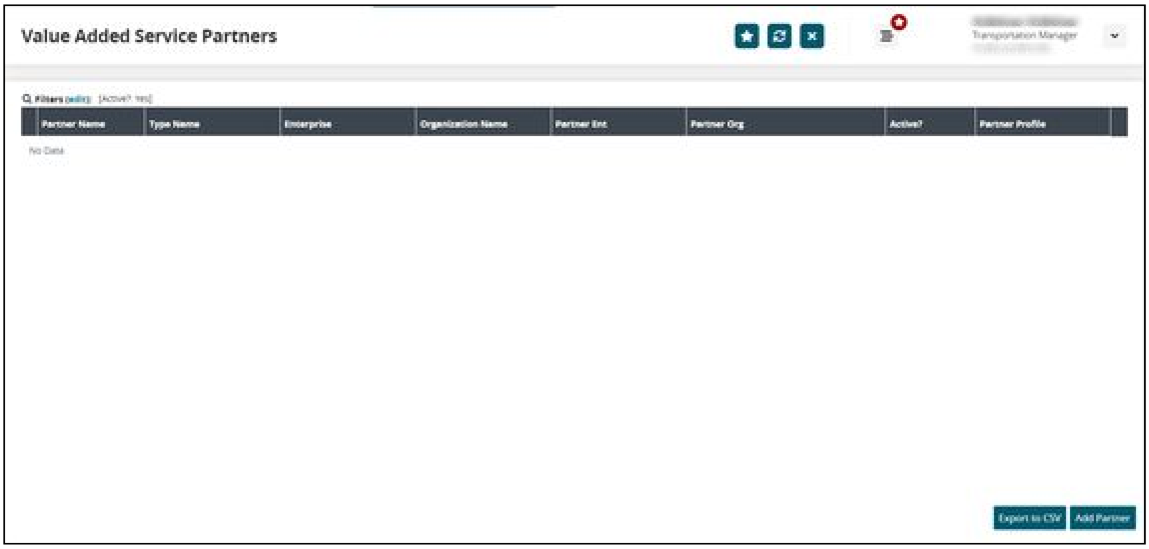
2.3.5 Visibility

2.3.5.1 Adding a Value Added Service (VAS) Partner

Value Added Service (VAS) partners, or providers, offer more than regular shippers and carriers. They often provide services above and beyond the transportation of goods, such as picking, packing, etc. Under a VAS partner, users can also set up profiles to define individual parameters for unique service needs.

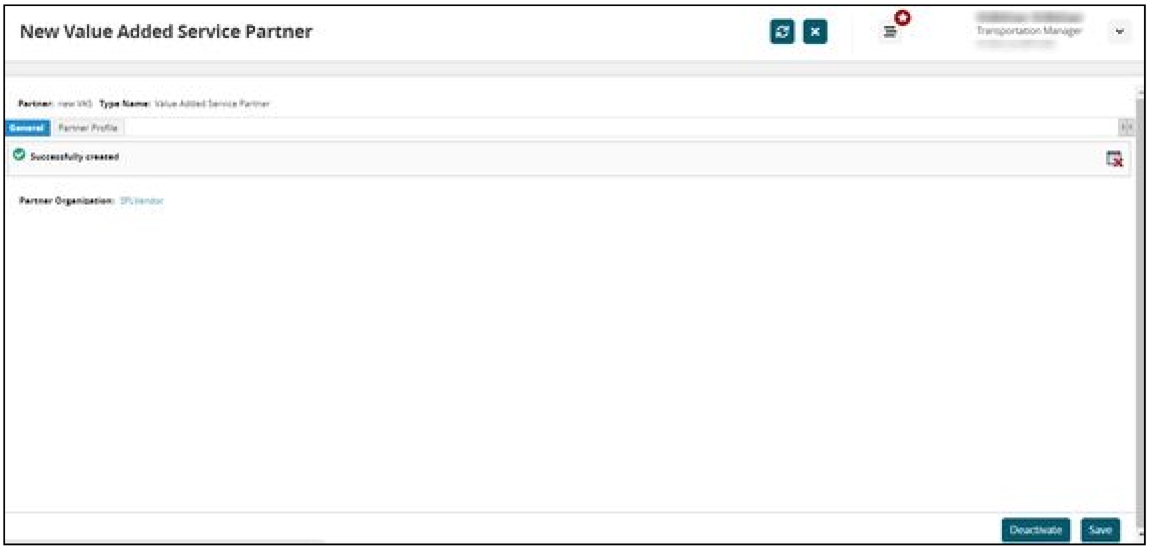
Complete the following steps to add a VAS partner:

1. Log in to the ONE system.
2. Click **Menu/Favs > Administration > Partners > Value Added Service Partners**.
   The Value Added Service Partners screen displays with all current VAS partners.



3. Click the **Add Partner** button.
   The New Value Added Service Partner screen displays.

4. Enter the VAS provider's name in the ***Partner Name** field. Fields with an asterisk (*) are required.
5. Use the picker tool to select the ***Partner Organization**.
6. Click the **Save** button.
   A success message displays on a new profile page for the VAS partner; the General tab is selected by default.



7. Click the **Partner Profile** tab.
   A profile report displays.
8. Click the **Add Partner Profile** button.
   The New Partner Profile screen displays.

9. Complete the following fields as described in the table below. Fields with an asterisk (*) are required.

Field	Description
*Name	Enter a name for this profile for the VAS partner.
Delivery Load Type	Select a delivery load type from the dropdown list.
PickUp Load Type	Select a pickup load type from the dropdown list.

Field	Description
Delivery Appointment Code	Click the picker tool to select a delivery appointment code for this partner profile.
PickUp Appointment Code	Click the picker tool to select a pickup appointment code for this partner profile.
Delivery Commodity Code	Click the picker tool to select a delivery commodity code for this partner profile.
PickUp Commodity Code	Click the picker tool to select a pickup commodity code for this partner profile.
Note	Enter a description if necessary.

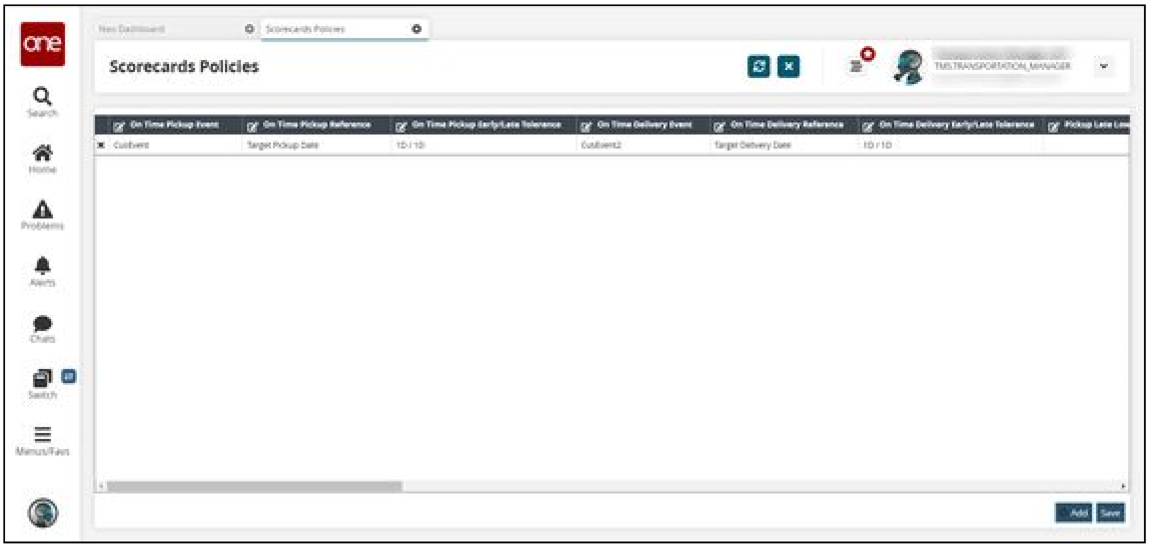
10. Click the **Save** button. You can click the **Save and Add Another** button if you have more profiles to create for this VAS partner.
    A green success message displays for the profile detail screen.
11. Click the **Close** button.
    The profile detail screen closes.
12. Click the refresh button on the VAS partner page detail page.
    The profile is added under the Profile tab in the table for profiles.

See the "Support for Detention and Demurrage Computations for Value Added Service Providers" section in the current version of the *Release Notes* for more information.

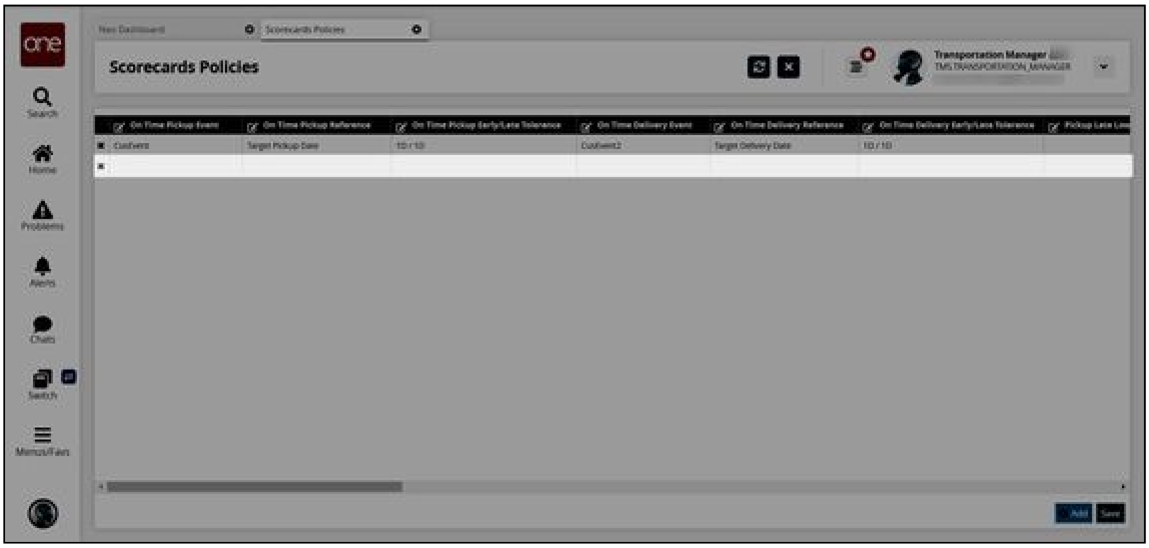
2.3.5.2 Configuring Scorecard Policies for Custom Tracking Events

Complete the following steps to configure scorecard policies for a custom tracking event:

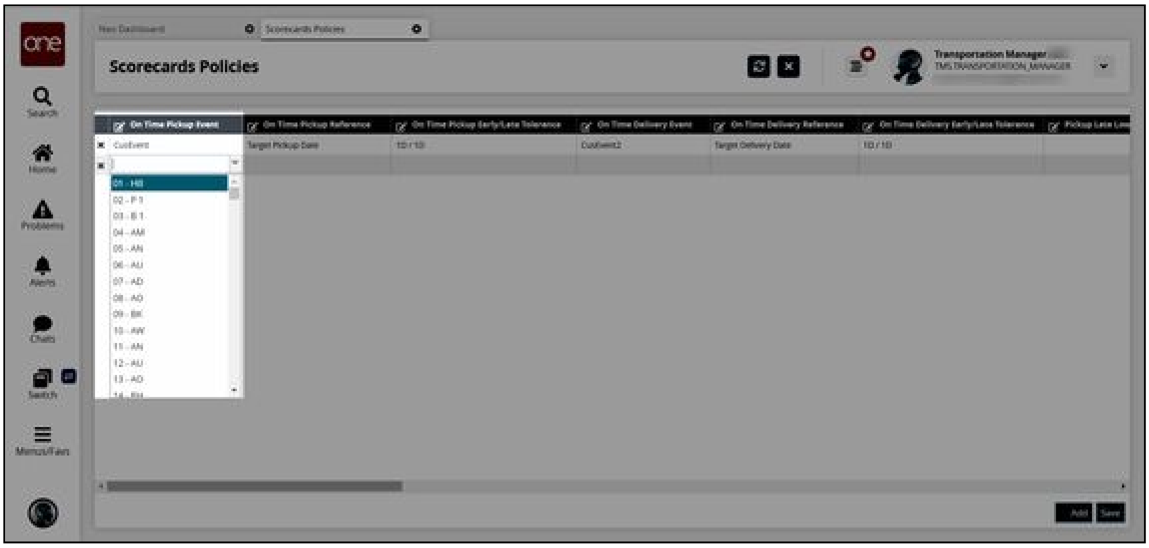
1. Log in to the ONE system.
2. Click **Menu/Favs > Reports > Scorecards > Scorecards Policies.**
   The Scorecards Policies page appears with any current scorecard policies displayed.



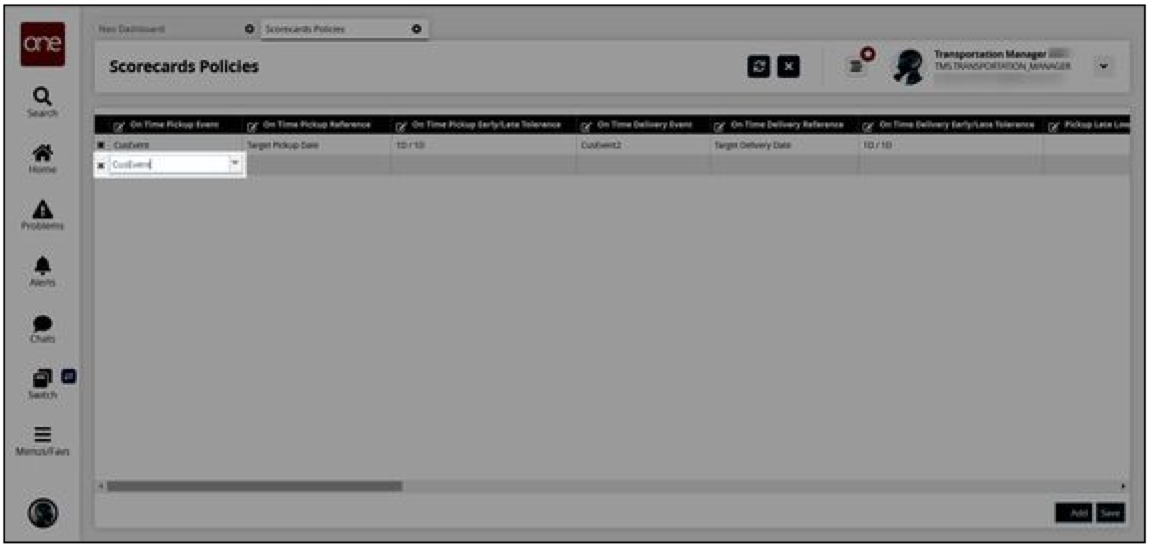
3. Click the **Add** button.
   A new row appears.



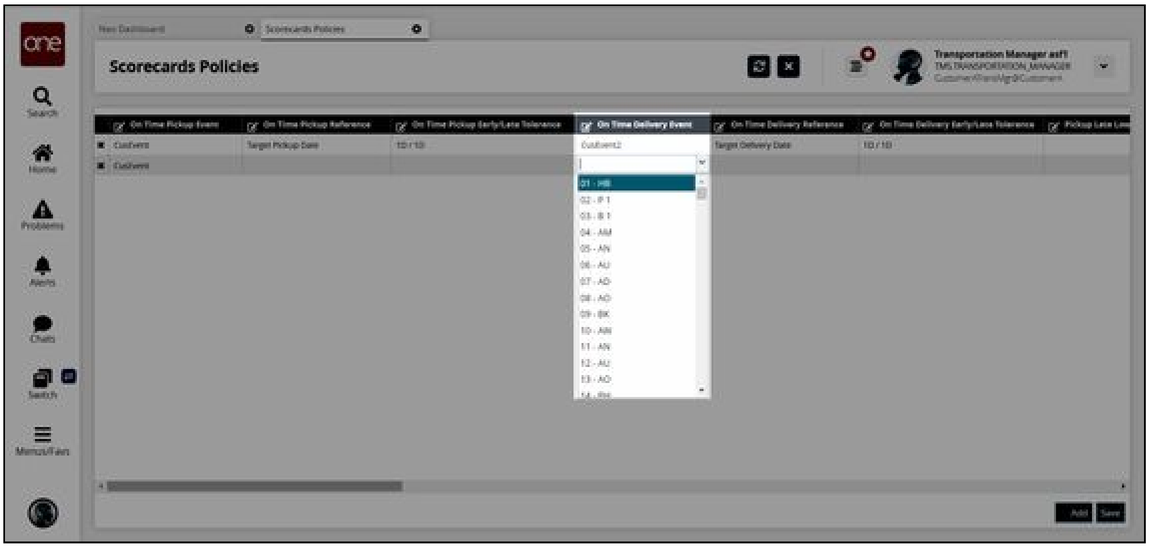
4. In the **On Time Pickup Event** column, click inside the cell for the newly added row.
   A dropdown list appears.



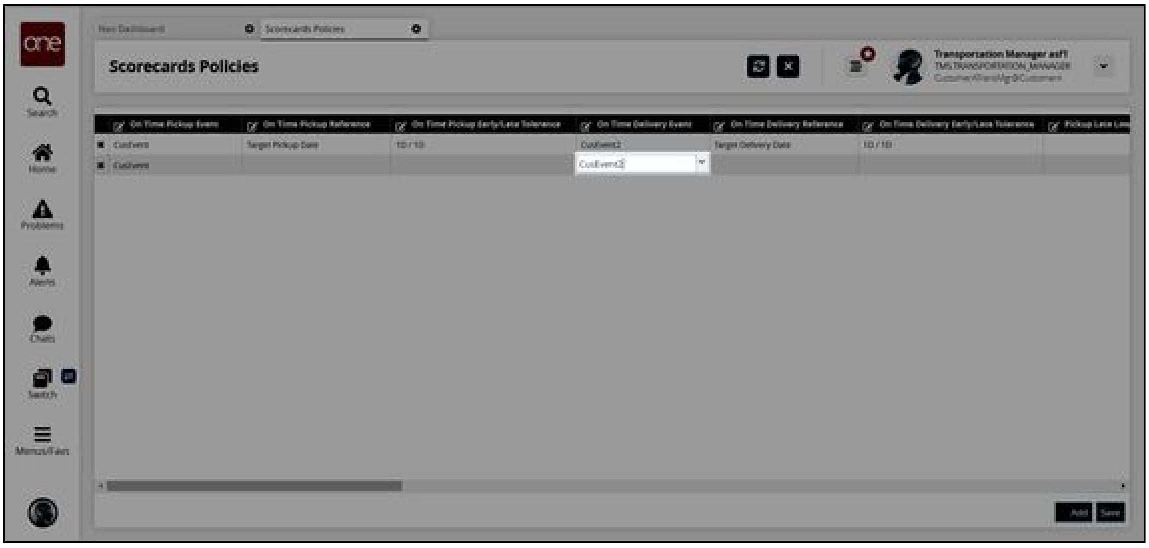
5. Select a custom tracking event from the dropdown list.



6. In the **On Time Delivery Event** column, click inside the cell for the newly added row.
   A dropdown list appears.



7. Select a custom tracking event from the dropdown list.



8. Fill in the rest of the row for the new scorecard policy as desired. The **On Time Pickup Reference** and **On Time Delivery Reference** fields are required.
   For more information, see the "Configuring Scorecard Policies" section in *Online Help*.
9. Click the **Save** button.
   A success message appears.

See the "Carrier Scorecard to Support Custom Tracking Events" section in the current version of the *Release Notes* for more information. Also, please see the "Carrier Scorecards" and "Configuring Scorecards" sections in the current release of *Online Help*.

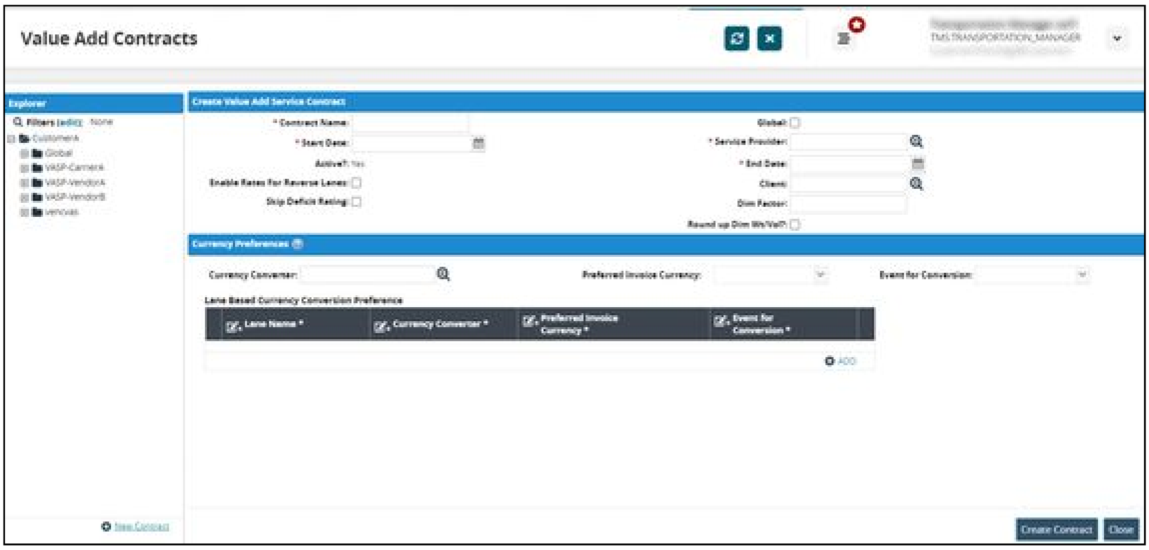
2.3.5.3 Creating a Value Added Service (VAS) Contract

Complete the following steps to create a VAS contract:

1. Log in to the ONE system.

2. Click **Menu/Favs > Contract Mgmt > Value Add Contracts**.
   The Value Add Contracts screen displays.
3. Click the **Add Contract** link.

The right pane displays fields for contract details.



4. Complete the following fields. Fields with an asterisk (*) are required.

Section	Field	Description
Create Value Add Service Contract	*Contract Name	Enter a name for this contract.
	*Start Date	Use the calendar tool to select the start date for the contract.
	Active?	This field is auto-populated for new contracts.

Section	Field	Description
	Enable Rates for Reverse Lanes	Check the box if this contract will include rates for reverse lanes.
	Skip Deficit Rating	Check the box if the rating calculations for the contract should be skipped if there is a deficit.
	Global	Check the box if this contract will be for a global VAS provider.
	*Service Provider	Use the picker tool to select a service provider.
	*End Date	Use the calendar tool to select an end date for the contract.
	Client	Use the picker tool to select a client.
	Dim Factor	Enter the factor used to calculate the dimensional weight.
	Round Up Dim Wt/Vol?	Check the box if the calculation should round up to the nearest whole UOM.
Currency Preferences	Currency Converter	Use the picker tool to select a currency conversion model.
	Preferred Invoice Currency	Select the preferred currency to be used for invoices from the dropdown list.
	Event for Conversion	Select the event that triggers the conversion.
	Lane Based Currency Conversion Preference	Complete the following instruction to add the preferred lane-based currency conversion: A. Click the **ADD** link. A new row displays in the table. Fields with an asterisk (*) are required. B. Click under **Lane Name*** and use the picker tool to select a geographical lane. C. Click under **Currency Converter*** and use the picker tool to select a conversion model. D. Click under **Event for Conversion*** and select the event that triggers the conversion. Complete the following fields. Fields with an asterisk (*) are required.

5. Click the **Create Contract** button.
   A green success bar displays.

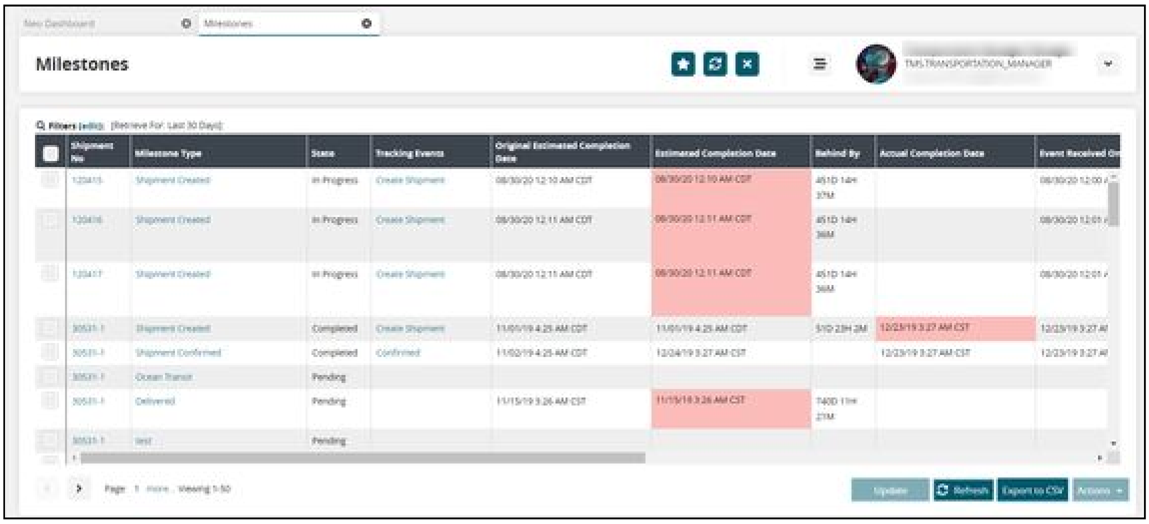
See the "Support for Detention and Demurrage Computations for Value Added Service Providers" section in the current version of the *Release Notes* for more information.

2.3.5.4 Enabling or Disabling Multiple Shipment Milestones

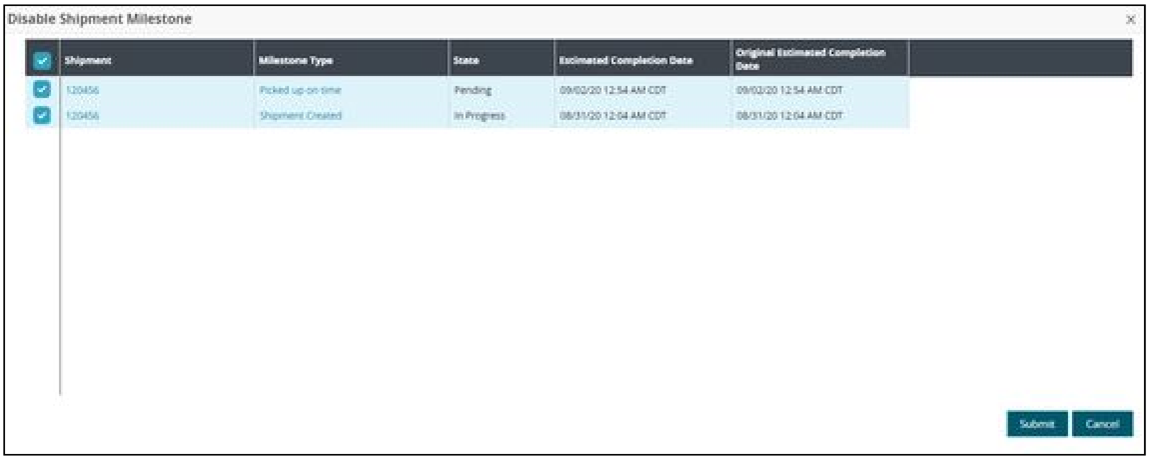
Users can enable or disable shipment milestones as a bulk action. The system will display whatever option is appropriate for the selected milestones (enable or disable), including no action options if the selected milestones have incompatible states. The Disable Shipment Milestone action will disable the records and change the milestone states to Not Applicable. The Enable Shipment Milestone action will enable the milestone records and change the states to Pending. Users can update multiple shipment milestones in bulk using one of two ways, as outlined below.

Complete the following steps to enable or disable multiple shipment milestones at one time:

1. Log in to the ONE system.
2. Click **Menu/Favs > Transportation > Shipment Milestones > Milestones**.
   The Milestones screen displays.



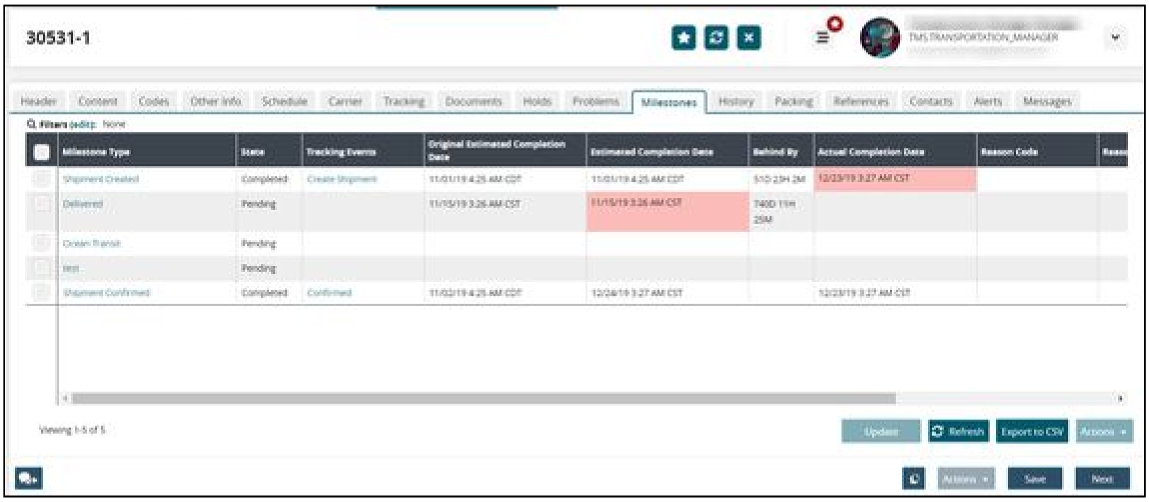
3. Use the filters to search for specific milestones if necessary.
4. Check the box in front of the milestone records. Milestones should be in similar states that would allow performing bulk enabling or disabling.
5. Click the **Actions** button.
   A menu displays.
6. Click the option (**Enable Shipment Milestone** or **Disable Shipment Milestone**).
   A popup screen displays the selected milestones.



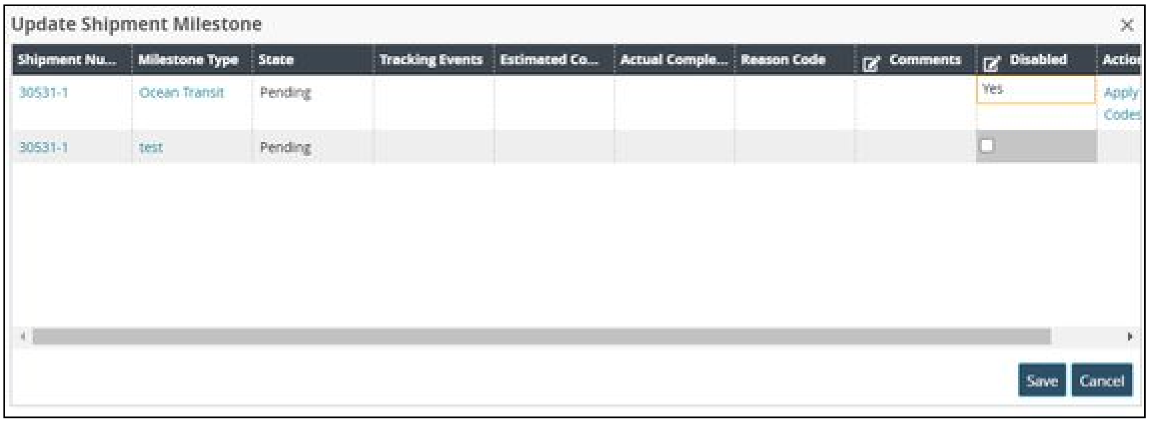
7. Click the **Submit** button.
   A green success bar displays and the screen updates the selected milestones' states.

Complete the following steps to enable or disable multiple milestones from a shipment's milestone details page:

1. Log in to the ONE system.
2. Search for a shipment using the global search bar on the navigation page or from the Search Shipments screen using the instructions above to locate a shipment.
3. Click on the **Shipment No** link.
   The shipment's detail screen displays.
4. Click on the **Milestones** tab.
   Milestones set for this shipment display.



5. Check the boxes to select milestones.
6. Click the **Update** button.
   The Update Shipment Milestone popup window displays.
7. Click in the **Disabled** field.
   A check box displays.



8. Click to check or uncheck the box.
   A checked box displays Yes for the Disabled field, and an unchecked box displays No.
9. Click the **Save** button.
   A green success bar displays.
10. Click the **Close and Refresh** button.
   The Milestone tab updates the milestones' details in the State column.

See the "Support for Bulk Enabling or Disabling Multiple Shipment Milestones" section in the current version of the *Release Notes* for more information.

2.3.5.5 Navigating the Redesigned Control Tower Workbench

The Control Tower Workbench (CTW) provides users with a single point of contact in the UI to track and optimize standard and multi-modal shipments within global trade. The workbench learns the transnational behavior of shipments and movements within the system and suggests a milestone template (which will be continuously refined based on new transnational patterns) in addition to generating problems and alerts. It provides visibility to the order, BOL, booking, and container numbers for each shipment. Order milestones are not only provided on their own timeline but they are linked to shipment timelines and appended to the shipment milestone timeline with the following conditions:

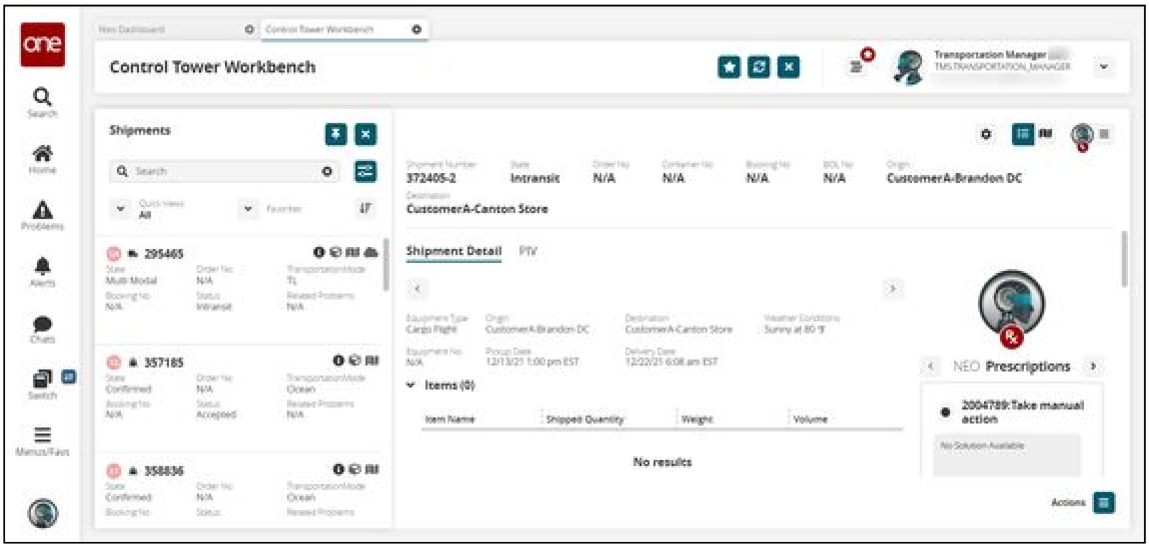
- Prefix order milestone with a milestone group as Order Confirmation.
- Suffix order milestone with a milestone group as Delivery Closure.

Users can monitor the progress of cargo from packing to clearing export customs along a progress bar with status indicators for each step. They also have the ability to drill down into shipment information to view tracking and milestone events, problems, and a map view of the shipment's location. Most importantly, the CTW provides users with the NEO It option that performs recommendations for the next step in solving any problems or optimizing the shipment.

- Shipments Slideout(see page 84)

Complete the following steps to access the Control Tower Workbench:

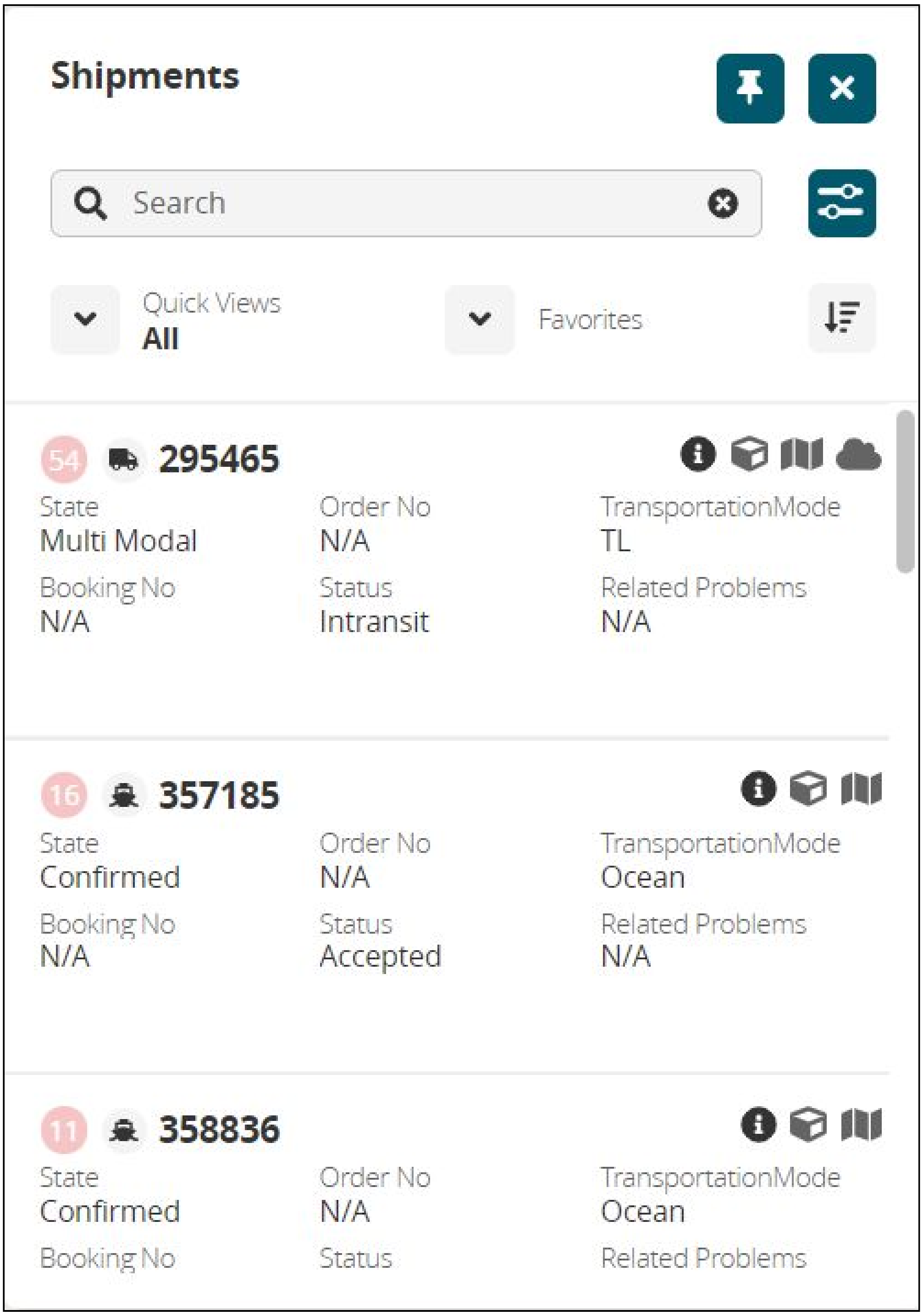
1. Log in to the ONE system.
2. Click **Menu/Favs > Transportation > Control Tower Workbench.**
   The Control Tower Workbench screen appears.



The following sections define functionality found in the CTW.

Shipments Slideout

The **Shipments** slideout is located on the left side of the CTW.



Customization Tools in the Shipments Slideout

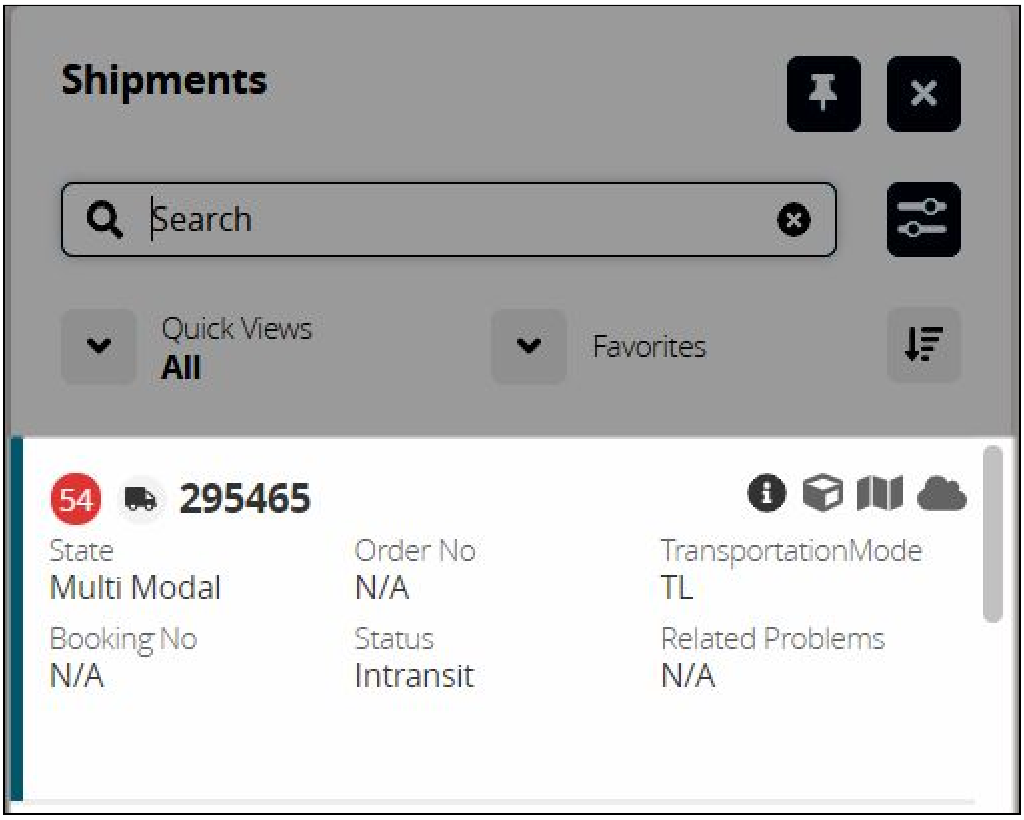
The CTW customization tools allow users to set the following attributes:

- Pin icon - Users can pin the Shipments slideout to an open position.
- X icon - Users can close the Shipments slideout.
- Favorites - Users can add views to the Favorites list.
- Quick Views - Users can select In Air, On Ocean, On-Road, At Port, Delivered, or Reset.
- Filter - Users can filter by shipment number, origin, destination, item number, warnings only, and problems only.

Shipment Information in the Shipment Slideout

The **Shipments** slideout provides shipment information and weather conditions as well as an indicator for critical problems that need attention or suggestions for optimization. As shown in the example, the following items are displayed for shipments:

- Shipment Number
- Order Number
- State
- Transportation Mode
- Status
- Booking Number
- Related problems

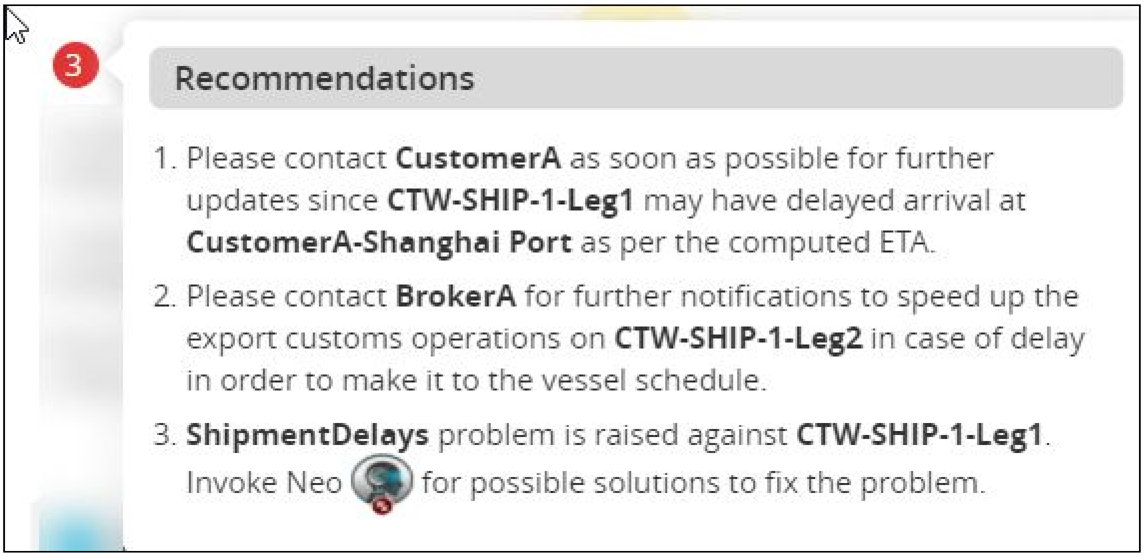


Click one of the icons indicated below for more information on the shipment:

- The information icon displays more shipment information in the pane to the right.
- The cube icon displays container information.
- The map icon displays the map view.
- The cloud icon displays animated weather information for the shipment's location.

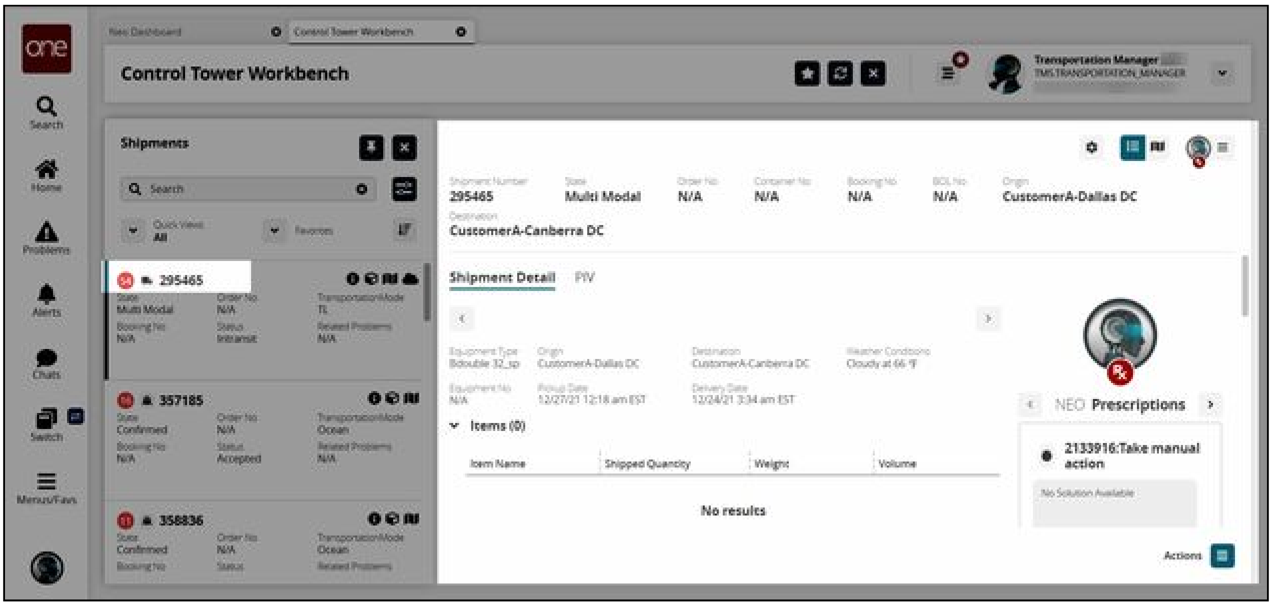
Recommendations in the Shipments Slideout

The red circle to the left of a shipment number in the **Shipments** slideout (shown below) indicates that there are critical recommendations that require immediate attention for the shipment. A blue circle indicates suggested recommendations that will improve optimization.



Shipment Information and Detail

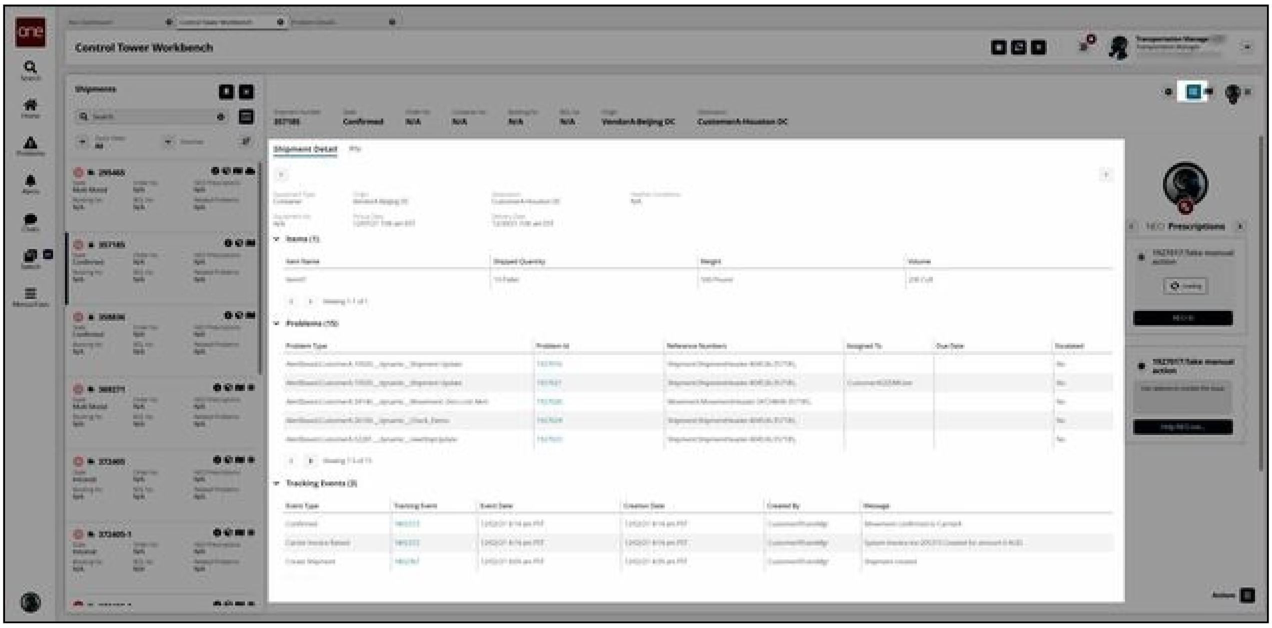
In the **Shipments** slideout, click a shipment number to display the shipment details in the pane to the right on the CTW.



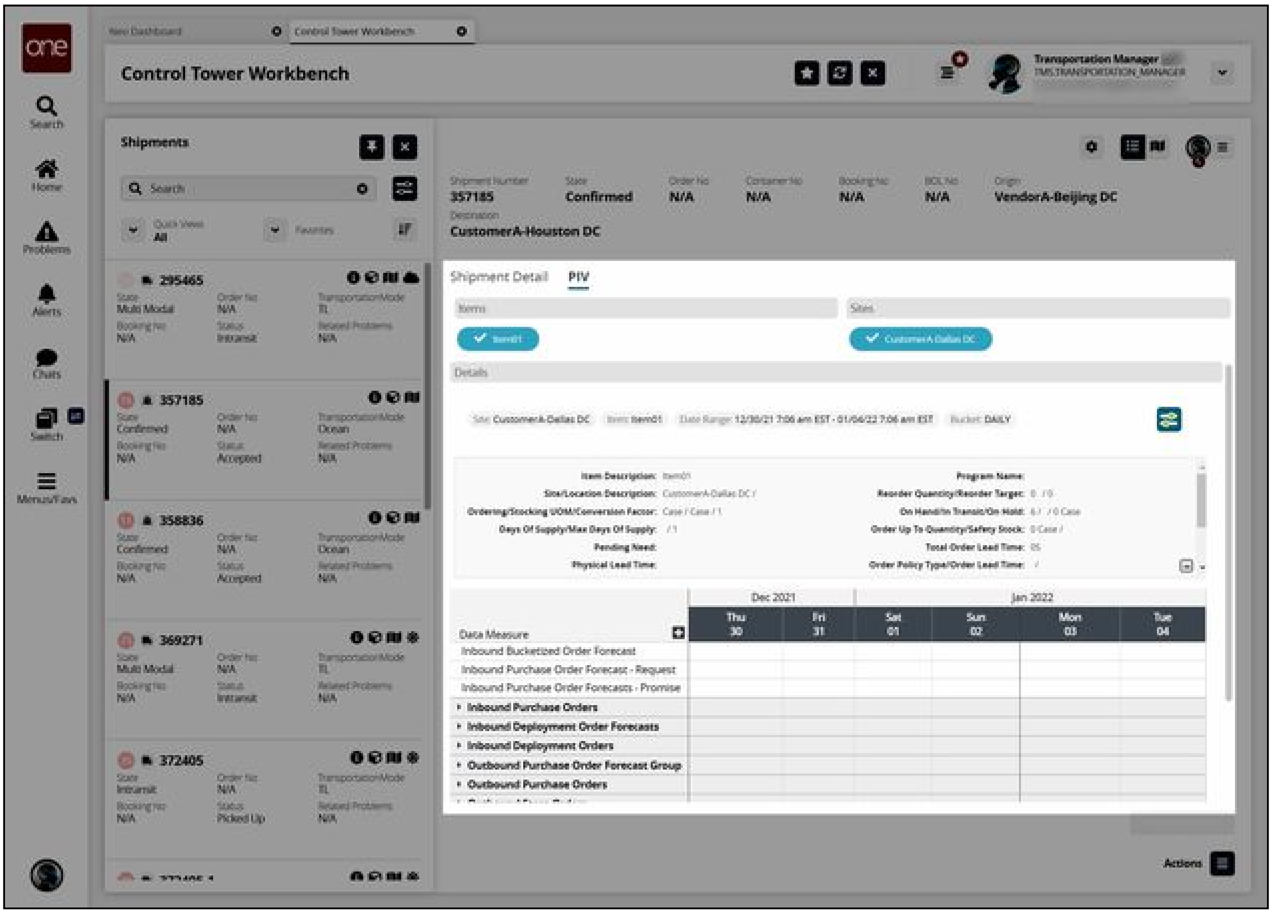
Tabs View

The shipment information opens with the **Tabs** view selected (bullet list icon). Users can switch between the **Shipment Detail** tab or the **PIV** tab.

The **Shipment Detail** tab displays an **Items, Problems, Tracking Events,** and **Milestones** section for the selected shipment.

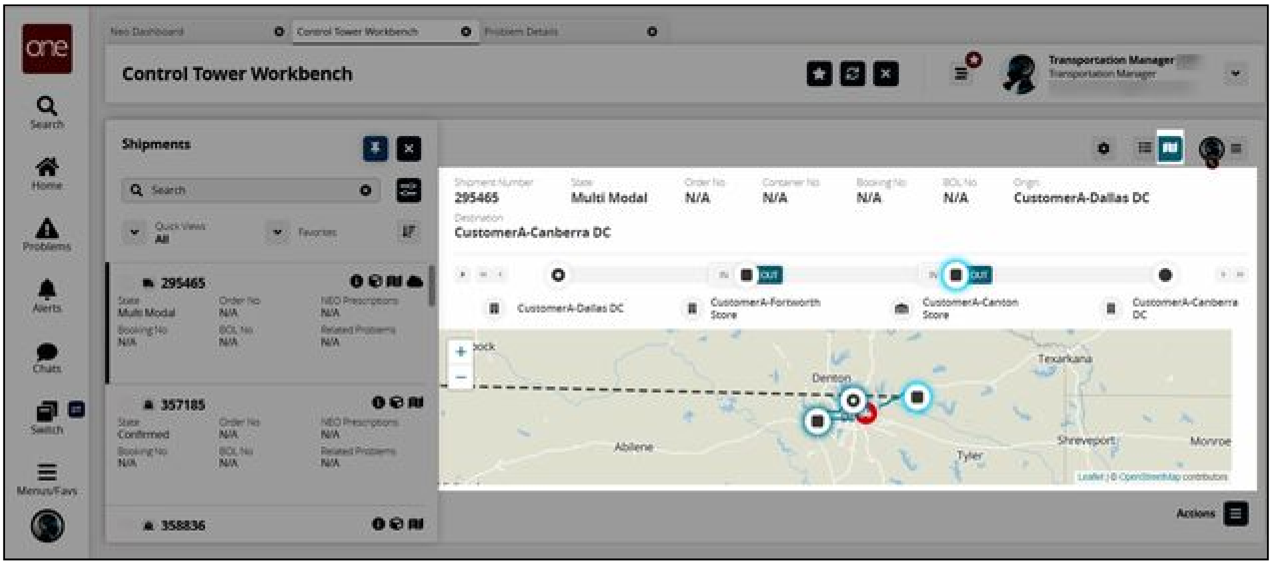


The **PIV** tab (shown in the image below) provides details for items and sites with specific data measures and anticipated dates. Users can swap locations (using the Swap Locations button) and apply more specific filters (using the filter icon) on this view. Filters include site, location, item, program, planner code, variation, date range, my preference, and a timeframe bucketization.

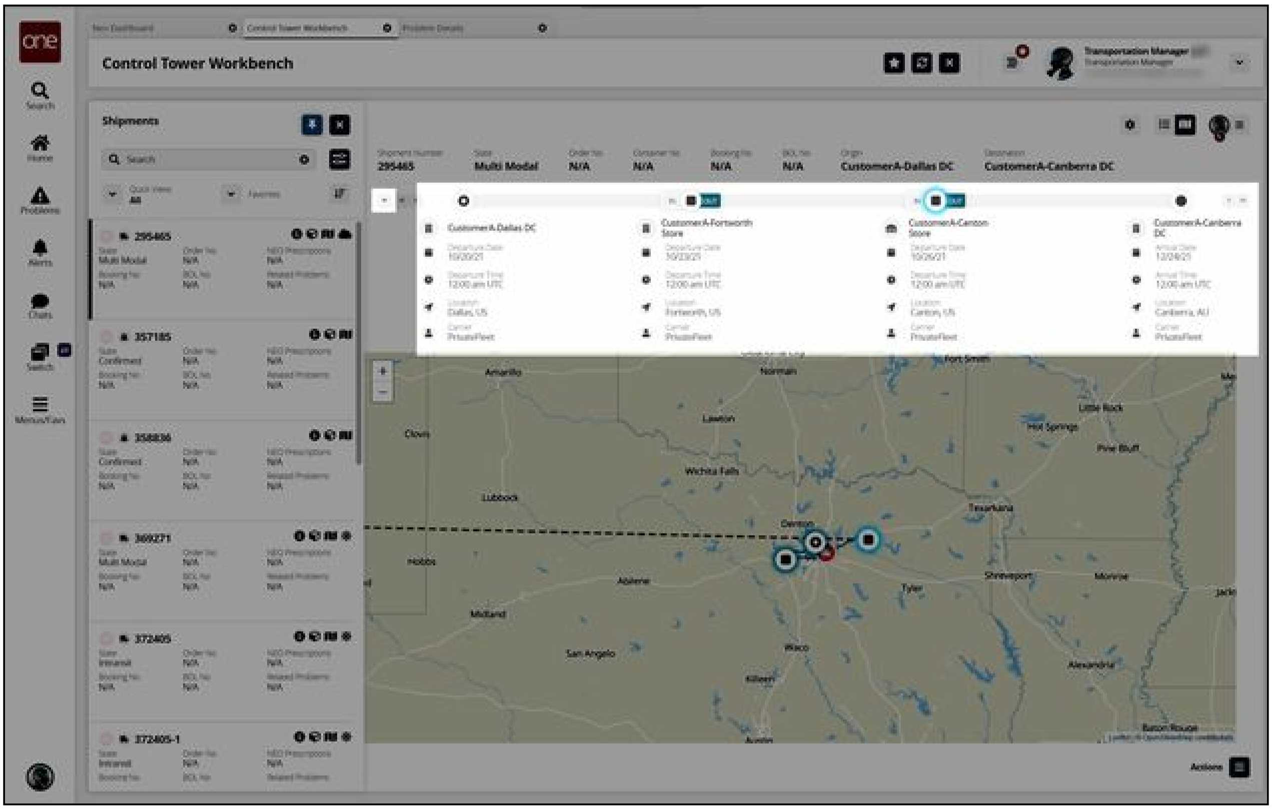


Map View

Click the map icon to display the shipment information in map view.

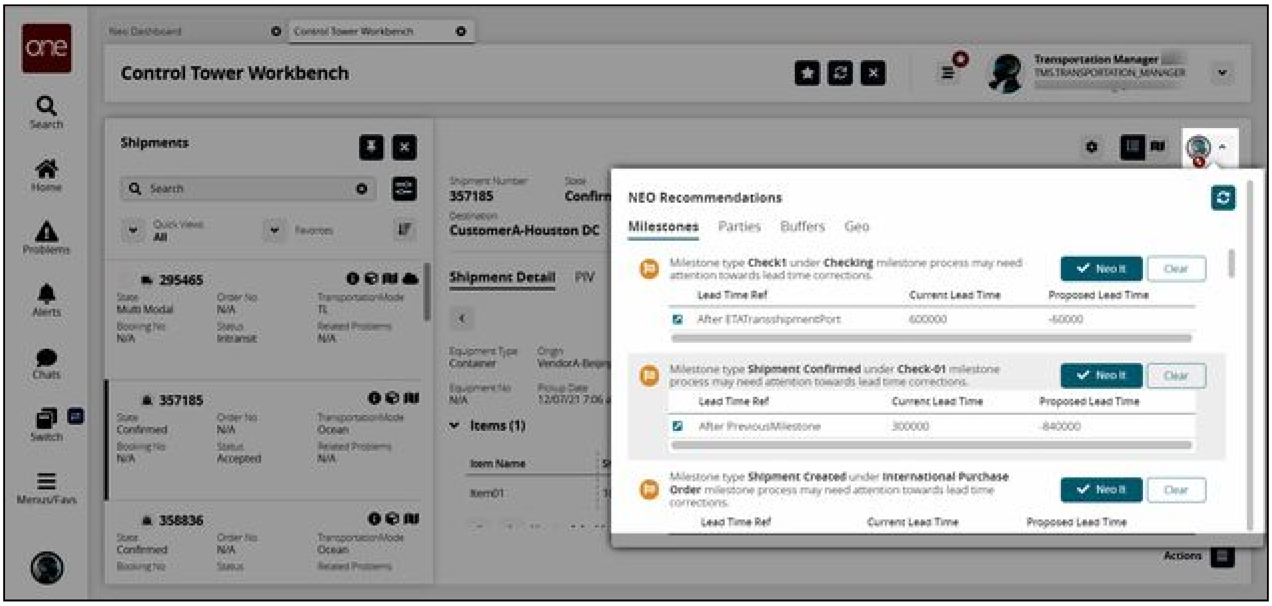


Click the arrow to the left to expand the information about each leg.



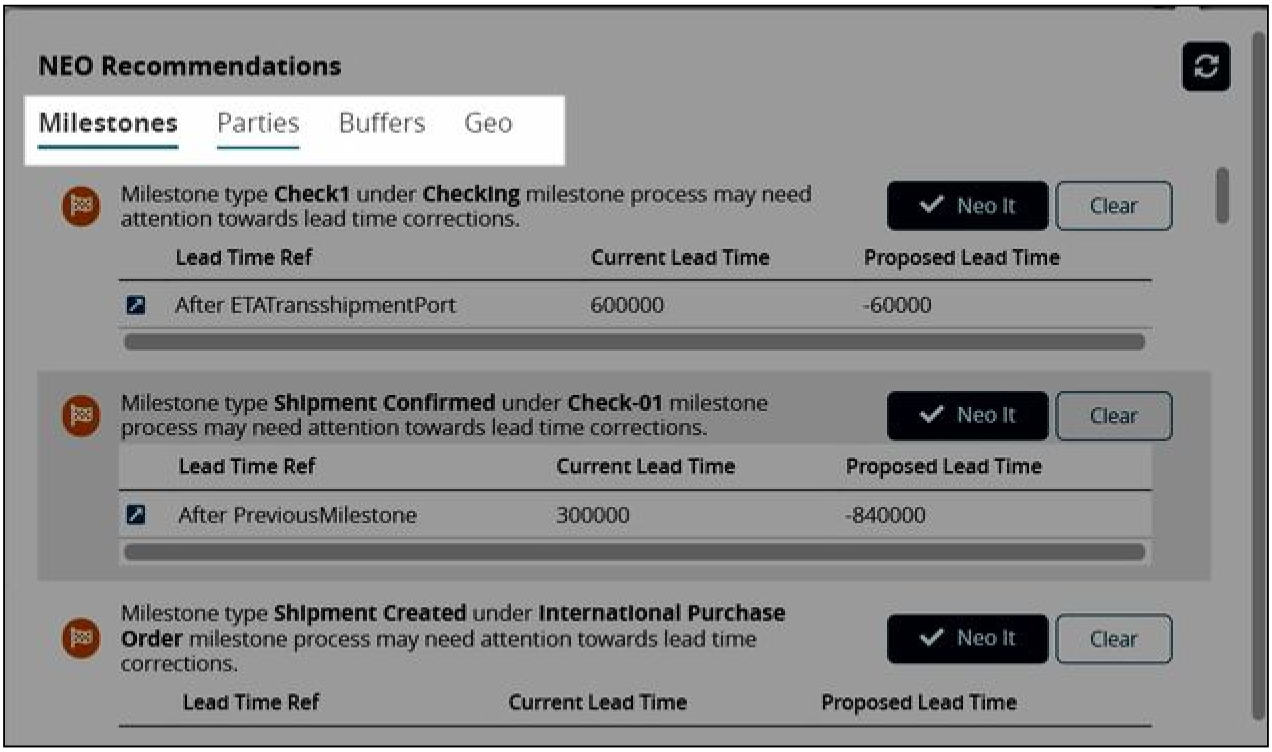
NEO Prescriptions

Click the **NEO Prescriptions** icon (top right) to display the **NEO Recommendations** slideout, which provides recommendations for parties associated with the shipment as well as milestones.

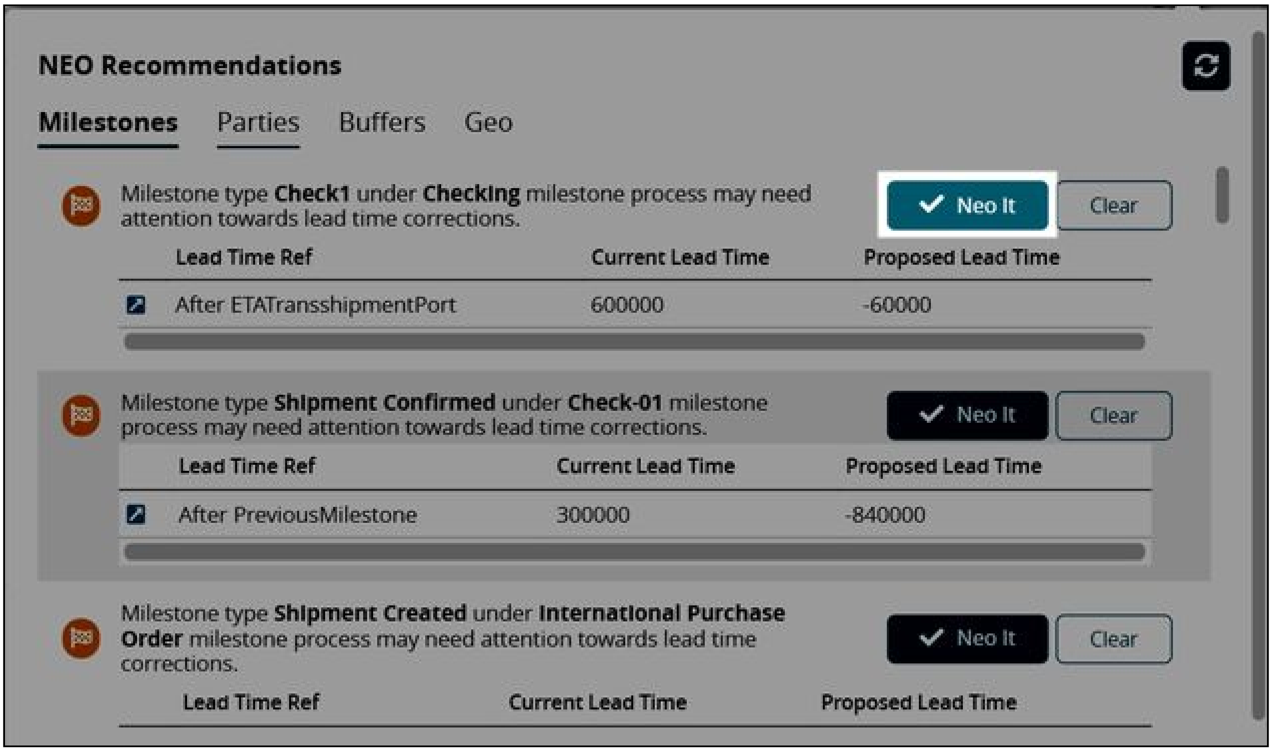


Click the tabs across the slideout to view the NEO recommendations for each of the following: **Milestones, Parties, Buffers,** or **Geo**.

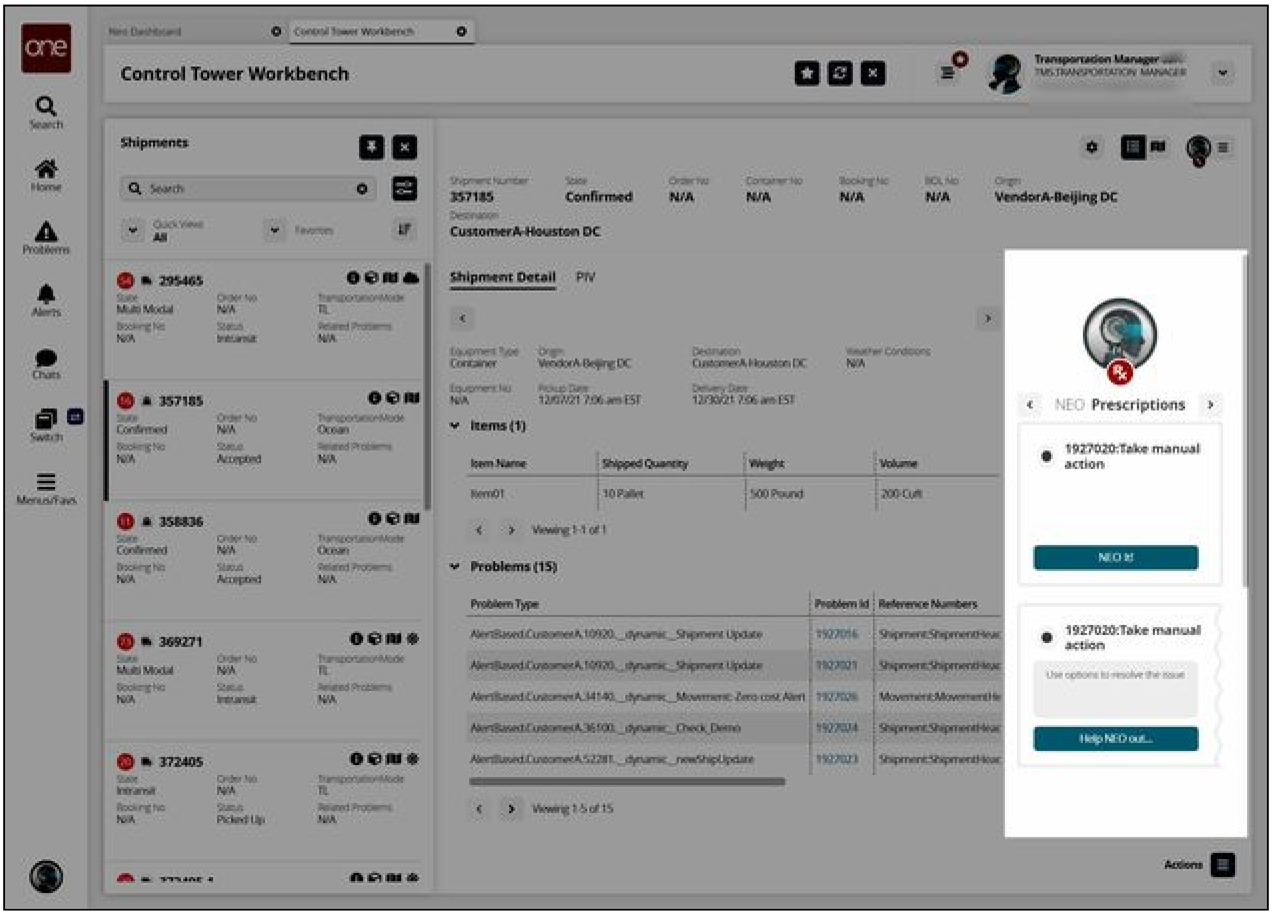
- **Milestones** - Analyze current milestones and determine the corrections that are needed.
- **Parties** -Analyze the carrier and broker performances and suggest alternatives to parties having the worst performance (i.e. overall performance less than 40%).
- **Geo** (Site Geofence) - Analyze the past Arrived and/or Departed events and, if required, recommend that geofence of the site be extended.
- **Buffers** - If the on-hand buffer quantity is below the safety stock quantity, NEO will recommend that the user place an order.



Click the **Neo It** button to accept a NEO recommendation on any tab.

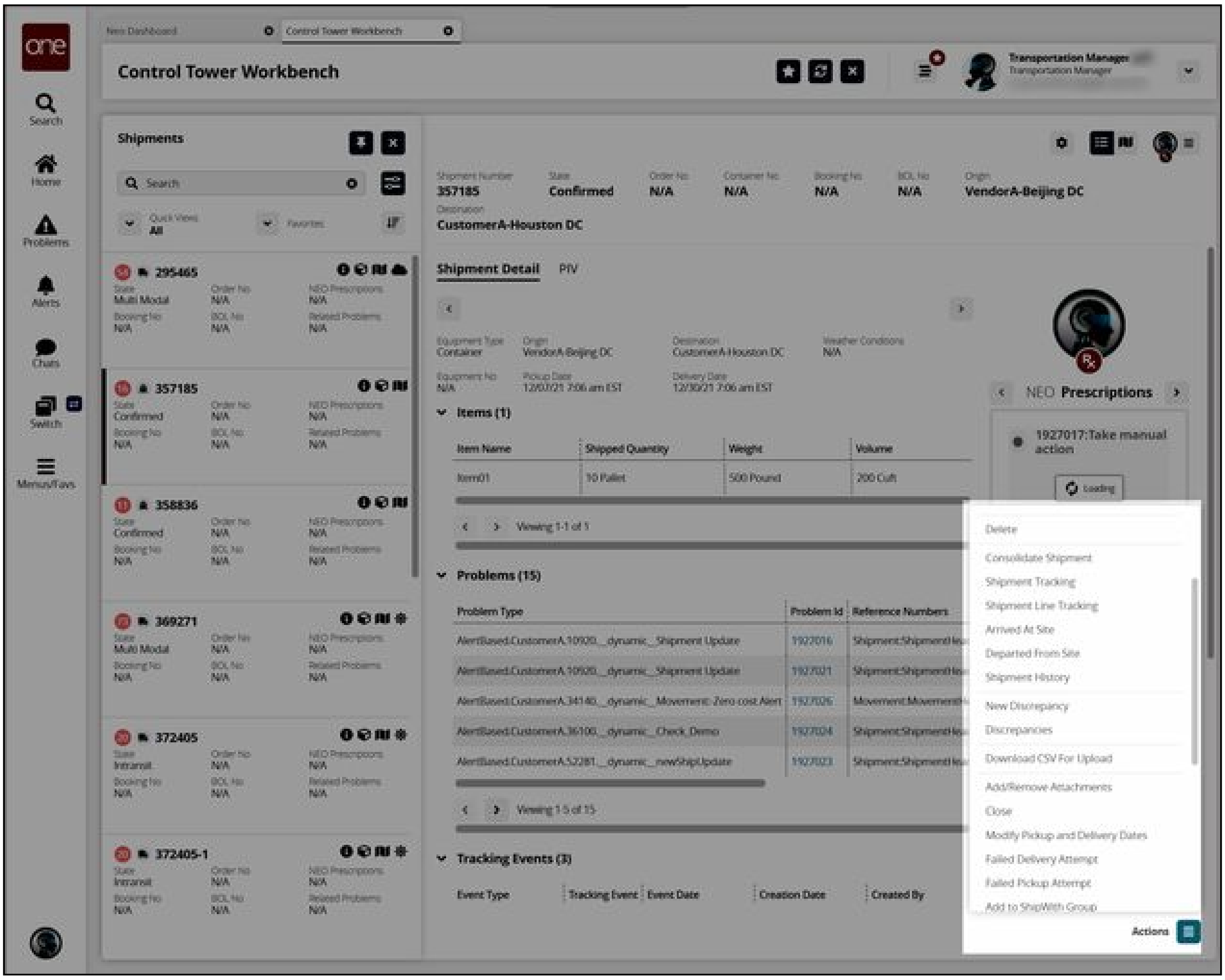


You can also view and accept NEO recommendations from the **NEO Prescriptions** section in the **Tabs** view.



Actions

Click the **Actions** icon in the bottom right corner to view and perform actions on the selected shipment. The available actions shown depend on the shipment selected.

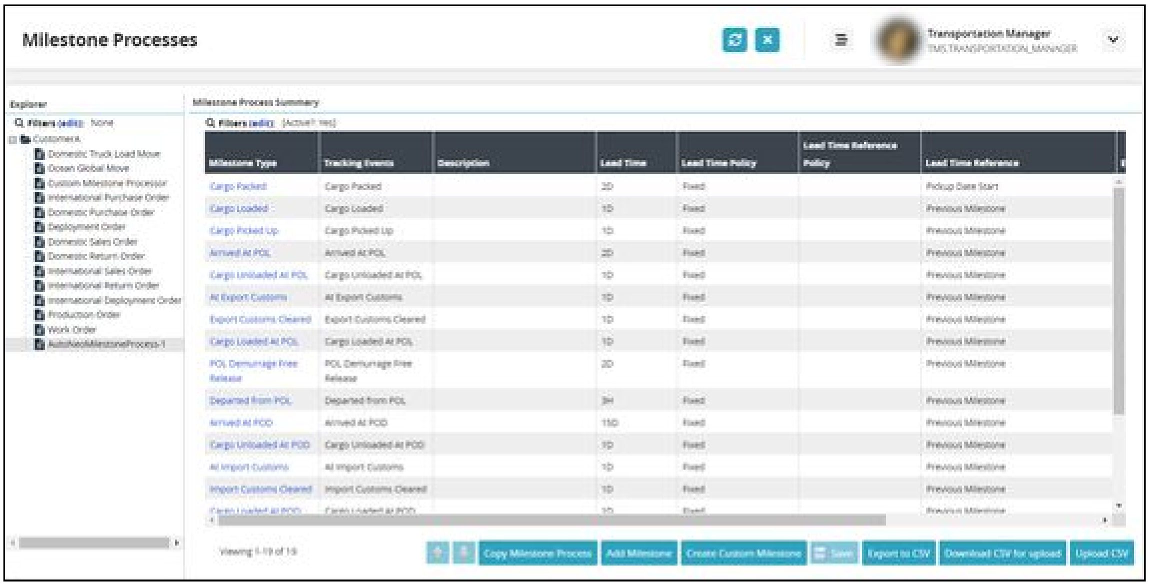


Uploading Historical Shipment Milestone Data

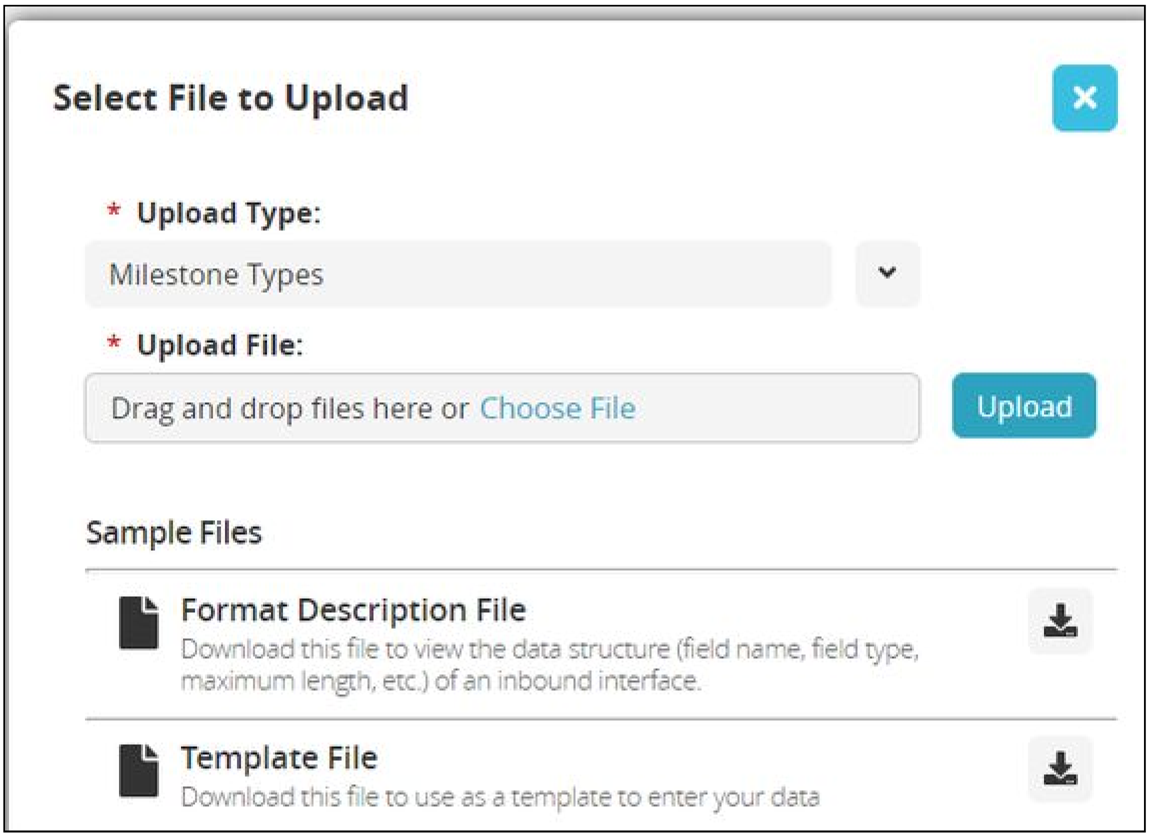
The CTW analyzes historical transportation data to develop optimization suggestions. The more data provided, the better the ONE system can optimize shipments with NEO recommendations.

Complete the following steps to upload historical shipment milestone data:

1. Log in to the ONE system.
2. Click **Menu/Favs > Transportation > Shipment Milestones > Milestone Processes**.
   The Milestone Processes screen appears.
3. Navigate to the customer in the left **Explorer** panel.
4. If necessary, click **Show More...**
   More links display for processes.
5. Click **AutoNeoMilestoneProccess-1**.
   The Milestone Process Summary displays milestone types and related details.



6. Click the **Upload CSV** button.
   The Select File to Upload popup window displays. Users can download a Format Description File and/or a Template File to assist with creating a correctly formatted CSV file. See the "Uploading Files" section in the Online Help for more information.



7. Click the **Choose File** link to select a CSV file from your computer.
8. Click the **Upload** button.
   The uploads and jobs status page displays the status of the upload.

For more information regarding milestone processes, see "Creating New Shipment Milestone Processes" and the "Updating Shipment Mileston Processes" sections of the *Online Help*.

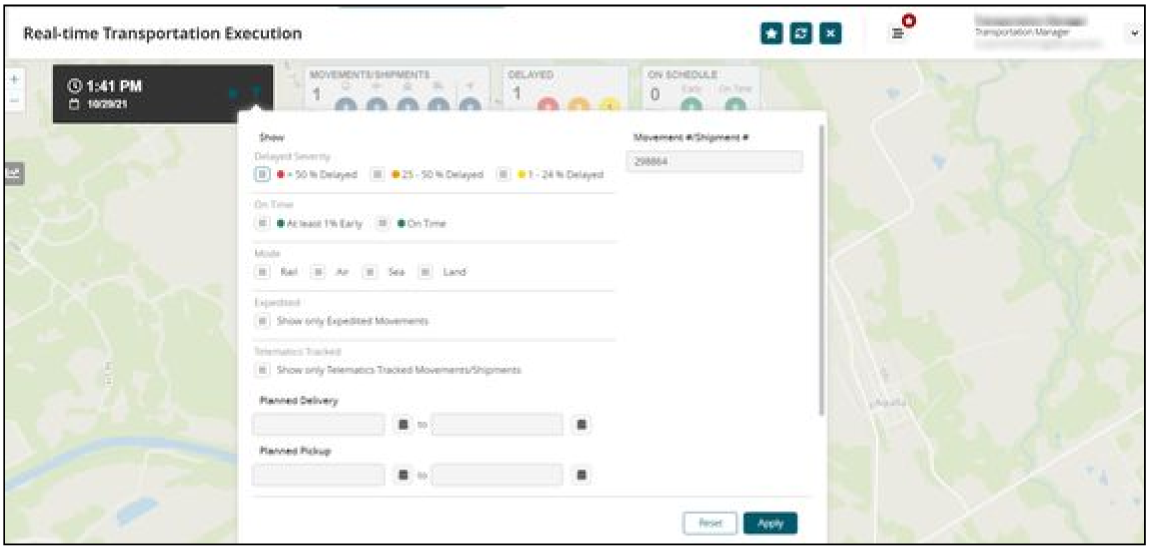
See the "Control Tower Workbench UI Redesign" section in the current version of the *Release Notes* for more information.

2.3.5.6 Saving and Viewing Filters as Favorites in RTTEP

Users can filter movements/shipments and save the result as a favorite, which is added to a list of saved favorites. In addition, favorited filters added to the Intransit, Delivery, Ready, and Received shipment state reports display as a favorite option for users on RTTEP.

Complete the following steps to save a filter as a favorite in RTTEP:

1. Log in to the ONE system.
2. Click **Menu/Favs > Transportation > Real-time Transportation Execution**.
   The Real-time Transportation Execution screen displays.
3. Click the **Filter** icon on the date and time widget.
   Filtering options display.

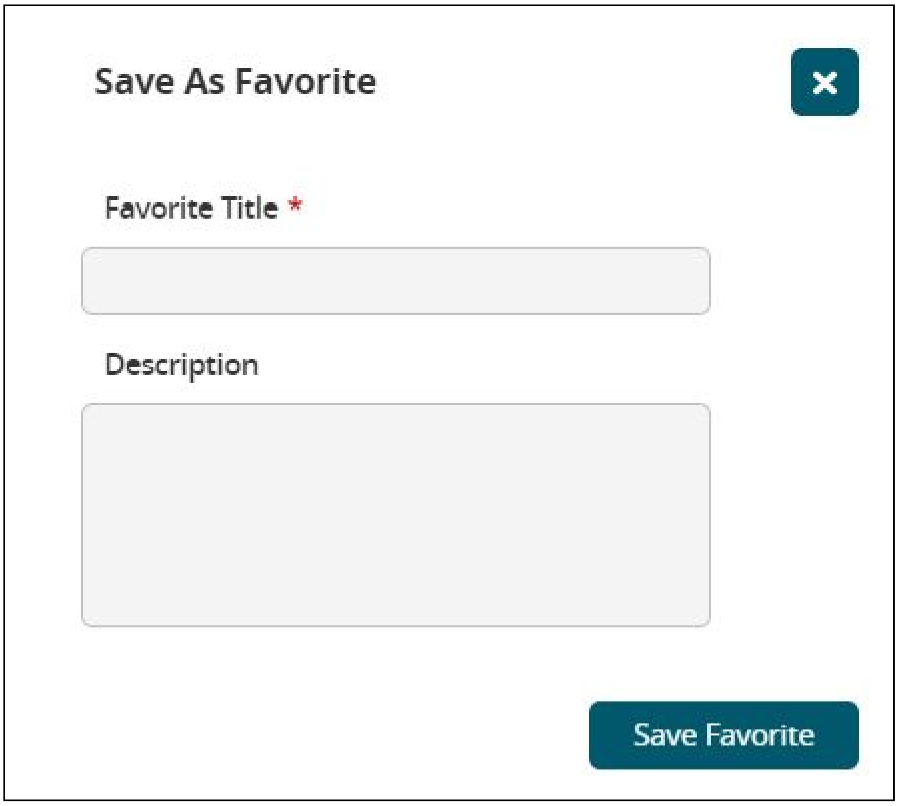


4. Complete the fields as described in the table below. Fields with an asterisk (*) are required.

Field	Description
Delayed Severity	Check the box(es) to show the severity level for the movements/shipments.
On Time	Check the box(es) to show movements/shipments that are on-time or at least 1% early.

Field	Description
Mode	Check the box(es) to display movements/shipments transported by particular modes.
Expedited	Check the box to display only expedited movement.
Telematics Tracked	Check the box to display only movements and/or shipments that are designated to be tracked by Telematics.
Planned Delivery	Use the calendar tool to select the beginning and end dates for the planned delivery date range.
Planned Pickup	Use the calendar tool to select the beginning and end dates for the planned pickup date range.
Carrier	Use the picker tool to select a carrier.
Origin Site	Use the picker tool to select the origin site for the movement/shipment.
Movement #/ Shipment #	Enter a movement or shipment number.
*Transaction Type	Select a transaction type from the dropdown menu.
Destination Site	Use the picker tool to select the destination site for the movement/shipment.

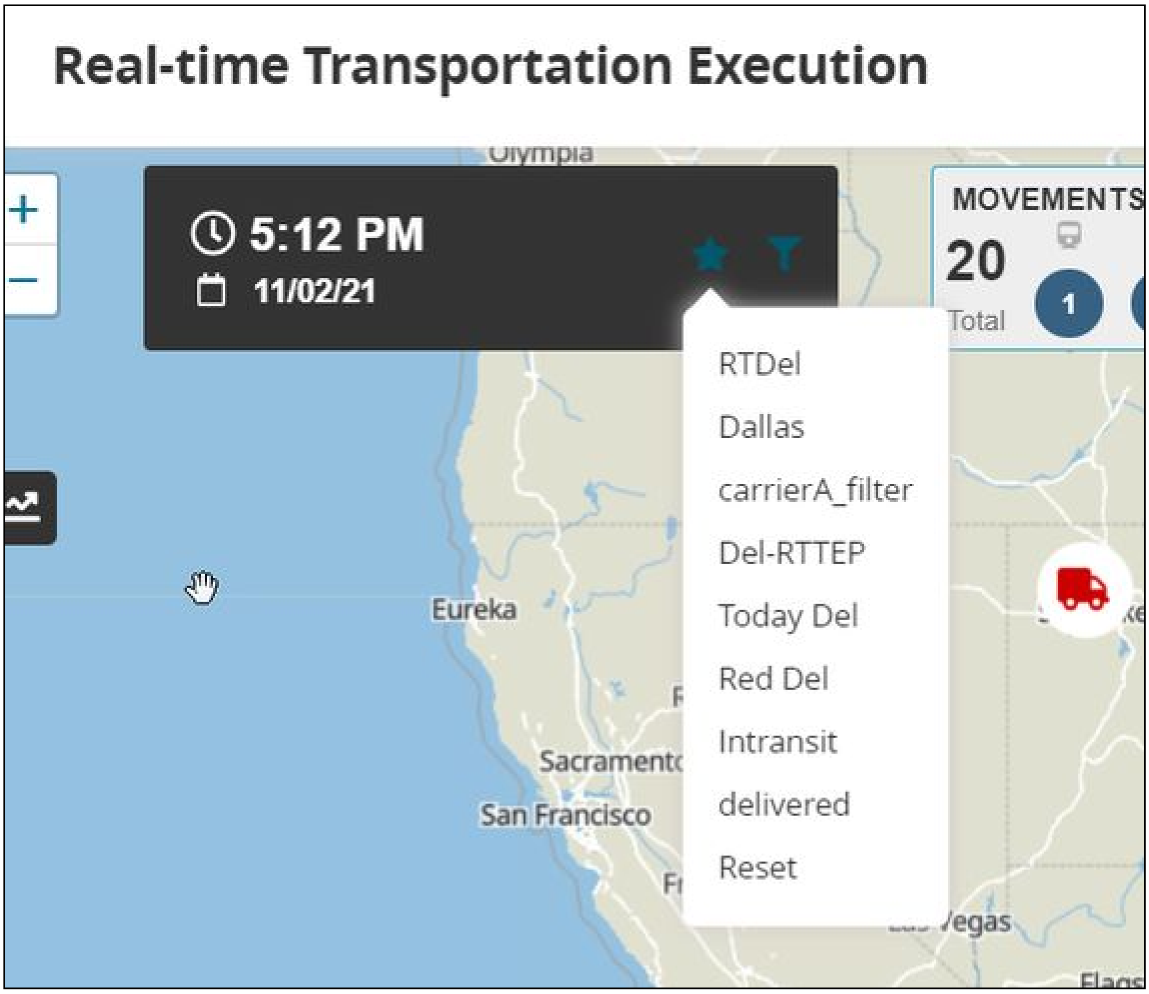
5. Click the **Apply** button.
   The screen refreshes with the data filtered accordingly.
6. Click the **Favorites** icon at the top of the RTTEP screen.
   A popup displays.



7. Enter a title for the filter in the ***Favorite Title** field.
8. Enter details about this filter favorite in the **Description** field.
9. Click on the **Save Favorites** button.
   A confirmation popup displays.
10. Click the **OK** button.
    The new filter is saved as a filter and can be accessed from the Favorite icon on the date/time widget.

Complete the following steps to view favorites from the Intransit, Delivery, Ready, and Received shipment state reports while in RTTEP:

1. From a shipment state report listed above, save a report with filters as a new favorite.
2. From the RTTEP screen, click the favorites star icon located in the date and time widget.
   A list of favorites displays with the favorite added from the shipment state screen.



3. Click on one of the options from the list.
   The RTTEP screen refreshes to show the movements and shipments as filtered from the shipment state report favorite.

See the "Adding Favorites Is Supported and Favorites from Shipment State Reports Display on RTTEP" section in the current version of the *Release Notes* for more information.

2.3.5.7 Setting and Viewing the ETA Age Indicator Thresholds

The ETA Age Indicator Thresholds policy under Transportation Policies provides shipper users with the ability to define upper and lower thresholds in hours calculating the age of the estimated time of arrival (ETA). The thresholds are calculated using the system time and the last event update time and will display in green, yellow, or red in the Next Stop/Next Stop ETA and Final Stop/Final Stop ETA columns of the shipment, shipment states, and movement reports. The colored display helps users to easily view movement and shipment ETAs. The following calculations determine the green, yellow, or red status of the movement/shipment:

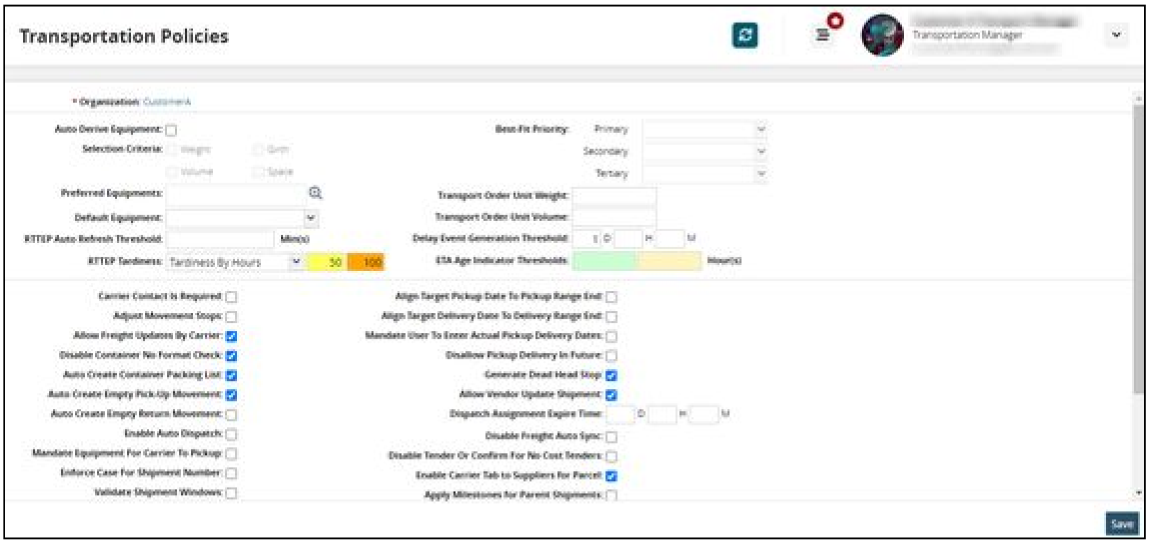
- Green: If the system time minus the last event update from the current position time is less than the lower threshold, then the Next Stop/Next Stop ETA and Final Stop/Final Stop ETA times are displayed in green.

- Yellow: If the system time minus the last event update from the current position time is greater than the lower threshold and less than the upper threshold, then the Next Stop/Next Stop ETA and Final Stop/Final Stop ETA times are displayed in yellow.
- Red: If the system time minus the last event update from the current position time is greater than the upper threshold, then the Next Stop/Next Stop ETA and Final Stop/Final Stop ETA times are displayed in red.

This feature is not available for all users. If the columns are not visible, you can add them. See the "Adding and Removing Columns in Reports" section in the *Online Help* for more information.

Complete the following steps to set the ETA Age Indicator Thresholds:

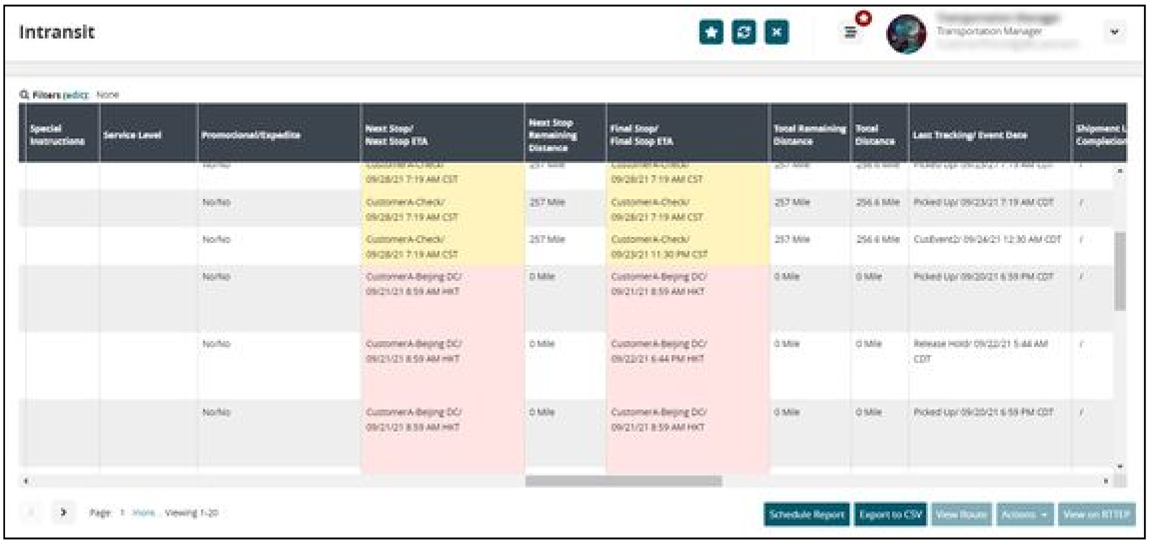
1. Log in to the ONE system.
2. Click **Menu/Favs > Transportation > Policies > Transportation Policies**.
   The Transportation Policies screen displays.



3. In the **ETA Age Indicator Thresholds** field, enter numbers for hours that will define the lower (in the green field) and upper (in the yellow field) thresholds that will show users where the shipments or movements fall in the parameters set for ETAs.
4. Click the **Save** button.
   A green success bar displays.

Complete the following steps to view the ETA Age Indicator Thresholds:

1. Log in to the ONE system.
2. Click **Menu/Favs > Transportation > Intransit**. The column is available on multiple reports, we have selected Intransit in this example.
   The screen displays color-coded data.



See the "New ETA Age Indicator Thresholds" section in the current version of the *Release Notes* for more information.

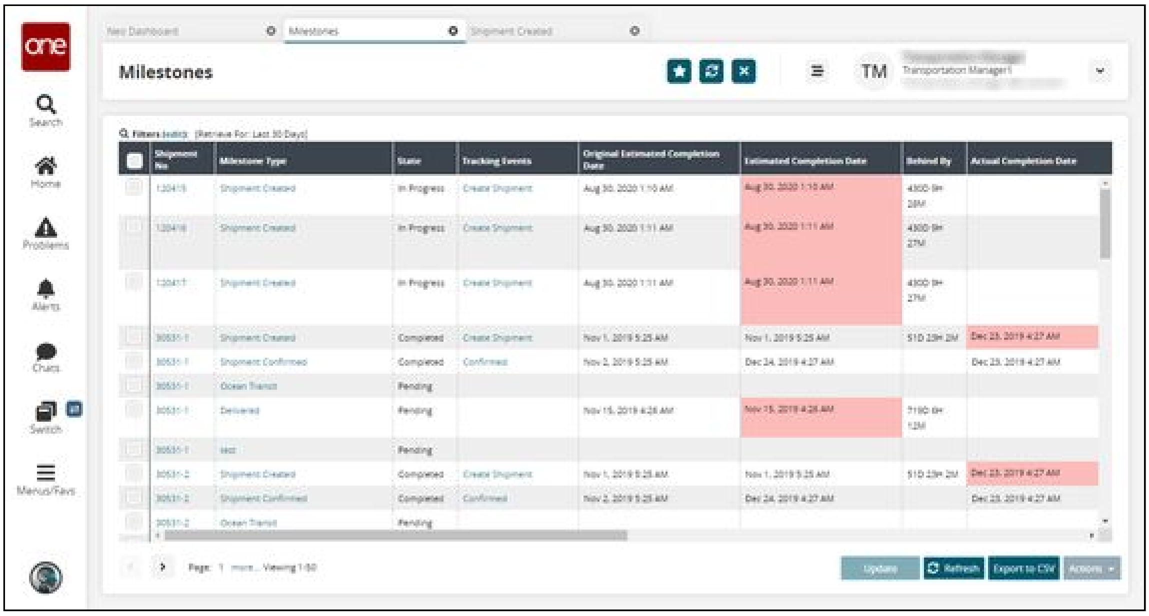
2.3.5.8 Specifying Milestone Visibility and Responsibility

Used in conjunction, the Partner Type Visibility field and the Responsible Organization field for milestones enable precise specification of which users can view which milestones. For a given user, if the Partner Type Visibility field is enabled for their role and if the user's organization is set as the Responsible Organization, then any milestones the user has permission to see are visible on both the Milestones report and on the Milestones tab of a relevant Shipment details screen. If a user is not eligible to see any milestones for a given shipment, the Milestone tab is still visible but empty of data. Note that Shipper users are somewhat unique in that they are not a specifiable user type for either of the new fields, but still have visibility on any milestones for any shipments they ship out.

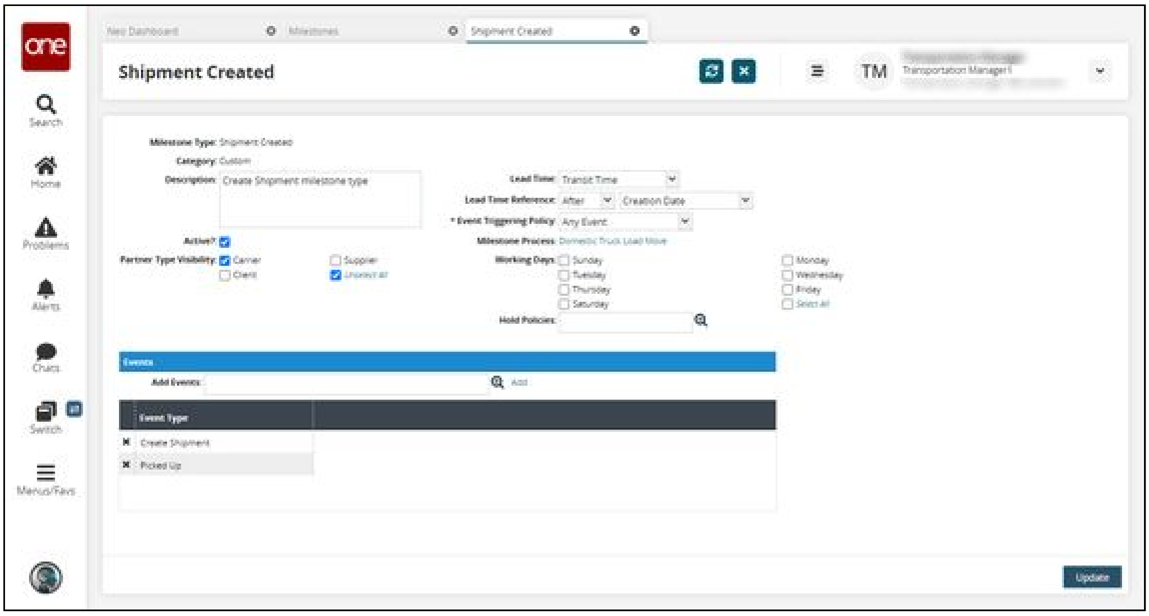
Milestone owners can configure the system so their partners will have better milestone visibility. For example, a carrier can see that for a particular milestone type, such as Picked Up, they are the responsible organization and need to provide the corresponding triggers so the milestone can be fulfilled and moved to the next milestone.

Complete the following steps to set the Partner Type Visibility field:

1. Log in to the ONE system.
2. Select **Menu/Favs > Transportation > Shipment Milestones > Milestones**.
   The Milestones report appears.



3. Click a link in the **Milestone Type** column.
   The Milestone Type details screen appears.



4. Update the following fields as desired. Fields marked with an asterisk (*) are required.

Field	Description
Milestone Type	The milestone type. This field cannot be edited.
Category	The milestone category. This field cannot be edited.

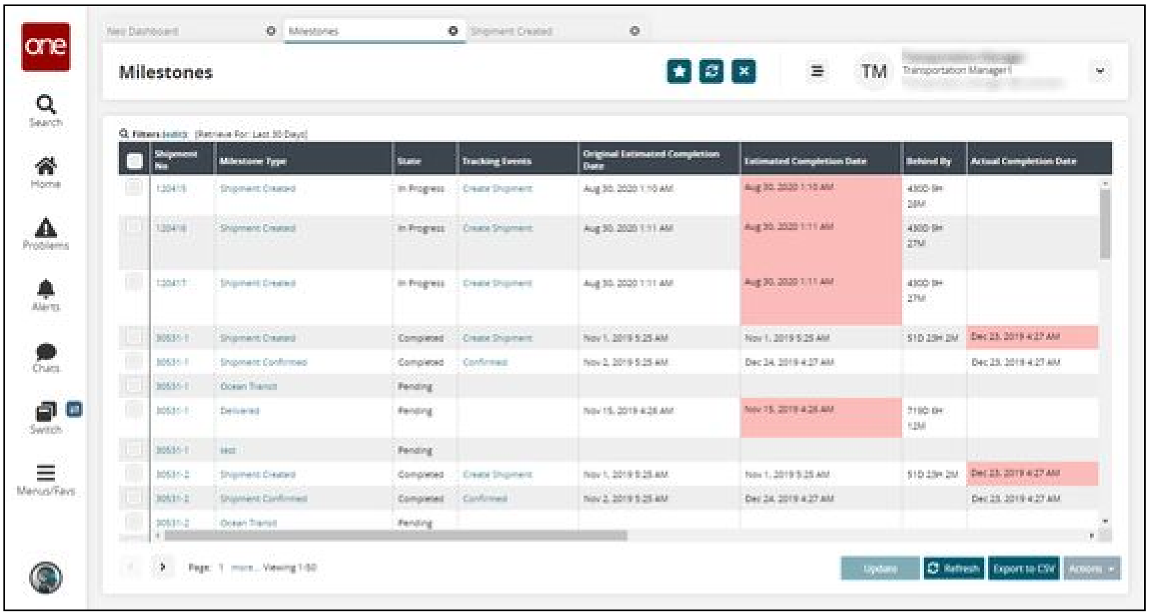
Field	Description
Description	Enter a description of the milestone type.
Active?	Select this checkbox if the milestone type is active.
Partner Type Visibility	Select all partner types checkboxes that will have visibility on this type of milestone. The available options are Carrier, Supplier, and Client. For example, for the Shipment Created milestone type, if the Carrier is selected in the Partner Type Visibility field, then only partners of type Carrier can see milestones of the Shipment Created type. Note that when using the Partner Type Visibility field, any combination of Carrier, Supplier, and Client can be selected.
Lead Time	Select the lead time from the drop-down menu.
Lead Time Reference	Select the lead time reference from the drop-down menus. For example, if you select After and Actual Pickup, the lead time will be calculated starting from after the actual shipment pickup.
*Event Triggering Policy	Select an event triggering policy from the drop-down menu.
Milestone Process	The milestone process. This field is not editable.
Working Days	Select all working days that apply.
Hold Policies	Use the picker tool to select hold policies.

5. Click **Update**.

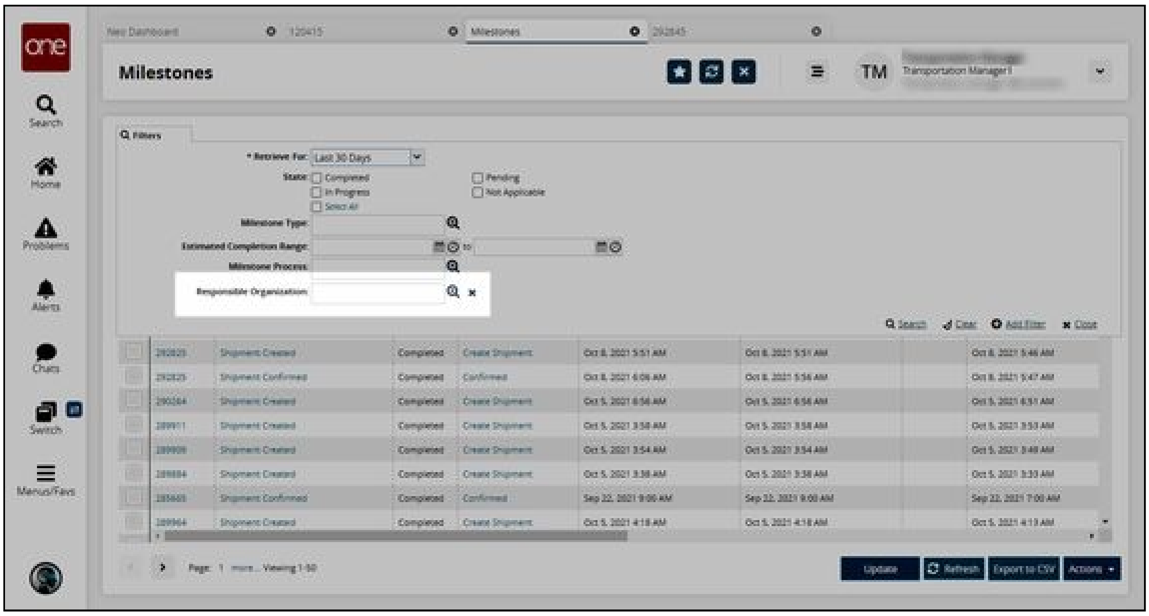
The Responsible Organization column and filter are available on the Milestones report and the Milestones tab of any Shipment Details screen.

Complete the following steps to view the Responsible Organization field and filter from the Milestones report and the Shipment Details UI:

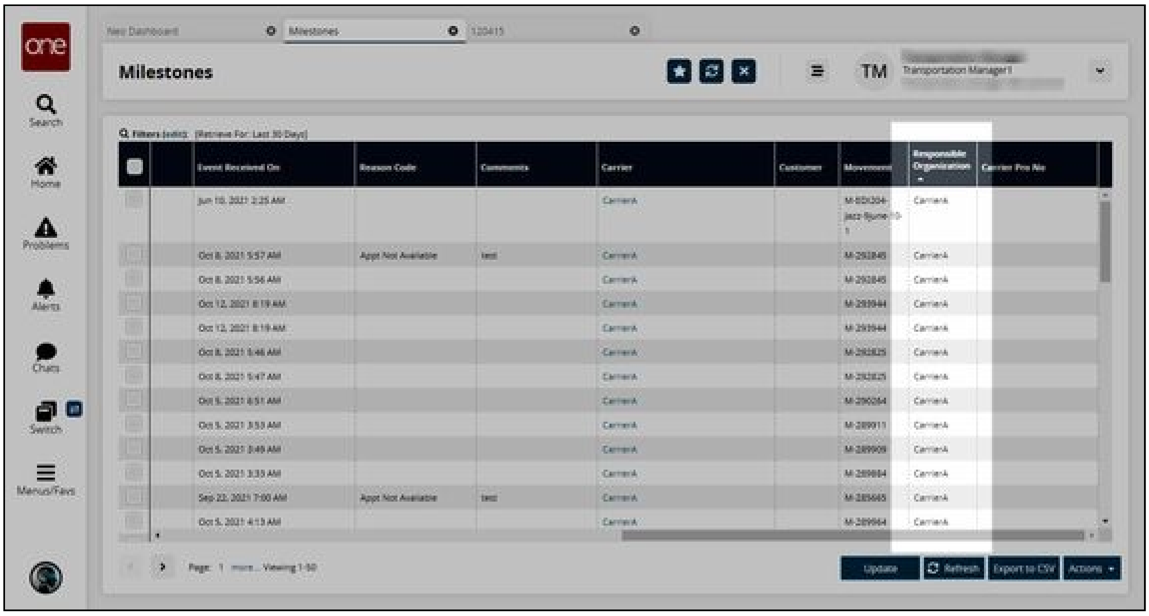
1. Log in to the ONE system.
2. Select **Menu/Favs > Transportation > Shipment Milestones > Milestones**.
   The Milestones report appears.



3. Click the **Filters (edit)** link to apply search criteria to reduce the number of entries shown.
   The Filters header appears.
4. To add more search filters, click the **Add Filter** link, and then click **Responsible Organization** from the **Add Filter** list.
   The new filter appears.

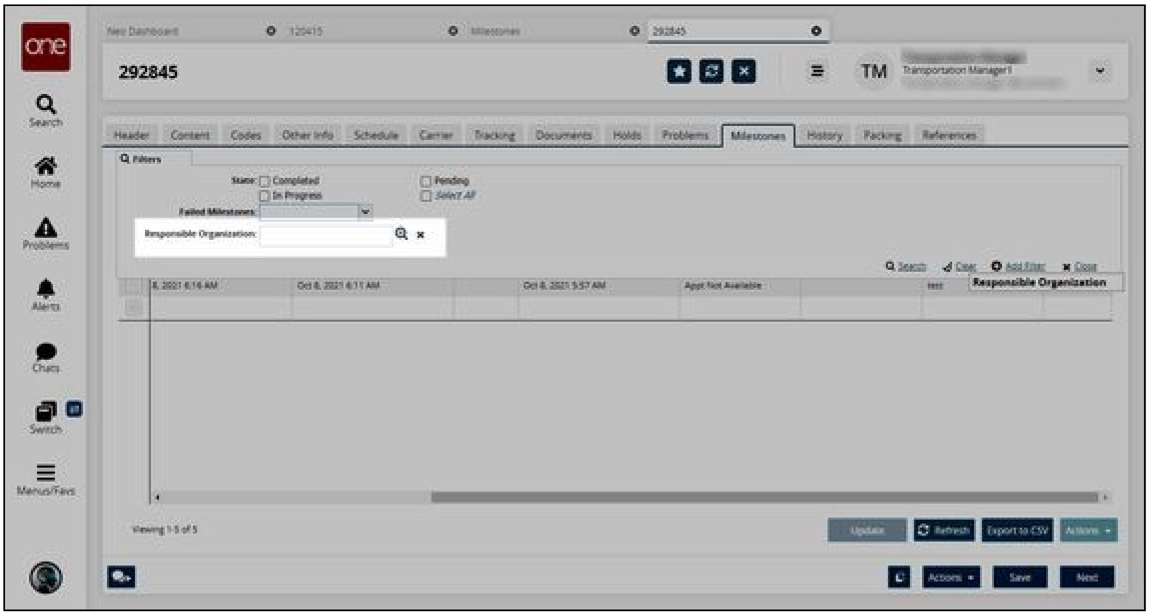


5. Fill out the filters as desired and click the **Search** link.
   The search results appear.
6. Scroll to the right to see the **Responsible Organization** column.

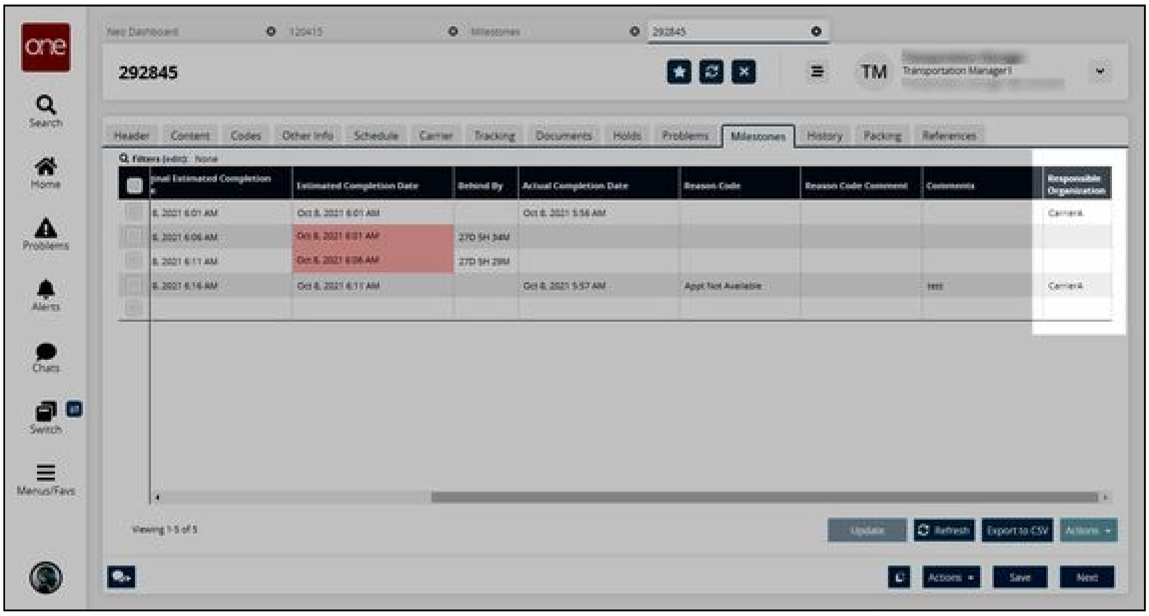


The Responsible Organization field indicates the organization that is responsible for fulfilling the milestone conditions and is populated based on the responsible organization defined as part of the tracking event that triggered the milestone computation. Please note this field cannot be changed once the milestone is created.

7. Select a link from the **Shipment No** column.
   The Shipment Details screen appears.
8. Click the Milestones tab.
9. Click the **Filters (edit)** link to apply search criteria to reduce the number of entries shown.
   The Filters menu appears.
10. To add more search filters, click the **Add Filter** link, and then click **Responsible Organization** from the **Add Filter** list.
    The new filter appears.



The Responsible Organization column is visible.



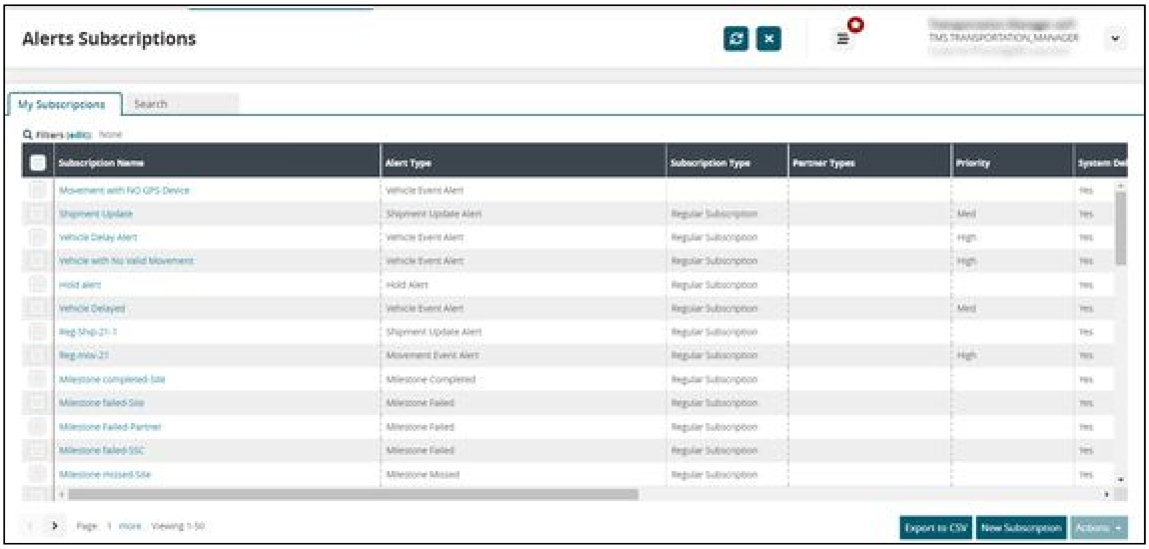
See the "Enhancements to Milestone Visibility and Responsibility" section in the current version of the *Release Notes* for more information.

2.3.5.9 Subscribing to a Free Days Expiration Alert for Detention, Demurrage, and DETMUR Costs

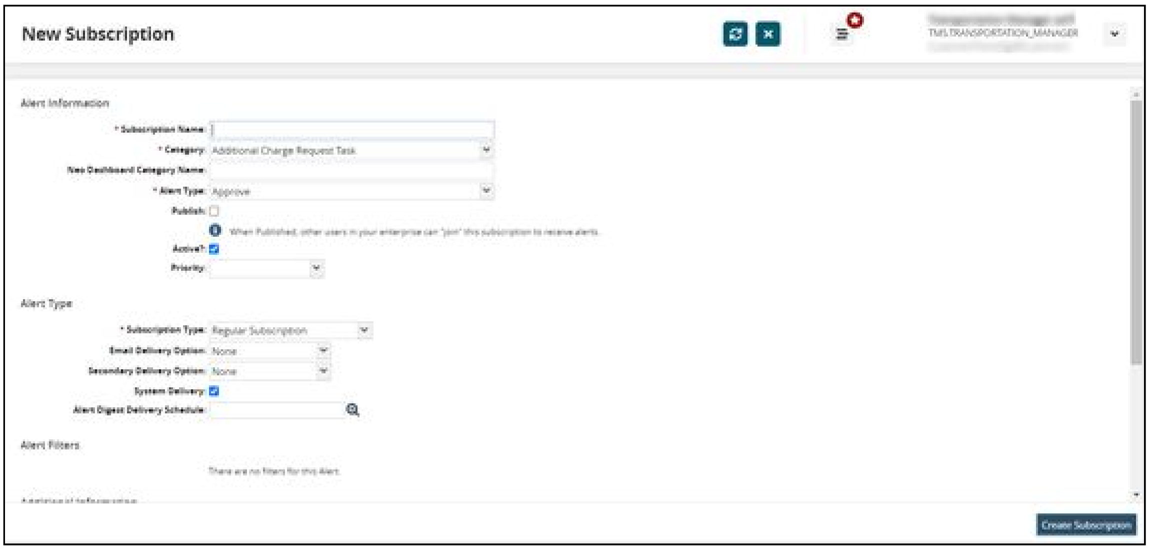
Detention, demurrage, and the combination of the two, DETMUR, are offered under client-specific Value Added Service (VAS) provider contracts. Users can subscribe to Container Move alerts for Detention Costs, Demurrage Costs, and DETMUR Costs when containers are not moved for a particular threshold in days.

Complete the following steps to subscribe to a Free Days Expiration Alert:

1. Log in to the ONE system.
2. Click **Menu/Favs > Tools > Alerts Subscriptions**.
   The Alerts Subscriptions screen displays.



3. Click the **New Subscription** button.
   The New Subscription screen displays.



4. Complete the fields described in the table below. Fields with an asterisk (*) are required.
   As alert options are selected, the available fields on the screen may change.

Section	Field	Description
Alert Information	*Subscription Name	Type the name of this subscription.
	*Category	To create the Free Days Expiration alert subscription, select **Container Move** from the dropdown list.
	NEO Dashboard Category Name	Enter the name of the NEO Dashboard Category for this alert subscription.

Section	Field	Description
	*Alert Type	For this alert type, select one of the following from the dropdown list: ◦ **Free DETMUR Days Expiry Alert** ◦ **Free Demurrage Days Expiry Alert** ◦ **Free Detention Days Expiry Alert**
	Publish	Check the box to publish this alert to the system so that other users can subscribe to it.
	Active?	Check the box to make this an active alert.
	Priority	Select High, Medium, or Low as the priority from the dropdown list.
Alert Type	*Subscription Type	Select the type of subscription from the dropdown list.
	Email Delivery Option	Select the email delivery option from the dropdown list. Enter an email address if required.
	Secondary Delivery Option	Select a secondary delivery option, if desired, from the dropdown list. Enter an email address if required.
	System Delivery	Check the box to ensure that the alert is delivered through the ONE system.
	Alert Digest Delivery Schedule	Use the picker tool to select a delivery schedule.
Alert Filters	*Threshold in Days	Enter a number of days for the threshold before this alert is triggered and sent.
	Site	Use the picker tool to select a site. Please note that the Detention Cost alert type will show From Site and To Site fields. Use the picker tool to select these different sites. Neither field is required.
	Carrier Partner	Use the picker tool to select a carrier partner.

Section	Field	Description
Additional Information	No additional fields are provided for these types of alerts	

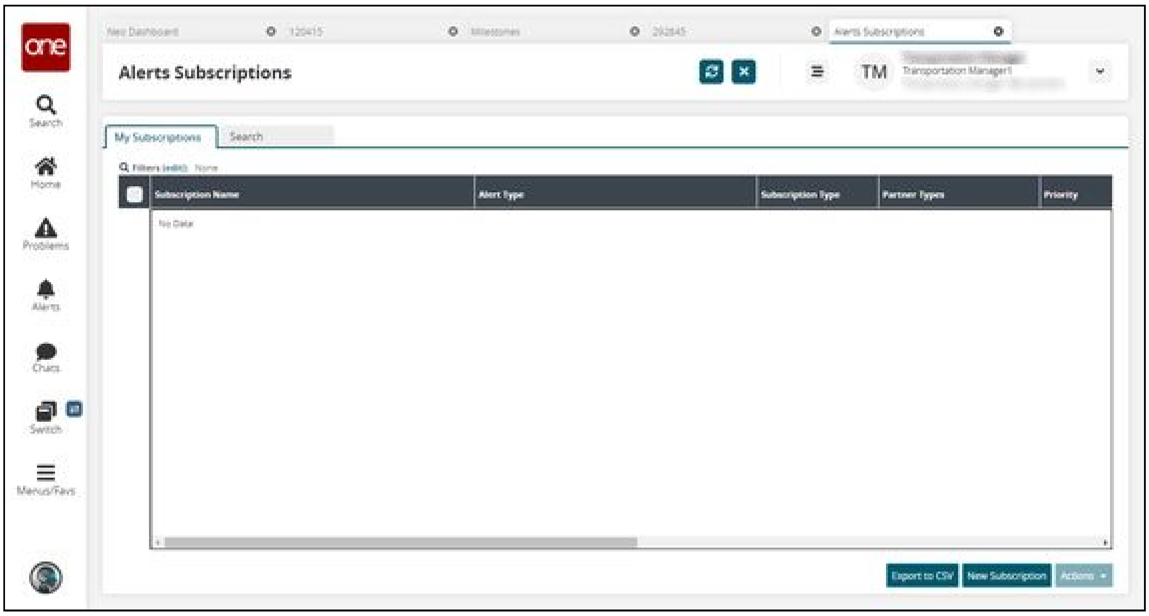
5. Click the **Create Subscription** button.
   A green success bar displays, and the screen title changes to the newly created subscription name.

See the "Support for Detention and Demurrage Computations for Value Added Service Providers" section in the current version of the *Release Notes* for more information.

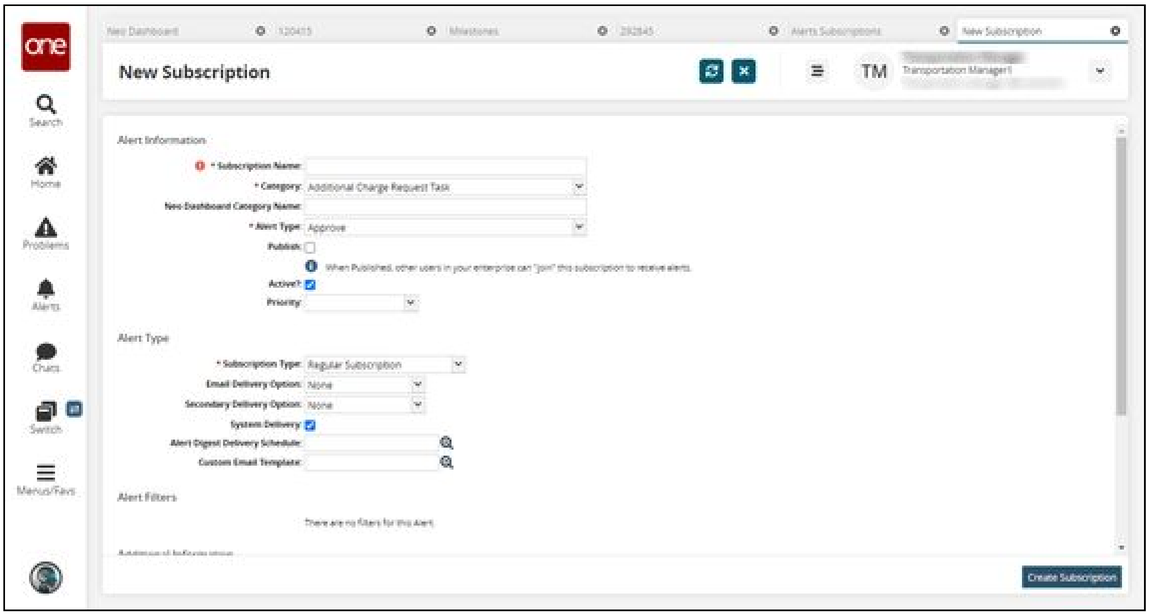
2.3.5.10 Subscribing to Milestone Alerts

Complete the following steps to subscribe to a Milestone Alert:

1. Log in to the ONE system.
2. Select **Menu/Favs > Tools > Alerts Subscriptions**.
   The Alerts Subscriptions screen displays.



3. Click the **New Subscription** button.
   The New Subscription screen appears.



4. Complete the fields described in the table below. Fields with an asterisk (*) are required.
As alert options are selected, the available fields on the screen may change.

Section	Field	Description
Alert Information	*Subscription Name	Type the name of this subscription.
	*Category	To create the Milestone alert subscription, select Shipment Milestone from the drop-down list.
	NEO Dashboard Category Name	Enter the name of the NEO Dashboard Category for this alert subscription.
	*Alert Type	For this alert type, select Milestone Alert, Milestone Completed, Milestone Failed, or Milestone Missed from the drop-down list.
	Publish	Check the box to publish this alert to the system so that other users can subscribe to it.
	Active?	Check the box to make this an active alert.
	Priority	Select High, Medium, or Low as the priority from the dropdown list.
Alert Type	*Subscription Type	Select the type of subscription from the dropdown list.

Section	Field	Description
	Email Delivery Option	Select the email delivery option from the dropdown list. Enter an email address if required.
	Secondary Delivery Option	Select a secondary delivery option, if desired, from the dropdown list. Enter an email address if required.
	System Delivery	Check the box to ensure that the alert is delivered through the ONE system.
	Alert Digest Delivery Schedule	Use the picker tool to select a delivery schedule.
Alert Filters	*Threshold	Enter a number of days for the threshold before this alert is triggered and sent.
	Milestone Type	Use the picker tool to select a milestone type.
Additional Information	Display Fields	Select the desired display fields by selecting the relevant checkboxes.

5. Click the **Create Subscription** button.

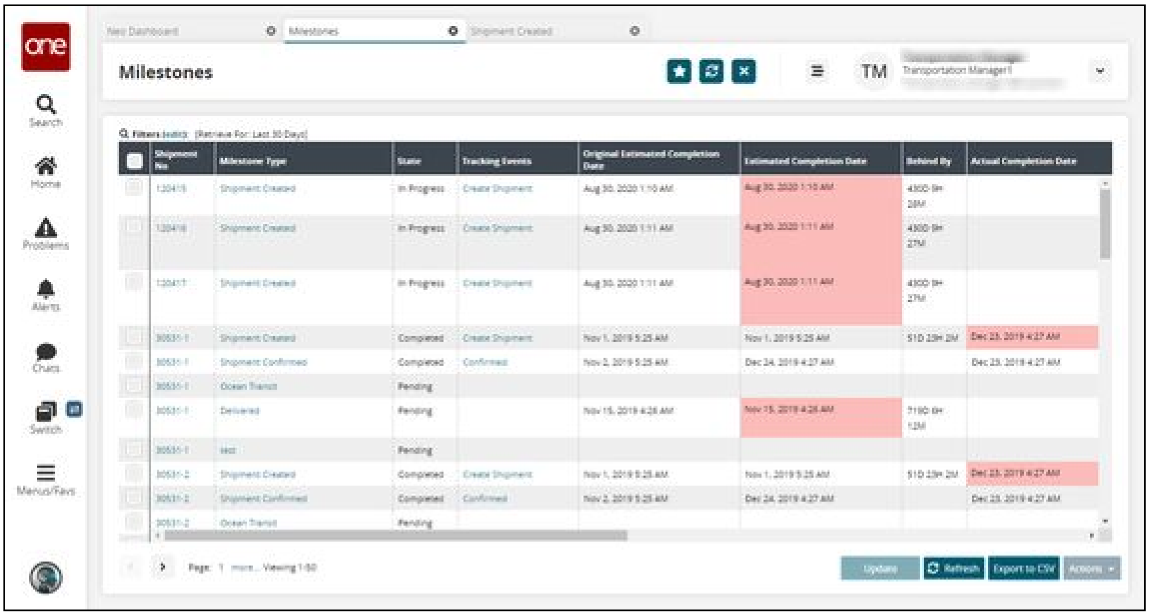
See the "Enhancements to Milestone Visibility and Responsibility" section in the current version of the *Release Notes* for more information.

2.3.5.11 Updating Milestone Types

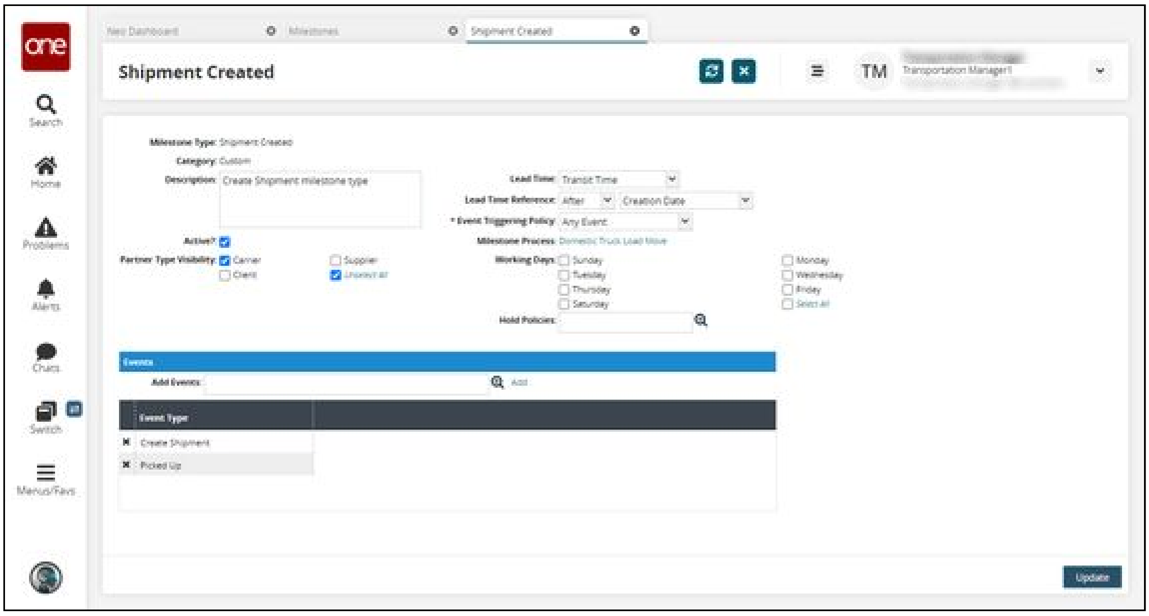
Users can update milestone types through the Milestones report.

Complete the following steps to update milestone types:

1. Log in to the ONE system.
2. Select **Menu/Favs > Transportation > Shipment Milestones > Milestones**.
   The Milestones report appears.



3. Click the **Filters (edit)** link to apply search criteria to reduce the number of entries shown.
   The Filters menu appears.
4. To add more search filters, click the **Add Filter** link, and then click one or more filter options from the **Add Filter** list.
5. Fill out the filters as desired and click the **Search** link.
   The search results appear.
6. Click a link in the **Milestone Type** column.
   The Milestone Type details screen appears.



7. Update the following fields as desired. Fields marked with an asterisk (*) are required.

Field	Description
Milestone Type	The milestone type. This field cannot be edited.
Category	The milestone category. This field cannot be edited.
Description	Enter a description of the milestone type.
Active?	Select this checkbox if the milestone type is active.
Partner Type Visibility	Select all partner types checkboxes that will have visibility on this type of milestone. The available options are Carrier, Supplier, and Client. For example, for the Shipment Created milestone type, if the Carrier is selected in the Partner Type Visibility field, then only partners of type Carrier can see milestones of the Shipment Created type. Note that when using the Partner Type Visibility field, any combination of Carrier, Supplier, and Client can be selected.
Lead Time	Select the lead time from the drop-down menu.
Lead Time Reference	Select the lead time reference from the drop-down menus. For example, if you select After and Actual Pickup, the lead time will be calculated starting from after the actual shipment pickup.
*Event Triggering Policy	Select an event triggering policy from the drop-down menu.
Milestone Process	This link opens the Custom Milestone Processor screen. See the "Creating Milestone Processes" in the *Online Help* for more information.
Working Days	Select all working days that apply.
Hold Policies	Use the picker tool to select hold polices.

8. In the **Events** section, use the picker tool to select and add event types this milestone type will trigger on.
9. Click the **Add** link.
   The selections appear in the table.
10. Click the **Update** button.
    A green success bar displays.

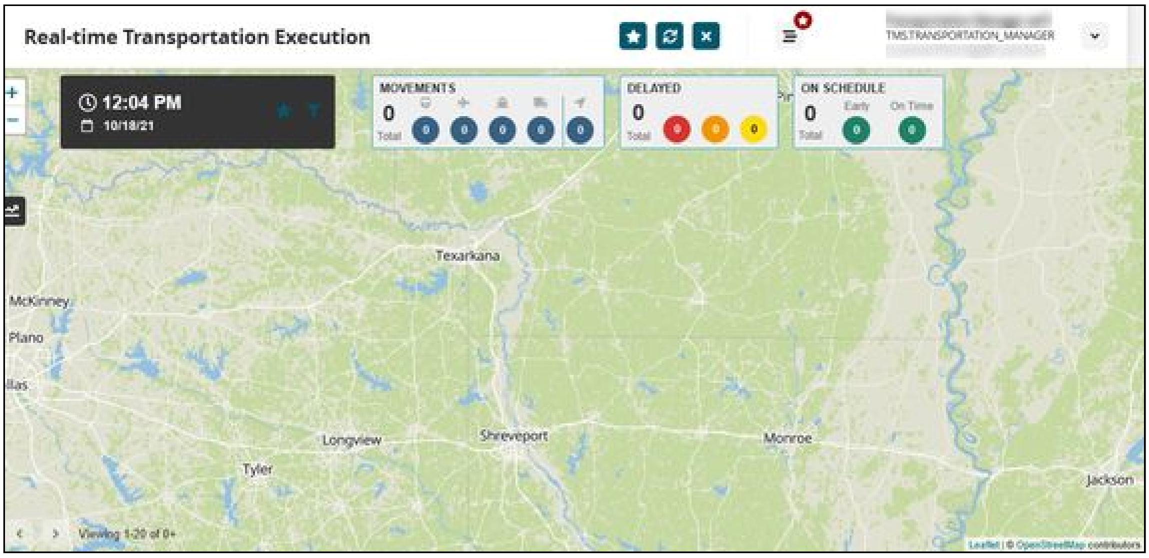
See the "Enhancements to Milestone Visibility and Responsibility" section in the current version of the *Release Notes* for more information.

2.3.5.12 Viewing Movement Estimates on Real-Time Transportation Execution Page

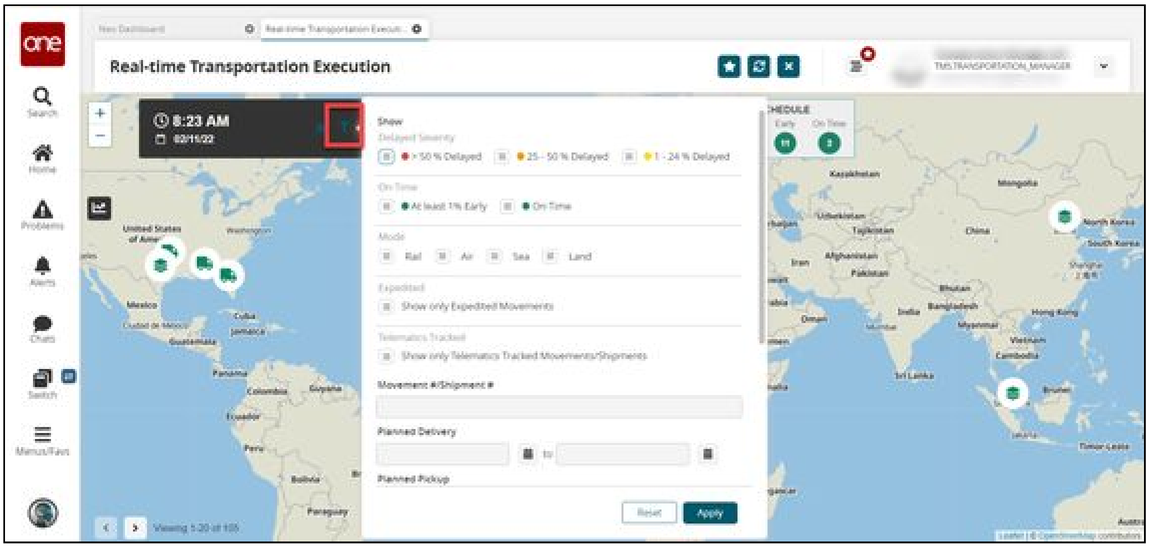
Transportation users can track movement details like the total distance, remaining distance, total time, and remaining time to the next stop and final destination on the Real-time Transportation Execution page (RTTEP).

Complete the following steps to view movement estimates and other details on the RTTEP:

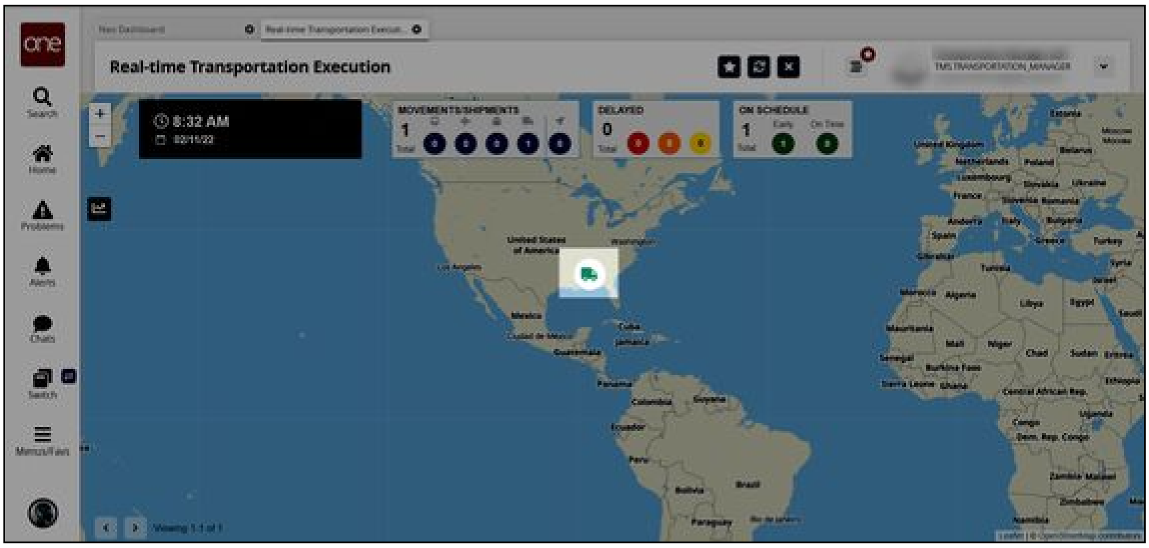
1. Log in to the ONE system as a Transportation Manager.
2. Click **Menus/Favs** > **Transportation** > **Real-time Transportation Execution**.
   The Real-time Transportation Execution page appears.



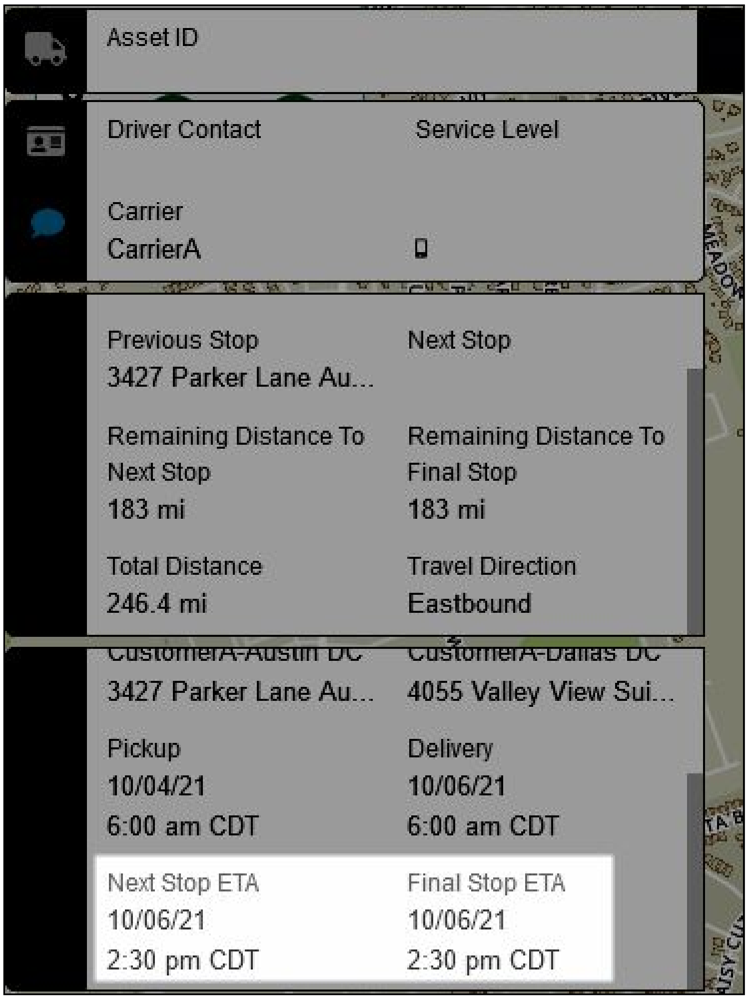
3. Click the **Filter** icon.
   The filter fields appear.



4. In the **Movement #/Shipment #** field, enter the movement or shipment number. For more information on accessing and using the filters, see the "Tracking Movements on the Real-Time Transportation Execution Page" section in *Online Help*.
5. Click **Apply**.
   The RTTEP displays the vehicle icon for the movement or shipment number entered.



6. Click the **Vehicle** icon and then click the information icon  .
   The movement/shipment details appear in a slideout to the right with the next stop and final stop estimates (ETAs) listed.

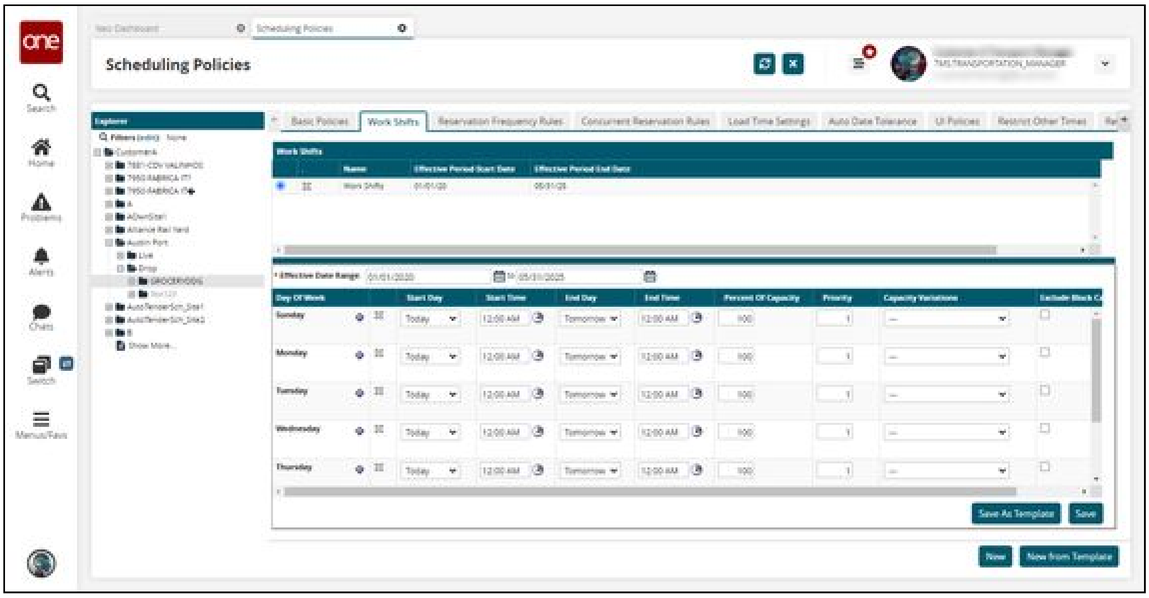


See the "Enhancements to Movement Tracking" section in the current version of the *Release Notes* for more information.

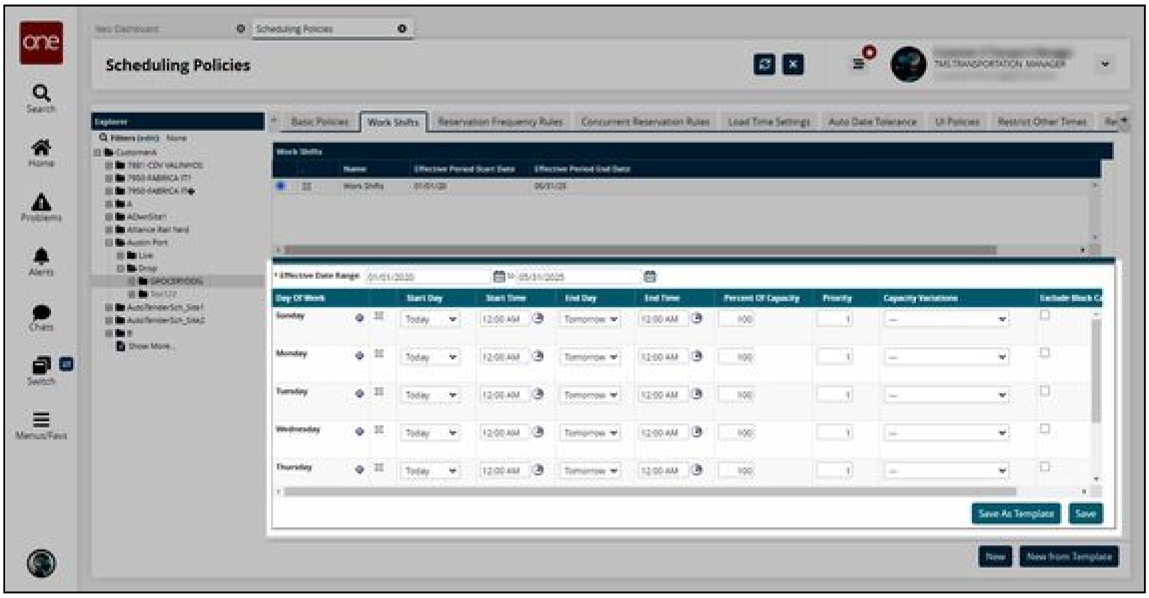
2.3.5.13 Working with Work Shift Templates

Complete the following steps create work shift templates:

1. Log in to the ONE system.
2. Select **Menu/Favs > Scheduling > Scheduling Policies.**
   The Scheduling Policies screen appears.
3. Select a dock door group level in the hierarchy.
   The dock door group settings appear with the Basic Policies tab visible.
4. Click the **Work Shifts** tab. For more information on the other tabs see the "Dock Door Group Policies" section of the *Online Help.*
   The Work Shifts tab appears.



5. In the lower pane, fill out the following fields. Fields marked with an asterisk (*) are required.

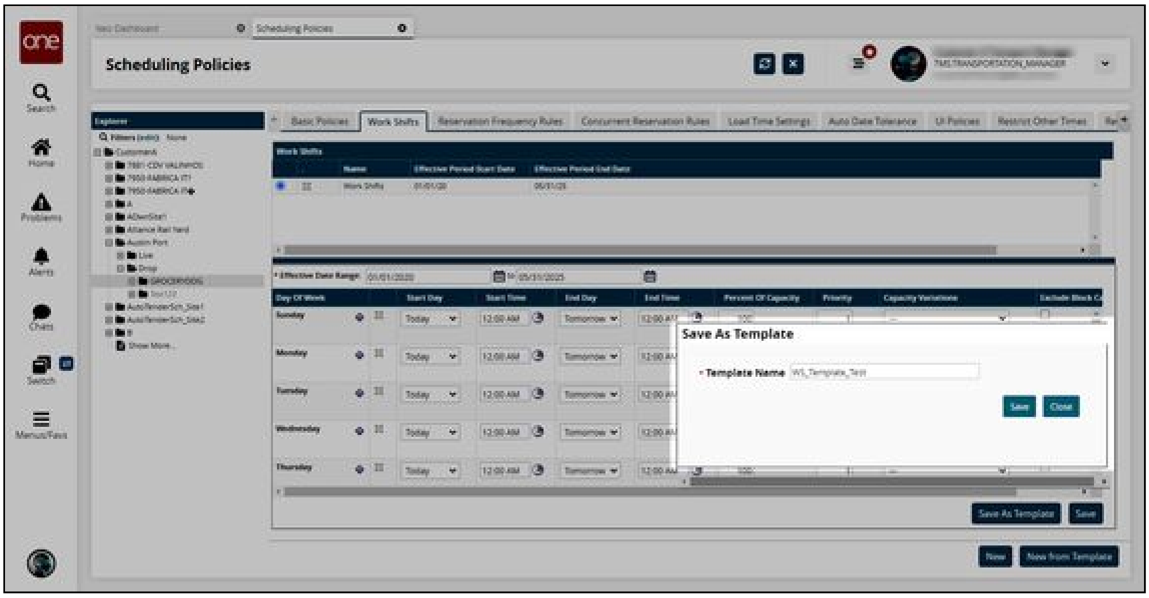


Field	Description
*Effective Date Range	Select a start and end date using the calendar icons.
*Start Day	Select Today or Yesterday from the drop-down list to specify when the work shift begins.
*Start Time	Click the clock icon to select a start time.
*End Day	Select Today or Tomorrow from the drop-down list to specify when the work shift ends.

Field	Description
*End Time	Click the clock icon to select an end time.
*Percent of Capacity	Enter a capacity value. Entering "50" means 50% capacity. You can allocate a percentage of the available daily shipping or receiving capacity to a shift (date pattern) along with a sequence (priority) number. Shipment planning considers these capacity percentages for load distribution. For days with only one shift, capacity is assumed to be 100 percent.
*Priority	Enter a priority value. For example, a day with three shifts (date patterns) will have priorities of 1, 2, and 3. The priority number determines the order in which the shifts will be filled with appointments when applying scheduling sequences. When the Appointment Scheduling engine searches for time slots, slots during the shift assigned priority 1 will be selected over slots during the shift with priorities 2 and 3. Similarly, slots with priority 2 will be selected over slots with priority 3.
Capacity Variations	Select a capacity variation from the drop-down menu.
Exclude Block Capacity	Select this checkbox to exclude block capacity.

Users can click the Copy and Paste icons in the column after Exclude Block Capacity to use the information again.

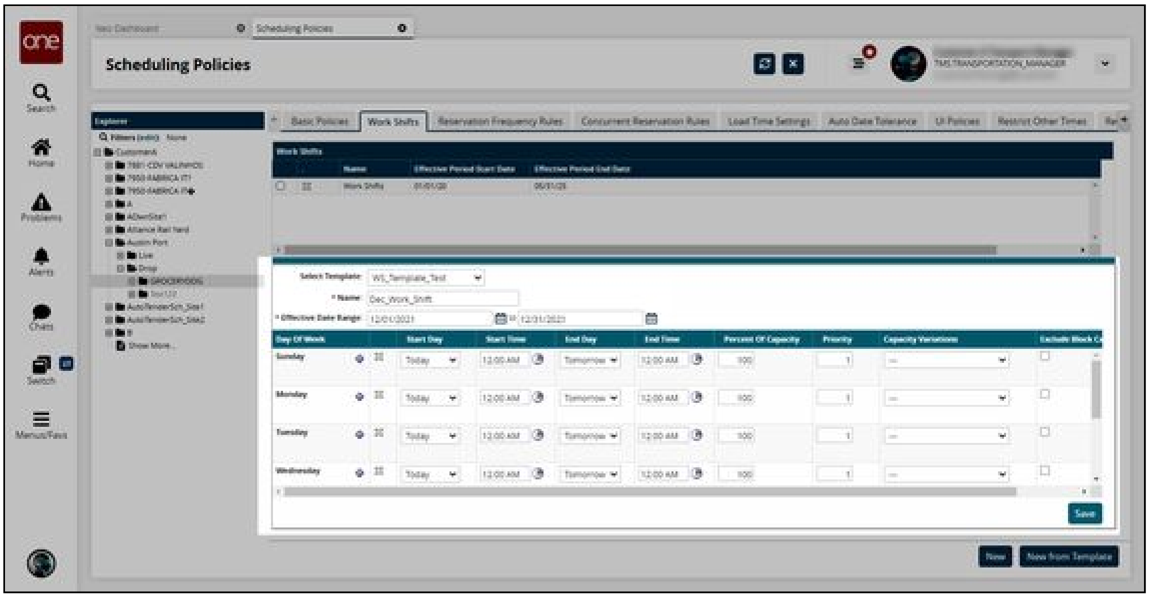
6. To add an additional row to a day of the week, click the **Add Pattern** button (blue plus sign).
   Another date pattern row appears for the selected day of the week.
7. To delete a date pattern, click the **Delete Row** button (white X).
8. When the schedule is set up as desired, click the **Save as Template** button.
   A popup appears.



9. Enter a ***Template Name.**
10. Click the **Save** button.
    A success message appears.

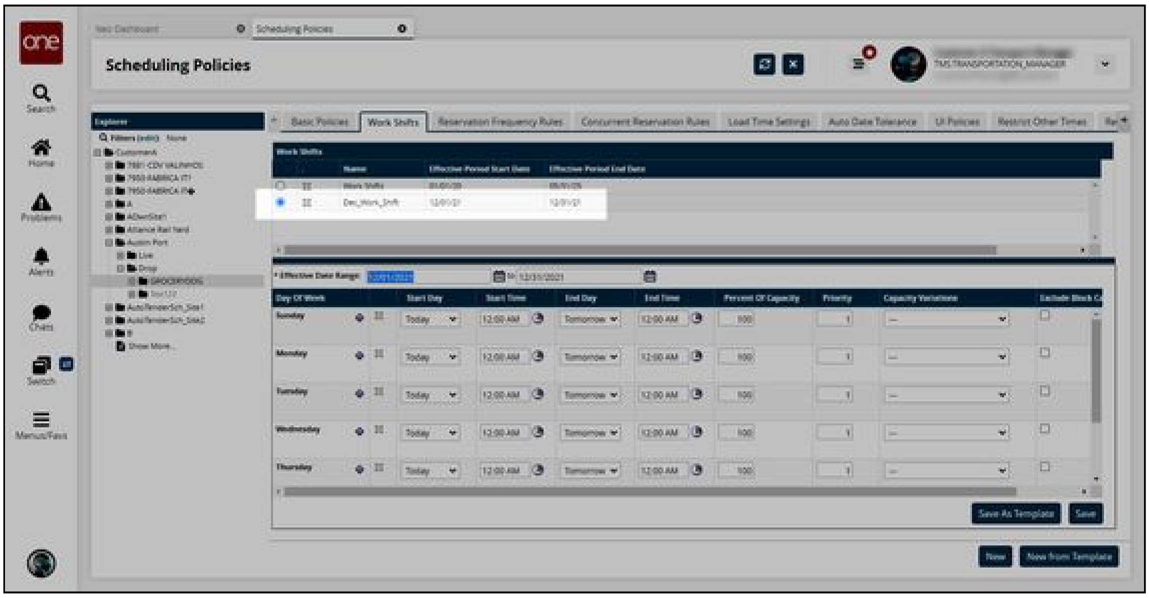
Complete the following steps to create a work shift schedule from a work shift template:

1. Click the **New from Template** button.
   The lower pane updates.
2. Select your desired work shift template from the **Select Template** dropdown menu.
   The lower pane updates and loads the template.



3. Enter a ***Name** and an ***Effective Date Range**.
4. Modify the work shift schedule as desired.

5. Click the **Save** button.
   The new work shift schedule appears in the upper pane.



Please note there are UI discrepancies currently present for these screens. Updates will be made in the future to align the UI to our standards.

See the "Saving Work Shift Templates" section in the current version of the *Release Notes* for more information.

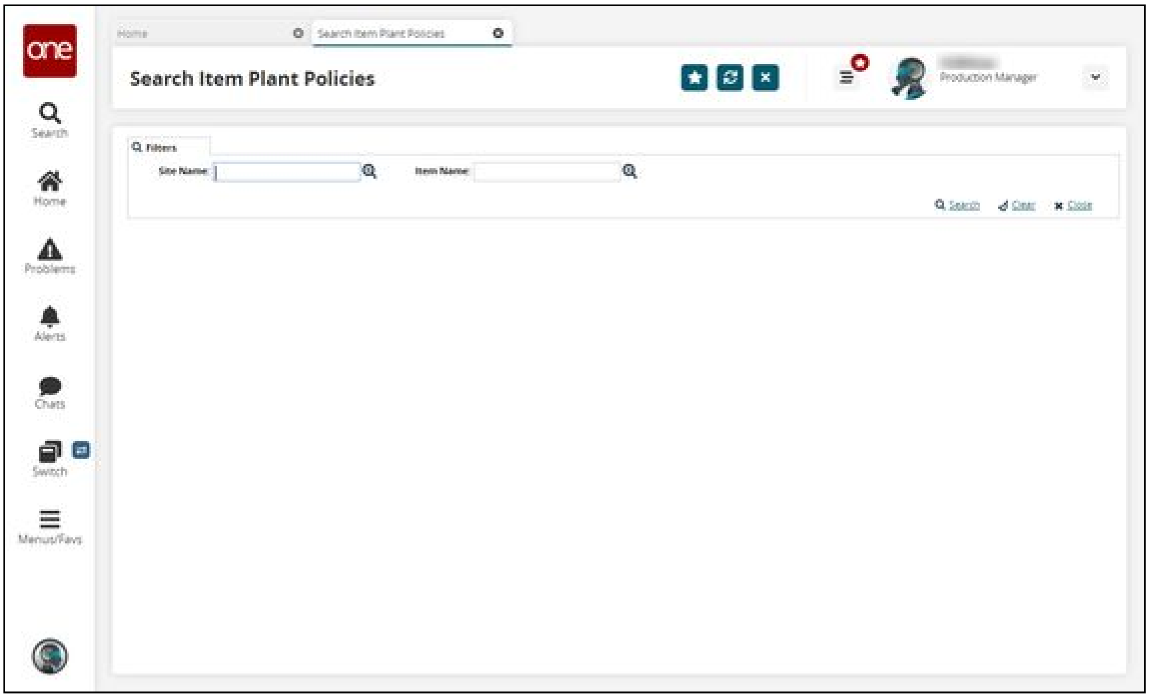
2.4 Manufacturing

2.4.1 Configure the Constrained Demand Translation Engine for Make to Order Items

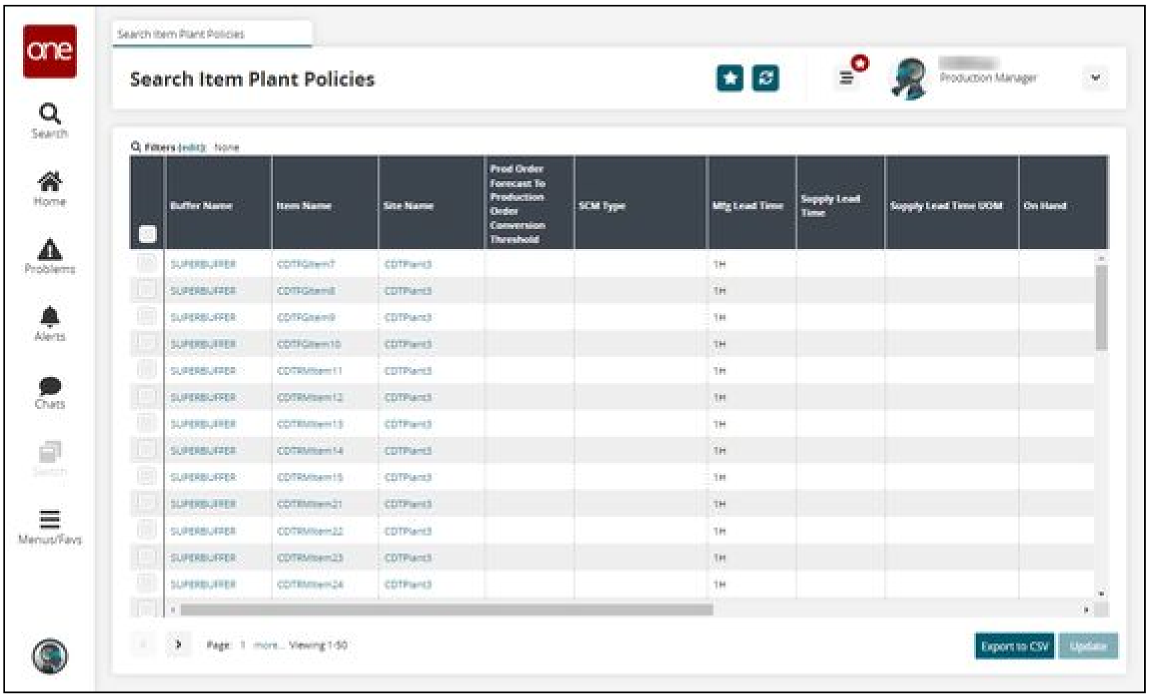
Production Manager users can configure the Constrained Demand Translation (CDT) engine for Make to Order (MTO) items. For the engine to operate in this mode, users must select the MTO option from the SCM Type dropdown field located on the Item Plant Policies screen.

Complete the following steps to select the MTO option from the SCM Type dropdown field:

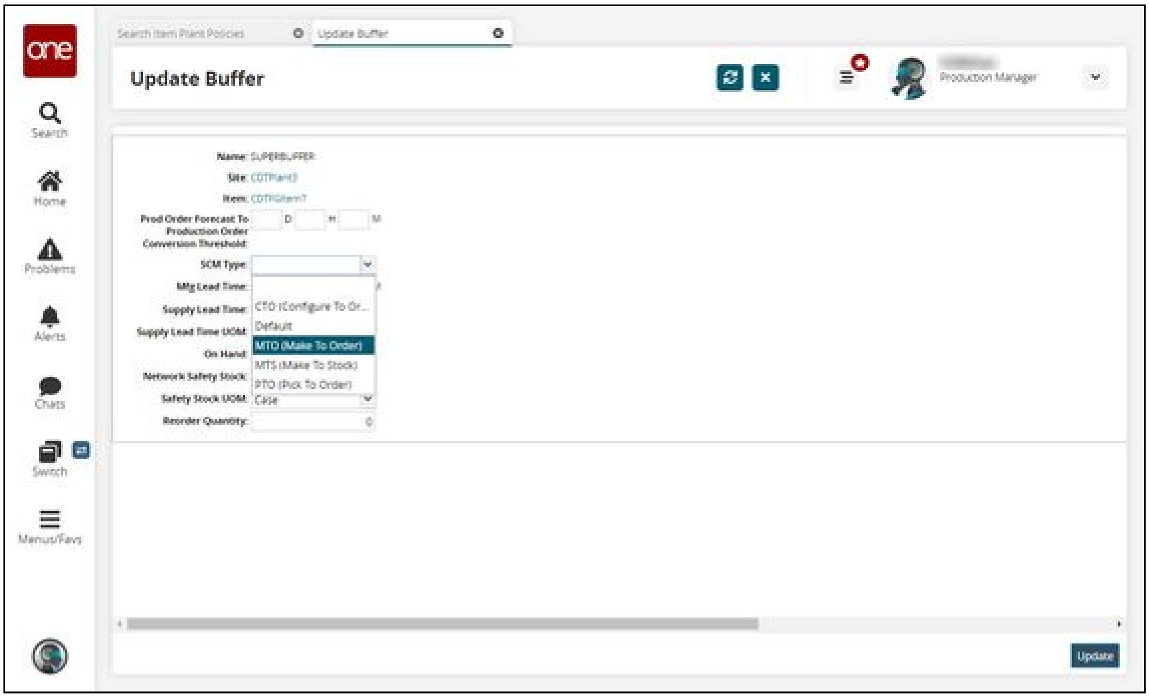
1. Log in to the ONE system.
2. Click **Menu/Favs > Manufacturing Policies > Search Item Plant Policies**.
   The Search Item Plant Policies screen appears.



3. (Optional) Enter a **Site Name** or **Item Name** in their respective fields.
4. Click the **Search** link.
   A table with the available Item Plant Policies (Buffer Name column) is displayed.



5. In the **Buffer Name** column, click a link to open the desired buffer.
   The buffer screen appears for the selected buffer.
6. In the **SCM Type** dropdown field, select the **MTO** option.



7. Click the **Update** button.
   A success message appears.

See "Make-To-Order Items Supported in CDT Unconstrained Mode" in the current version of the *Release Notes* for more information.

2.4.2 Production Management

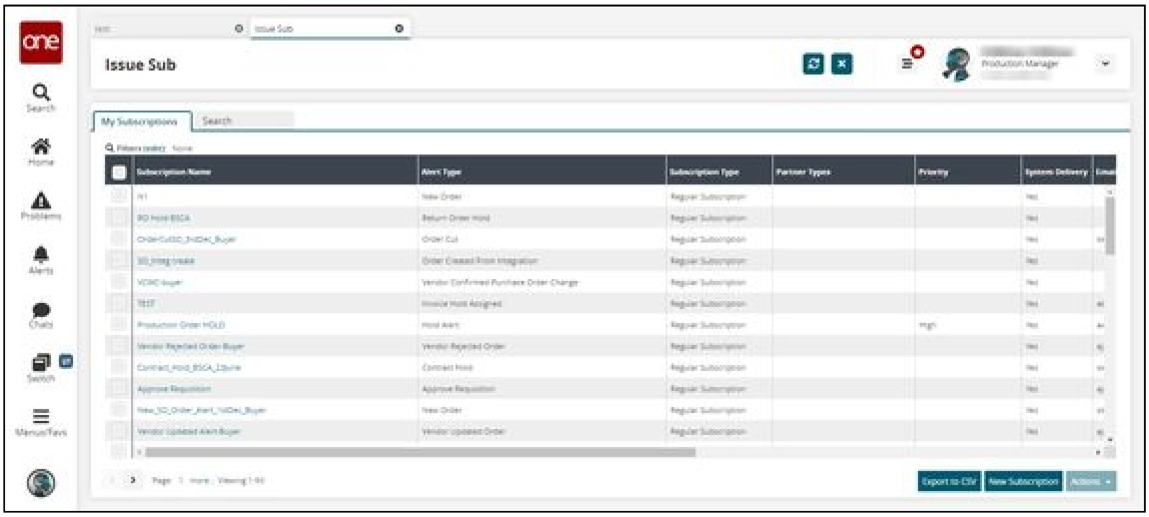
2.4.2.1 Alerts for Work Order Changes

Users can be alerted when a work order changes, providing increased visibility during planning. Users can subscribe to alerts when any of the following work order variables change:

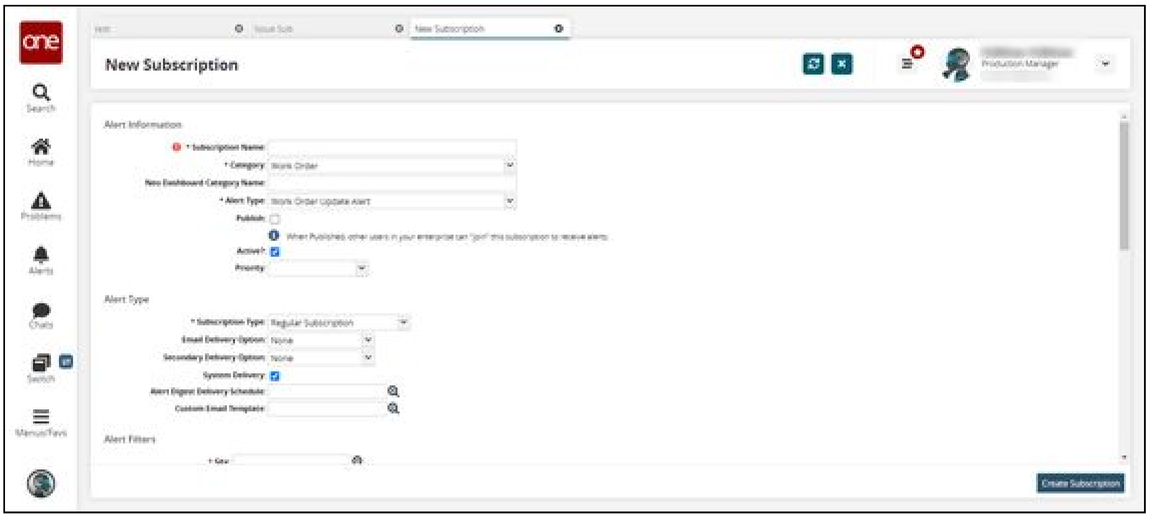
- Task Planned Start Time
- Task Planned End Time
- Task Actual Start Time
- Task Actual End Time
- Task Actual Quantity
- Task Planned Quantity
- Planned Quantity
- Request Quantity
- Issued Quantity
- Actual Quantity

Complete the following steps to set up alerts for work order changes:

1. Log in to the ONE system as a Production Manager role.
2. Click **Menu/Favs > Tools > Issue Sub.**
   The Issue Sub screen appears.



3. Click **New Subscription**.
   The New Subscription screen appears.



4. Fill out the following fields. Fields with an asterisk (*) are required.

Section	Field	Description
Alert Information	*Subscription Name	Enter a name for this alert subscription.
	*Category	Select an alert category. For this example, select **Work Order**. This selection affects what appears in other fields.

Section	Field	Description
	Neo Dashboard Category Name	Input a category name for the dashboard.
	*Alert Type	From the Alert Type dropdown list, select the desired value. For this example, select **Work Order Update Alert.** The options that appear in the dropdown list are dependent on what is selected in the Category field.
	Publish	When this checkbox is selected, other users in your enterprise can join the subscription to receive alerts.
	Active?	Check this checkbox if this is an active subscription.
	Priority	Select a priority from the dropdown menu. The options are High, Medium, or Low.
Alert Type	*Subscription Type	Select either Regular Subscription or Partner Recommendation. Selecting Partner Recommendation sets up alert subscriptions for your partner's supplier site.
	Email Delivery Option	Select either Alternate Email, Email, or None from the dropdown menu. ◦ None: No email alert will be sent. ◦ E-mail: An email alert will be sent. The default email address for the alert appears to the right of the list. ◦ Alternate Email: An email alert will be sent. In the box that appears to the right of the Email Delivery Option list, type the alternate email address for alerts.
	Secondary Delivery Option	Select either Alternate Email or None from the dropdown menu. ◦ None: No email alert will be sent. ◦ Alternate Email: An email alert will be sent. In the box that appears to the right of the Email Delivery Option list, type the alternate email address for alerts.

Section	Field	Description
	System Delivery	Select this checkbox to send the alert email to the Alert Inbox. Unselecting this checkbox sends the alert email to the specified addresses.
	Alert Digest Delivery Schedule	Use the picker tool to select a delivery schedule.

5. Fill out the following fields in the **Alert Filters** section. Fields with an asterisk (*) are required.

Field	Description
*Site	Select a site name using the picker tool.
Item	Select an item using the picker tool.
Start Date Threshold	Enter a start date threshold.
End Date Threshold	Enter an end date threshold.
Task Planned Start Time Change Alert	Select Yes or No from the dropdown menu.
Task Planned End Time Change Alert	Select Yes or No from the dropdown menu.
Task Actual Start Time Change Alert	Select Yes or No from the dropdown menu.
Task Actual End Time Change Alert	Select Yes or No from the dropdown menu.
Task Planned Quantity Change Alert	Select Yes or No from the dropdown menu.
Task Actual Quantity Change Alert	Select Yes or No from the dropdown menu.
Task Start Date Change Threshold	Enter a number for the task start date change threshold.
Task End Date Change Threshold	Enter a number for the task end date change threshold.
Task Quantity Change Threshold	Enter a number for the task quantity change threshold.

Field	Description
Task Part Planned Quantity Change Alert	Select Yes or No from the dropdown menu.
Task Part Request Quantity Change Alert	Select Yes or No from the dropdown menu.
Task Part Issued Quantity Change Alert	Select Yes or No from the dropdown menu.
Task Part Actual Quantity Change Alert	Select Yes or No from the dropdown menu.
Task Part Quantity Change Threshold	Enter a number for the task part quantity change threshold.

6. Click the **Create Subscription** button.
   The screen refreshes, and the new subscription name displays at the top of the screen with a green success message.

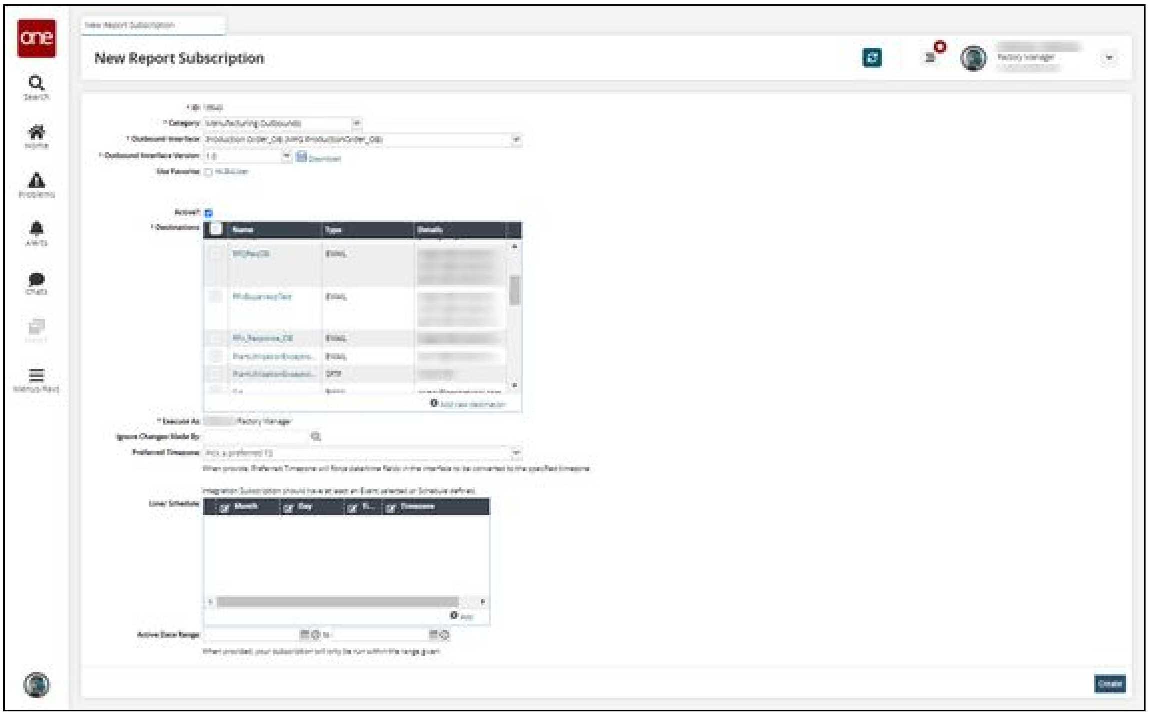
See the "Alerts for Work Order Changes" section in the current version of the *Release Notes* for more information.

2.4.2.2 Creating a Time-Based Integration Subscription for Production Order Changes

The time-based Production Orders outbound interface allows users to schedule recurring delivery of an outbound file containing the net change in production orders. Unlike the event-based Production Order integration subscription, this version allows NEO to send a single outbound file on a specific schedule as opposed to sending outbound files every time someone changes a production order in ONE. Only changes that occurred since the last net change are included in the outbound file.

Complete the following steps to create a time-based integration subscription for production orders:

1. Log in to the ONE system as a Production Manager or Factory Manager.
2. Click **Menu/Favs > Tools > New Report Subscription.**
   In the NEO UI, users can click the Menu/Favs icon on the left sidebar and type in the name of the screen in the menu search bar. For more information, see "Using the Menu Search Bar."
   The New Report Subscription screen appears.



3. Fill out the following fields. Fields with an asterisk (*) are required.

Field Name	Field Description
*ID	This field is system generated.
*Category	Select **Manufacturing Outbounds** from the Category dropdown menu.
*Outbound Interface	Select **Production Order_OB** from the Outbound Interface dropdown menu.
*Outbound Interface Version	Select **1.0** from the Outbound Interface Version drop-down menu. Version 1.0 is for time-based subscriptions. Version 2.0 is for event-based subscriptions.
Active?	Select this checkbox to activate this subscription. To deactivate, uncheck the checkbox.
*Destinations	The Destinations table allows you to select from existing destinations in the system to include them in the subscription. You can add a new destination by clicking on **Add new destination** and following the on-screen instructions.
*Execute As	This field is system generated.

Field Name	Field Description
Ignore Changes Made By	To exclude changes from the report that are made by one or more users, use the magnifying glass icon to search for users in the system and add them to this field.
Preferred Timezone	Select your preferred timezone from the dropdown menu.

4. Add a schedule to instruct the system on when to run the subscription.
   A. Click Add to start the process of adding a schedule to the subscription.
   B. In the Month dropdown specify a month when the subscription should run. You can choose a single month, or select Every Month.
   C. Use the Day dropdown menu to select a day when the subscription should run.
   D. Use the Time dropdown menu to select a time when the subscription should run.
   E. Use the Timezone dropdown menu to set the timezone used by the schedule.
5. Enter a date range in the Active Date Range field to restrict the running of this subscription to the date range provided.
6. Click **Create**.

See the "Outbound Interface for Net Change to Production Orders" section in the current version of the *Release Notes* for more information.

2.4.2.3 Enable the Date Format Override Policy for Production Orders

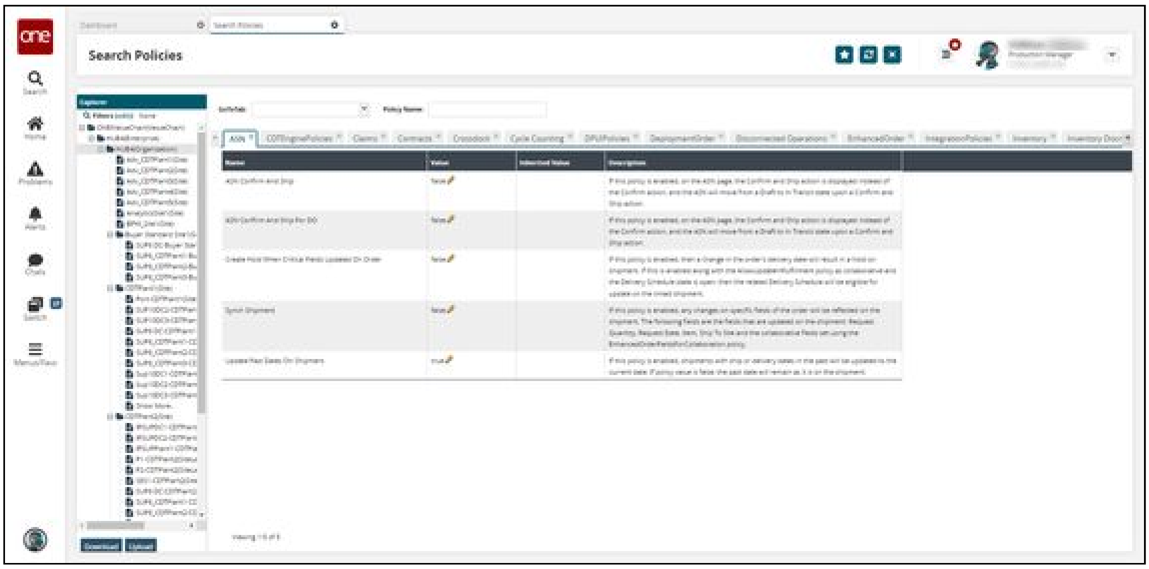
The Production Order Inbound Date Format Override policy allows the use of custom date formats for Production Order imports and exports. When the policy is enabled, it overrides the date format prescribed by the Production Order inbound interfaces for an organization. This helps users configure the date format, allowing them to work with dates in various editing tools such as Excel.

> Note that the Inbound and Outbound Interface File template will not change.

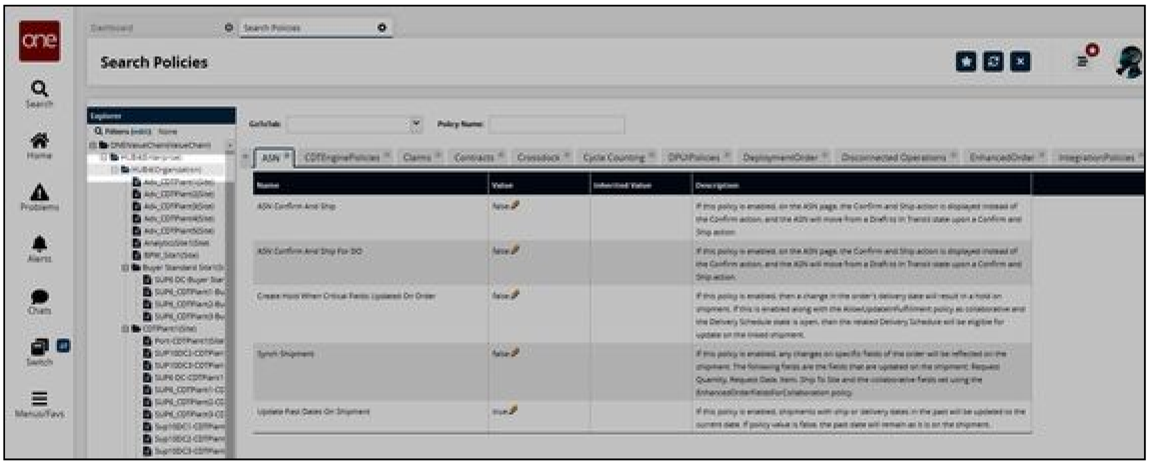
Complete the following steps to enable the date format override policy:

1. Log in to the ONE system as a Production Manager.
2. Click **Menu/Favs > Manufacturing Policies > Search Policies.**
   In the NEO UI, users can click the Menu/Favs icon on the left sidebar and type in the name of a menu item in the menu search bar. For more information, see "Using the Menu Search Bar."

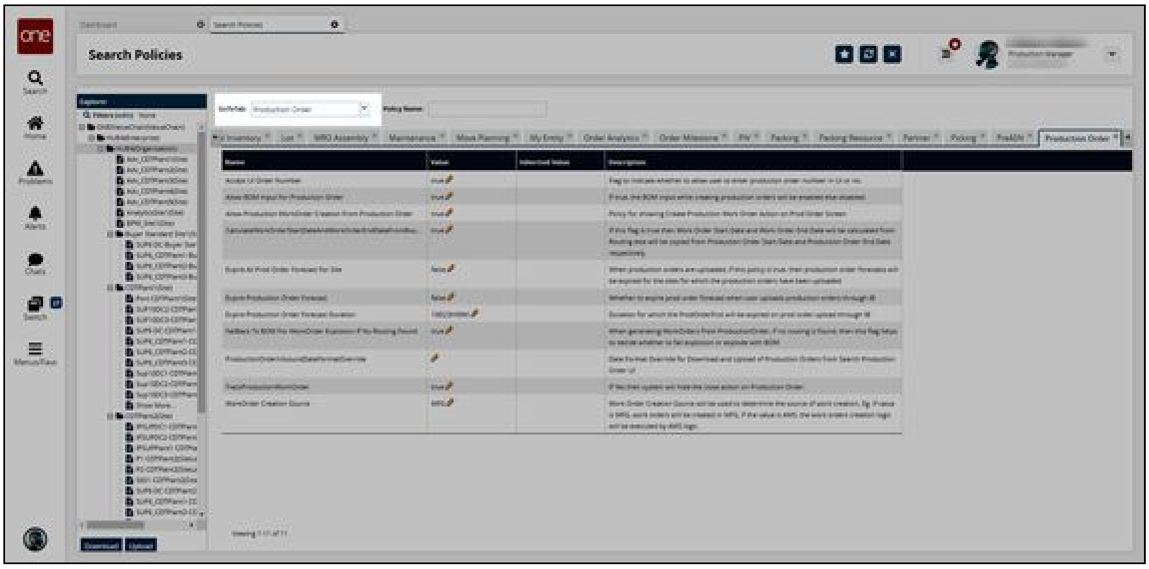
The Search Policies screen appears.



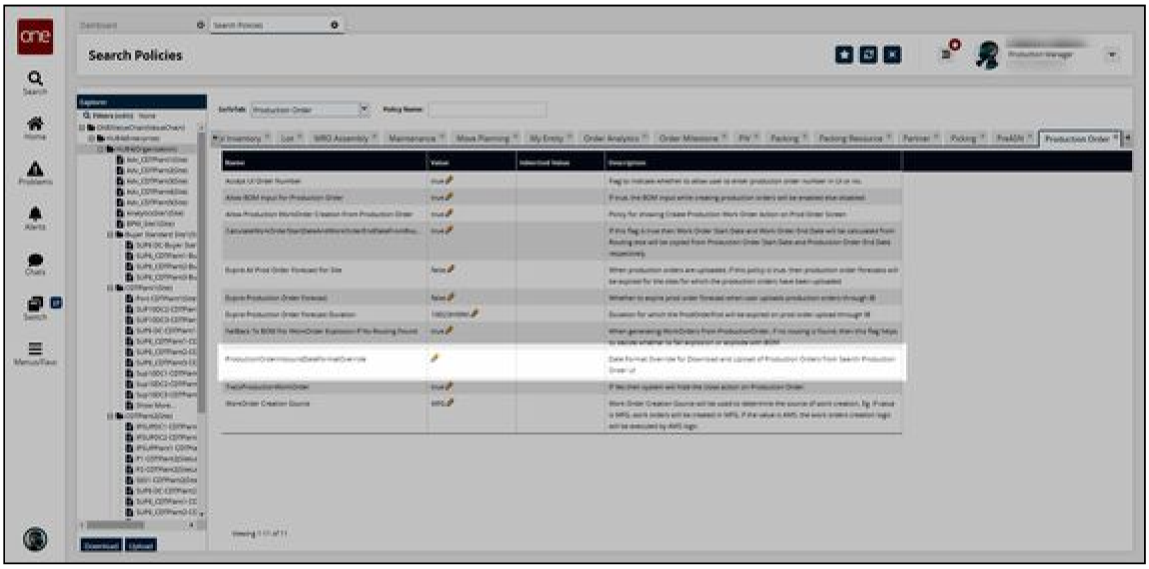
3. In the **Explorer** pane on the left side of the screen, click the name of your organization. When selected, the organization name is highlighted in grey.



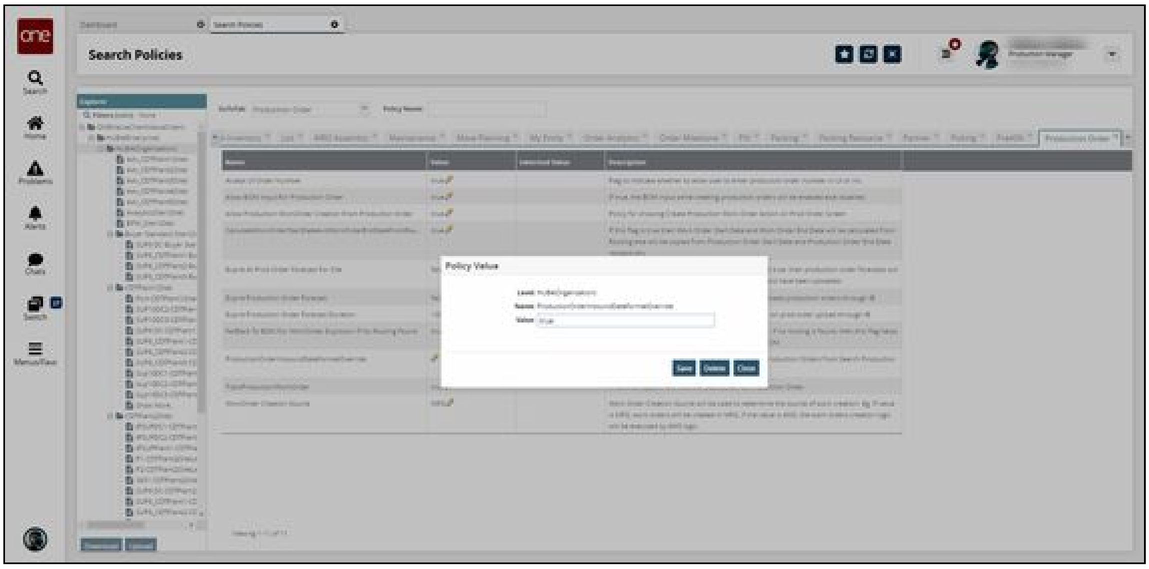
4. In the **GoToTab** field, select **Production Order** from the dropdown list and press enter.
   The Production Order tab displays the production order policies.



5. In the **Name** column, locate the **Production Order Inbound Date Format Override** policy.
6. In the **Value** column, click the pencil icon to edit the policy configuration.



A policy configuration popup window opens.



7. In the **Value** field, type "true."
8. Click **Save**.
   The policy is configured to override date formatting.

See the "Date Format Override for Production Order Inbound Interface" section in the current version of the *Release Notes* for more information.

2.4.2.4 Production Order Forecast Accuracy

Configure the Production Order Forecast Accuracy Engine via Integration

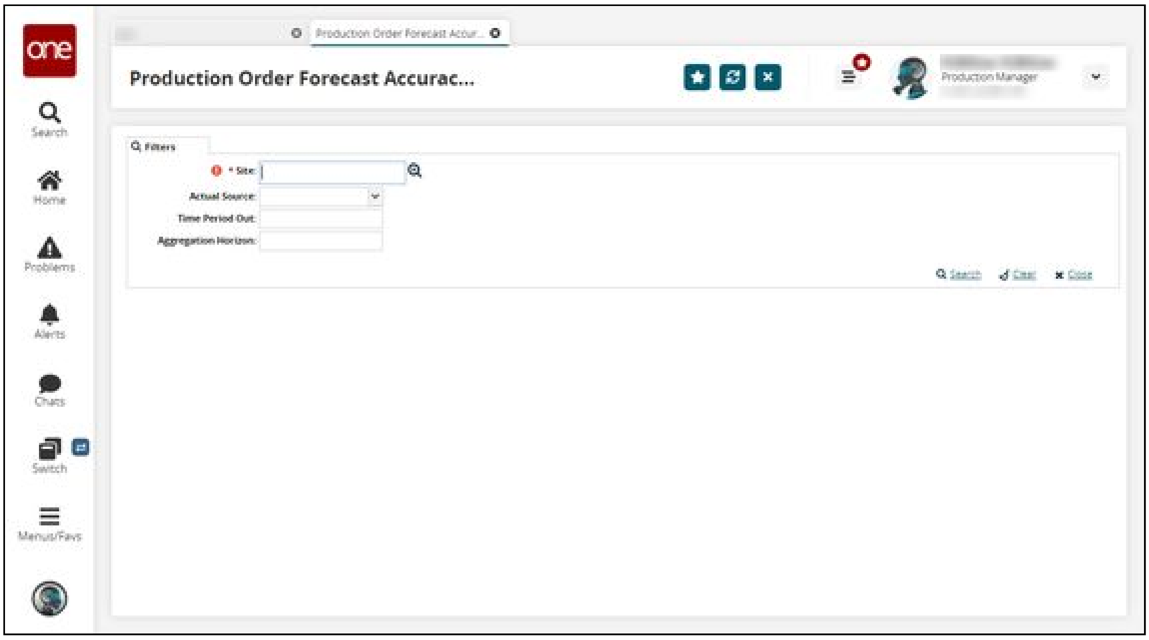
The Production Order Forecast Accuracy engine is used to calculate the accuracy of forecast data and compare the forecast data against actual production data. The data from the Production Order Forecast Accuracy engine is used in forecast accuracy calculations and is displayed in various reports and pivot tables. Users can configure the engine via integration.

Complete the following steps to configure and run the Production Order Forecast Accuracy Engine:

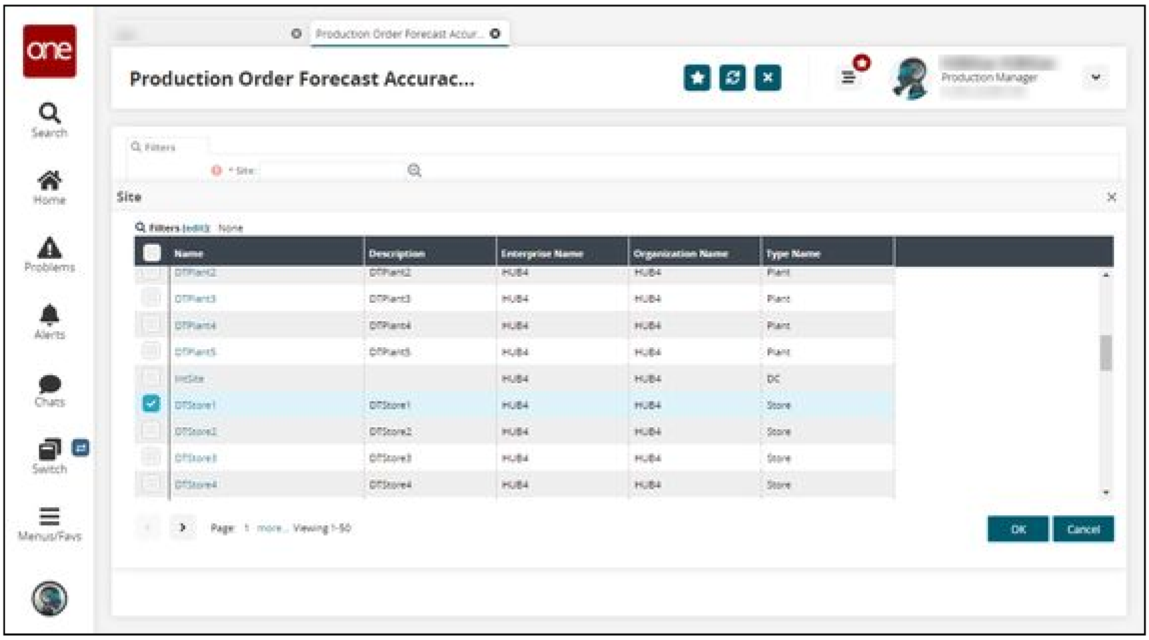
1. Log in to the ONE system as a Production Manager.
2. Click **Menu/Favs > Production Order Forecast Accuracy > Production Order Forecast Accuracy Configuration Report.**

   > Users can search the menus by clicking the Menu/Favs icon on the left sidebar and typing the name of the screen in the menu search bar.

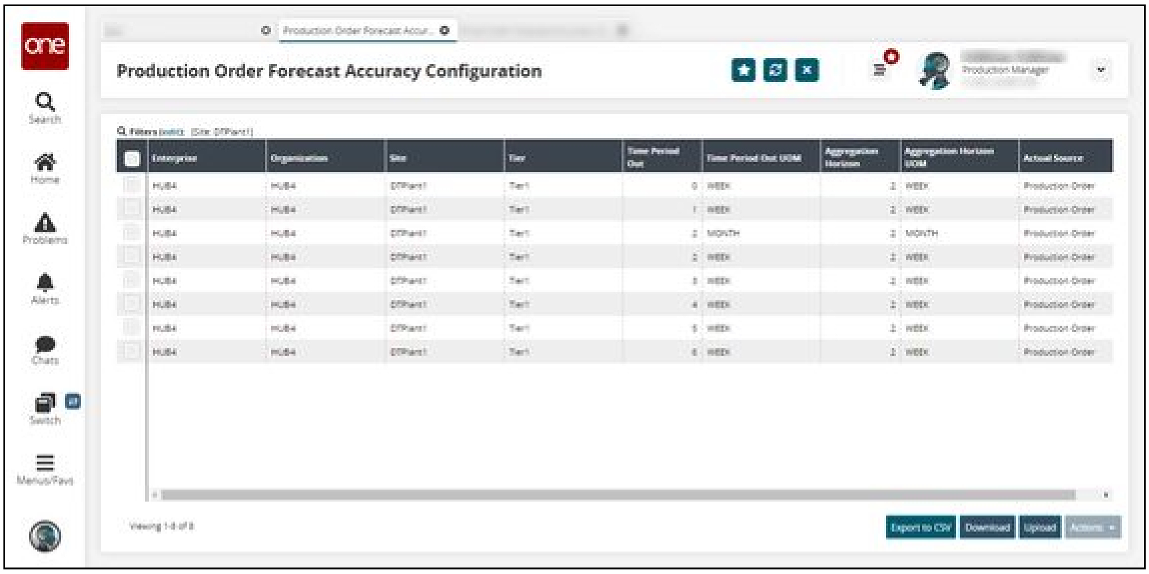
   The Production Order Forecast Accuracy Configuration Report screen appears with the filter options displayed.



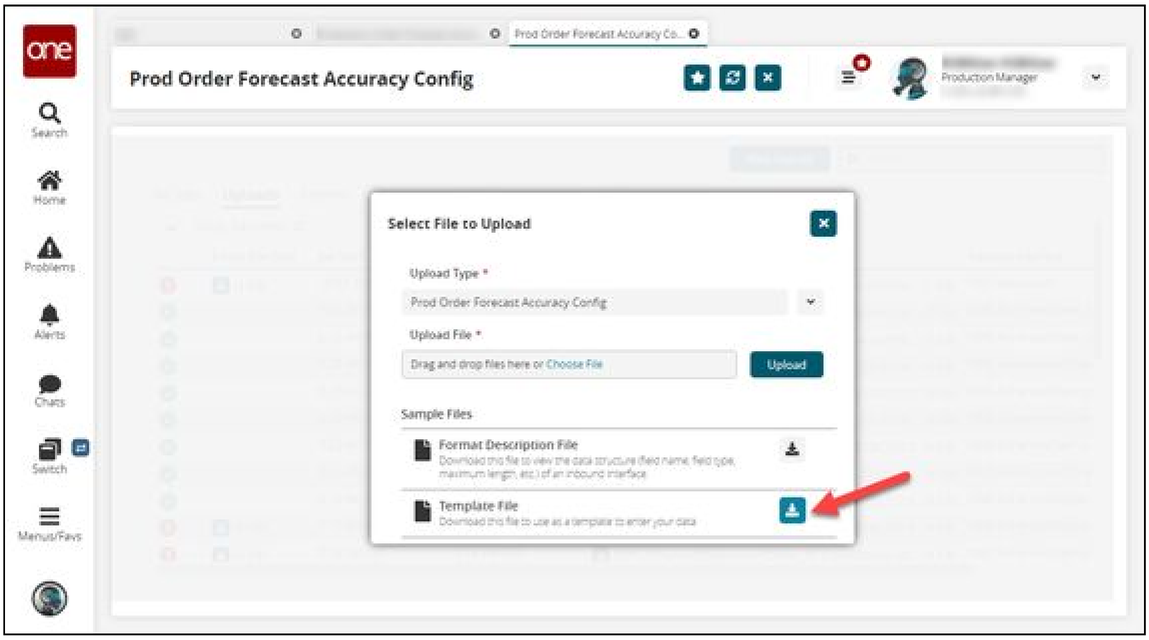
3. Enter a site in the *__Site__ field or click the magnifying glass icon to browse and select a site. Fields with an asterisk (*) are required.
   If you click the magnifying glass icon, a list of sites display.



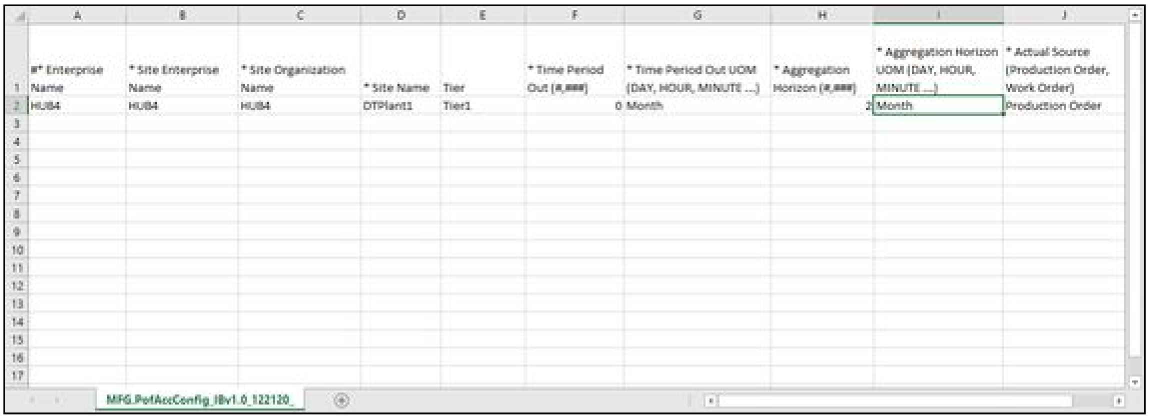
4. Select a site from the list, and click **OK**.
   The site selected displays in the Site filter field.
5. Fill in other filter fields as desired.
6. Click the **Search** link.
   The report displays a list of matching configurations that belong to the site selected in the previous steps.



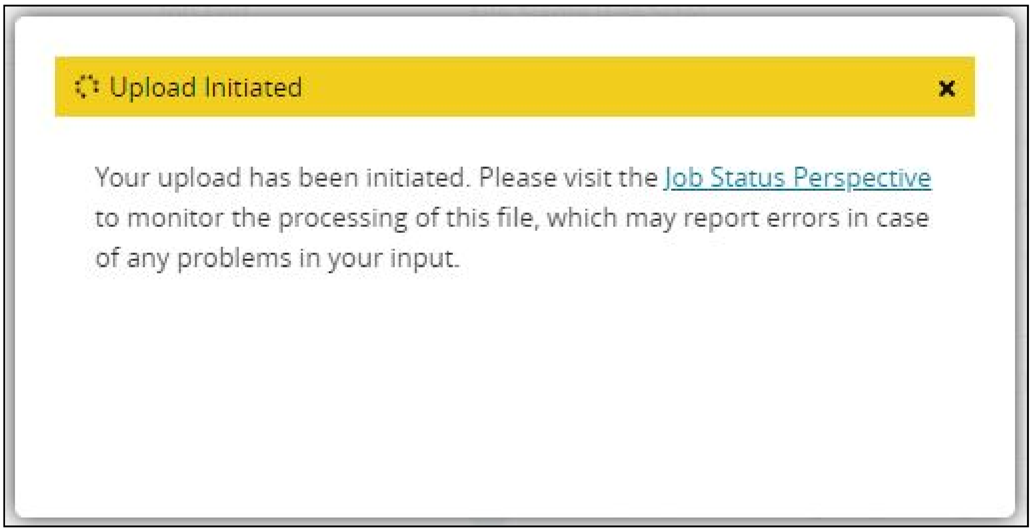
7. Click the **Upload** button.
   The Select File to Upload popup appears.
8. Click the **Template File** download button. The file downloads to your default browser download location.



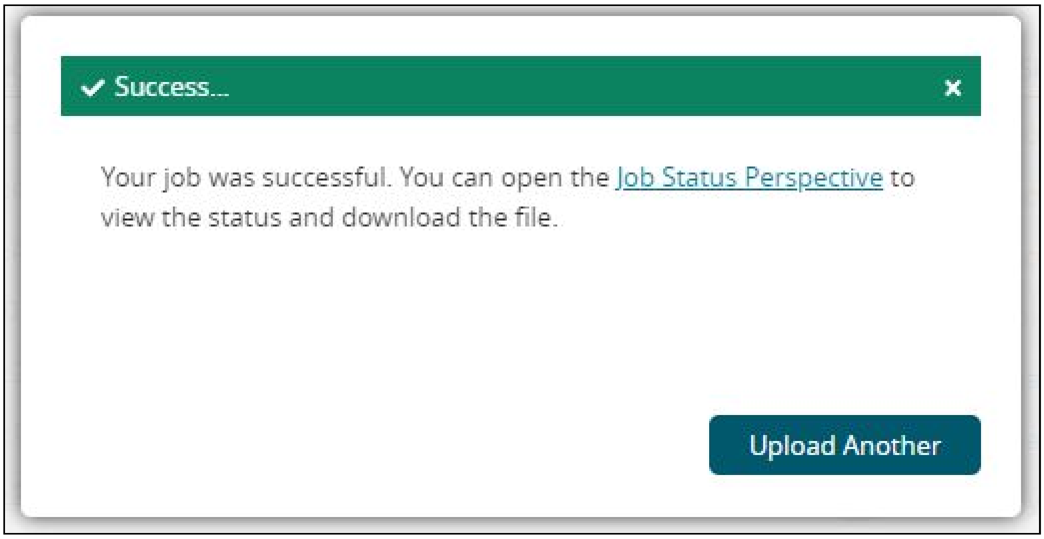
9. Edit the file using your CSV editor.
   Unable to render include or excerpt-include. Could not retrieve page.



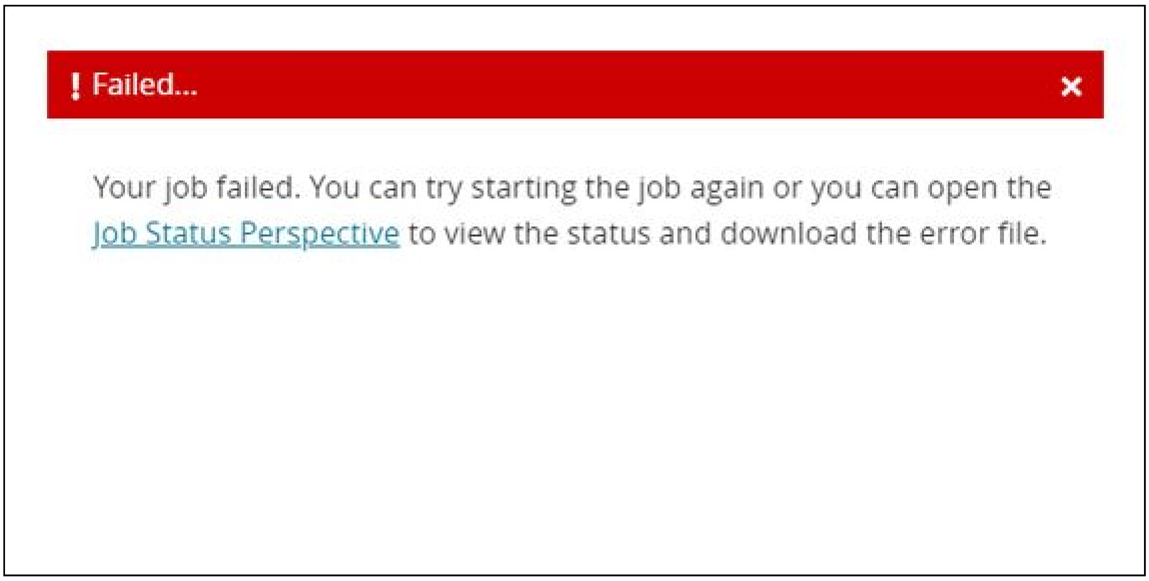
10. Save the file when finished editing.
11. Returning to the **Select File to Upload** popup, click the **Choose File** link and select your edited CSV file from your local machine.
12. Click the **Upload** button.
    The system displays a status message.



If the upload was successful, the following message is shown.



13. If the upload encounters an error, follow the instructions in the message to resolve any issues with your CSV file and repeat the upload process.



See the "Production Order Forecast Accuracy Engine, Reports, and Widgets" section in the current version of the *Release Notes* for more information.

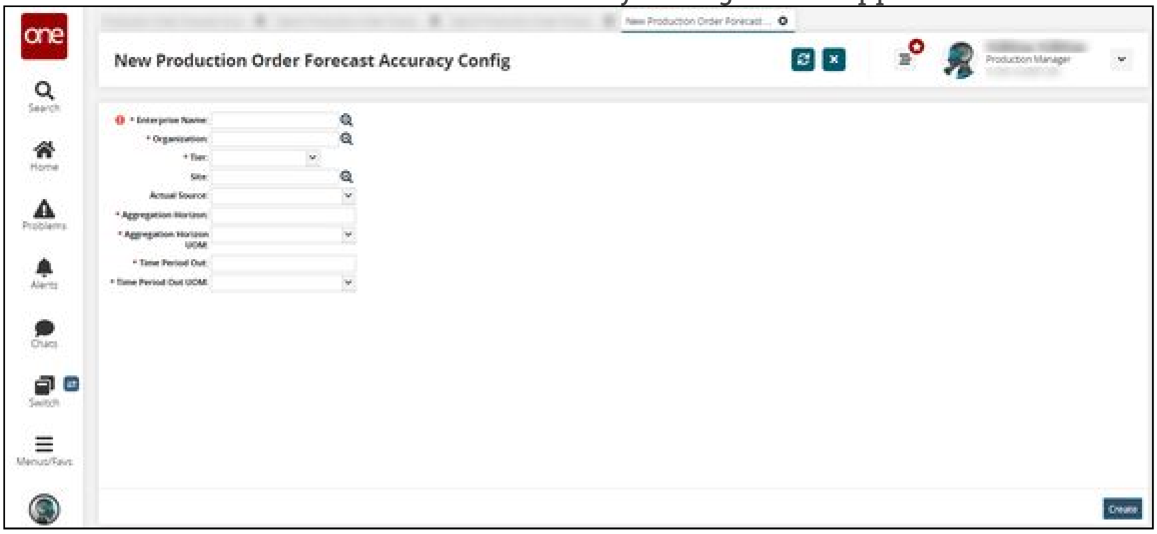
Configure the Production Order Forecast Accuracy Engine via UI

The Production Order Forecast Accuracy engine is used to calculate the accuracy of forecast data and compare the forecast data against actual production data. Users can create many different Production Order Forecast Accuracy Configurations which the engine uses to generate production order forecast accuracy reports. When the engine is run, it runs for all valid configurations simultaneously. These configurations are visible in the Production Order Forecast Accuracy Configuration Report.

Complete the following steps to run the Production Order Forecast Accuracy Engine:

1. Log in to the ONE system as a Production Manager.
2. Click **Menu/Favs > Production Order Forecast Accuracy > New Production Order Forecast Accuracy Config.**
   In the NEO UI, users can click the Menu/Favs icon on the left sidebar and type in the name of the screen in the menu search bar.
   For more information, see "Using the Menu Search Bar."

   The New Production Order Forecast Accuracy Config screen appears.

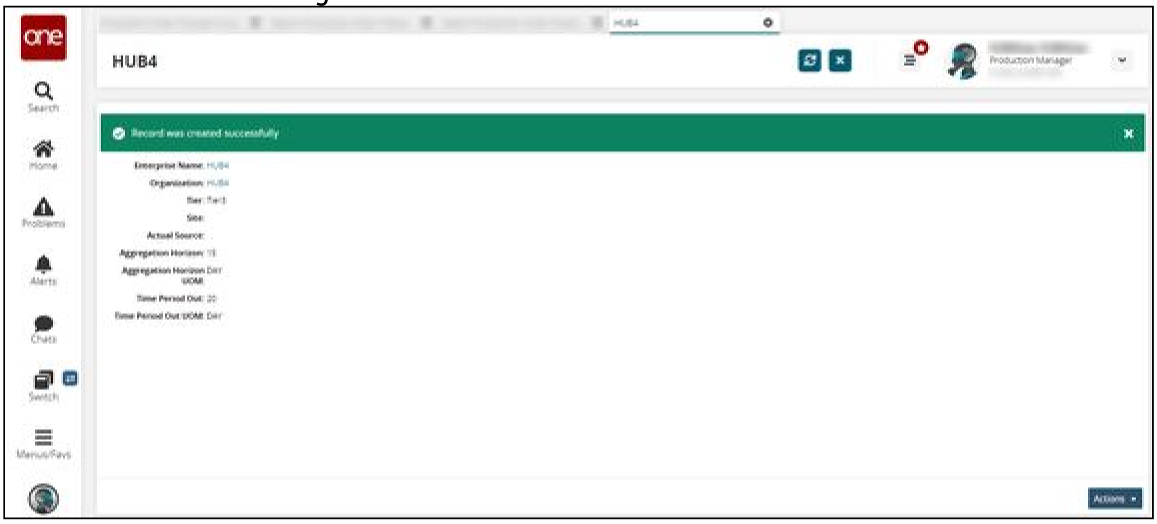


3. Use the following table to enter data into the fields. Field marked with an asterisk are mandatory fields.

Field Name	Description
* Enterprise Name	Name of the enterprise for which the forecast accuracy is run.
* Organization:	Name of the organization for which the forecast accuracy is run.
* Tier:	Product tier.
Site:	Use this field to specify a site where the forecast accuracy data is needed.
Actual Source:	Source of actual data used for forecasting. Allowed values: Production Order, Work Order.
* Aggregation Horizon:	Horizon for data aggregation (e.g. 1 week, 7 days, 30 days).
* Aggregation Horizon UOM:	Unit Of Measure used for AggregationHorizon field.

Field Name	Description
* Time Period Out:	Use this field to configure how far out in the future to consider forecasts. Period Out for Forecast accuracy calculation (e.g. 1 week out, 2 weeks out).
* Time Period Out UOM:	Unit Of Measure for Time Period Out field.

4. Click Create. The configuration is saved.



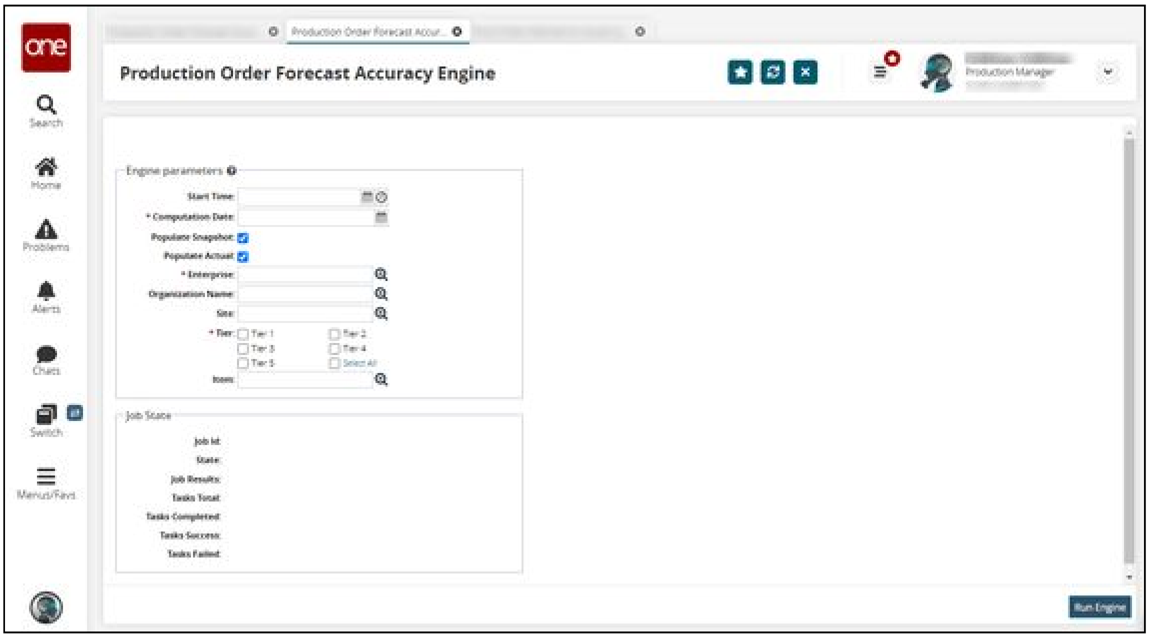
See the "Production Order Forecast Accuracy Engine, Reports, and Widgets" section in the current version of the *Release Notes* for more information.

Run the Production Order Forecast Accuracy Engine

The Production Order Forecast Accuracy engine is used to calculate the accuracy of forecast data and compare the forecast data against actual production data. The data coming from the Production Order Forecast Accuracy engine is used to calculate forecast accuracy and the results are displayed in various reports and pivot tables.

Complete the following steps to run the Production Order Forecast Accuracy Engine:

1. Log in to the ONE system as a Production Manager.
2. Click **Menu/Favs > Production Order Forecast Accuracy > Production Order Forecast Accuracy Engine.**
   In the NEO UI, users can click the Menu/Favs icon on the left sidebar and type in the name of the screen in the menu search bar. For more information, see "Using the Menu Search Bar."
   The Production Order Forecast Accuracy Engine screen appears.



3. Fill out the following fields. Fields with an asterisk (*) are required.

Field Name	Field Description
Start Time	Select a start time that determines when to start the engine. If left empty, the engine runs immediately.
* Computation Date	Select a date using the calendar tool. This is the date on which the engine runs for the purposes of generating Production Order Forecast Accuracy information. This is a user-defined field that defaults to the current date.
Populate Snapshot	Select this checkbox to have the engine populate a snapshot of forecast data.
Populate Actual	Select this checkbox to have the engine populate actual data.
* Enterprise	Select an enterprise using the picker tool. This is the enterprise on which the Accuracy Engine Config is run.
Organization Name	Select an organization name using the picker tool. This is the organization on which the Accuracy Engine Config is run.
Site	Select a site using the picker tool. This is the site on which the Accuracy Engine Config is run.

Field Name	Field Description
*Tier	Select any number of tiers using the checkboxes. Users can group sites by an attribute called Tier, which is a standard NEO field. Instead of specifying a site name, the user can provide a tier name that includes all sites in that tier. The engine will run for all sites that belong to the selected tier(s).
Item	Select an item using the picker tool. This is the item for which the Accuracy Engine Config is run. This is an optional field. If a value is not provided, the engine runs for all items of the given Enterprise and Site.

4. Click **Run Engine**.
   A success message appears.

See the "Production Order Forecast Accuracy Engine, Reports, and Widgets" section in the current version of the *Release Notes* for more information.

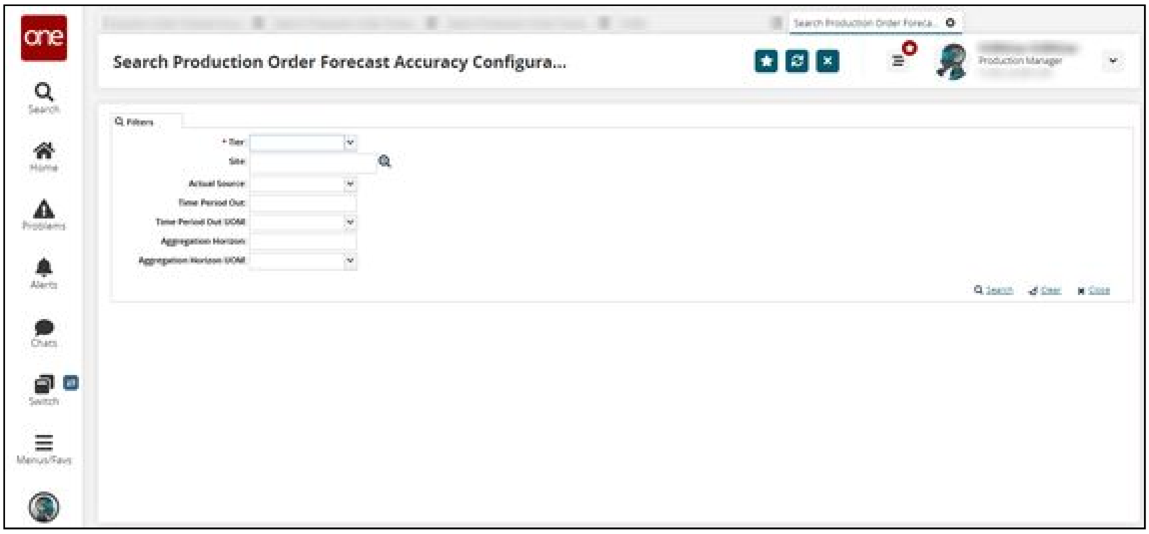
Viewing and Editing Production Order Forecast Accuracy Configurations

Users can search for and view a report containing all of the Production Order Forecast Accuracy Configurations. The data in the Production Order Forecast Accuracy Configurations report can be exported as a CSV file. Users can also create a new configuration from this screen by clicking Create. Additionally, users can update or delete existing configurations by selecting their corresponding checkbox and selecting an action from the Actions menu.

Complete the following steps to search and optionally edit Production Order Forecast Accuracy Configurations:

1. Log in to the ONE system as a Production Manager.
2. Click **Menu/Favs > Production Order Forecast Accuracy > Search Production Order Forecast Accuracy Configuration Report**.
   In the NEO UI, users can click the Menu/Favs icon on the left sidebar and type in the name of the screen in the menu search bar.
   For more information, see "Using the Menu Search Bar."

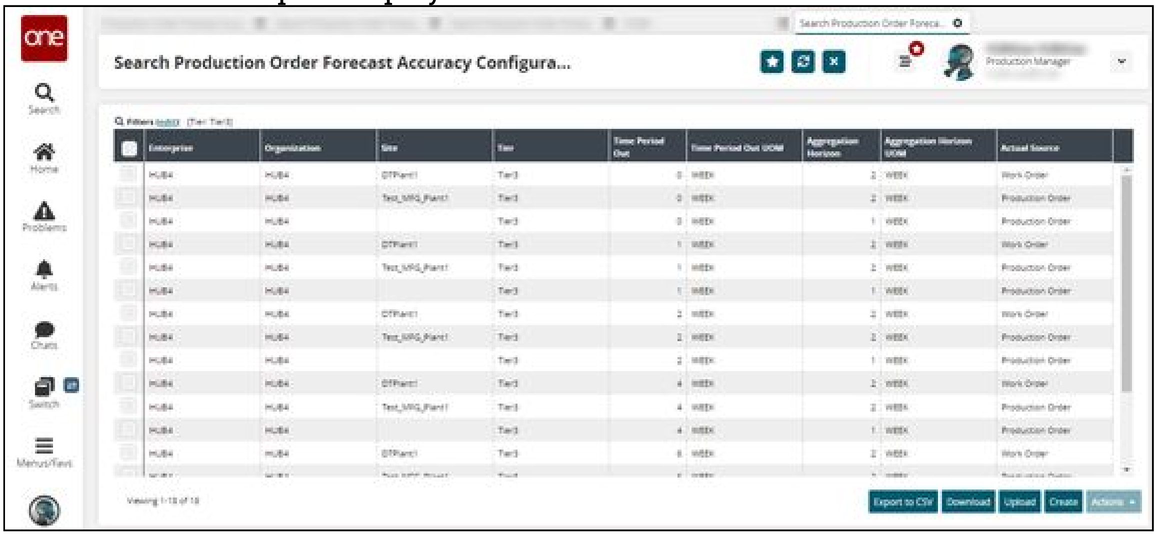
   The Search Production Order Forecast Accuracy Configuration Report screen appears.



3. Use the following table to fill in the fields. Fields marked with an asterisk are required fields.

Field Name	Description
* Tier:	Product tier.
Site:	Use this field to specify a site where the forecast accuracy data is needed.
Actual Source:	Source of actual data used for forecasting. Allowed values: Production Order, Work Order.
Time Period Out:	Use this field to configure how far out in the future to consider forecasts. Period Out for Forecast accuracy calculation (e.g. 1 week out, 2 weeks out).
Time Period Out UOM:	Unit Of Measure for Time Period Out field.
Aggregation Horizon UOM:	Unit Of Measure used for AggregationHorizon field.
Aggregation Horizon:	Horizon for data aggregation (e.g. 1 week, 7 days, 30 days).

4. Click Search. The report displays on the screen.



See the "Production Order Forecast Accuracy Engine, Reports, and Widgets" section in the current version of the *Release Notes* for more information.

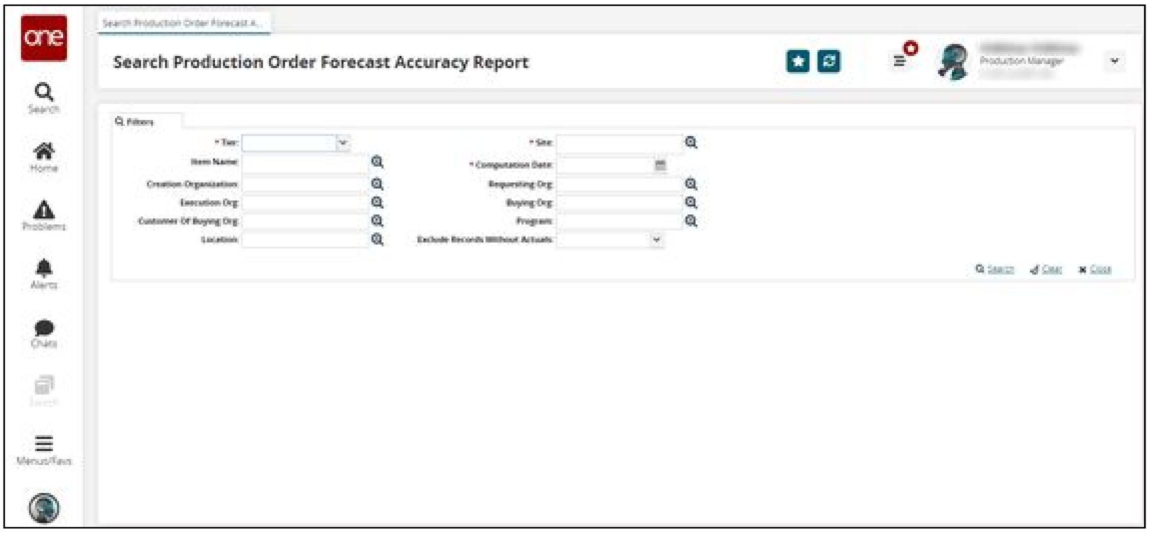
Viewing the Production Order Forecast Accuracy Report

The Production Order Forecast Accuracy Report is used to display the accuracy of forecast data relative to forecasted data as calculated by the Production Order Forecast Accuracy Engine.

Complete the following steps to view the Production Order Forecast Accuracy Report:

1. Log in to the ONE system as a Production Manager.
2. Click **Menu/Favs > Production Order Forecast Accuracy > Search Production Order Forecast Accuracy Report.**
   In NEO UI, users can click the Menu/Favs icon on the left sidebar and type in the name of the screen in the menu search bar. For more information, see "Using the Menu Search Bar."

   The Search Production Order Forecast Accuracy Report appears with the search filters on display.

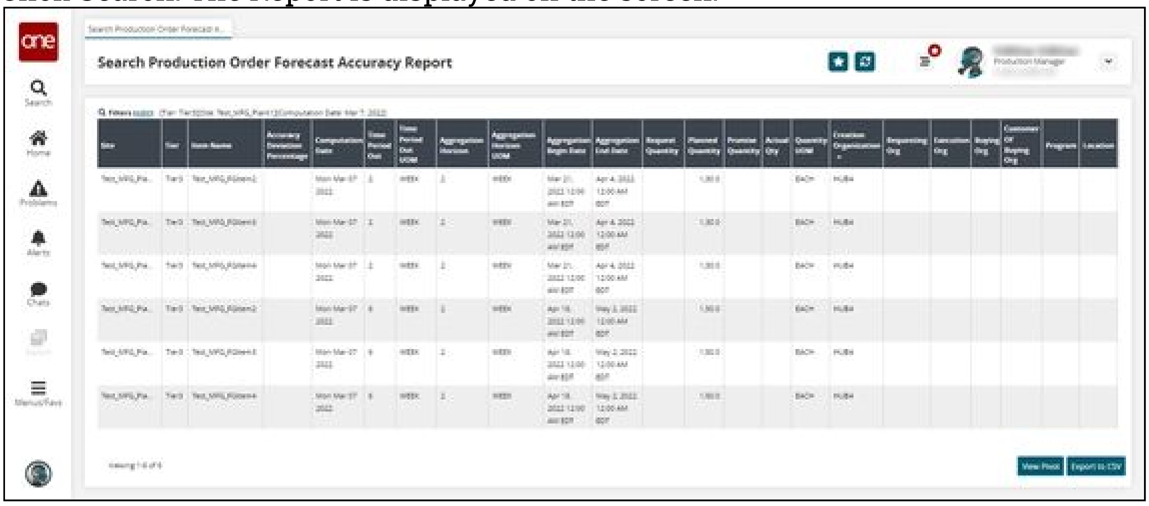


3. Use the following table to enter filter parameters. Fields marked with an asterisk are required fields.

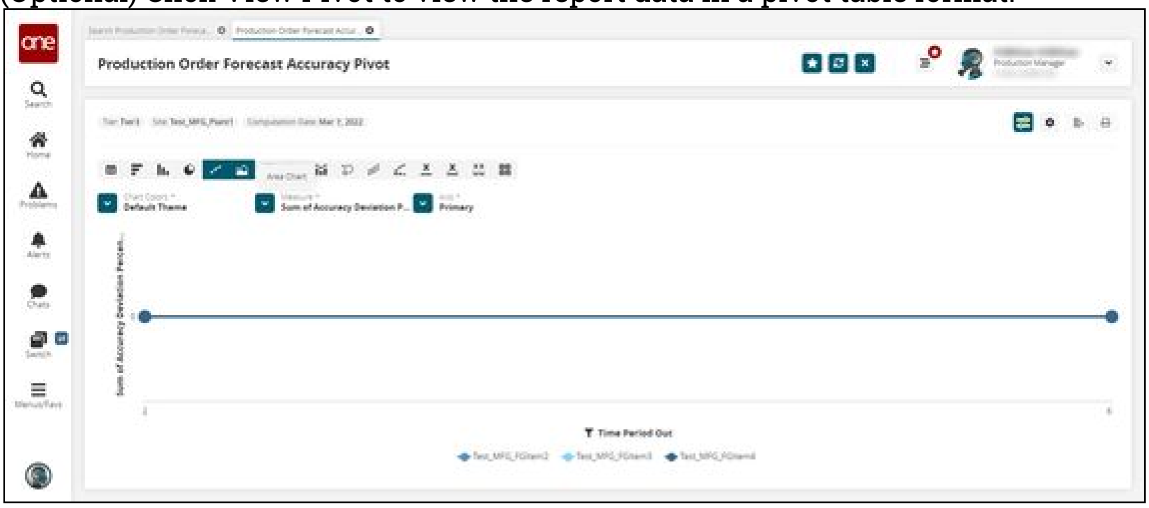
Fied Name	Description
* Tier	Select a product Tier from the dropdown menu.
Item Name	Filter the results by item name using the picker magnifying glass to select an item.
Creation Organization	Filter the results by Creation Organization using the picker magnifying glass to select a Creation Organization.
Execution Org	Filter the results by Execution Org using the picker magnifying glass to select an Execution Org.
Customer Of Buying Org	Filter the results by Customer of Buying Org using the picker magnifying glass to select a Customer of the Buying Org.
Location	Filter results by location using the picker magnifying glass to select a location.
* Site	Filter results by site using the picker magnifying glass to select a site.
* Computation Date	Filter results by the date the data computations occurred using the calendar tool.

Fied Name	Description
Requesting Org	Filter the results by Requesting Org using the picker magnifying glass to select a Requesting Org.
Buying Org	Filter the results by Buying Org using the picker magnifying glass to select a Buying Org.
Program	Enter programs in this field using the picker magnifying glass to filter results by selected programs.
Exclude Records Without Actuals	Set this to Yes to exclude records without actuals information. Set this to No to include records without actuals.

4. Click Search. The Report is displayed on the screen.



5. (Optional) Click View Pivot to view the report data in a pivot table format.



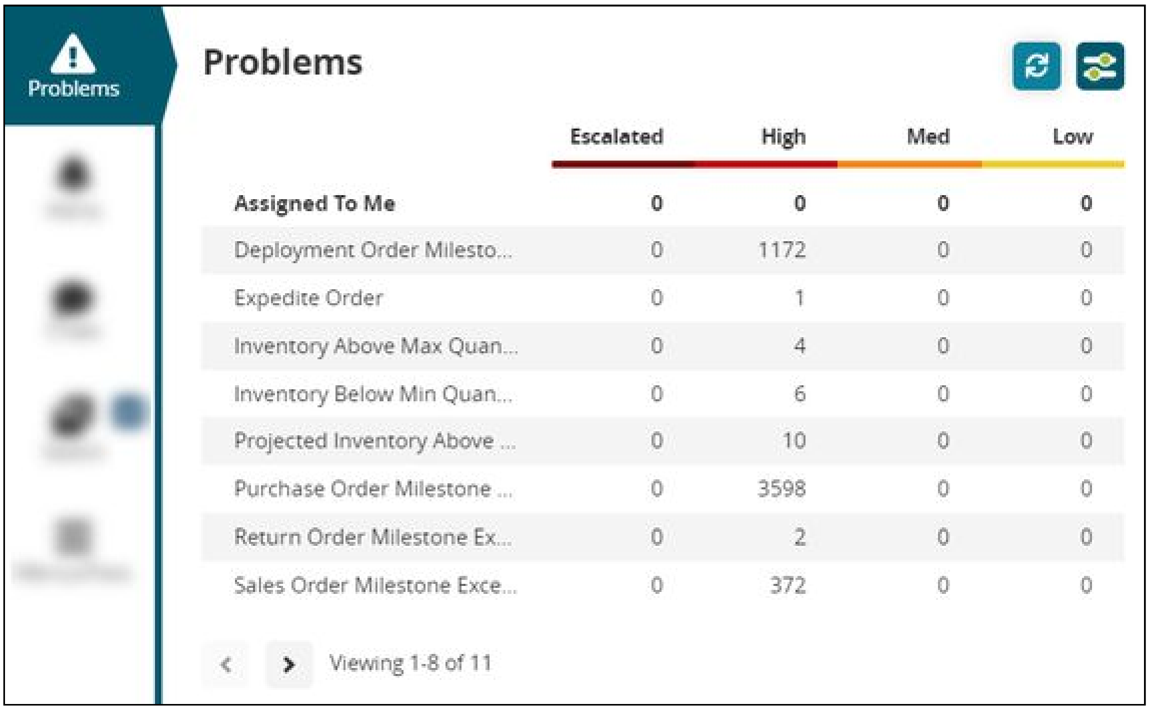
See the "Production Order Forecast Accuracy Engine, Reports, and Widgets" section in the current version of the *Release Notes* for more information.

2.5 Assign Problems To Users In Partner Organizations

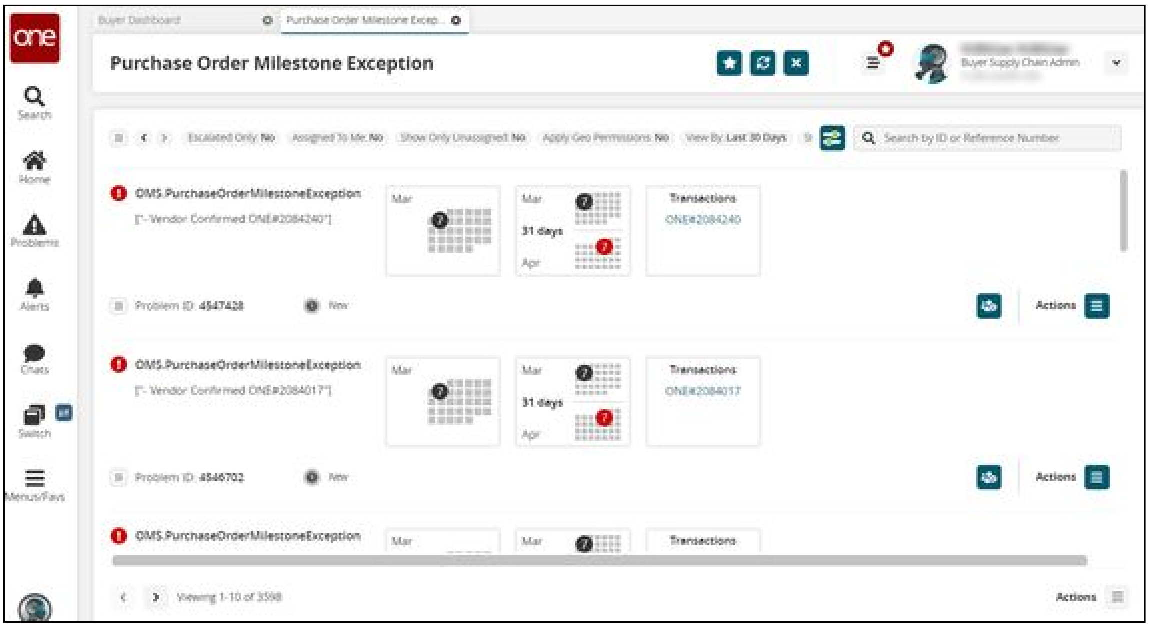
Enterprise users can share and assign problems with users of a partner organization. The Share button on the problem detail screen makes it easy to select and share with partner organizations. The Assign button allows users to assign the problem to specific users in a partner organization. Partner users, with whom the problems are shared, have access to the full range of actions for that given problem as long as they have the correct permissions to execute those actions. Partner users are able to reassign the problem back to the parent organization as needed.

Complete the following steps to share problems with users in a partner organization:

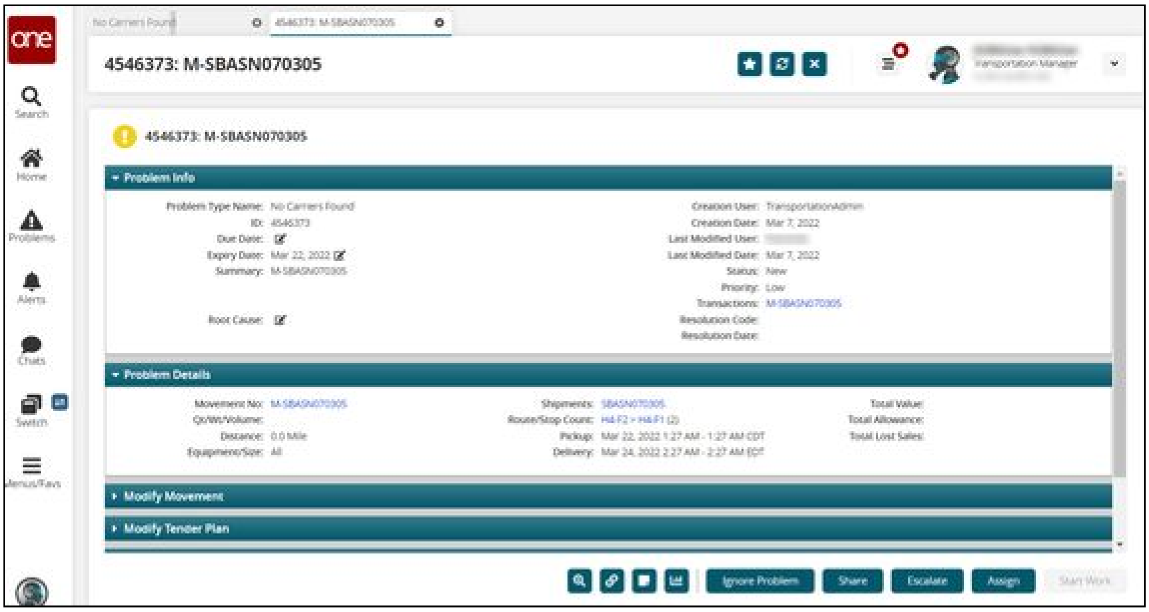
1. Log in to the ONE system.
2. Click the **Problems** icon on the left navigation panel.
   The Problems slideout displays.



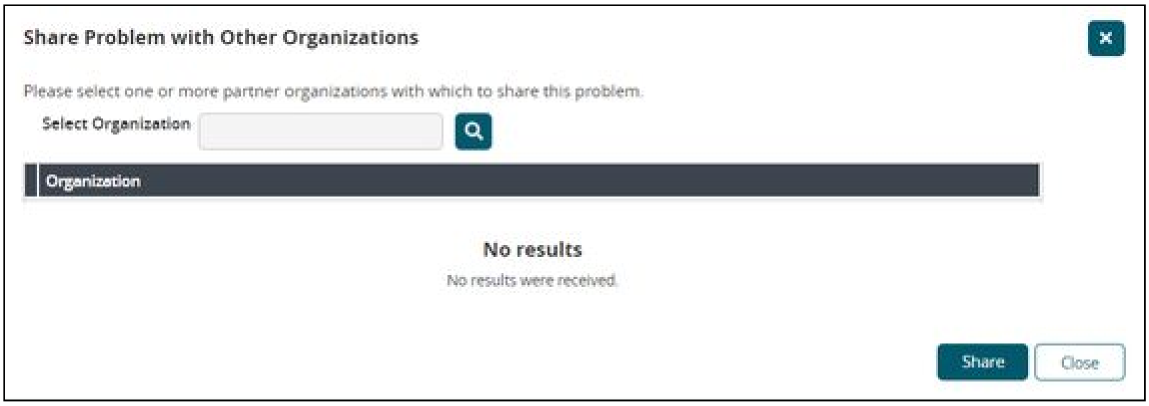
3. Click a link under one of the problem states (Escalated, High, Medium, or Low) for a category of problems identified by your organization and role type.
   The Problems workbench displays.



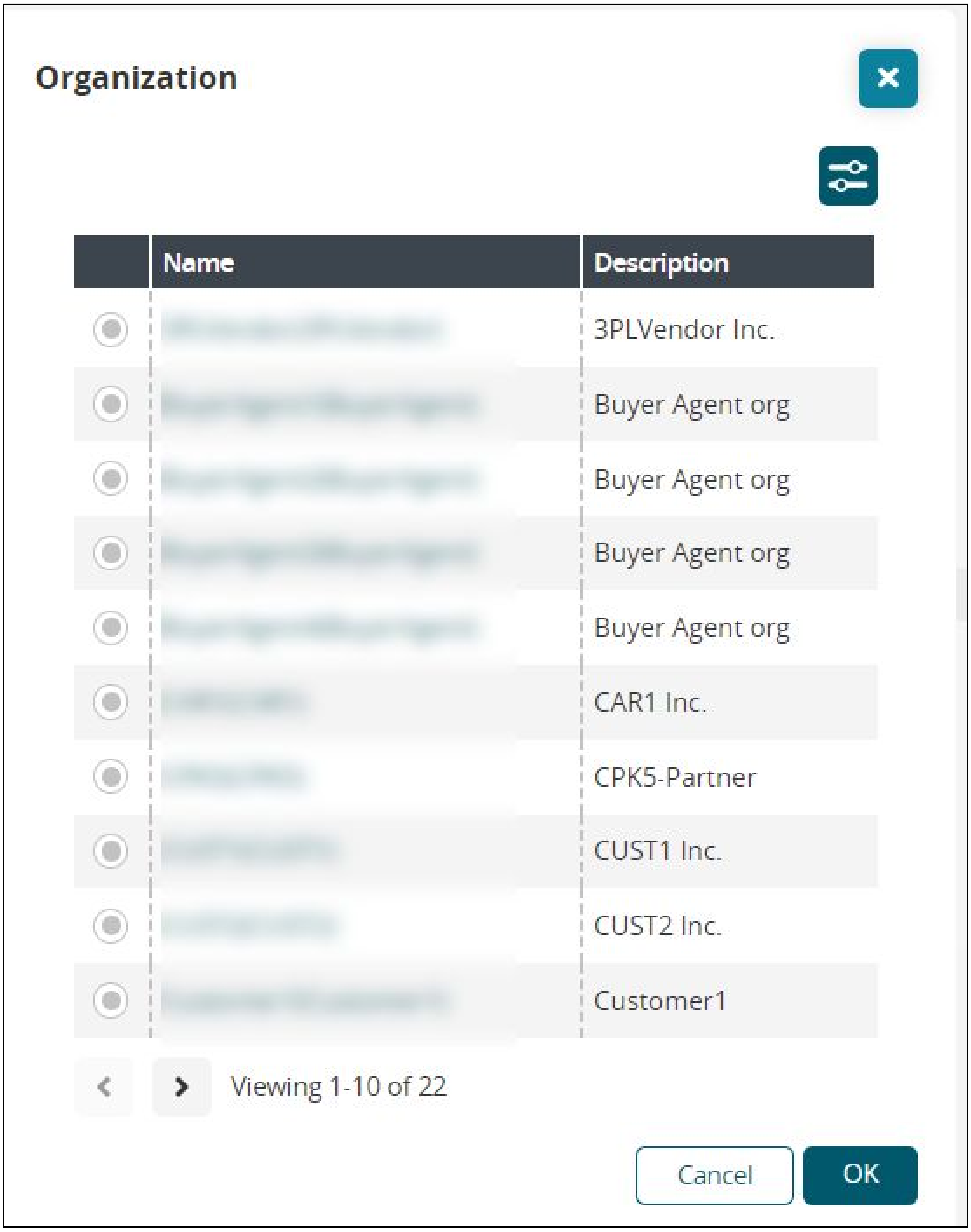
4. Click a problem name (not the Problem ID).
   The details page for the problem displays.



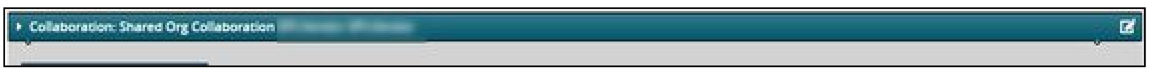
5. Click the **Share** button.
   The Share Problem with Other Organizations popup window displays.



6. Click the picker tool.
   The Organization popup window displays.



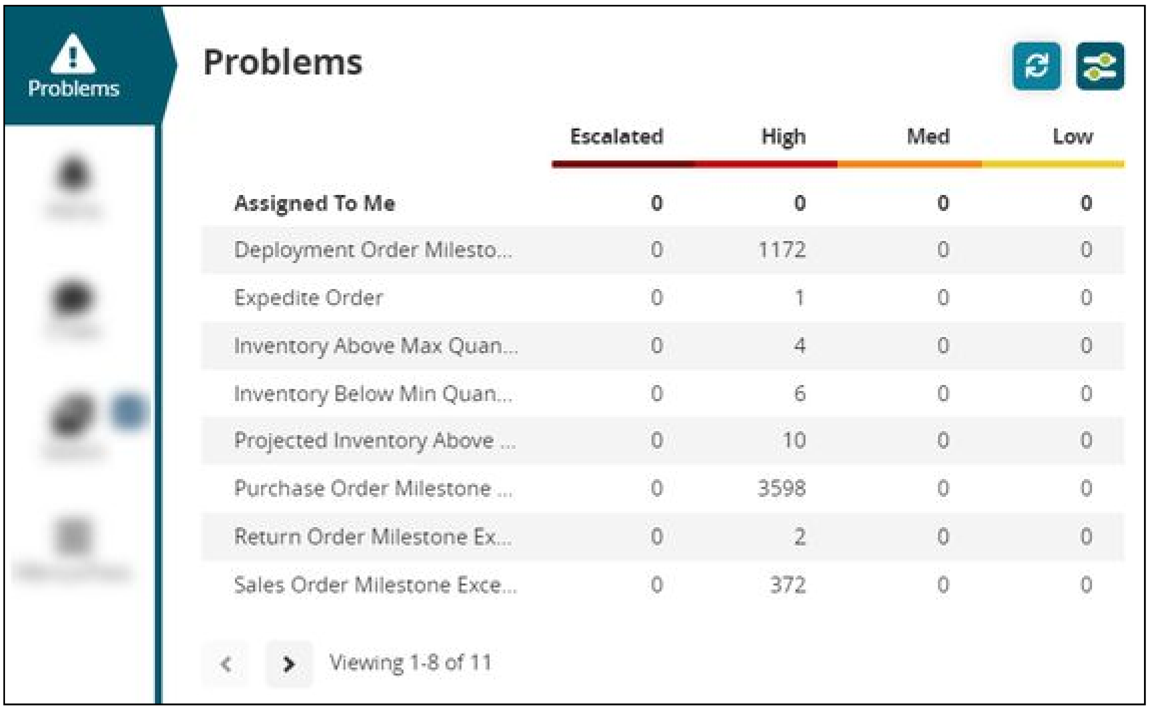
7. Click the radio button for an organization to select it.
8. Click the **OK** button.
   The partner organization is added to the previous popup window.
9. Click the **Share** button.
   The partner organization is added to the problem detail screen in the Collaboration: Shared Org Collaboration section.



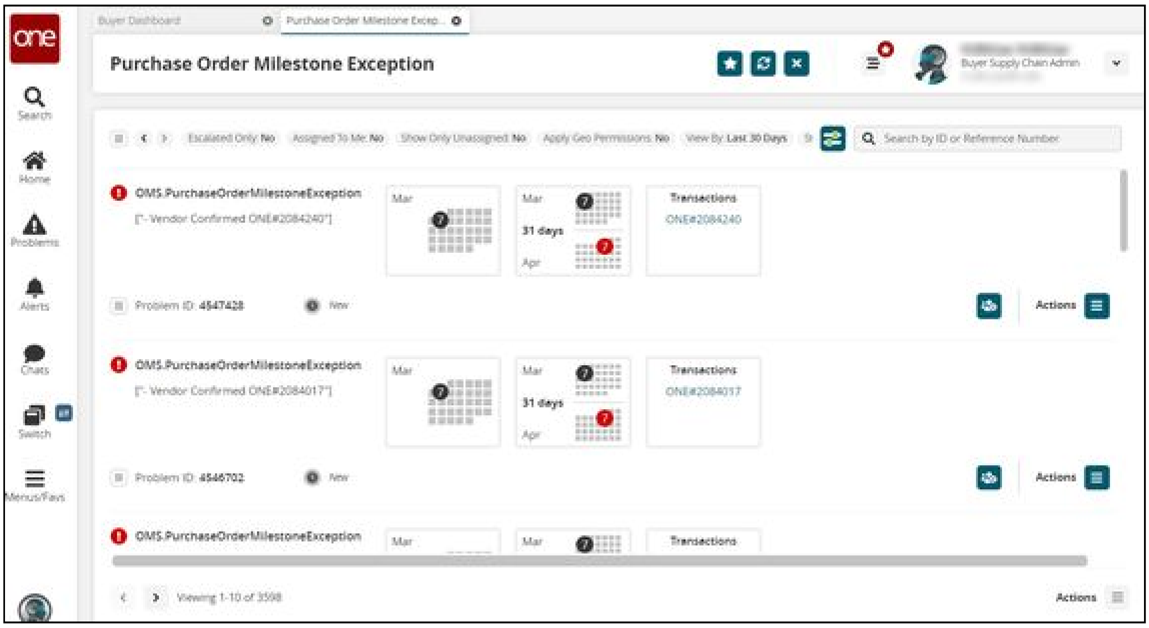
Users can assign partner organization users to a problem after the problem is shared with the organization.

Complete the following steps to assign problems with users in a partner organization:

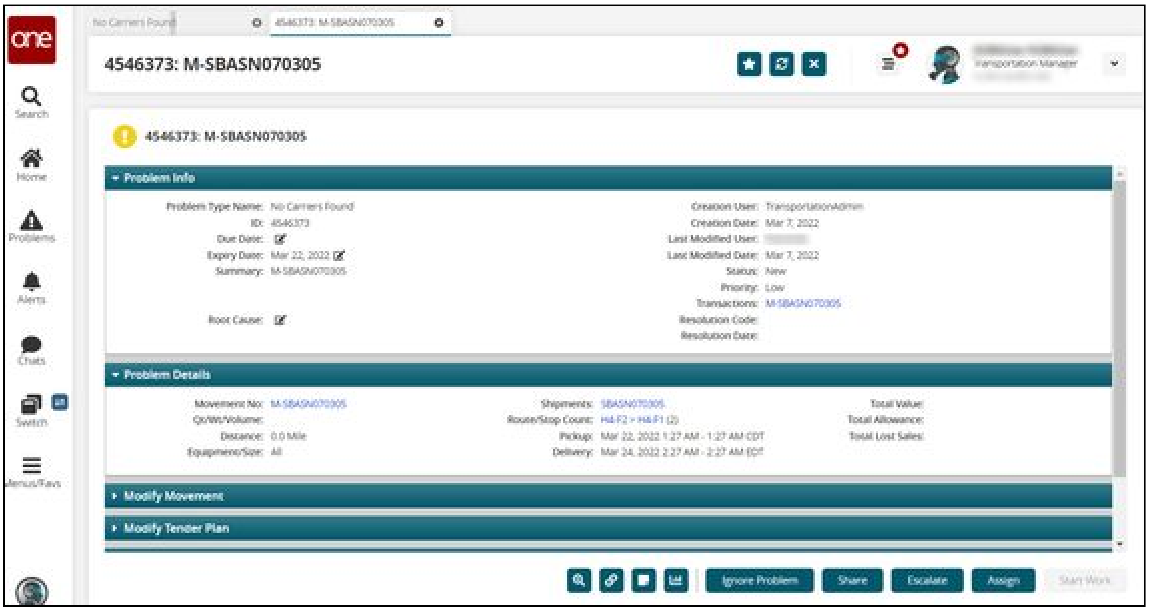
1. Log in to the ONE system.
2. Click the **Problems** icon on the left navigation panel.
   The Problems slideout displays.



3. Click a link under one of the problem states (Escalated, High, Medium, or Low).
   The Problems workbench displays.



4. Click a problem name (not the Problem ID).
   The details page for the problem displays.



5. Click the **Assign** button.
   The Assign Problem popup window displays.

6. Select a user name from the dropdown list.
7. Click the **Assign** button.
   The screen refreshes, and the problem is now assigned to the user.

See the "Assign Problems to Users in Partner Organizations" section in the current version of the *Release Notes* for more information.

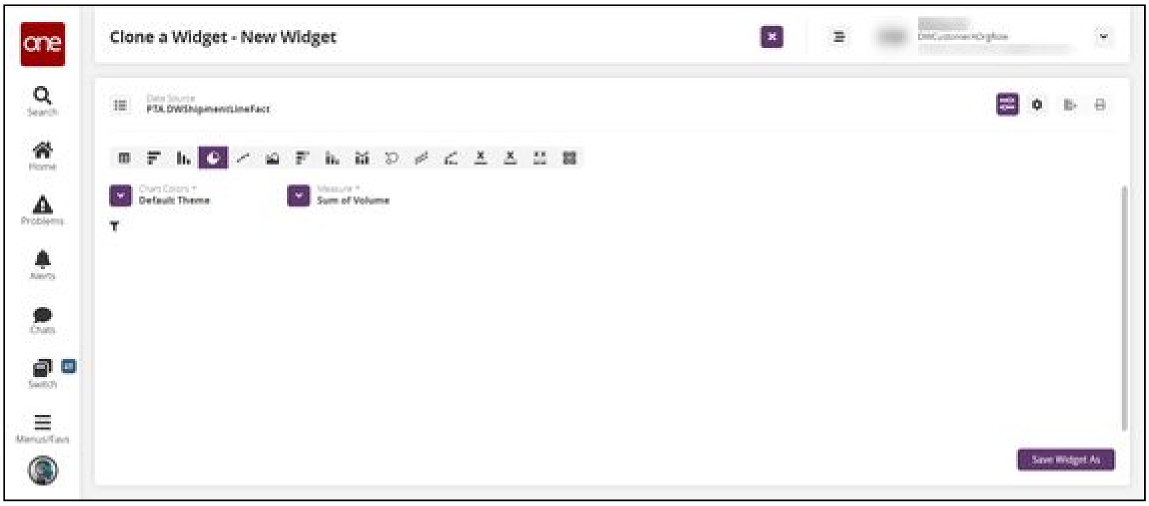
2.6 Viewing Custom Analytic Widgets In The Workbench

Complete the following steps to view custom analytic widgets in the workbench:

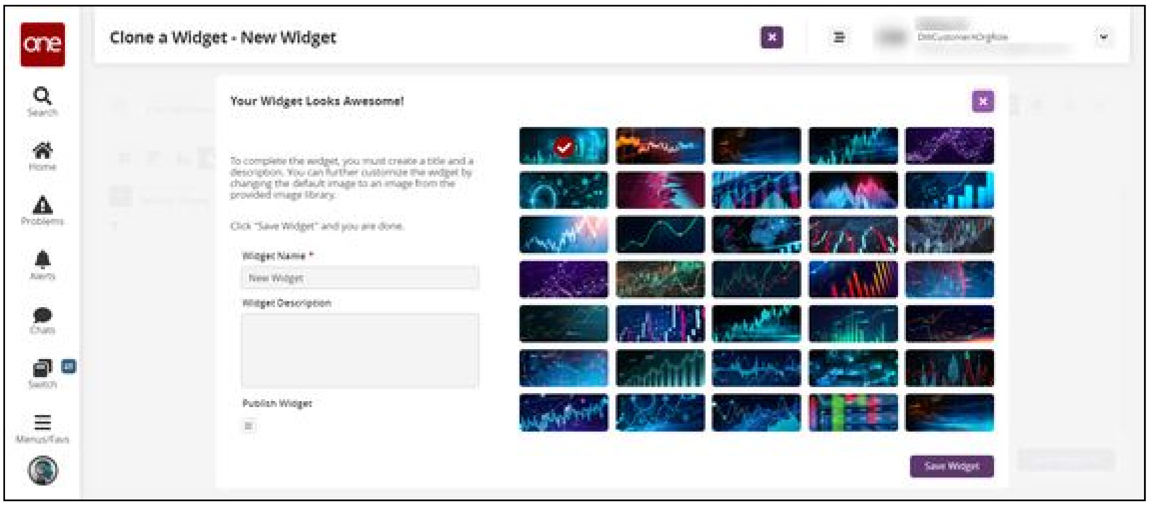
1. Log in to the ONE system.
   The Dashboard displays with a custom analytic widget. To add a custom analytic widget, see the "Adding and Creating a Custom Analytic Widget" section in *Online Help* for more information.

2. Right-click on a custom analytic widget.
   A popup window displays.

3. Click the **View in Workbench** button.
   The workbench displays the widget information.



4. Edit the widget as desired. See the "Adding and Creating a Custom Analytic Widget" section in *Online Help* for information on the fields and options for widgets.
5. Once the options for the new widget have been set, click the **Save Widget As** button.
   A popup window appears.



6. In the ***Widget Name** field, enter a name for your widget. This field is required.
7. In the **Widget Description** field, enter a widget description if desired.
8. Check the **Publish Widget** checkbox if you want the widget available to others to add to their dashboards.
9. Click one of the images to the right to select a graphic for your widget.
10. Click the **Save Widget** button.
    The new widget is now available to add when you edit a dashboard. See the "Adding Widgets" section in *Online Help* for more information.

See the "Added View in Workbench Option for Custom Analytic Widgets" section in the current version of the *Release Notes* for more information.

2.7 Optimization

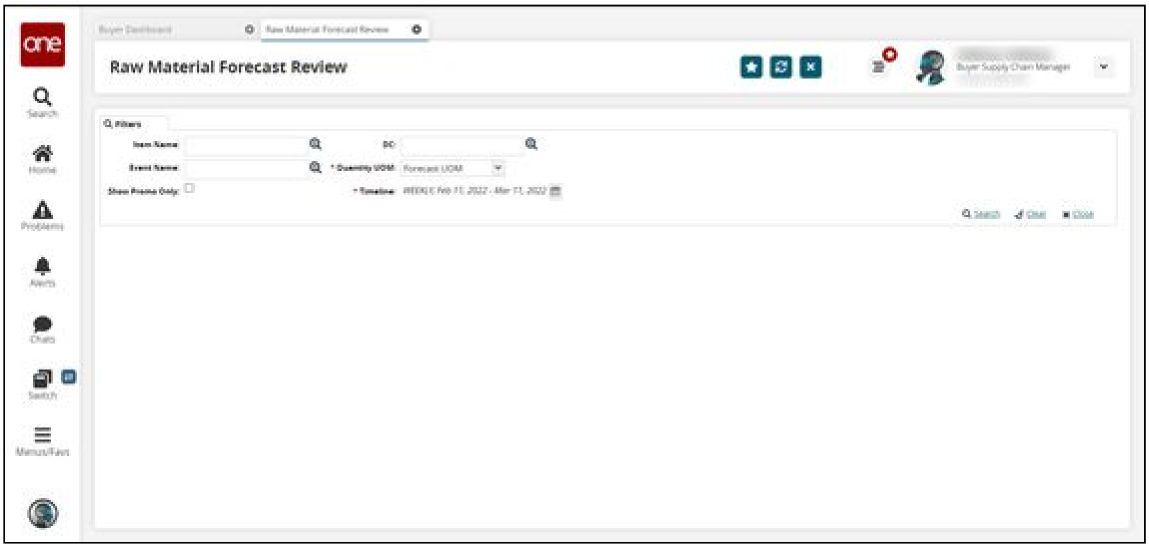
2.7.1 Demand Planning

2.7.1.1 Viewing the Demand Planning Raw Material Forecast Review TLV

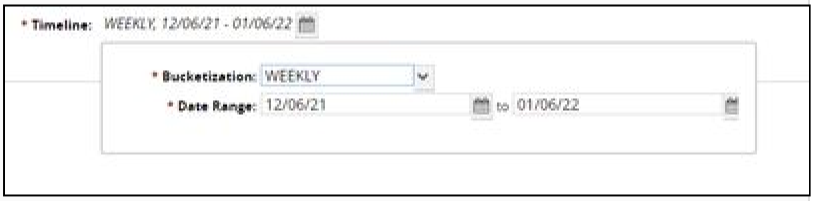
The Raw Material Forecast Review timeline view (TLV) shows raw material forecasts by item and event belonging to different distribution centers. With this TLV, users view the effects of events on raw material forecasts, which improves visibility of the impacts of changes in the supply chain.

Complete the following steps to view and work with the Raw Material Forecast Review TLV:

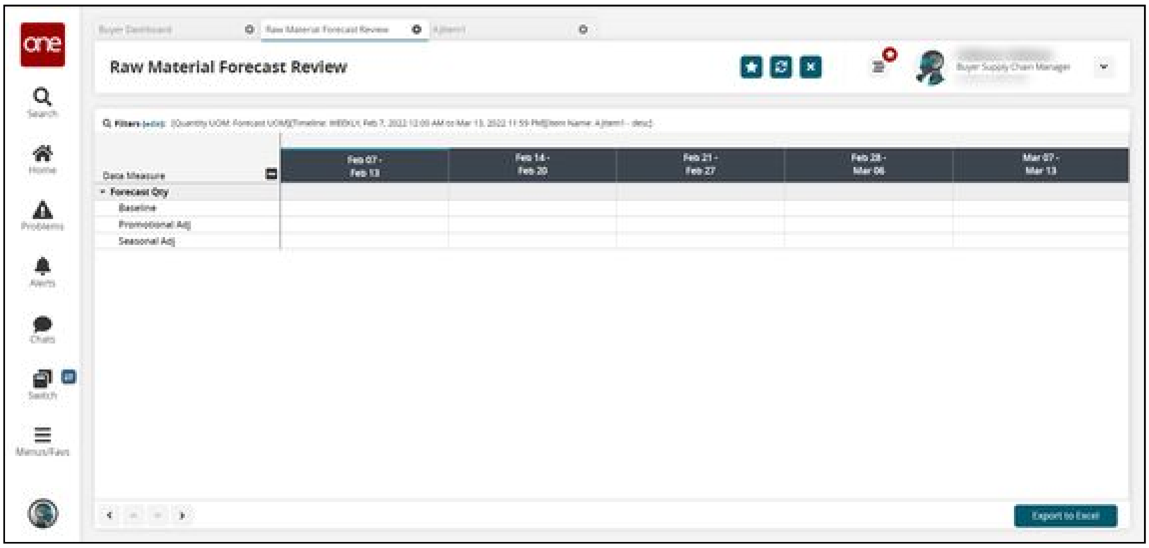
1. Log in to the ONE system.
2. Click **Menu/Favs > Demand Planning > Forecast Review > Raw Material Forecast Review.**
   The Raw Material Forecast Review screen displays the filter header.



3. Enter values into the filter fields described in the table below. Fields with an asterisk (*) are required.

Field	Description
Item Name	Use the picker tool to select an item to base the raw materials forecast upon. Either an item or an event must be selected.
Event Name	Use the picker tool to select an event to base the raw materials forecast upon. Either an item or an event must be selected.
Show Promo Only	Check the box to limit the results shown to promotional items/events only.
DC	Use the picker tool to select a distribution center.
*Quantity UOM	Select a unit of measure from the dropdown menu.
*Timeline	Click the calendar icon. The following popup displays.  A. Select the ***Bucketization** period from the dropdown menu. B. Use the calendar tool to select beginning and end dates for the ***Date Range**.

4. Click the **Search** link.
   The timeline view displays.



> Please note that the timeline view displays differently based on the filter selections.

5. Click the **Export to Excel** button.
   The data is exported as an .xls file to your computer.

See the "Demand Planning Raw Material Forecast Review Timeline View" section in the current version of the *Release Notes* for more information.

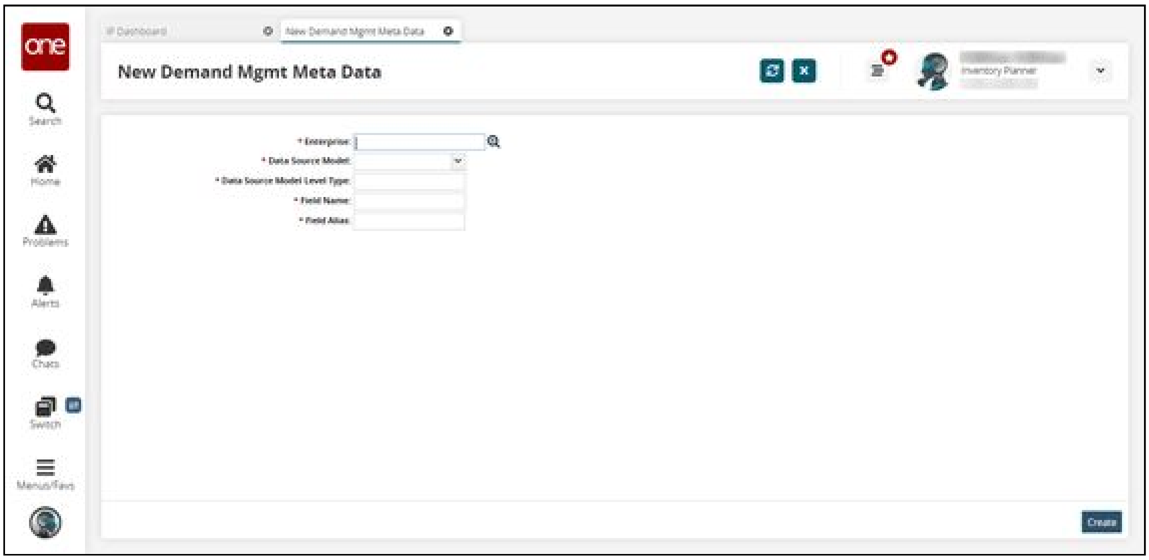
2.7.2 Inventory Planning

2.7.2.1 Creating and Searching Demand Management Metadata

From the New Demand Mgmt Metadata and Search Demand Mgmt Metadata screens, users can create and search demand management metadata. Demand management metadata is created by specifying various components such as data source model, field name, and field alias. The search interface lists fields on demand-related transactions that can be used to apply conditions to demand data for data management purposes.

Complete the following steps to create demand management metadata:

1. Log in to the ONE system.
2. Click **Menu/Favs > Inventory Planning > Configuration > Demand Management Data > New Demand Mgmt Metadata**.
   The New Demand Mgmt Metadata screen appears.



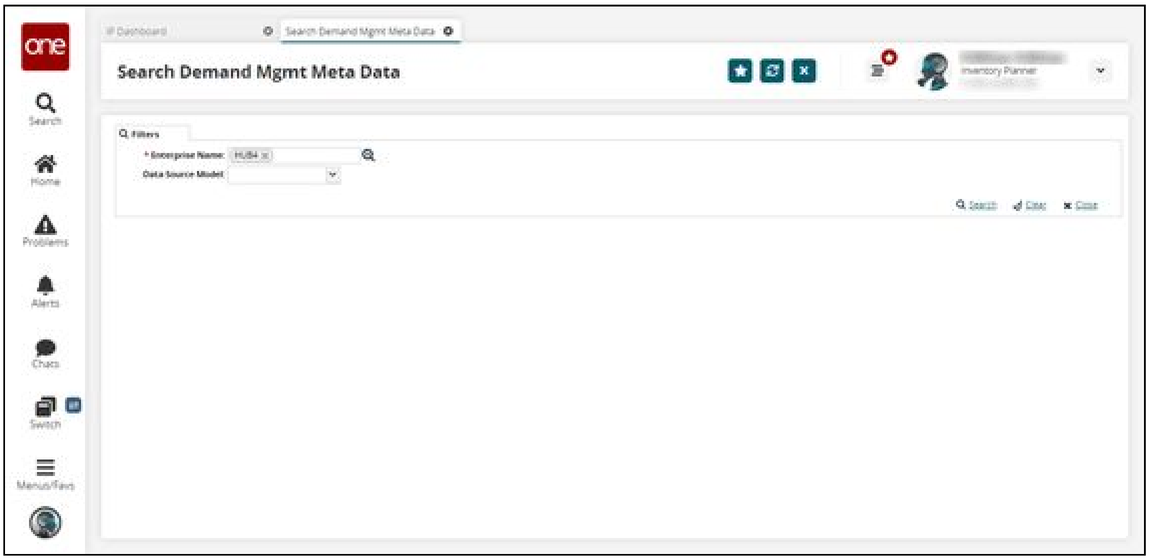
3. Fill out the following fields. Fields with an asterisk (*) are required.

Field	Description
*Enterprise	Select an enterprise using the picker tool.
*Data Source Model	Select a data source model from the dropdown menu. Currently, only **Enhanced Order** is available.
*Data Source Model Level Type	Select a data source model level type by clicking inside the field, pressing the down arrow, and selecting an option. The available options depend on the **Data Source Model** chosen.
*Field Name	Select a field name by clicking inside the field, pressing the down arrow, and selecting an option. The available options depend on the **Data Source Model Level Type** chosen.
*Field Alias	Enter a field alias. This is a user-defined name used to identify the newly created metadata.

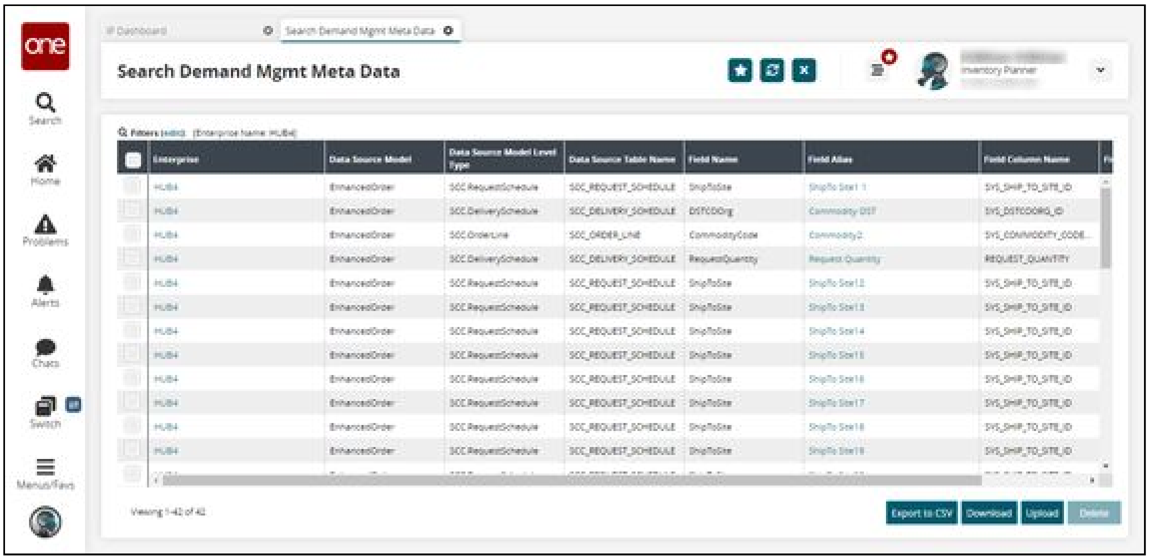
4. Click **Create**.
   A success message appears.

Complete the following steps to search demand management metadata:

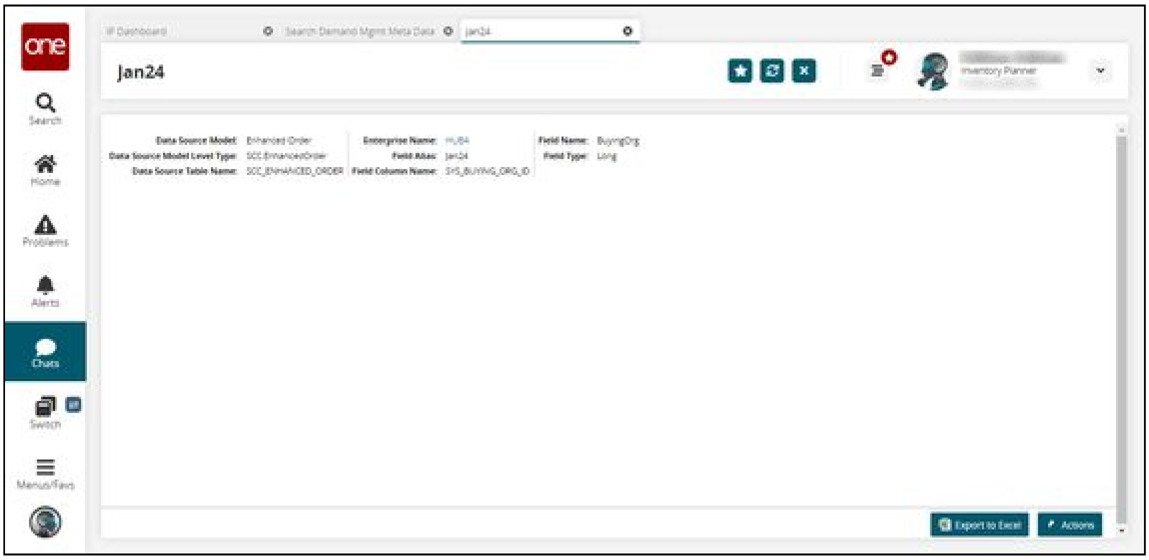
1. Log in to the ONE system as an Inventory Planner role.
2. Click **Menu/Favs > Configuration > Demand Management Data > Search Demand Mgmt Metadata**.
   The Search Demand Mgmt Metadata screen appears.



3. Select an ***Enterprise Name** and **Data Source Model** and click the **Search** link.
   The search results appear.



4. Click the **Export to CSV** button to export the report to a CSV file.
5. Click the **Download** button to download the report.
6. Click the **Upload** button to upload information to the report.
7. Select a checkbox for a metadata row and click the **Delete** button to delete a row.
8. Click a **Field Alias** link to see metadata details.
   The metadata details page appears.



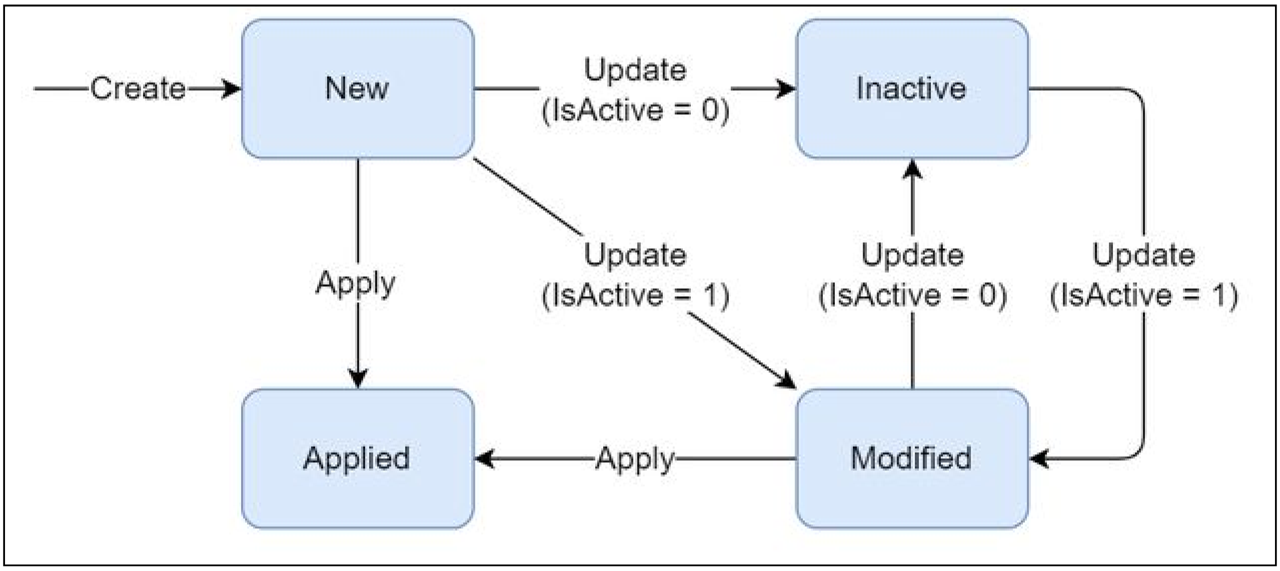
9. Select **Export to Excel** to export the information to an Excel file.
10. Click the **Actions** button to delete or update the fields.

See the "Demand Promotion and Demand Exclusion" section in the current version of the *Release Notes* for more information.

2.7.2.2 Searching Demand Management Rules

From the Search Demand Mgmt Rules screen, users can define and search rules used to determine if demand data is eligible for management actions such as demand promotion and demand exclusion. Users may define multiple rules, and all rules are combined and use "OR" logic; if an order matches at least one rule, then the order is selected. Demand management rules data should be managed by the Inventory Planner role. In addition, from the report users can update or delete condition values, delete conditions, and deactivate rules.

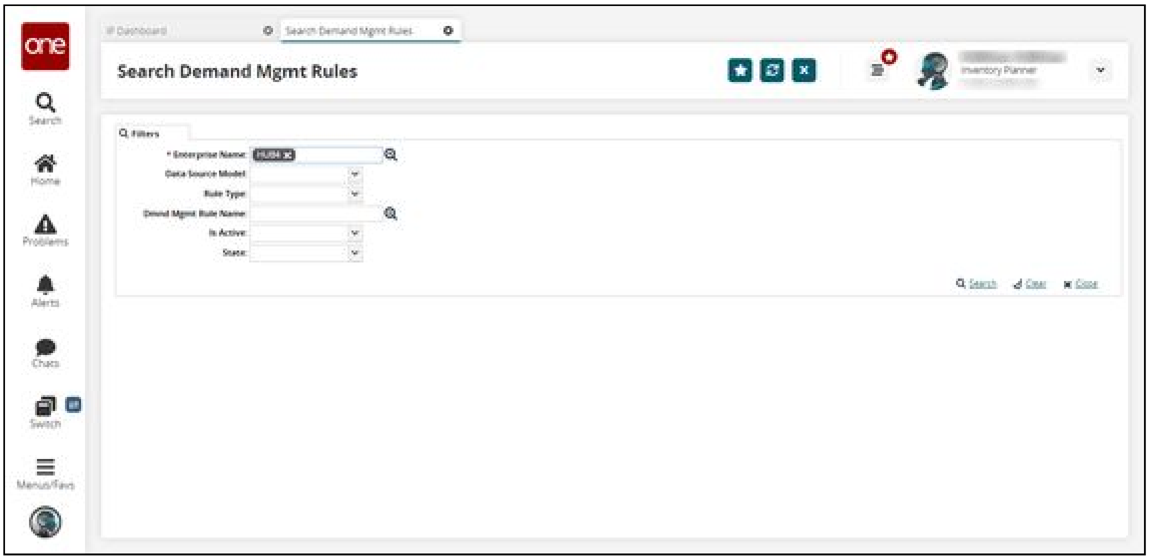
Demand management rules can be described by the following state machine diagram.



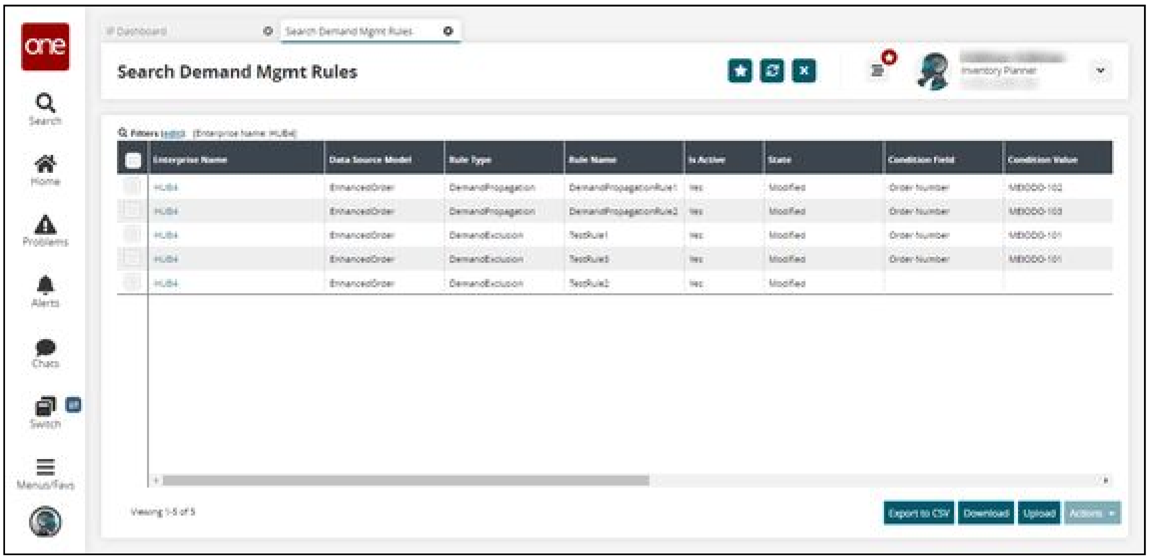
- New: The initial state when created.
- Modified: Moved to this state if the user makes any update to the rule and if the IsActive flag is set to True.
- Applied: The Demand Management Processing engine moves rules to this state during processing using the Apply action.
- Inactive: Rules are moved to this state if updated with the IsActive flag set to False.

Complete the following steps to search demand management rules:

1. Log in to the ONE system.
2. Click **Inventory Planning > Configuration > Demand Management Data > Search Demand Mgmt Rules**.
   The Search Demand Mgmt Rules screen appears.

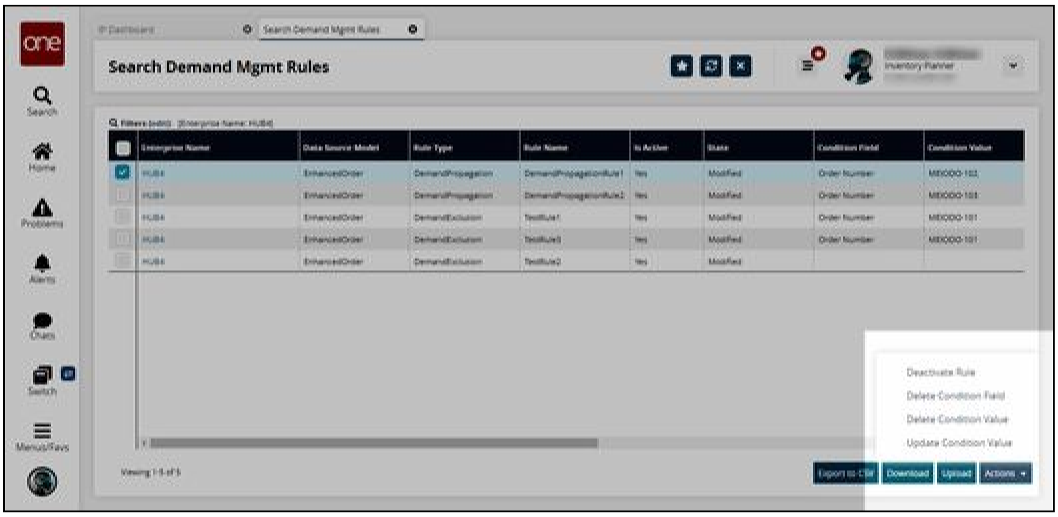


3. Enter any filter criteria as desired and click the **Search** link.
   The search results appear.



4. Click the **Export to CSV** button to export the report to a CSV file.
5. Click the **Download** button to download the report.
6. Click the **Upload** button to upload information to the report. Please note that currently, uploading is the only way to create new demand management rules.
7. Select one or more checkboxes and click the **Actions** button to perform various actions on rules.
   - Deactivate Rule
   - Delete Condition Field
   - Delete Condition Value

- Update Condition Value



See the "Demand Promotion and Demand Exclusion" section in the current version of the *Release Notes* for more information.

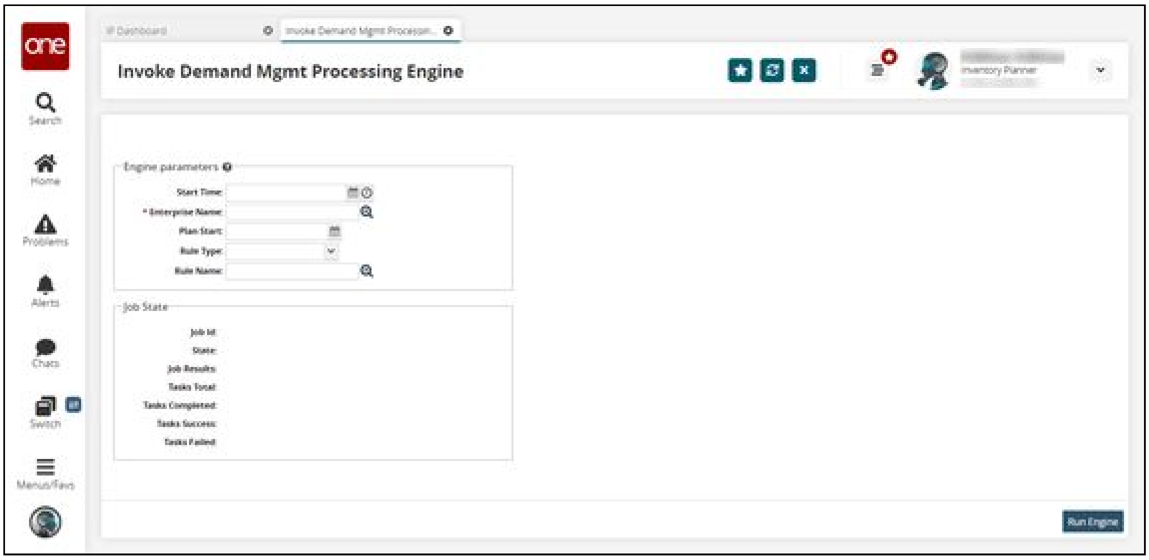
2.7.2.3 Invoking the Demand Management Processing Engine

The Demand Management Processing engine is used to mark orders matching specified demand management rules. The engine can run on a schedule or manually, considers orders that are marked for demand promotion and demand exclusion, and should be run before inventory planning and demand planning engines that analyze demand (order) history. The engine processes data management rules in the New and Modified states in the following way:

1. For rules in the Modified states, the engine first reads orders that were previously processed by the given rules and resets all rule-related settings on those orders.
2. Then, for rules in both the New and Modified states, the engine reads orders matching the given rules and marks that the orders have been processed by the given rule.
3. Lastly, the engine updates the collected order data and changes the rule state to Applied.

Complete the following steps to run the demand management processing engine:

1. Log in to the ONE system.
2. Click **Menu/Favs > Inventory Planning > Demand Management Processing > Invoke Demand Mgmt Processing Engine**.
   The Invoke Demand Mgmt Processing Engine screen appears.



3. Fill out the following fields. Fields with an asterisk (*) are required.

Field	Description
Start Time	Select a start date and time using the calendar and clock icons.
*Enterprise Name	Select an enterprise name using the picker tool.
Plan Start	Select a plan start date and time using the calendar and clock icons. By default, this field is considered the current date, but this field also allows users to simulate an engine run in the past.
Rule Type	Select a rule type from the dropdown menu. The available options are **Demand Exclusion** and **Demand Propagation**.
Rule Name	Select a demand management rule using the picker tool.

4. Click **Run Engine**.
   A success message appears. See the Search Processed Orders report to view processed orders.

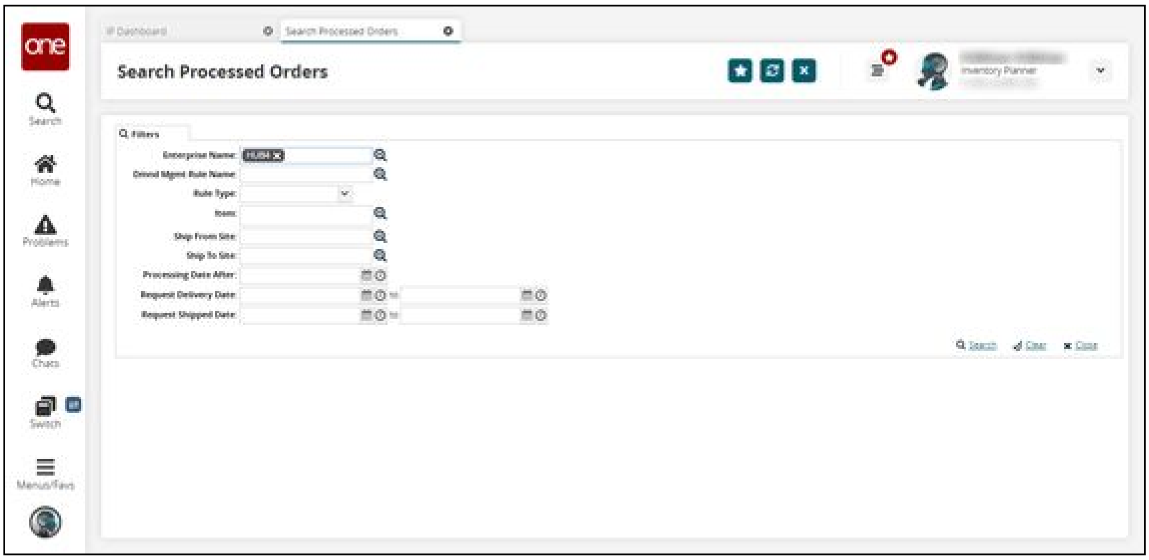
See the "Demand Promotion and Demand Exclusion" section in the current version of the *Release Notes* for more information.

2.7.2.4 Searching Processed Orders

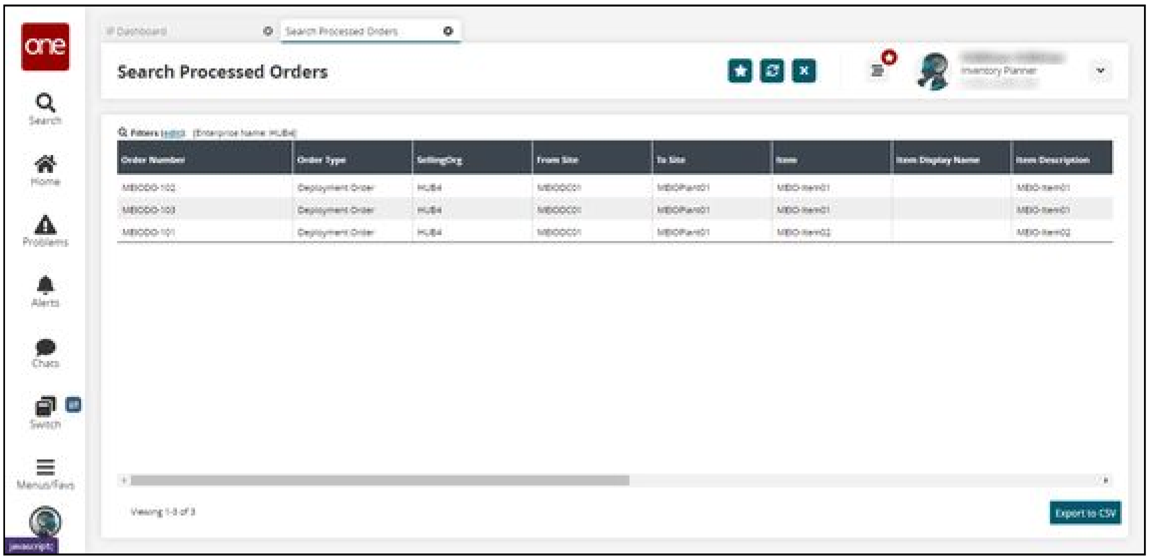
From the Search Processed Orders report, users can review orders that were processed by demand management rules and filter orders based on particular rules.

Complete the following steps to search processed orders:

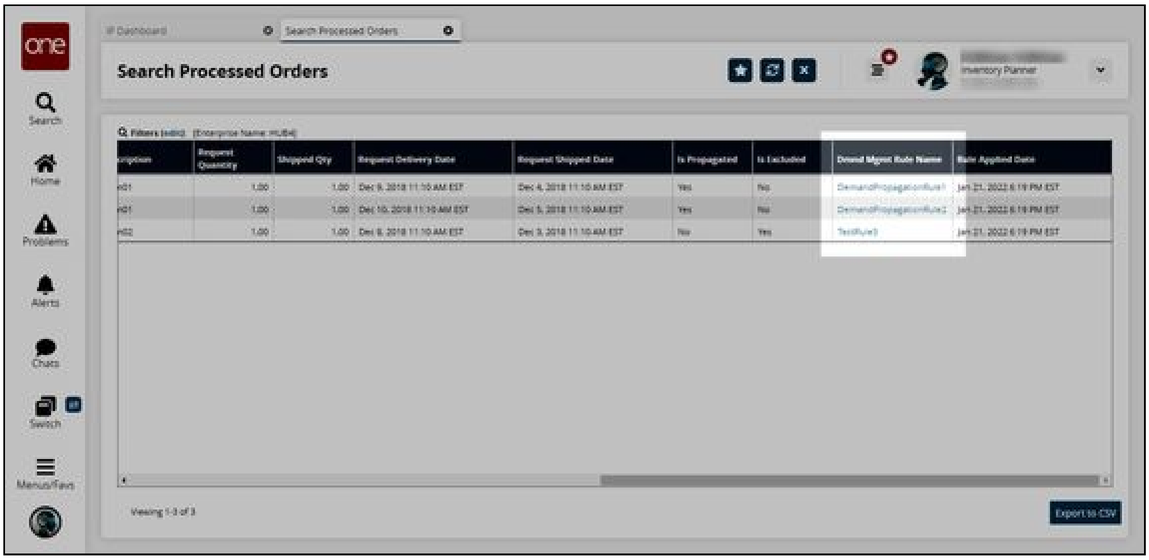
1. Log in to the ONE system.
2. Click **Inventory Planning > Demand Management Processing > Search Processed Orders**.
   The Search Processed Orders screen appears.



3. Enter any filter criteria as desired and click the **Search** link.
   The search results appear.



4. Click the **Export to CSV** button to export the report to a CSV file.
5. Scroll to the right and click the **Dmnd Mgmt Rule Name** link to view which rule the given orders were processed by.



See the "Demand Promotion and Demand Exclusion" section in the current version of the *Release Notes* for more information.

2.7.2.5 Using the Demand Promotion and Demand Exclusion Feature

Users can make changes to demand promotion and demand exclusion information more quickly and efficiently. Demand promotion is the promotion of historical demand (orders) from a site to a parent site when a customer begins ordering from the parent site and uses customers, orders types, and warehouses to define which demand should be included. Demand exclusion stops reading historical demand (orders) when a customer stops ordering from a parent site and only uses the order type to determine which demand should be excluded.

The basic flow of this functionality consists of the following steps:

1. Create or select demand management metadata.

> Please note this step is skipped in this workflow. Currently, demand management rules (which require demand management metadata) can only be created through the upload process and not through the UI and is outside the scope of this section.

2. Create or select demand management rules, which require demand management metadata.
3. Run the Demand Management Processing engine, which can use demand management rules as input.
4. Confirm which orders were successfully processed by the Demand Management Processing engine from the Search Processed Orders report.

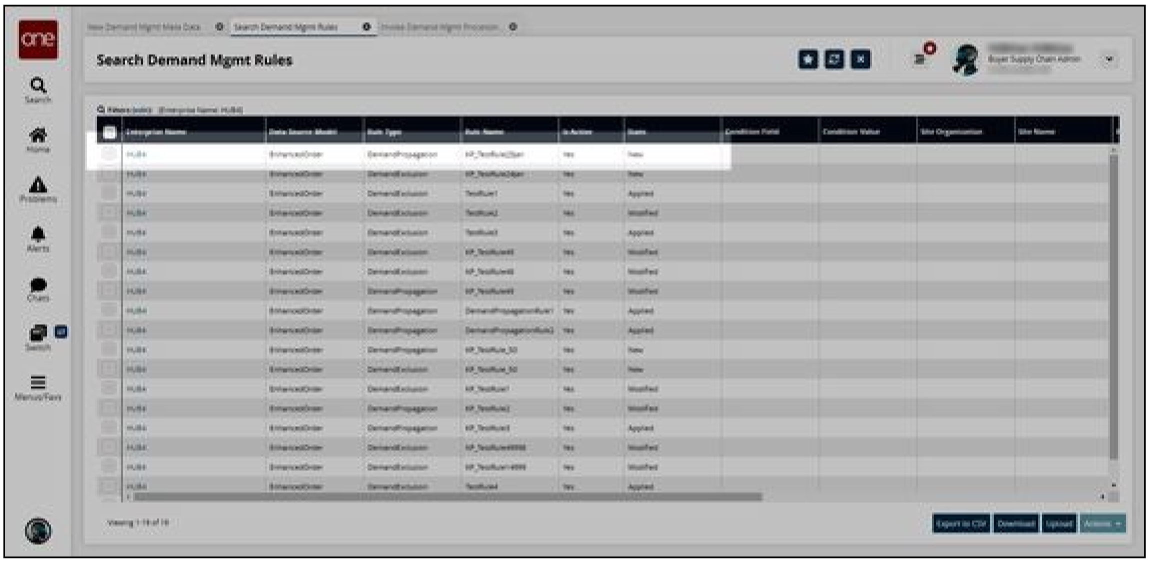
5. Enable the Apply Demand Management Rules flag on the appropriate Multi-Tier Stat Scenario.
6. Run the Multi-Tier Inventory Planning (MTIP) Stat engine with the previously configured Multi-Tier Stat Scenario.
7. Open the MTIP Stats Buffer Search Detail report to confirm the MTIP engine ran correctly and successfully promoted or excluded demand.

The following workflow is meant to describe how to walk through each step in sequence with example data:

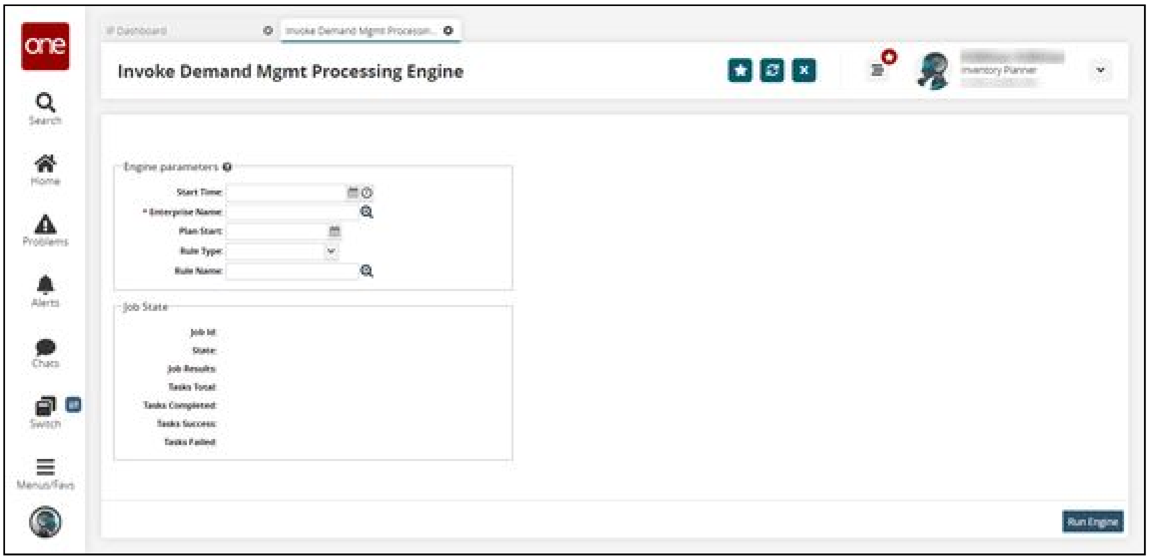
1. Log in to the ONE system as an Inventory Planner or Buyer Supply Chain Admin role.
2. Click **Menu/Favs > Inventory Planning > Configuration > Demand Management Data > New Demand Mgmt Metadata**.
3. Create a demand management metadata object. See the "Creating and Searching Demand Management Metadata(see page 154)" section for detailed information.

> Please note this step is skipped in this workflow. Currently, demand management rules (which require demand management metadata) can only be created through the upload process and not through the UI and is outside the scope of this section.

4. Click **Inventory Planning > Configuration > Demand Management Data > Search Demand Mgmt Rules**.
   The Search Demand Mgmt Rules screen appears. For this example, we will use existing the KP_TestRule25Jan rule. For more information on demand management rules, see the "Searching Demand Management Rules(see page 157)" section.



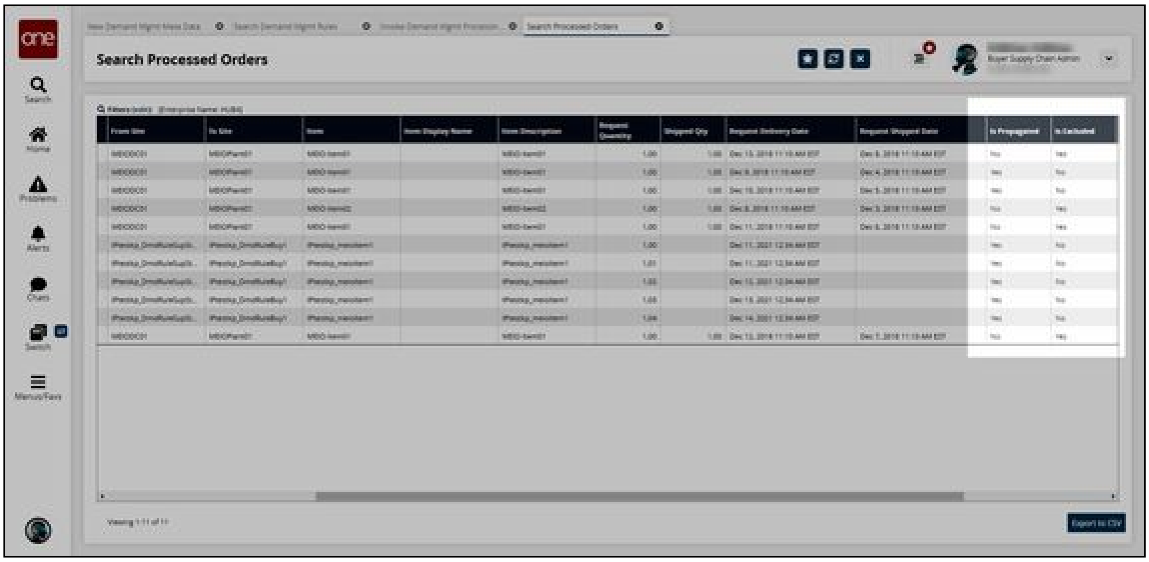
5. Click **Inventory Planning > Demand Management Processing > Invoke Demand Mgmt Processing Engine**.
   The Invoke Demand Mgmt Processing Engine screen appears. For more information on the Demand Management Processing engine, see the "Invoking the Demand Management Processing Engine(see page 159)" section.



6. Fill out the following fields. Fields with an asterisk (*) are required.

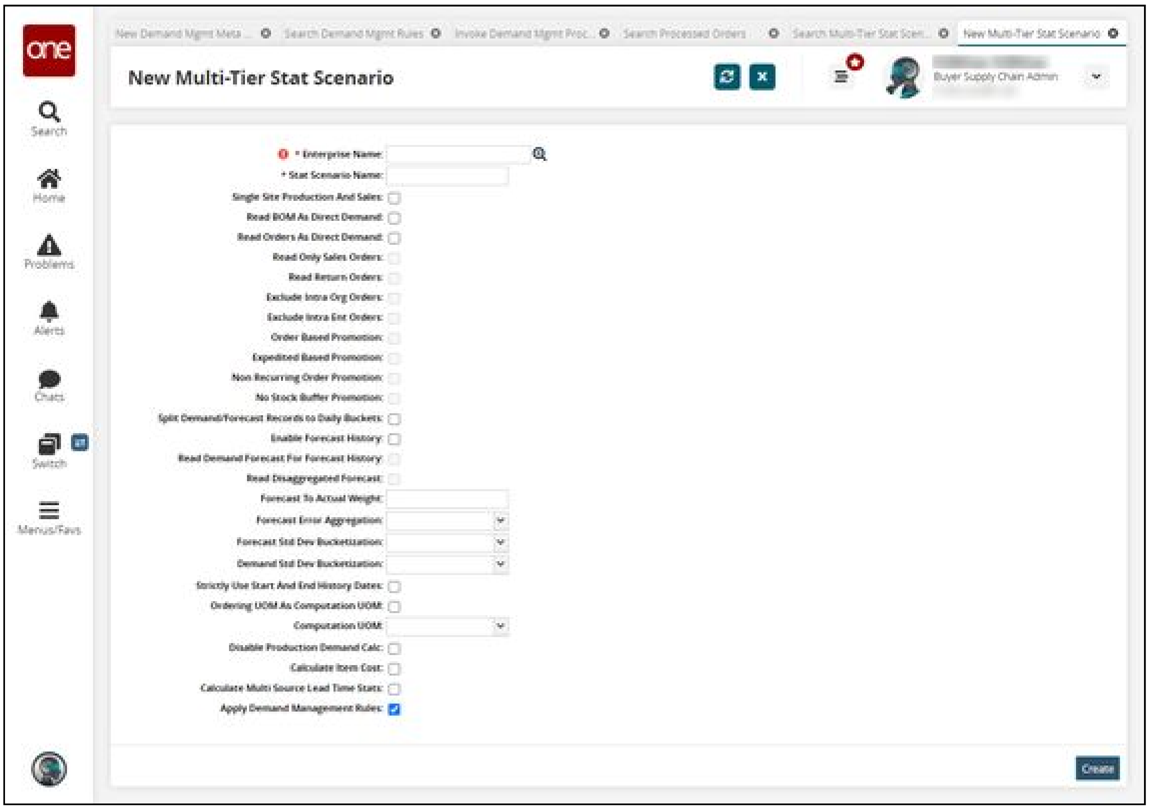
Field	Description
Start Time	Select a start date and time using the calendar and clock icons.
*Enterprise Name	Select an enterprise name using the picker tool. For this example, select **HUB4.**
Plan Start	Select a plan start date and time using the calendar and clock icons. By default, this field is considered the current date, but this field also allows users to simulate an engine run in the past.
Rule Type	Select a rule type from the dropdown menu. For this example, leave this field blank.
Rule Name	Select a demand management rule using the picker tool. For this example, select **KP_TestRule25Jan**.

7. Click **Run Engine**.
   The engine runs and a success message appears.
8. Click **Menu/Favs > Inventory Planning > Demand Management Processing > Search Processed Orders**.
   The Search Processed Orders screen appears. For more information on the Search Processed Orders report, see the "Searching Processed Orders(see page 160)" section.



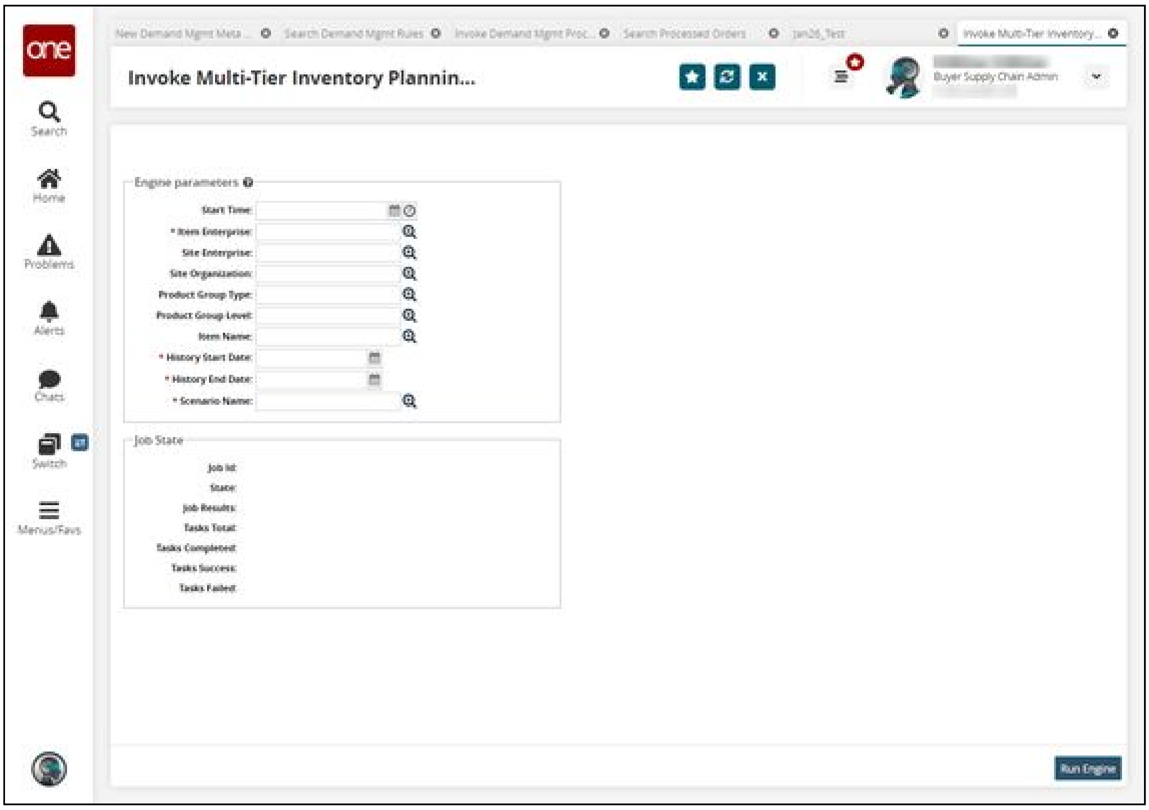
Note the IsPropagated and IsExcluded fields, which detail whether each order was propagated (promoted) or excluded.

9. Click **Menu/Favs > Inventory Planning > Configuration > Multi-Tier Stat Scenario > New Multi-Tier Stat Scenario** to create a new Multi-Tier Stat Scenario.
   The New Multi-Tier Stat Scenario screen appears.

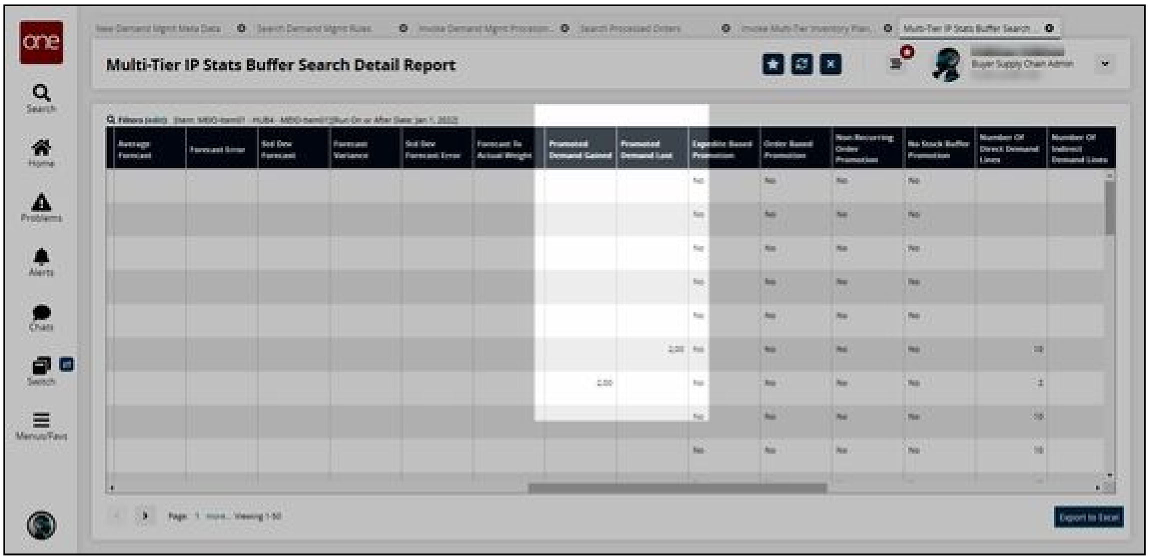


10. Fill out the fields as needed. For this example, ensure the **Apply Demand Management Rules** flag is enabled. For more information, see the "Creating and Working with MTIP Stats Engine Scenarios" section of the *Online Help.*
11. Click the **Create** button.
    A success message appears.

12. Click **Menu/Favs > Inventory Planning > Multi-Tier Inventory Planning Stats > Invoke Multi-Tier Inventory Planning Stat Engine**.
    The Invoke Multi-Tier Inventory Planning Stat Engine screen appears.



13. Fill out the fields as needed. For this example, ensure the **Scenario Name** is a scenario with the **Apply Demand Management Rules** flag enabled. For more information, see the "Running the MTIP Stats Engine" section of the *Online Help*.
14. Click **Run Engine**.
    The engine runs and a success message appears.
15. Click **Menu/Favs > Inventory Planning > Multi-Tier Inventory Planning Stats > Multi-Tier IP Stats Buffer Search Detail Report.**
    The Multi-Tier IP Stats Buffer Search Detail Report screen appears.



Note the Promoted Demand Gained and Promoted Demand Lost columns. This is where the results of the MTIP engine appear. In this example, one site lost two units of demand and one site gained two units. This is expected behavior.

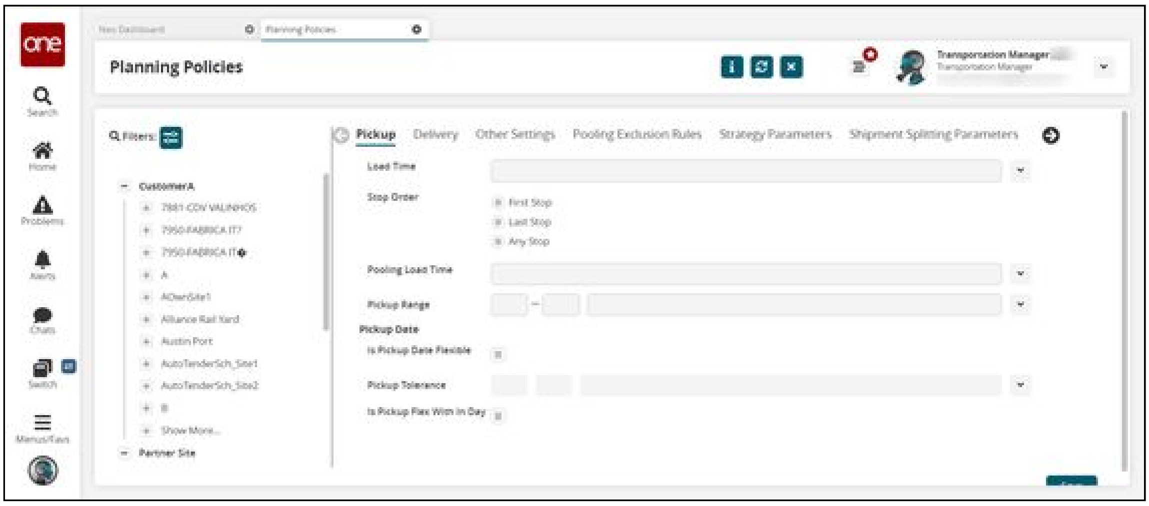
See the "Demand Promotion and Demand Exclusion" section in the current version of the *Release Notes* for more information.

2.7.3 Transportation Planning and Optimization

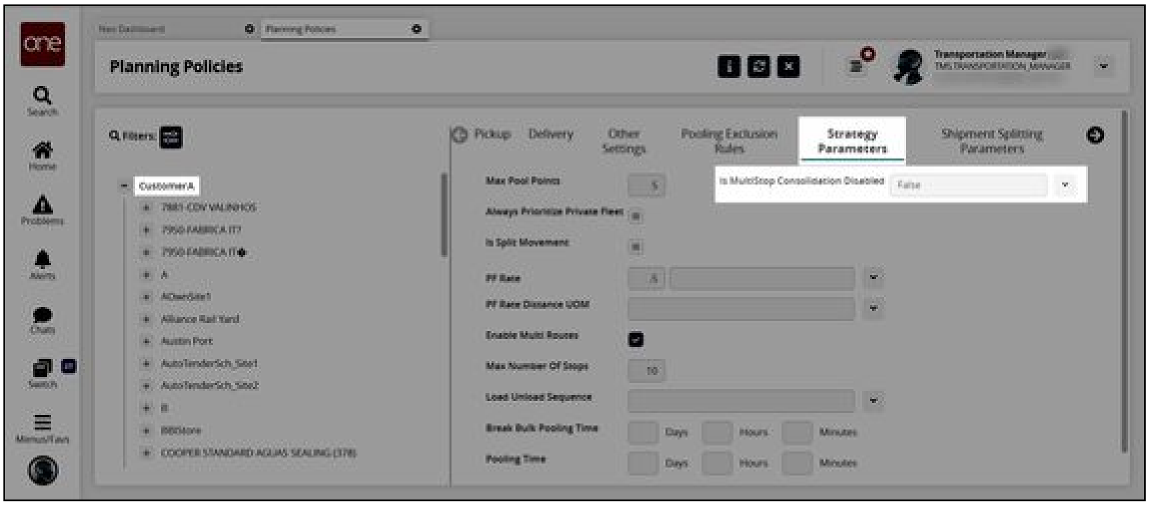
2.7.3.1 Restricting Multi-Stop Consolidation

Complete the following steps to restrict or allow multi-stop consolidation:

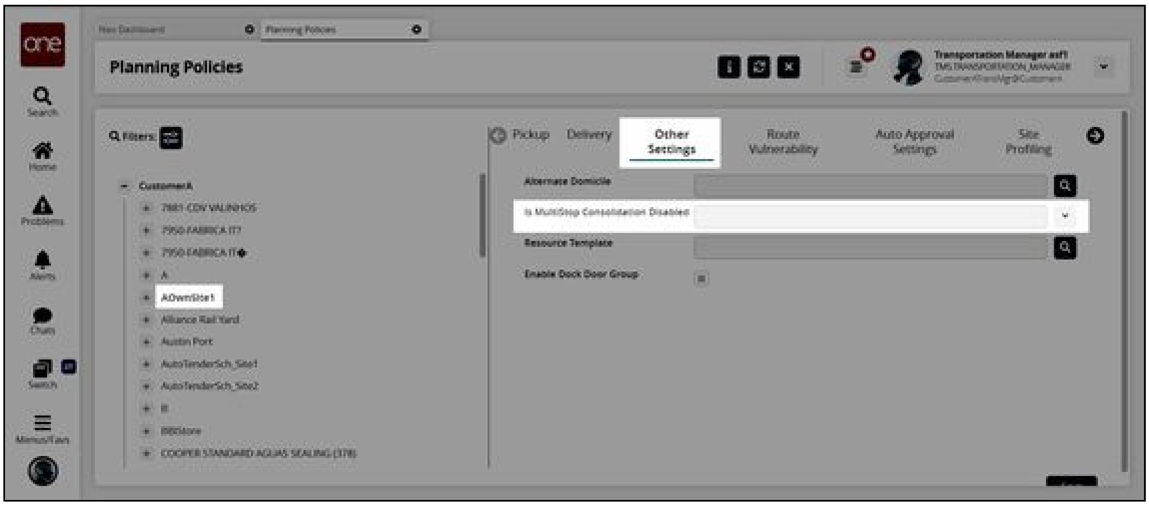
1. Log in to the ONE system.
2. Click **Menu/Favs > Planning > Policies > Planning Policies**.
   The Planning Policies screen appears.



3. In the pane on the left, select the site or organization for which you want to restrict or allow multi-stop consolidation or click the filters icon to search for the site.
   The site's or organization's current settings for planning policies display to the right.
4. If an organization is selected, click the **Strategy Parameters** tab.



If a site is selected, click the **Other Settings** tab.



5. In the **Is MultiStop Consolidation Disabled** field, select **True** or **False** from the dropdown list.
   A. True - Shipments are scheduled as singletons or in an aggregation movement. In other words, these shipments will not be a part of a multi-stop consolidated movement.
   B. False - Shipments can be added to a multi-stop consolidated movement.

> The following logic rules apply to this policy setting:

- When the policy is set to True at the organization level and the policy has a null value at the site level, then the organization policy is used and shipments are not consolidated into a movement.
- When the policy is set to True at the organization level and the policy is set to False at the site level, then the system will respect the site-level value and generate consolidated movements.
- When the policy is set to False at the organization level and the policy is set to True at the site level, then the system will respect the site-level value and won't generate consolidated movements.

6. Click the **Save** button.
   The planning policy setting updates, and a success message appears.

See the "New Planning Policy: Is Multi-Stop Consolidation Disabled" section in the current version of the *Release Notes* for more information.

2.8 Order Management System

2.8.1 Accepting and Rejecting Vendor Changes to Orders, Lines, and Line Schedules

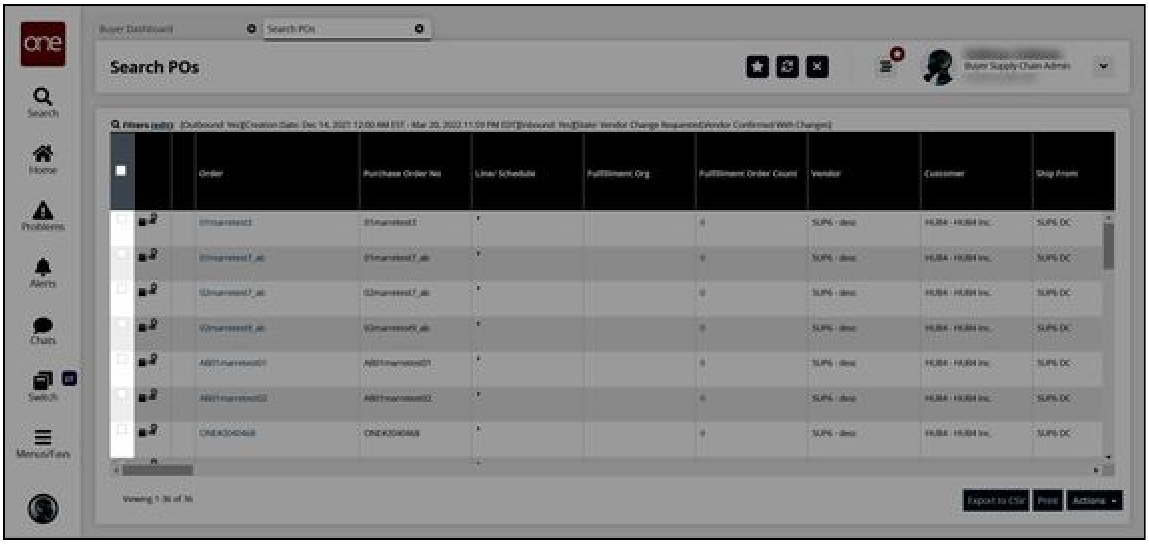
During order collaboration, buyers and vendors communicate, make change requests, and accept or reject orders. Buyers can now accept or reject vendor changes at the order, line, or line schedule levels for purchase orders (POs) and deployment orders (DOs).

2.8.1.1 Accepting or Rejecting at the Order Level

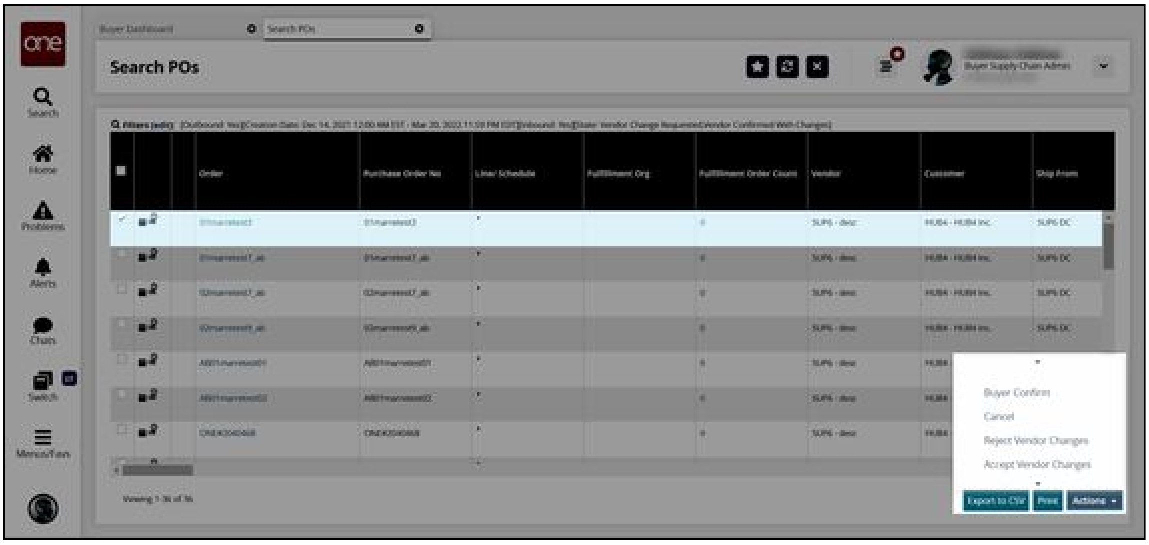
Complete the following steps to accept or reject vendor changes to orders as a buyer:

1. Log in to the ONE system as a Buyer role. The following instructions use POs, but the same process is followed for DOs.
2. Click **Menu/Favs > Order Mgmt > Purchase Order > Search POs**. Users can also perform a search using the Global Search feature on the left navigation pane. See the "Global Search" section of the *Online Help* for more information.
   The Search POs screen displays with the filter header showing.
3. Click the arrow icon to expand the **State** filter checkboxes.
   Two State checkboxes filter orders related to this enhancement: Vendor Change Request and Vendor Confirmed with Changes.

4. Check the appropriate box or boxes. (In this case, we have selected both states.)
5. Click the **Search** link.
   The data results display.
6. Click the row selection box for the order(s).



7. Click the **Actions** button.
   Available actions display in a menu.



8. To accept the vendor's changes, click **Accept Vendor Changes**.
   The order changes are accepted, and a success message displays.
9. To reject the vendor's changes, click **Reject Vendor Changes.**
   A confirmation popup window displays.
10. Click the **Yes** button.
    The order changes are accepted, and a success message displays.

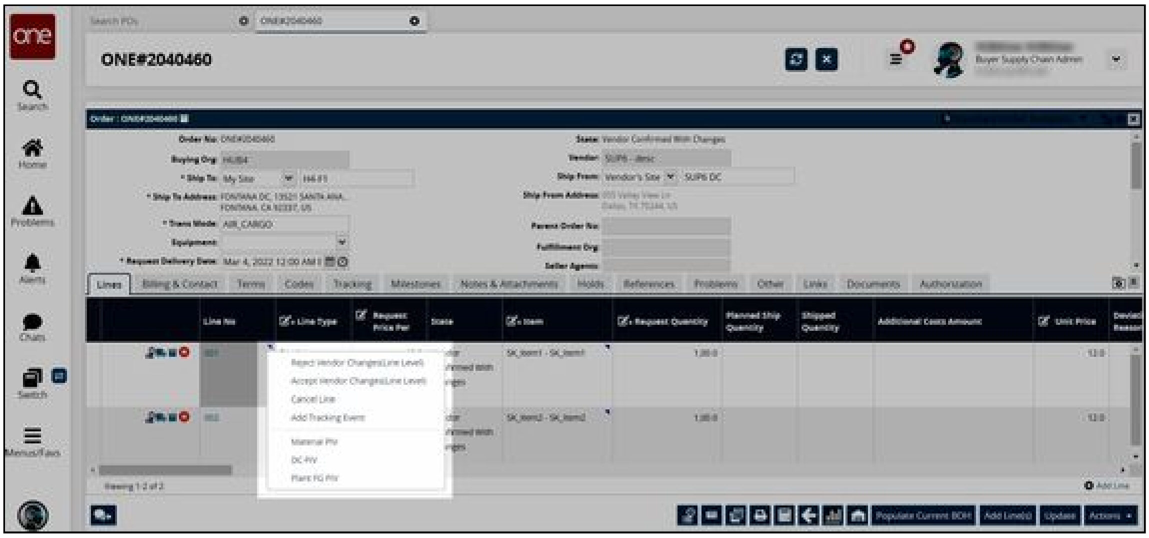
Users can also accept or reject vendor changes from within the order details screen.
Complete the following steps to accept or reject vendor changes to orders in the order details screen:

1. Follow steps 1-5 from the instructions above.
2. In the **Order** column, click the order number link.
   The order details screen displays.
3. Click the **Actions** button.
4. To accept the vendor's changes, click **Accept Vendor Changes**.
   The order changes are accepted, and a success message displays.
5. To reject the vendor's changes, click **Reject Vendor Changes.**
   A confirmation popup displays.
6. Click the **Yes** button.
   The order changes are accepted, and a success message displays.

2.8.1.2 Accepting or Rejecting at the Order Line Level

Complete the following steps to accept or reject vendor changes to order lines as a buyer:

1. Follow steps 1-5 from the instructions above to view the search results.
2. In the **Order** column, click the order number link.
   The order details screen displays.
3. Click the contextual menu icon (blue triangle in the top corner of the cell).
   A menu displays.



4. To accept the vendor's changes, click **Accept Vendor Changes (Line Level)**.
   The order changes are accepted, the state is updated, and a success message displays.
5. To reject the vendor's changes, click **Reject Vendor Changes (Line Level).**
   A confirmation popup window displays.
6. Click the **Yes** button.
   The order changes are accepted; the state is updated, and a success message displays.

Users can also accept or reject vendor changes from the order line details screen.

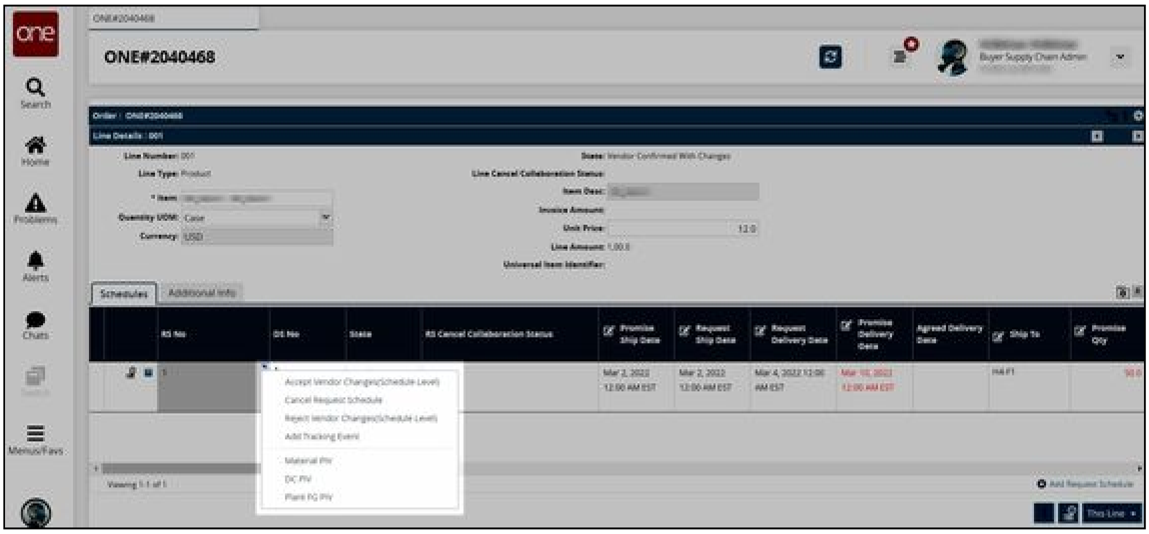
Complete the following steps to accept or reject vendor changes to the order line in the line details screen:

1. Follow steps 1-5 from the instructions above to view the search results.
2. In the **Order** column, click the order number link.
   The order details screen displays.
3. Click the line link under the **Line No** column.
   The line details display.
4. Click the **This Line** button.
   A menu displays.
5. To accept the vendor's changes, click **Accept Vendor Changes (Line Level)**.
   The order changes are accepted, the state is updated, and a success message displays.
6. To reject the vendor's changes, click **Reject Vendor Changes (Line Level).**
   A confirmation popup window displays.
7. Click the **Yes** button.
   The order changes are accepted; the state is updated, and a success message displays.

2.8.1.3 Accepting or Rejecting at the Line Schedule Level

Complete the following steps to accept or reject vendor changes to order line schedules as a buyer:

1. Follow steps 1-5 from the instructions above to view the search results. Users can also access the information from the **Menu/Favs > Order Mgmt > Purchase Order > Search PO Schedules** screen.
2. Click the link in the **Order** (Search POs) or **Order Number** (Search PO Schedules screen) column.
   The order details screen displays.
3. Click the link for the **Line No** (number).
   The order line details display with the Schedules tab showing as the default.
4. Click the contextual menu icon (blue triangle in the top corner of the cell).
   A menu displays.



5. To accept the vendor's changes, click **Accept Vendor Changes (Schedule Level)**.
   The order changes are accepted, the state changes, and a success message displays.
6. To reject the vendor's changes, click **Reject Vendor Changes (Schedule Level).**
   The order changes are accepted; the state is updated, and a success message displays.

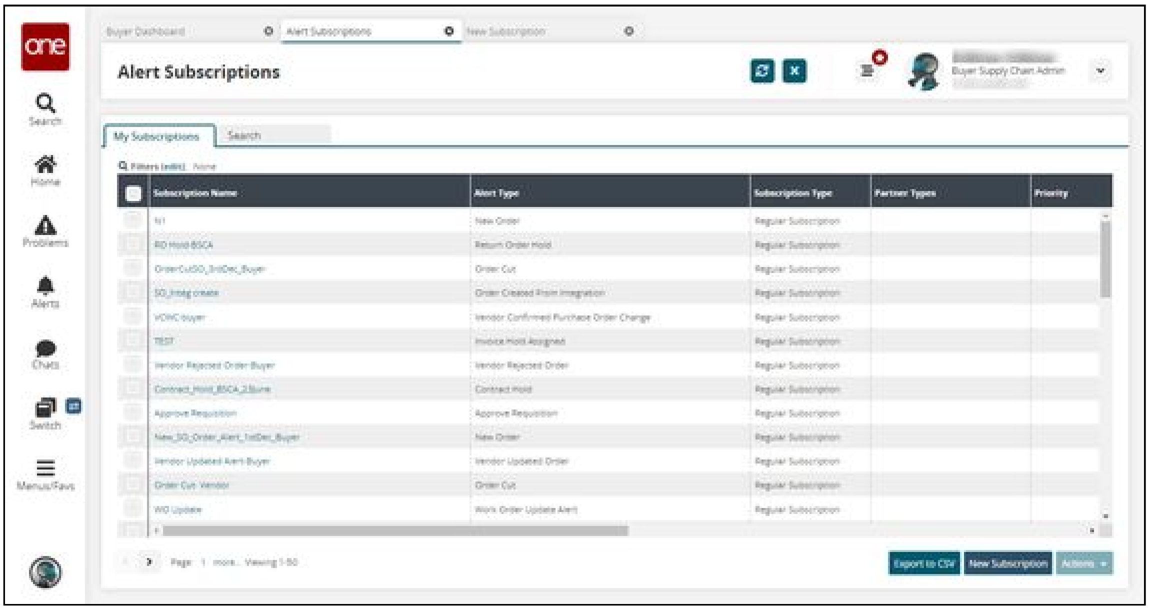
See the "Buyers Can Accept or Reject Vendor Changes to Orders, Lines, and Line Schedules" section in the current version of the *Release Notes* for more information.

2.8.2 Additional Display Fields for Order Alert Subscriptions

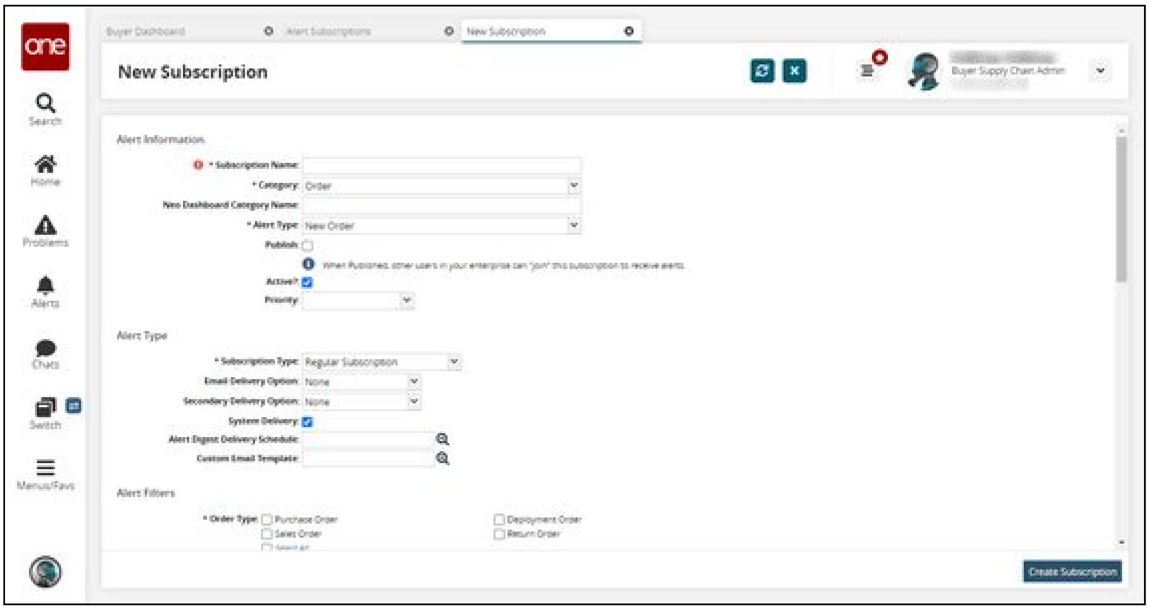
When subscribing to order alerts with a category of Order, many display fields are available in the Additional Information section.

Complete the following steps to subscribe to order alert subscriptions:

1. Log in to the ONE system.
2. Click **Menus/Favs > Tools > Alert Subscriptions**.
   The Alert Subscriptions screen appears.



3. Click **New Subscription**.
   The New Subscription screen appears.

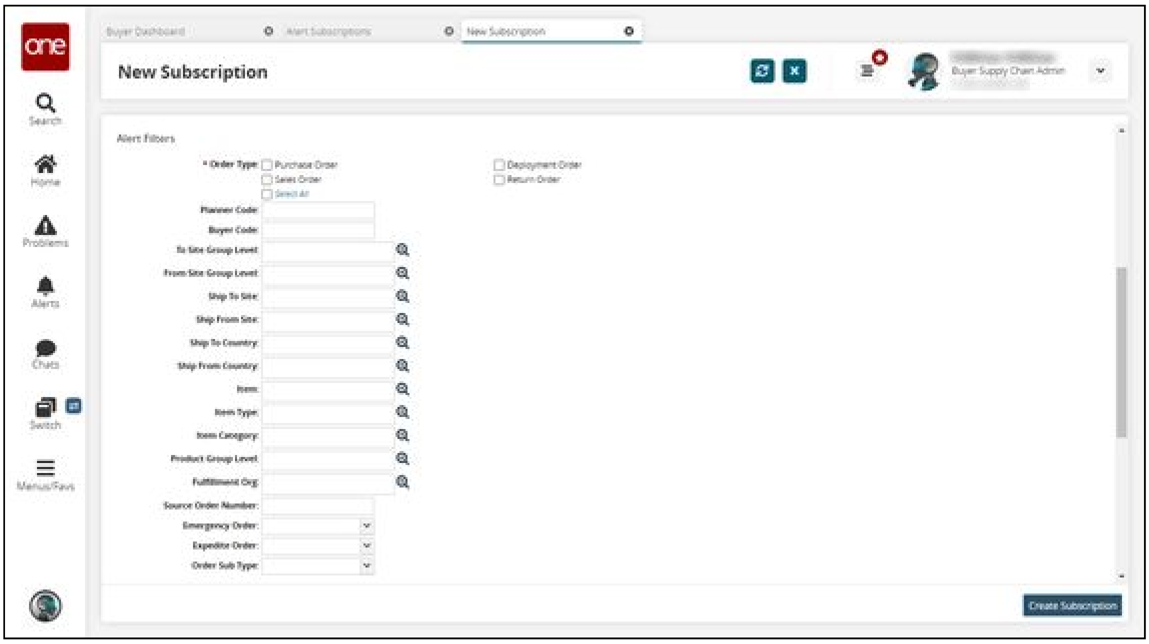


4. Fill out the following fields. Fields with an asterisk (*) are required.

Section	Field	Description
Alert Information	*Subscription Name	Input a Subscription Name.
	*Category	Select the Order category. This affects what appears in other fields and what fields appear.
	Neo Dashboard Category Name	Input a category name for the dashboard.
	*Alert Type	From the Alert Type dropdown list, select the desired value. What appears in the dropdown is dependent on what is selected in the Category field.
	Publish	When this checkbox is selected, other users in your enterprise can join the subscription to receive alerts.
	Active?	Check this checkbox if this is an active subscription.
	Priority	Select a priority from the dropdown menu. The options are High, Medium, or Low.
Alert Type	*Subscription Type	Select either Regular Subscription or Partner Recommendation. Selecting Partner Recommendation sets up alert subscriptions for your partner's supplier site.
	Email Delivery Option	Select either Alternate Email, Email, or None from the dropdown menu. ◦ None: No email alert will be sent. ◦ E-mail: An email alert will be sent. The default email address for the alert appears to the right of the list. ◦ Alternate Email: An email alert will be sent. In the box that appears to the right of the Email Delivery Option list, type the alternate email address for alerts.
	Secondary Delivery Option	Select either Alternate Email or None from the dropdown menu. ◦ None: No email alert will be sent. ◦ Alternate Email: An email alert will be sent. In the box that appears to the right of the Email Delivery Option list, type the alternate email address for alerts.

Section	Field	Description
	System Delivery	Select this checkbox to send the alert email to the Alert Inbox. Unselecting this checkbox sends the alert email to the specified addresses.
	Alert Digest Delivery Schedule	Use the picker tool to select a delivery schedule.

5. Scroll down to the **Alert Filters** section and fill out the following fields. Fields with an asterisk (*) are required.



Field	Description
*Order Type	Select the order type(s) for this alert subscription.
Planner Code	Enter a planner code.
Buyer Code	Enter a buyer code.
To Site Group Level	Use the picker tool to select a To Site Group Level.
From Site Group Level	Use the picker tool to select a From Site Group Level.
Ship To Site	Use the picker tool to select a ship to site.

Field	Description
Ship From Site	Use the picker tool to select a ship from site.
Ship To Country	Use the picker tool to select a ship to country.
Ship From Country	Use the picker tool to select a ship from country.
Item	Use the picker tool to select an item.
Item Type	Use the picker tool to select an item type.
Item Category	Use the picker tool to select an item category.
Product Group Level	Use the picker tool to select a product group level.
Fulfillment Org	Use the picker tool to select a fulfillment organization.
Source Order Number	Enter a source order number.
Emergency Order	Select whether this is an emergency order or not from the dropdown menu.
Expedite Order	Select whether to expedite this order or not from the dropdown menu.
Order Sub Type	Select the order subtype from the dropdown menu.

6. Scroll down to the **Additional Information** section and select any number of fields to include them in the alert, notifying users when those specific fields are modified on selected order types.

7. Click the **Create Subscription** button.

See the "New Display Fields for Order Alert Subscriptions" section in the current version of the *Release Notes* for more information.

2.8.3 Automate Fulfillment Order Creation

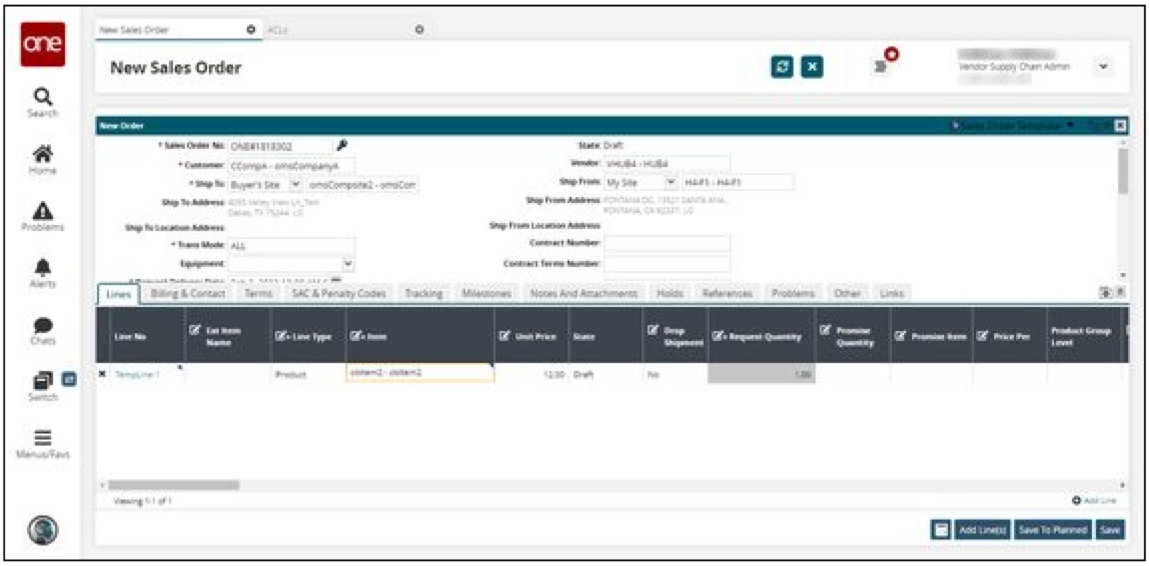
Users can automate the fulfillment order creation process for purchase orders (POs), deployment orders (DOs), and sales orders (SOs). Using the Auto-Create Fulfillment Order field for POs and SOs and the policy of the same name, fulfillment orders can be automatically created. Any fulfillment orders tied to a specific order are displayed under the Related Orders section in the Links tab of the respective order.

Complete the following steps to automate the creation of fulfillment orders:

1. Log in to the ONE system as a Buyer Supply Chain Admin or Vendor Supply Chain Admin.
2. Click **Menu/Favs > Order Mgmt > New Sales Order**.

   > Please note this workflow describes SOs but functions identically for POs. DOs have a slightly different process.

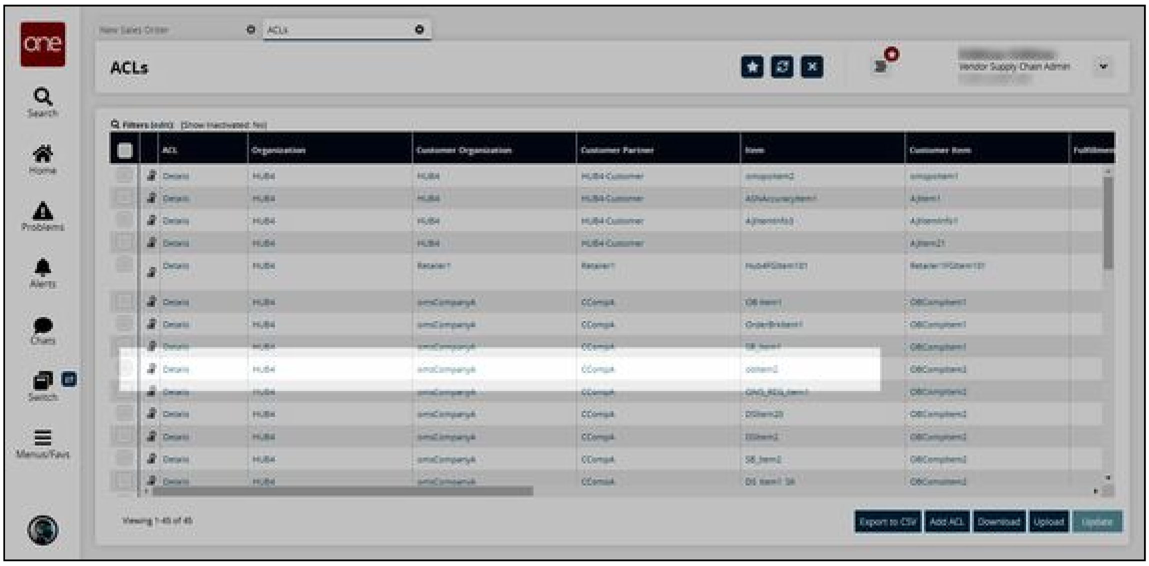
   The New Sales Order screen appears.
3. Fill out the fields as desired. For this example, we will use the test data seen in the screenshot. See the "Creating Sales Orders" section in the *Online Help* for more information.



4. Click **Menu/Favs > Administration > ACLs**.
   The ACLs screen appears.

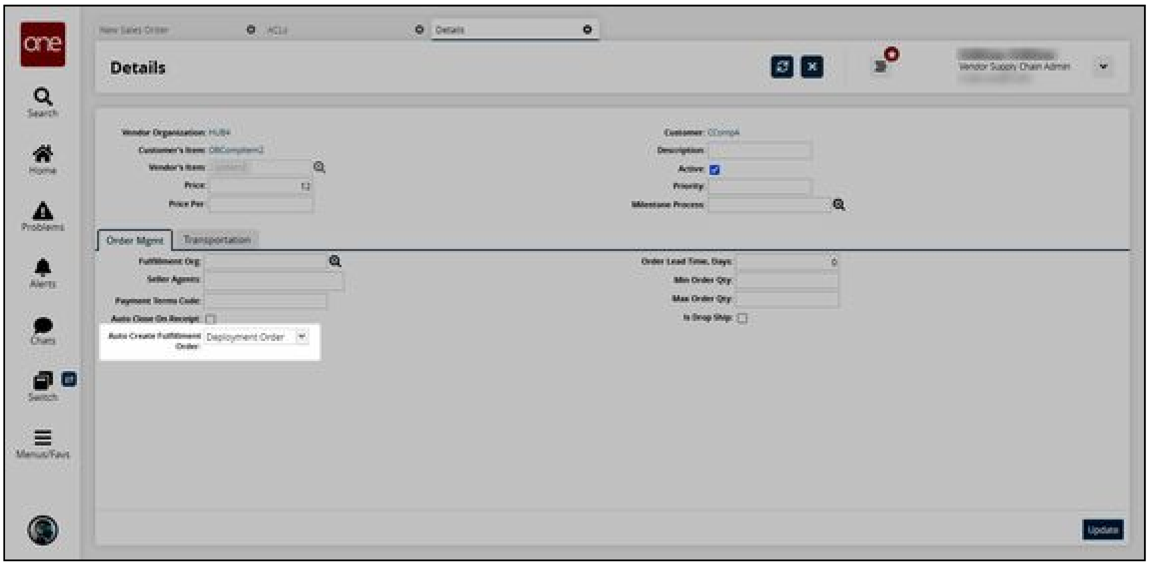
Please note this workflow uses ACLs, but vendors, customers, and AVLs also function identically.

5. Click the **ACL Details** link that corresponds to the item selected in the **Lines** tab of the SO creation process. In this example, **obItem2**.



The ACL details screen appears.

6. In the **Auto-Create Fulfillment Order** field, select **Deployment Order** from the dropdown list.

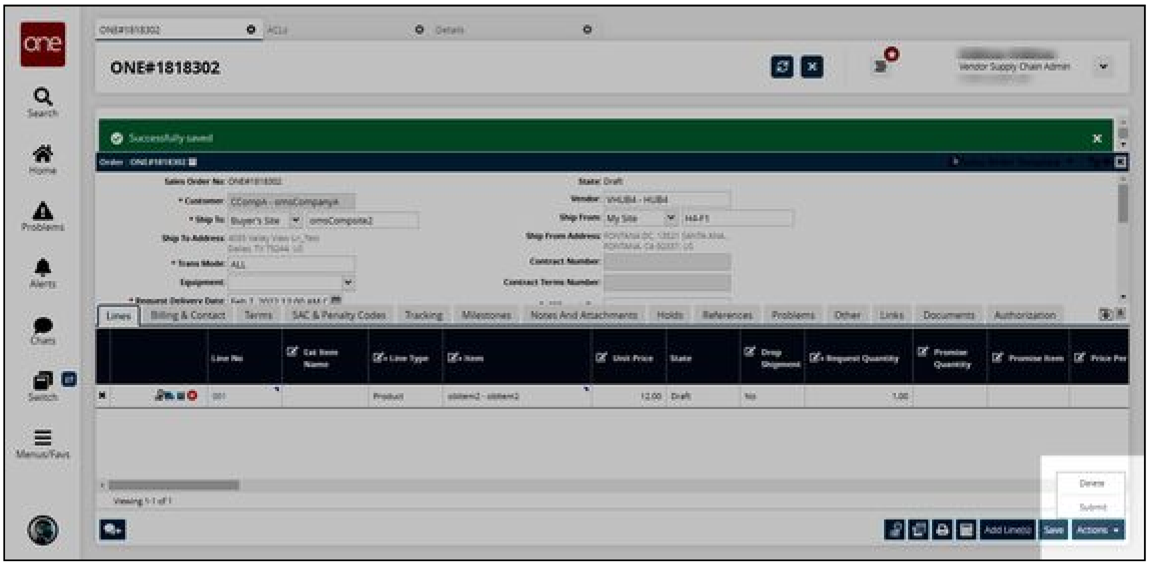


7. Click **Update**.
   A success message appears.

For SOs and POs, the **Auto-Create Fulfillment Order** field is set as described; for DOs, the **Auto-Create Fulfillment Order** policy must be enabled. See the "Searching Policies" section in the *Online Help* for more information.

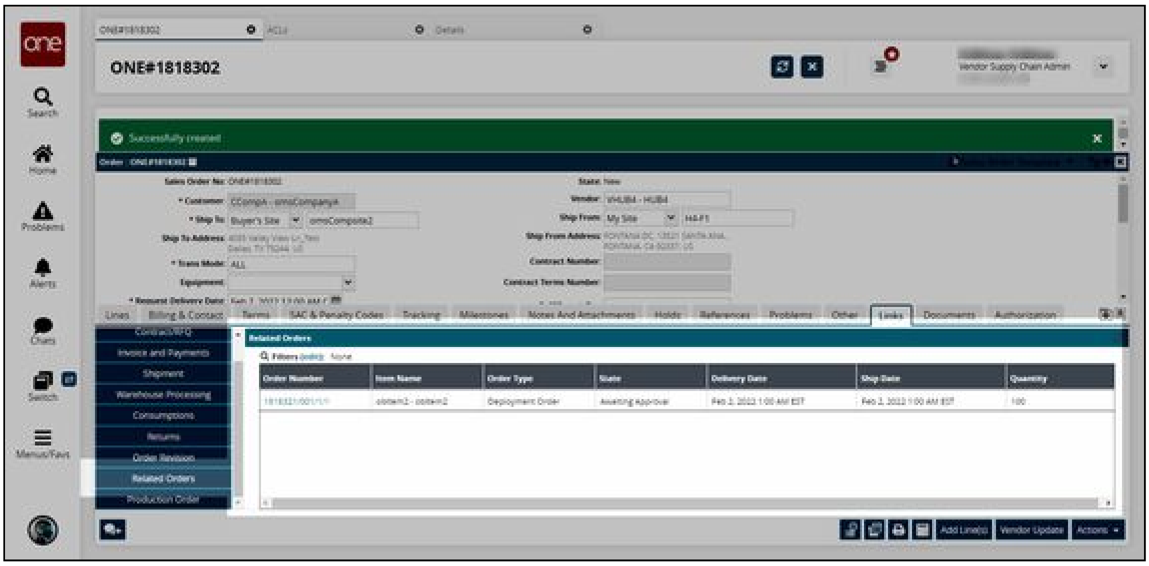
8. Back on the **New Sales Order** screen, click **Save**.
   A success message appears and the page updates.
9. Click **Actions > Submit**.

Fulfillment orders are only automatically created when the parent order transitions from the Draft state to the New state.

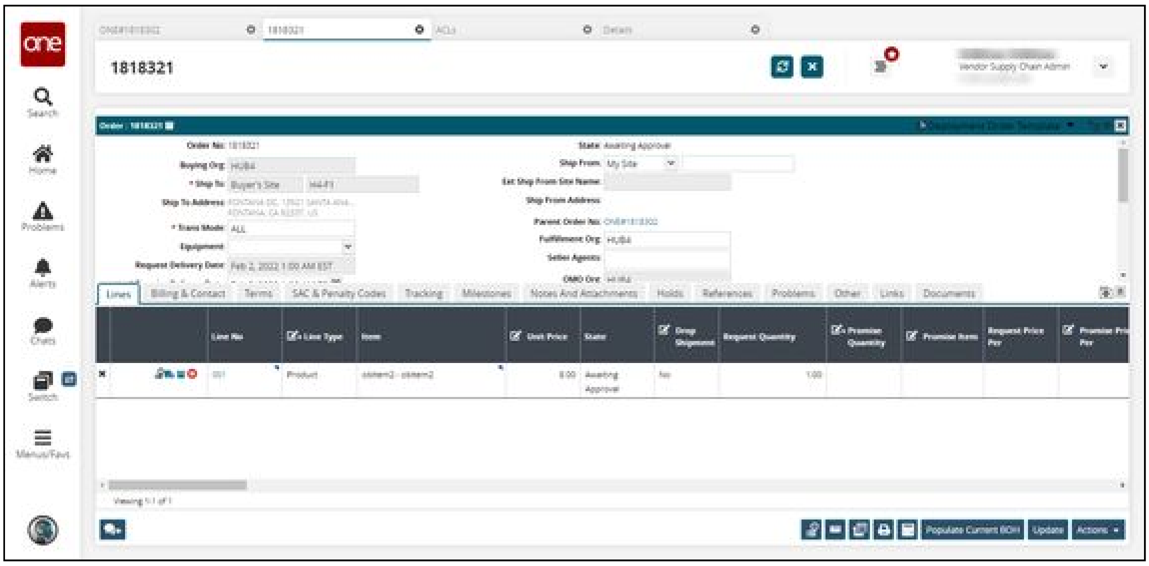


A success message appears and the SO moves to the New state.

10. Click the **Links** tab.
11. In the pane to the left, click the **Related Orders** sub-group.
    The automatically created fulfillment order(s) are visible.



12. In the **Order Number** column, click the order number link.
    The fulfillment order details screen appears.



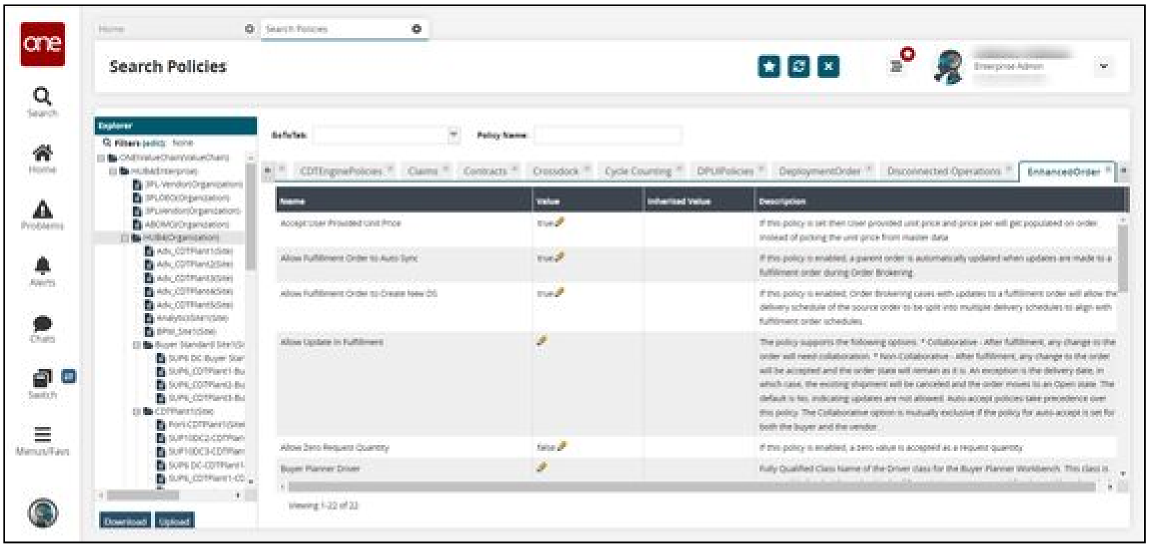
See the "Automate Fulfillment Order Creation" section in the current version of the *Release Notes* for more information.

2.8.4 Configuring Time-Based Policy to Automatically Update Order State to Closed

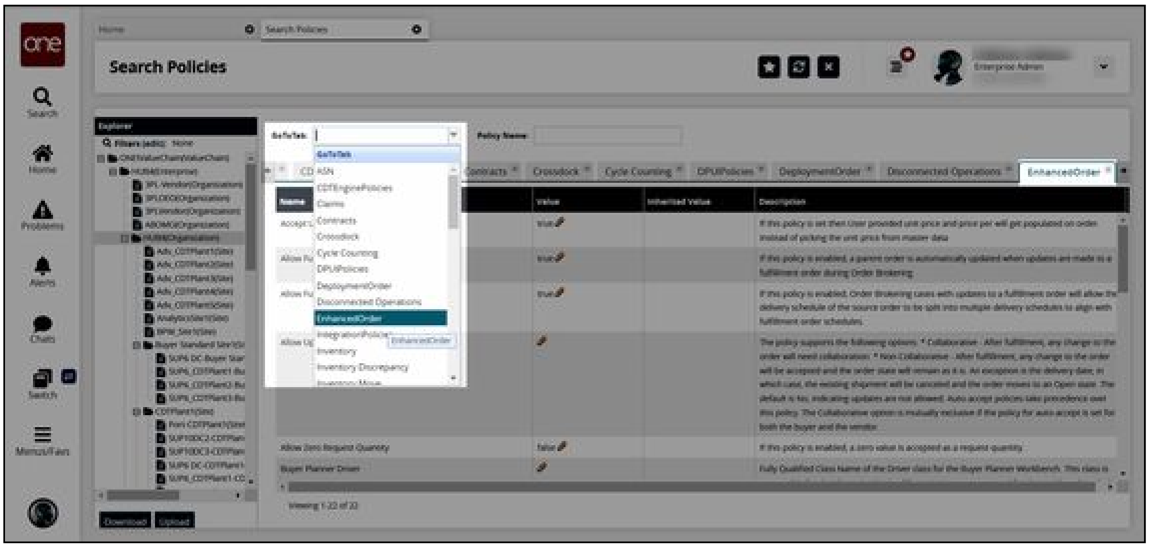
The Time Period to Auto Close Received Orders policy specifies the time period after which the system automatically updates orders (Sales, Purchase, and Deployment) from Received to Closed state. This automation runs at 12 a.m. every day and moves all received orders to the Closed state with the actual receipt date after the time period specified in the policy. If there are multiple delivery schedules, the system considers the latest actual receipt date. This policy is applicable only if the owning organization does not have an active Financials subscription. If the Financials module is enabled, the order state changes only after an invoice is closed.

Complete the following steps to configure the Time Period to Auto Close Received Orders policy:

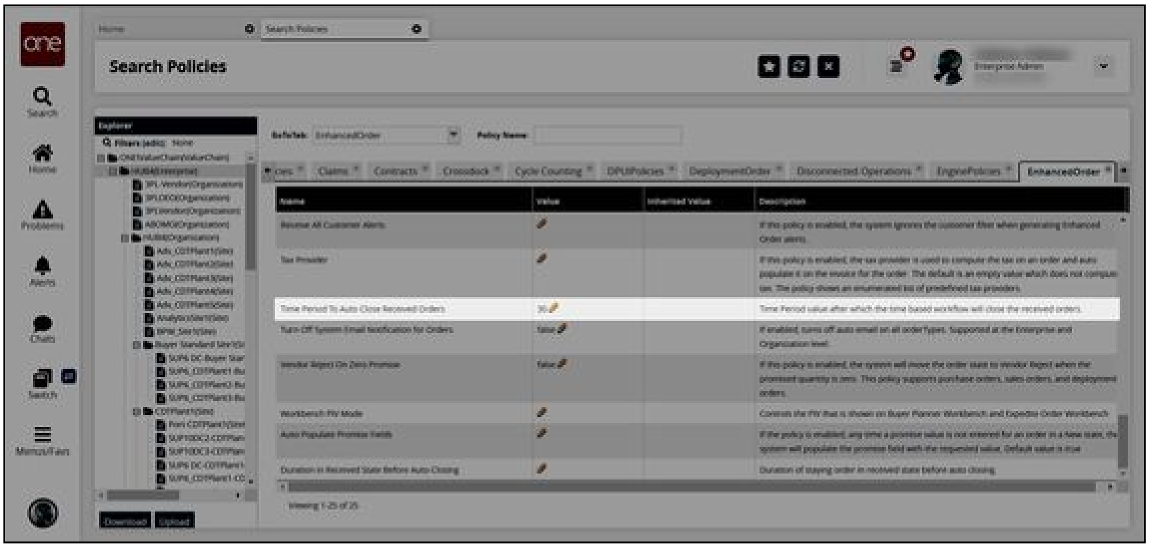
1. Log in to the ONE system.
2. Click **Menu/Favs > Administration > Search Policies**.
   The Search Policies screen appears.



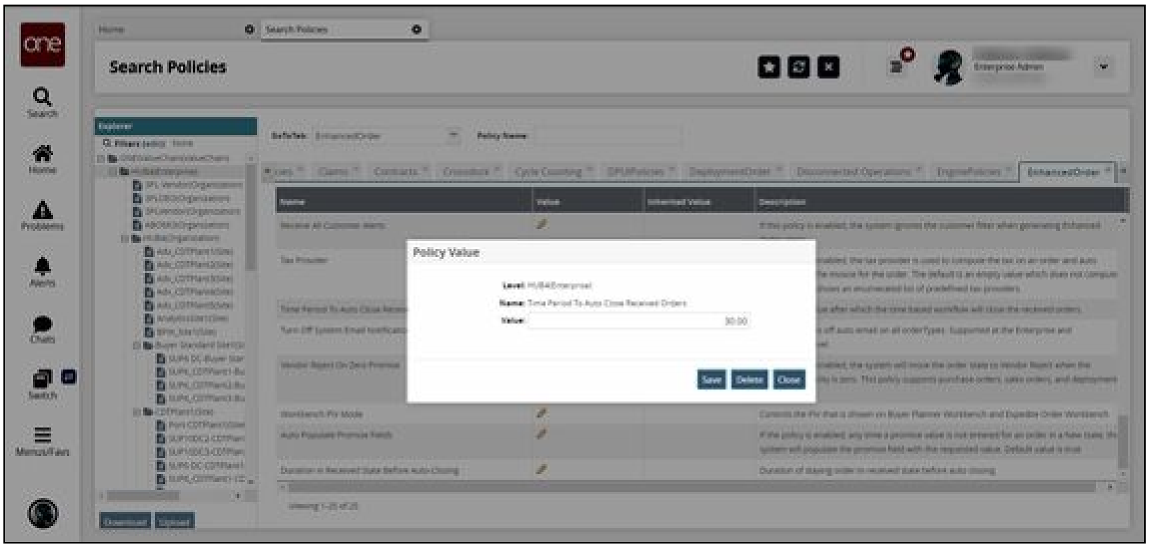
3. In the **Explorer** pane on the left, click the name of the enterprise for which you want to set the policy.
   The available policies display under the tabs to the right.
4. In the **GoToTab** field, select **EnhancedOrder** from the dropdown list.
   The EnhancedOrder tab displays a list of policies.



5. In the **Name** column, locate the **Time Period To Auto Close Received Orders** policy.



6. In the **Value** column, click the pencil icon.
   The Policy Value popup window appears.



7. In the **Value** field, enter the number of days after which orders in the **Received** state are to be moved to the **Closed** state.
8. Click **Save**.
   The policy updates.

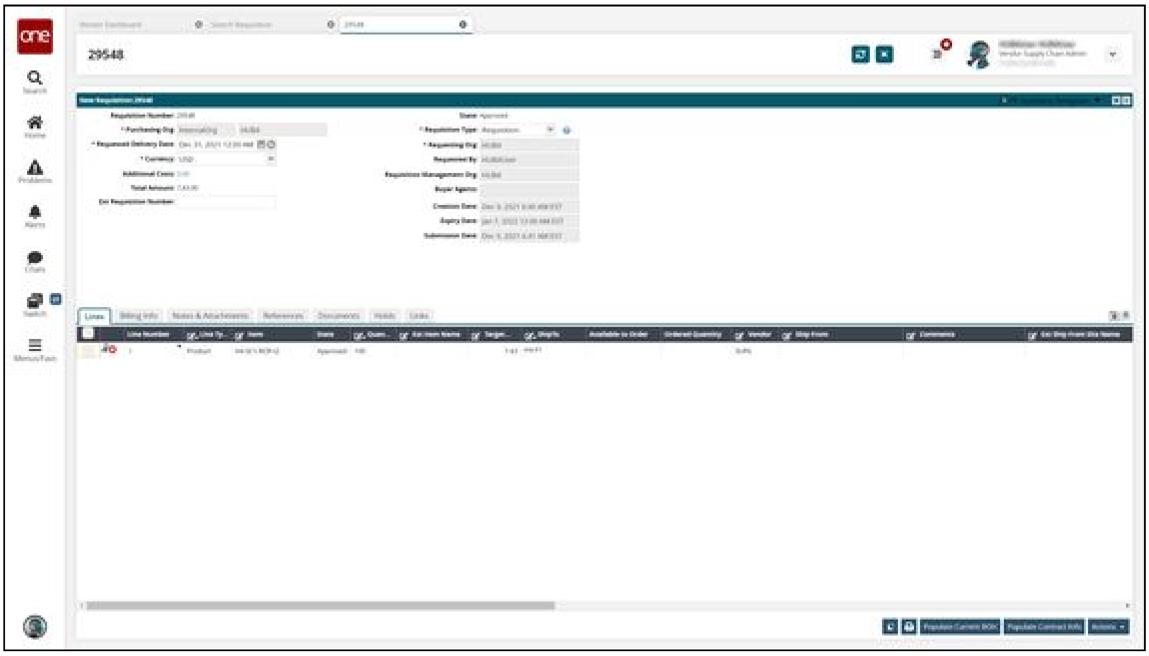
See the "Automatic Order State Change" section in the current version of the *Release Notes* for more information.

2.8.5 Creating a Sales Order from the Requisition Detail Screen

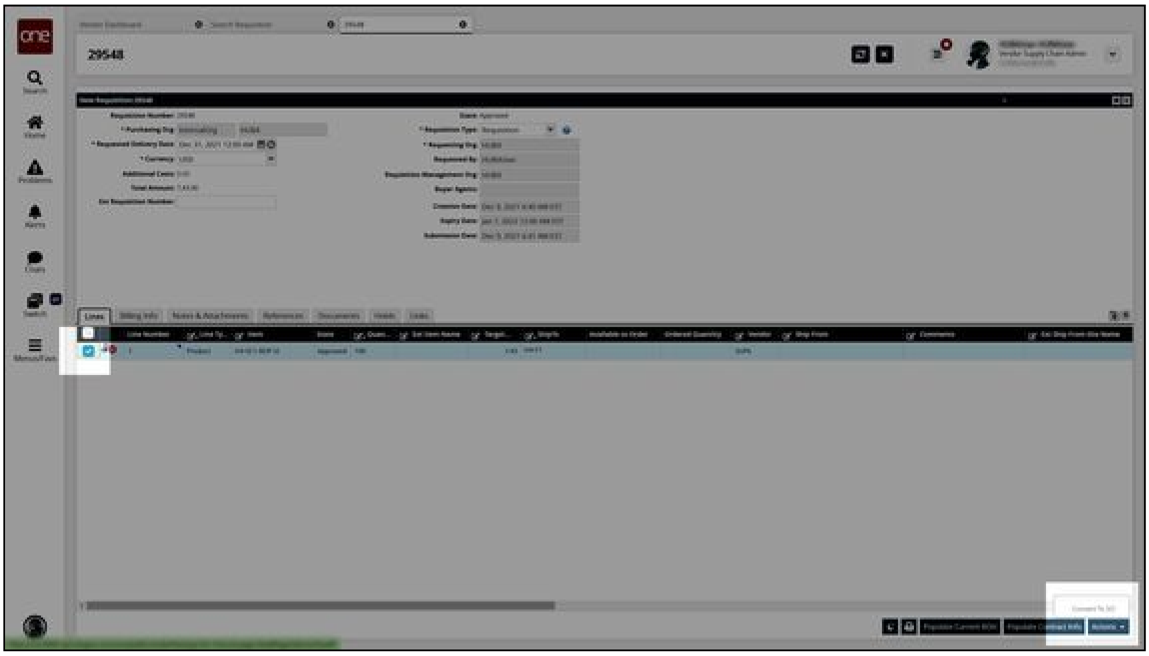
Users in Buyer and Vendor roles can create sales orders (SOs) from a requisition detail screen.

Complete the following steps to create a sales order from a requisition detail screen:

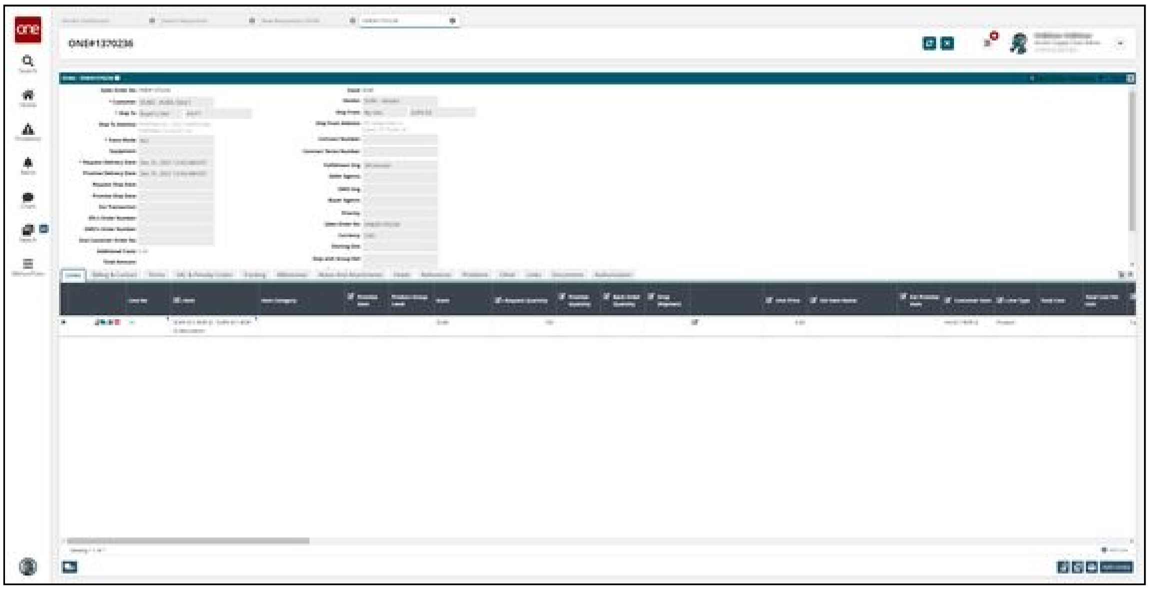
1. Log in to the ONE system.
2. Follow the instructions found in the "Search Requisition Orders" section of *Online Help* to locate the requisition you wish to convert to a sales order.
3. In the PR Number column, click the link for the desired requisition.
   The requisition detail screen appears.



4. In the **Lines** tab, click the checkbox to select the line number you want to convert to a sales order.
5. Click the **Actions** button and select **Convert to SO**.



A new Sales Order detail screen displays in a new tab with the fields from the requisition detail screen auto-populated.



See the "Searching Sales Orders" and "Creating Sales Orders" sections in *Online Help* for information on the options available on the newly created sales order.

See the "Create Sales Orders from the Requisition Detail Screen" section in the current version of the *Release Notes* for more information Please also see the "Working with Requisitions" section in *Online Help* for more information.

2.8.6 Creating Production Orders from the PO or DO Workflow

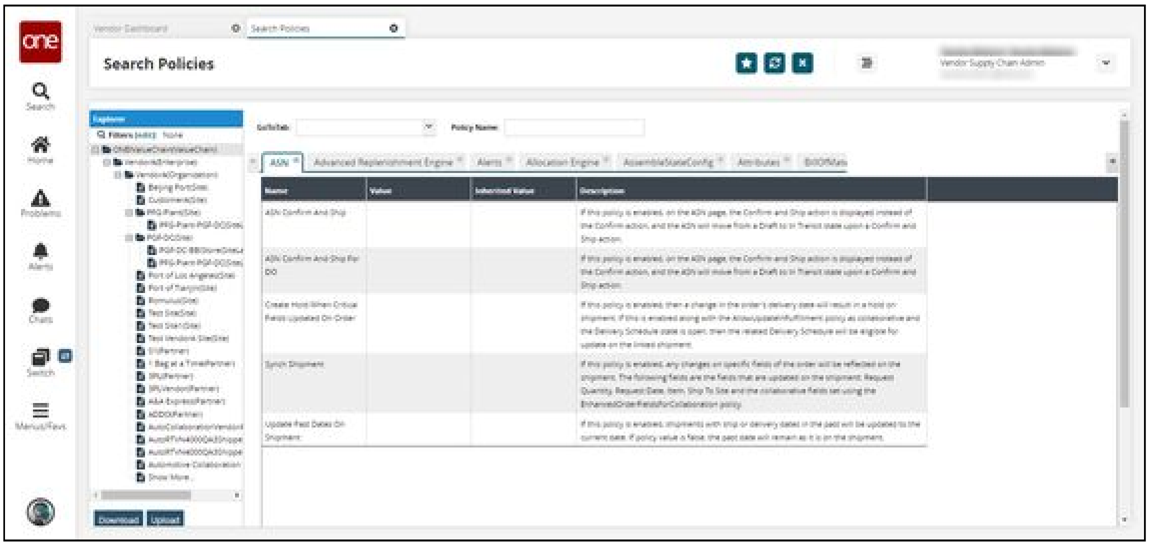
Vendor users can manually create production orders from the purchase order (PO) and deployment order (DO) workflows. The Enable Production Order Creation policy must be enabled to use this enhancement. Once enabled, the Create Production Order action is available for POs and DOs in the Open state on the PO and DO detail pages and on the Search POs and Search DOs reports. This action is only available when a PO or DO is in the Open state.

Please note the following clarifications regarding this feature:

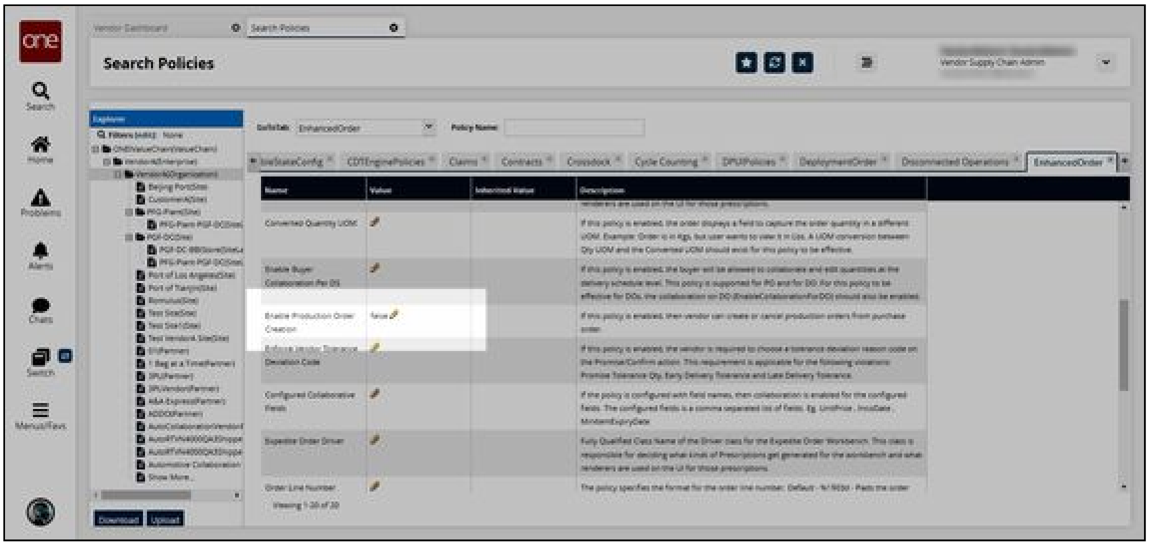
- The Enable Production Order Creation policy must be enabled on the selling organization (for POs) or the Ship From organization (for DOs), not for the owning or creation organization.
- There are no restrictions on the number of production orders that can be created from a single PO or DO.
- Production orders created in this way can still be canceled. The pre-existing Cancel Production Order is called internally when a user cancels an order, cancels an order line, or requests a schedule cancelation for the order.
- This feature only supports standard POs and is not intended to be used with other types of POs, such as AVL POs, VMI POs, Spot POs, Release POs, VMI POs, and Blanket POs.

Complete the following steps to enable the Enable Production Order Creation policy:

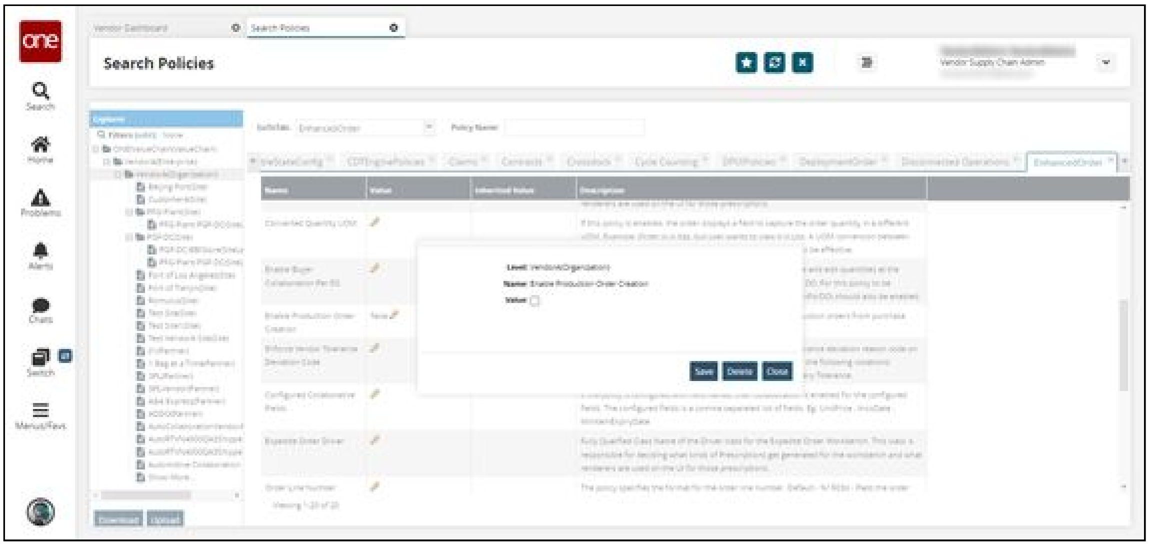
1. Log in to the ONE system as a vendor supply chain admin.
2. Click **Menu/Favs > Administration > Search Policies**.
   The Search Policies screen appears.



3. In the left-hand **Explorer** pane, select the appropriate organization.
   The right pane updates.
4. In the **GoToTab** drop-down menu, select **Enhanced Order**.
   The Enhanced Order tab appears.
5. Click the pencil icon for the **Enable Production Order Creation** policy.



A popup appears.

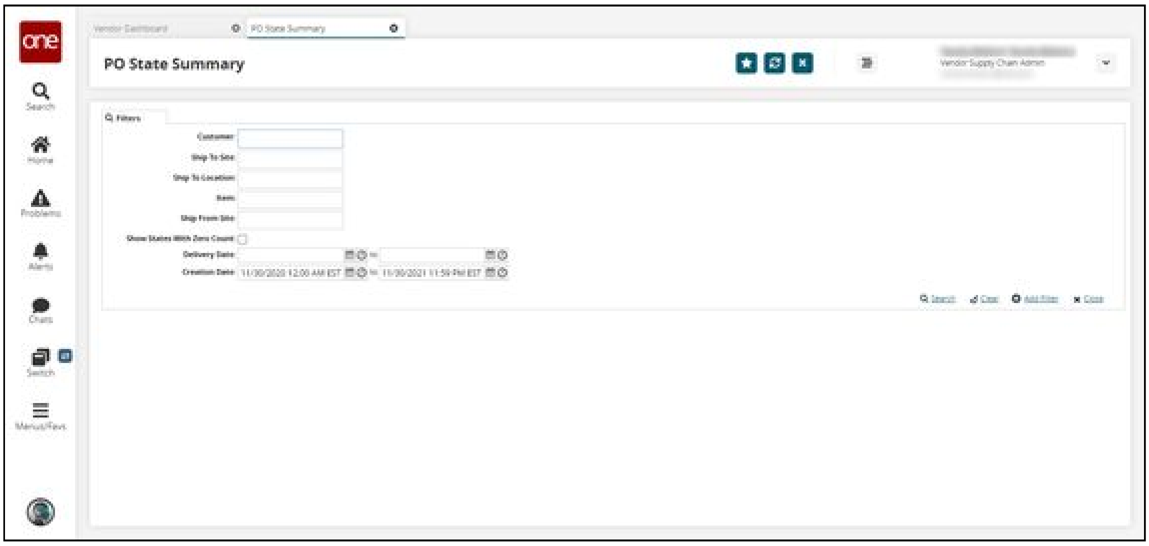


6. Select the **Value** checkbox and click **Save**.

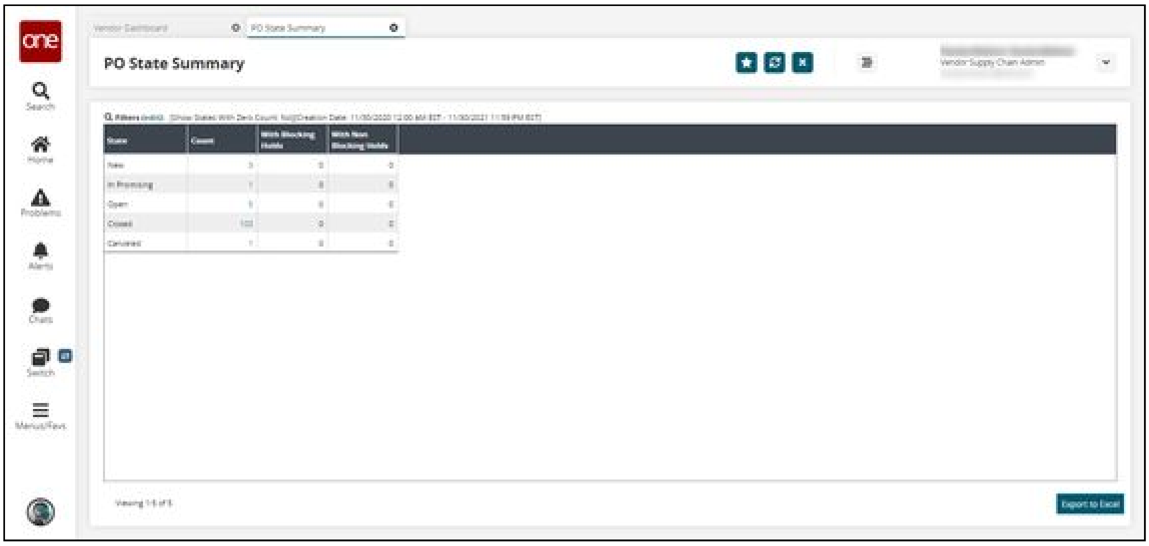
Complete the following steps to create a production order from a PO or DO:

This workflow describes the process for POs, but the steps are the same for DOs.

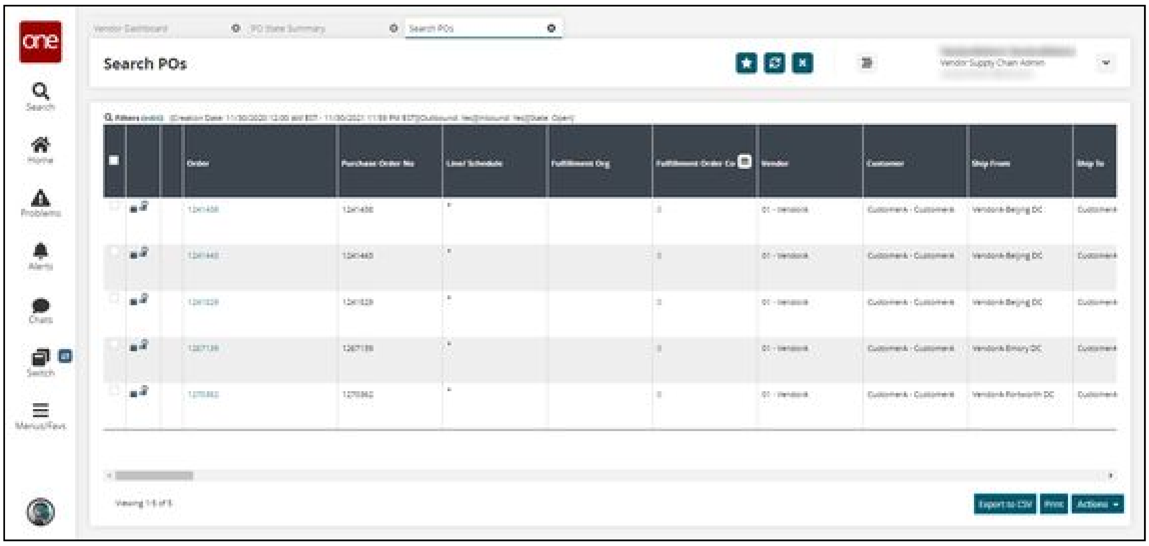
1. Select **Menu/Favs > Order Mgmt > Purchase Order > PO State Summary**.
   The PO State Summary screen appears.



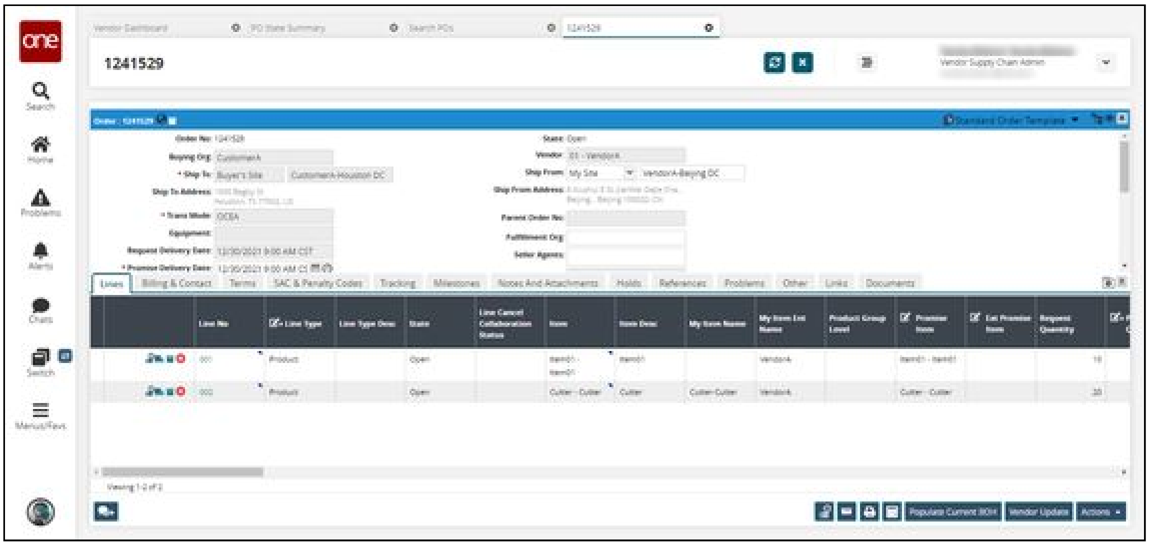
2. Input the desired filters and click **Search**. See the "Purchase Order State Summary Report" section in the *Online Help* for more information on this report.
   The search results appear.



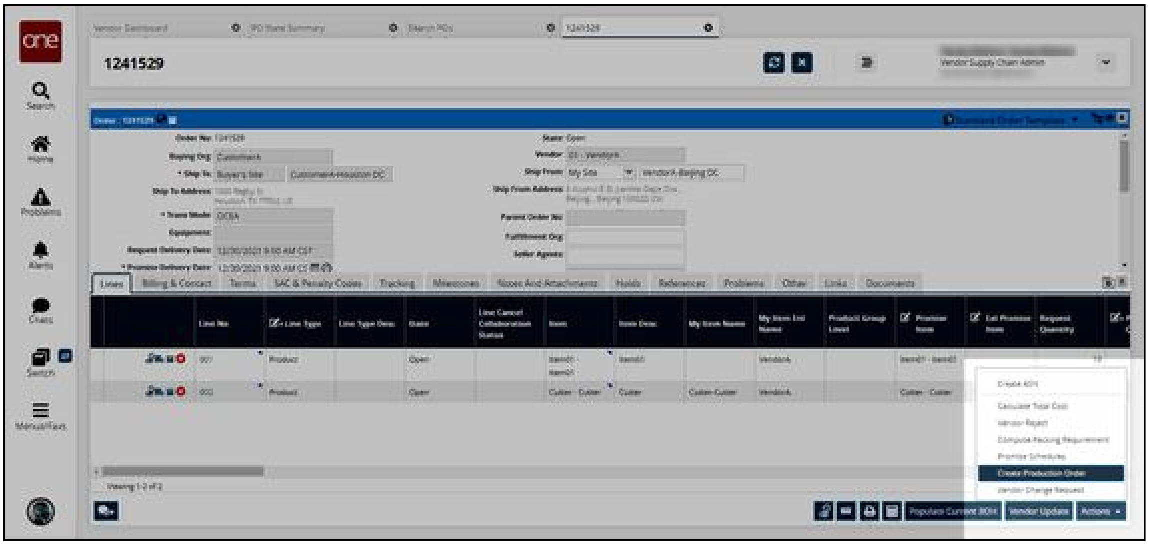
3. Click the Open **Count** link because we can only create production orders from POs and DOs in the Open state.
   The Open state POs appear.



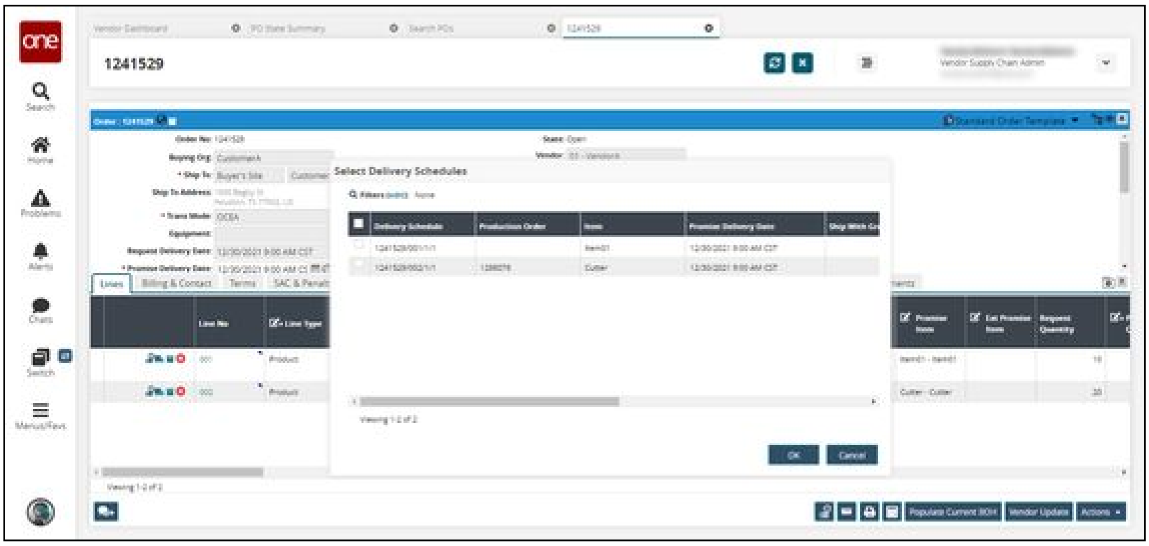
4. Click an **Order** link.
   The PO details screen appears.



5. Click the **Actions** button and then click **Create Production Order**.



The Select Delivery Schedules popup appears.



6. Select the desired delivery schedule and click **OK**.
   A success message appears. A production order is created for the selected delivery schedule.

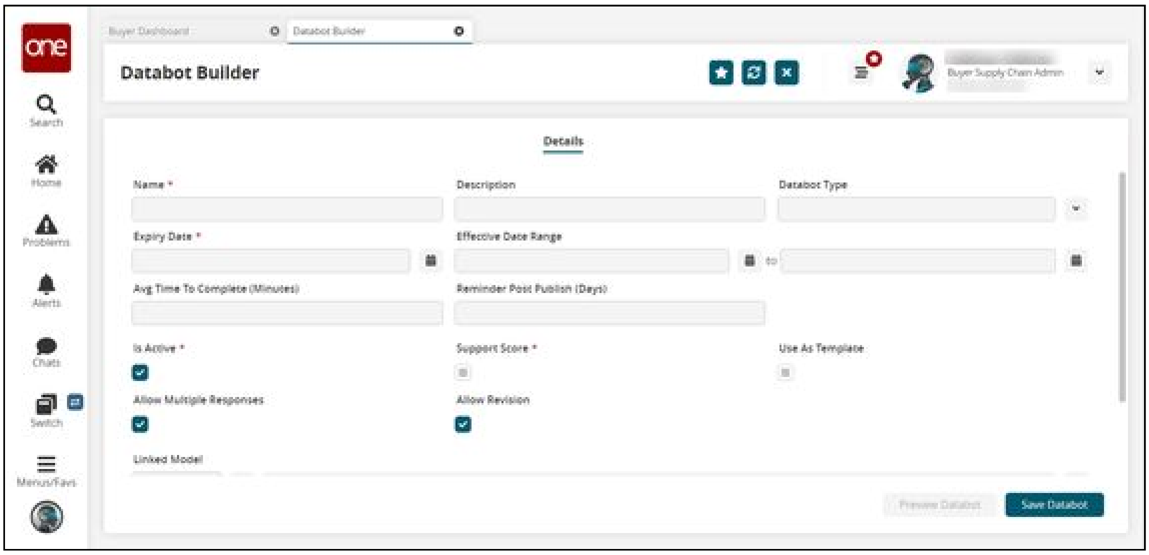
See the "Create Production Orders from Purchase Order and Deployment Order Workflows" section in the current version of the *Release Notes* for more information.

2.8.7 Customize Databot Email Invite and Response Messages

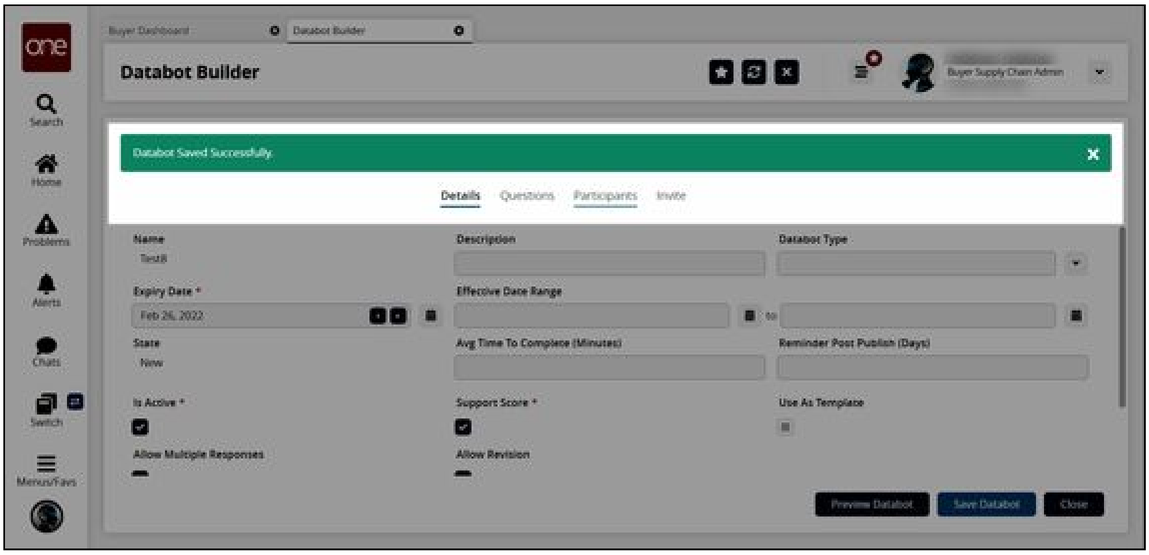
Users can customize the email sent to participants when inviting them to join a databot as well as the response message they see once they join. The email and response content is defined under the Invite tab of the Databot Builder details screen.

Complete the following steps to customize a databot email invite and response message:

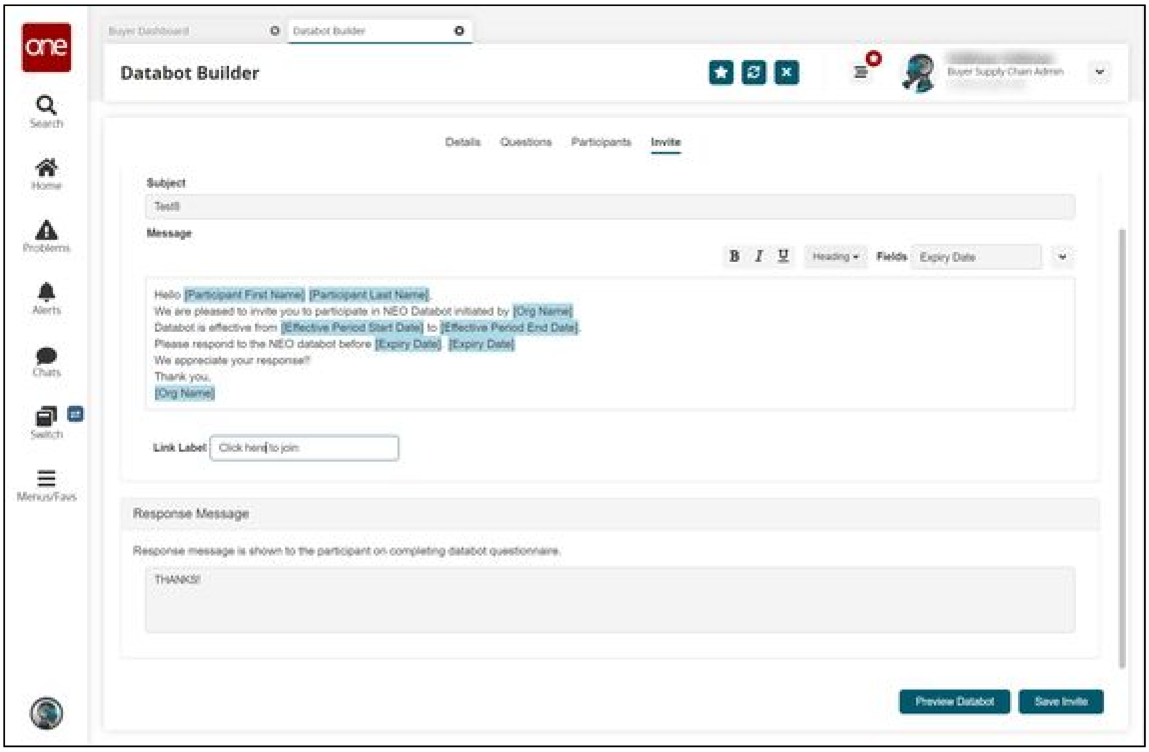
1. Log in to the ONE system.
2. Click **Menus/Favs > Tools > Databot > Databot Builder**.
   The Databot Builder screen appears.



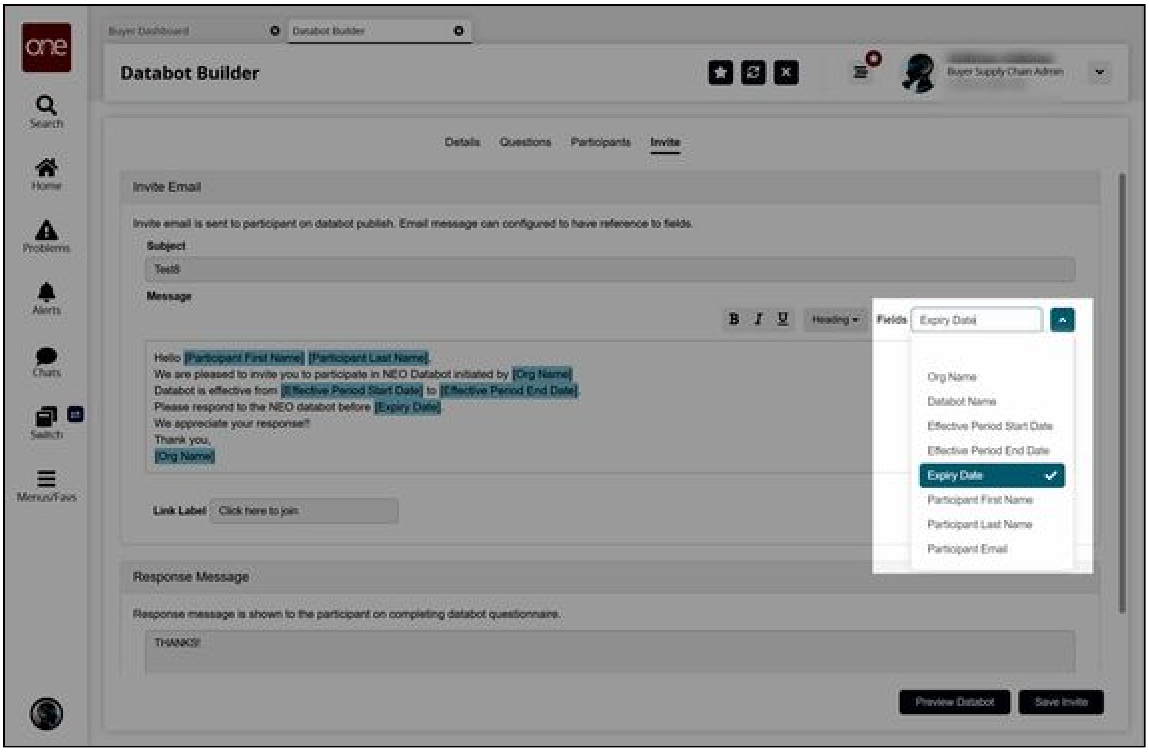
3. Fill in the fields as desired. Fields with an asterisk (*). For information on the available fields, see the "Working with the Databot Builder" section in *Online Help*.
4. Click the **Save the Databot** button.
   Additional tabs and a success message appear.



5. Click the **Invite** tab.
   The Invite tab displays with the default email invite message in the Message text box and the data fields highlighted in blue. The data fields pull the values directly from the system.

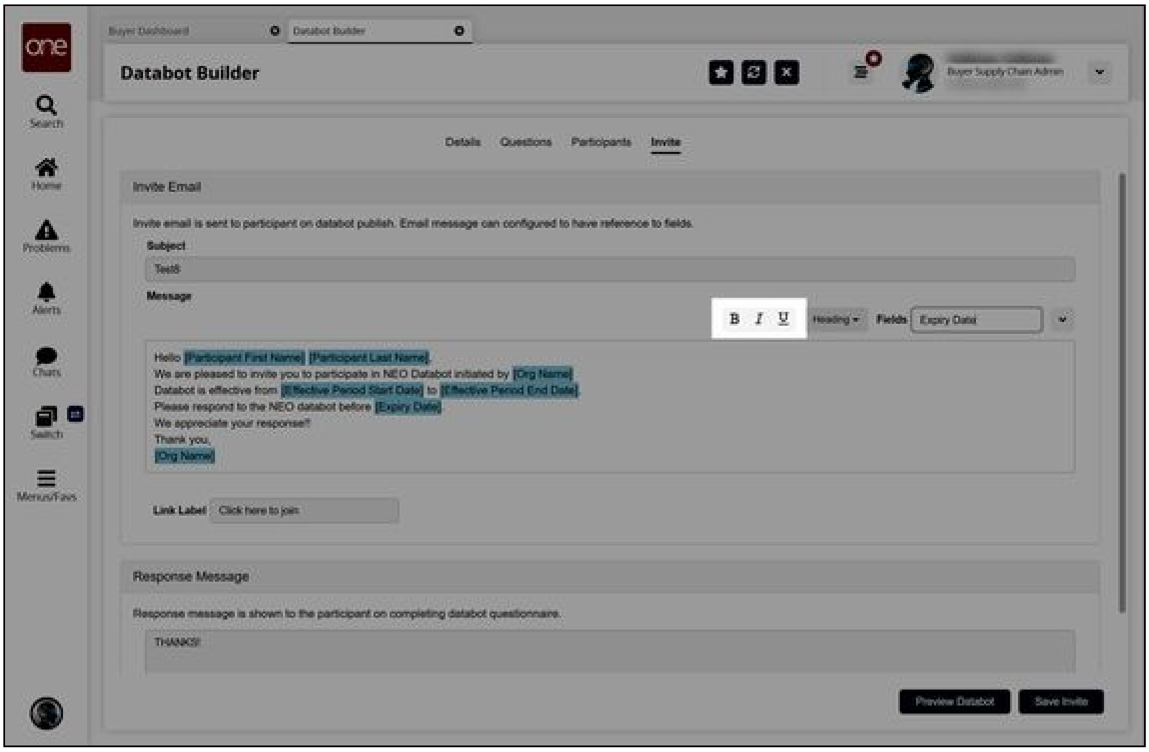


6. In the **Subject** field, enter the subject for the databot email invite. The subject field pre-populates with the Databot name. You may change it if desired.
7. In the **Message** text box, type your custom message or make changes to the default message if desired.
8. To add a data field at any point in your custom message, place the cursor where you want to insert a data field.
9. Click the dropdown menu in the **Fields** field and select the desired data field.

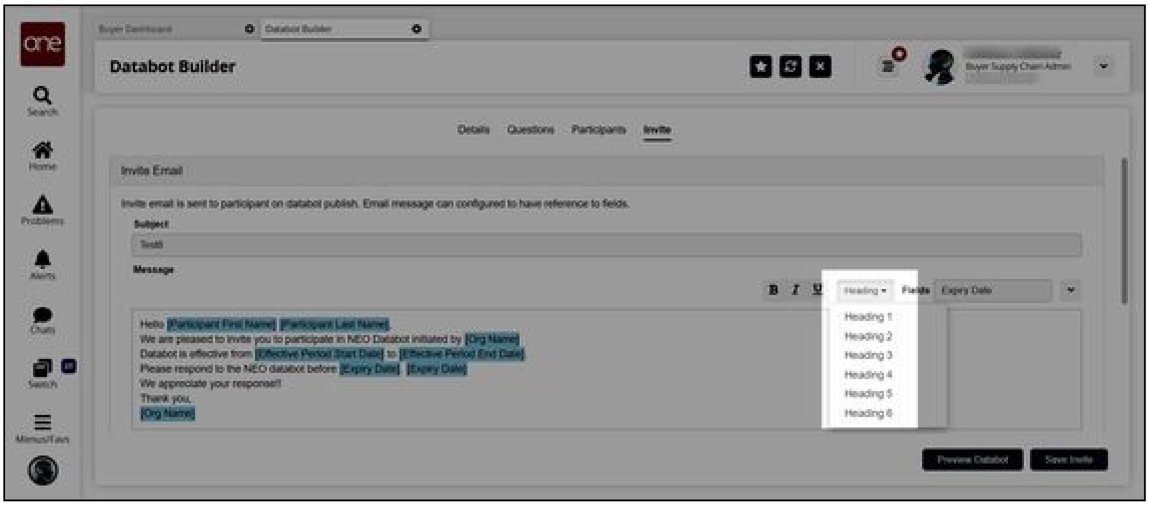


The new data field is added to the chosen place in your custom message.

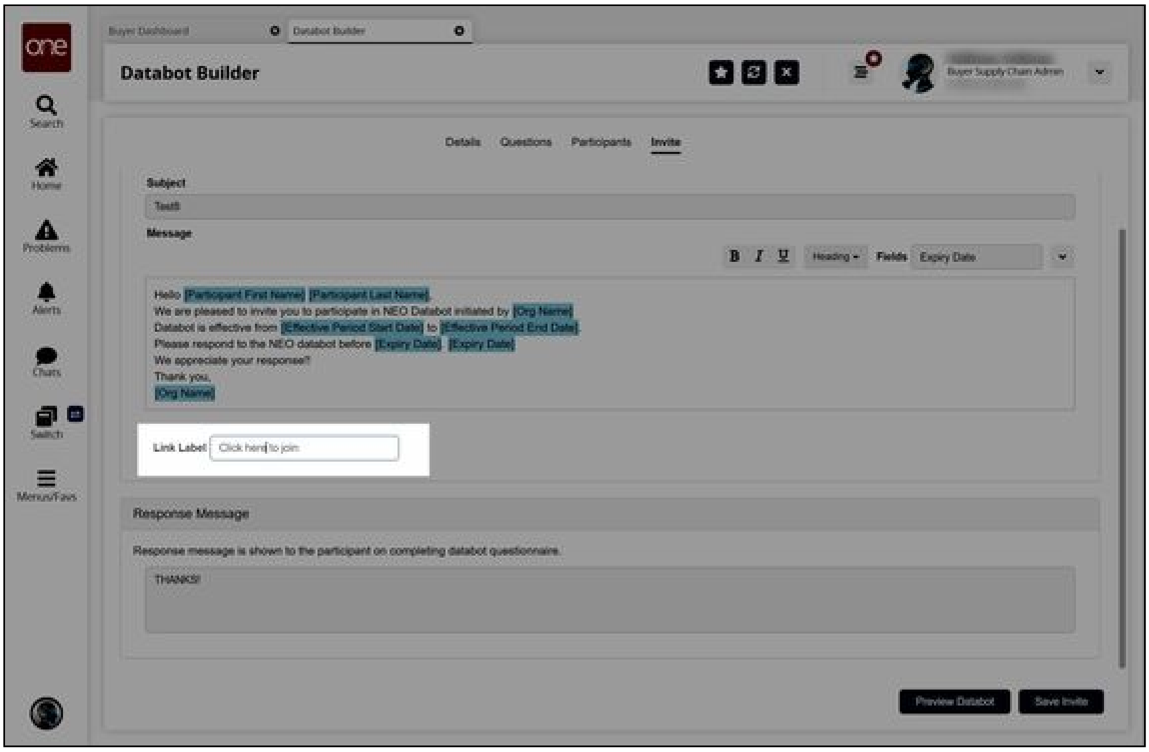
10. Enter the required information in the data fields that are included in your custom message. Data fields are highlighted in blue in the UI. The following data fields can be added to a custom message:
    A. Participant First Name
    B. Participant Last Name
    C. Participant Email
    D. Databot Name
    E. Org Name
    F. Effective Period Start Date
    G. Effective Period End Date
    H. Expiry Date
11. Once your custom message has been typed, use the format buttons above the message text field to bold, italicize, or underline text as desired.



12. If desired, insert standard HTML headings (H1-H6) using the **Heading** dropdown list above the message text field.



13. In the **Link Label** field, enter the label you want to display on the link the user clicks to join the databot. This field defaults to "Click here to join."



14. In the **Response Message** section, enter the message you want the user to see once they complete the databot questionnaire. This field contains "THANKS!" as a default message.
15. Click the **Preview Databot** button to preview the message as it has been entered and formatted.
    The preview screen appears.
16. Click the **Save Invite** button to save the custom email invite.
    A success message appears.

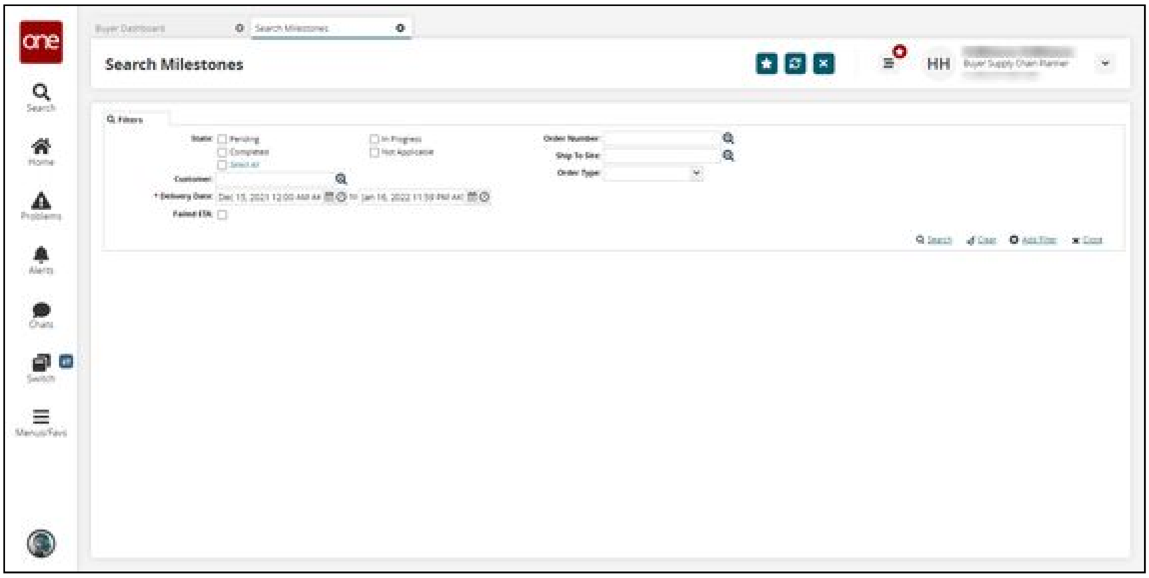
See the "Custom Databot Email Invite and Response Messages" section in the current version of the *Release Notes* for more information. Also, see the "Working with the Databot Builder" section in the current release of the *Online Help* for more information.

2.8.8 Disable and Update Reason Codes Actions for Order Milestones

Users can disable order milestones and update reason codes on order milestones.

Complete the following steps to disable order milestones:

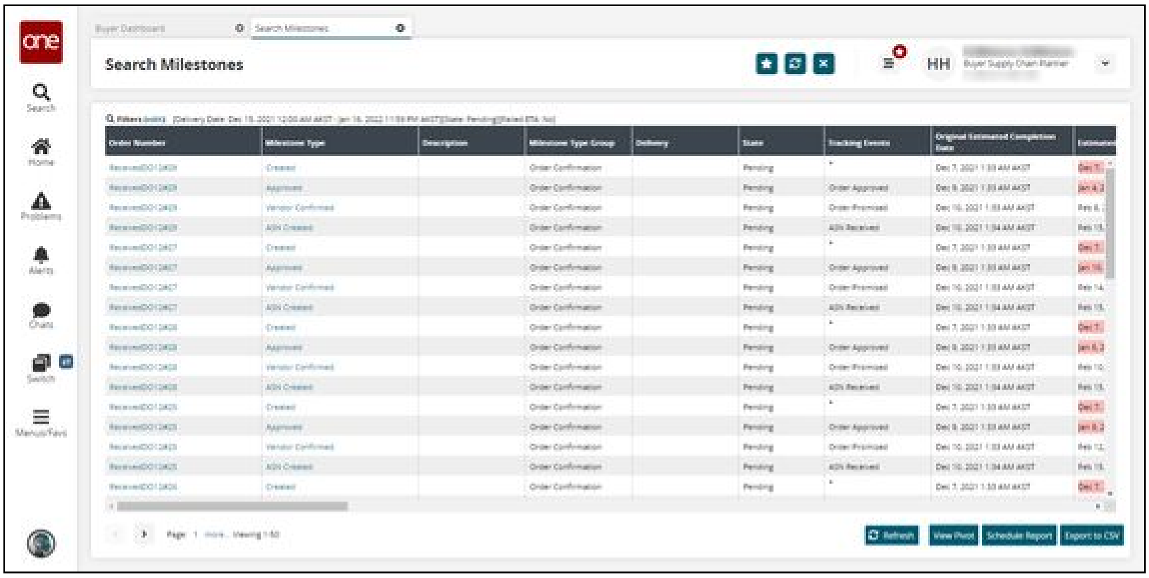
1. Log in to the ONE system as a Buyer Supply Chain Planner, a Vendor Supply Chain Planner, or an Orchestrator.
2. Click **Menu/Favs > Reports > Milestones > Search Milestones**.
   The Search Milestones screen appears with the filters displayed.



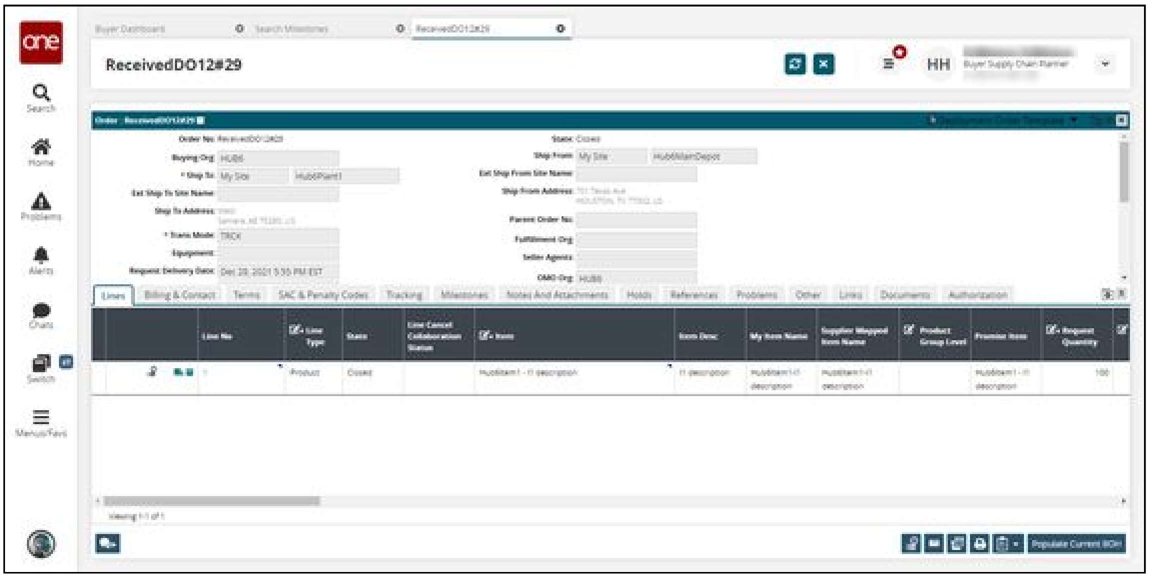
3. Fill out the following fields. Fields with an asterisk (*) are required.

Field	Description
State	Select the states you wish to view. To disable a milestone, select **Pending**.
Customer	Select a customer using the picker tool.
*Delivery Date	Select a delivery date range using the calendar and clock buttons.
Failed ETA	Select this checkbox to see milestones that did not hit their ETA.
Order Number	Select an order number using the picker tool.
Ship To Site	Select a ship to site using the picker tool.
Order Type	Select an order type using the dropdown menu.

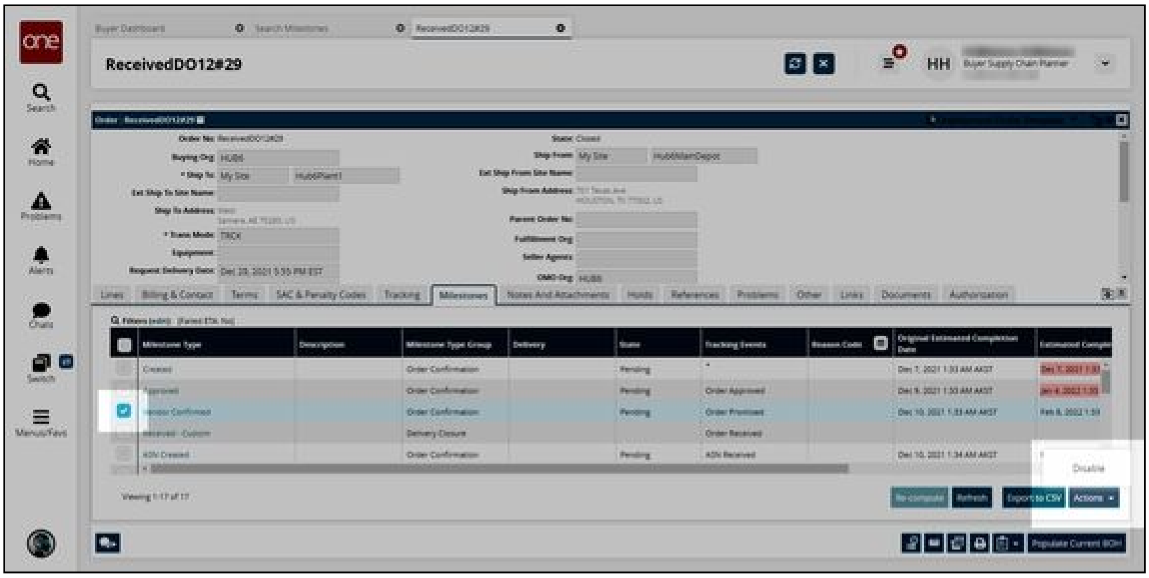
4. Click **Search**.
The search results appear.



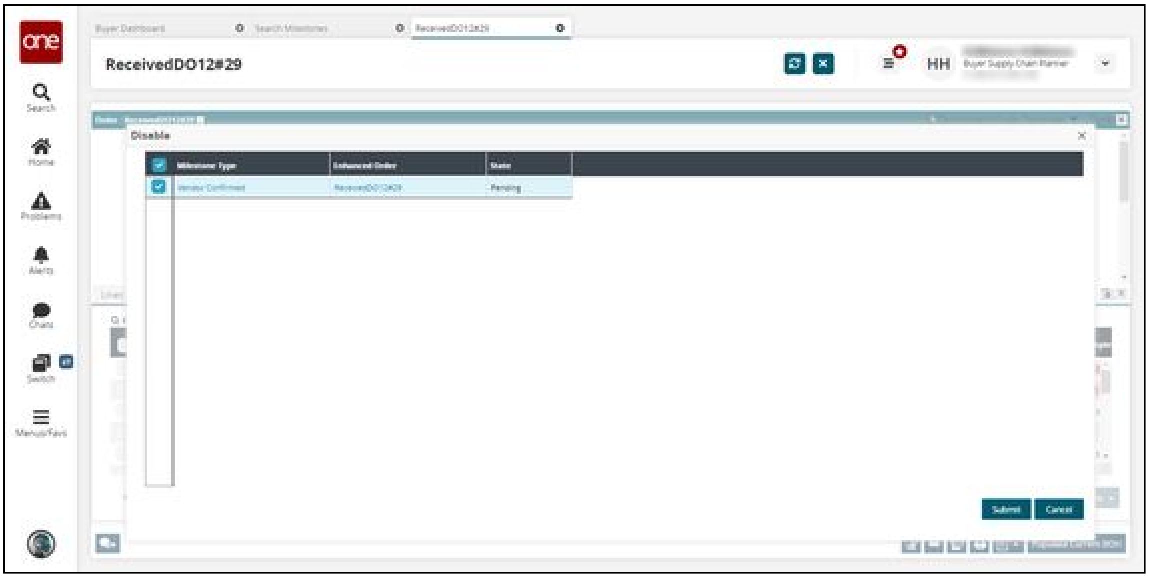
5. Select an **Order Number** link.
   The order details page appears.



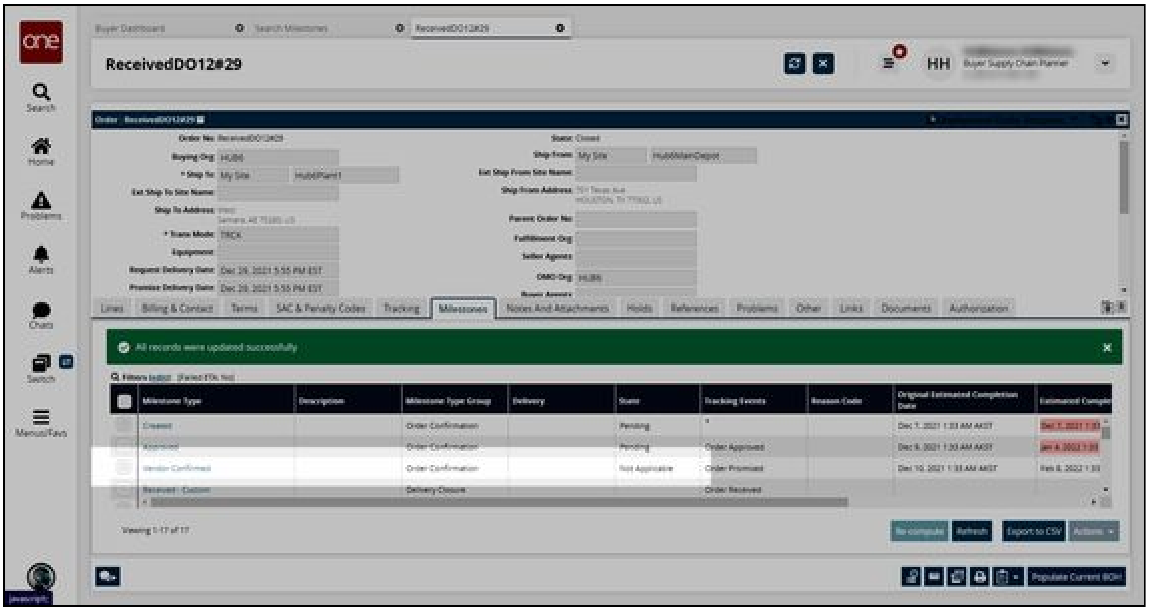
6. Click the **Milestones** tab.
   The Milestones tab appears.
7. Select a Pending state milestone and then click **Actions > Disable**.



The Disable popup appears.

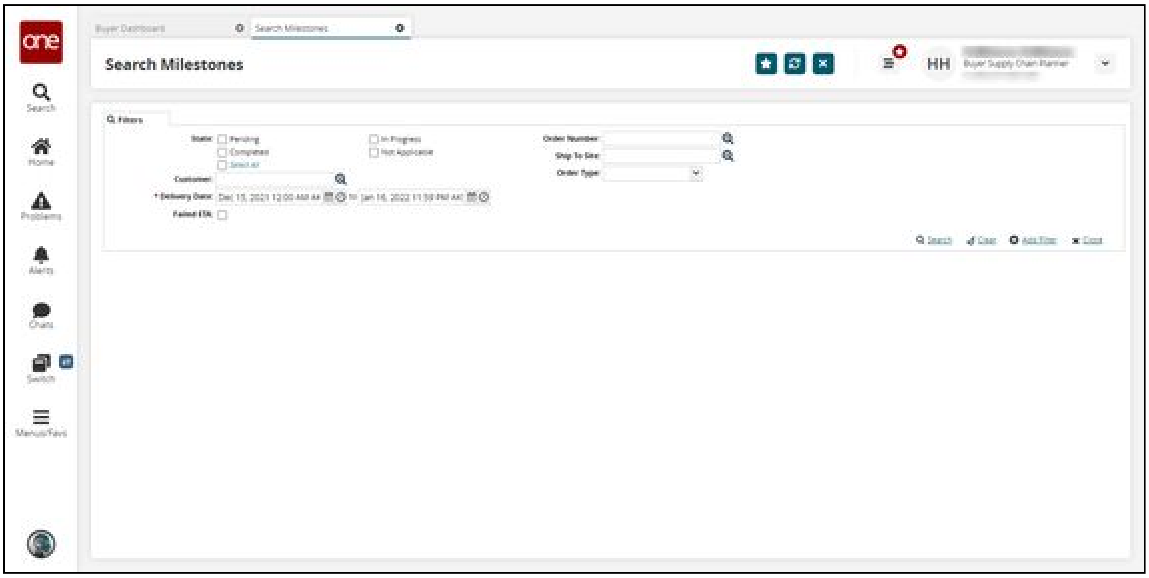


8. Click **Submit**.
   A success message appears and the specified milestone changes to the Not Applicable state.



Complete the following steps to update a reason code for order milestones:

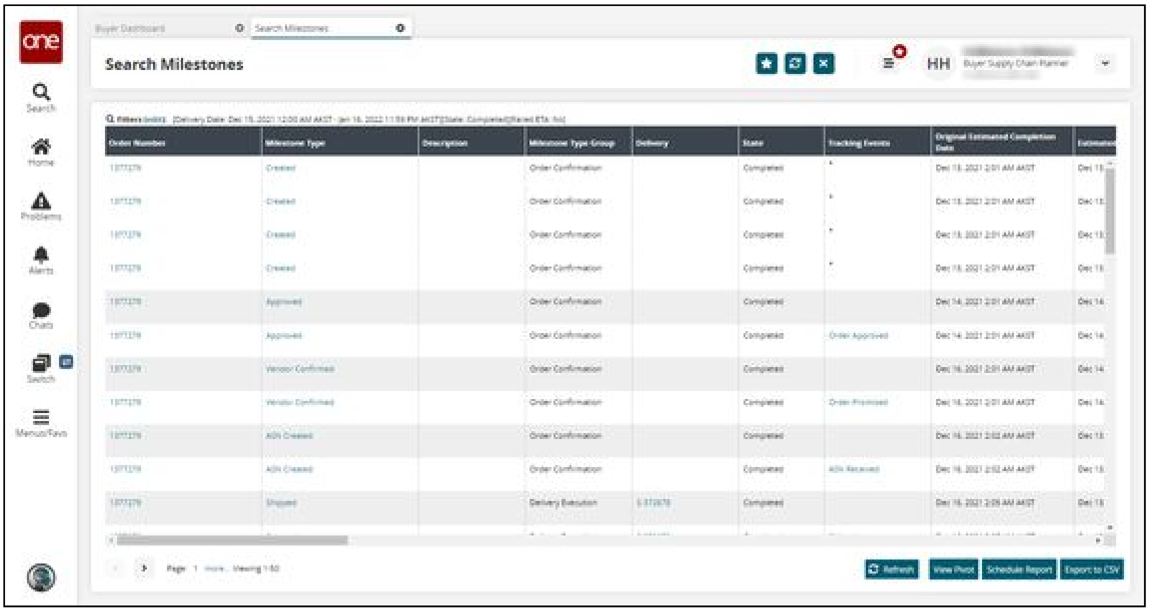
1. Log in to the ONE system as a Buyer Supply Chain Planner, a Vendor Supply Chain Planner, or an Orchestrator.
2. Click **Menu/Favs > Reports > Milestones > Search Milestones**.
   The Search Milestones screen appears with the filters displayed.



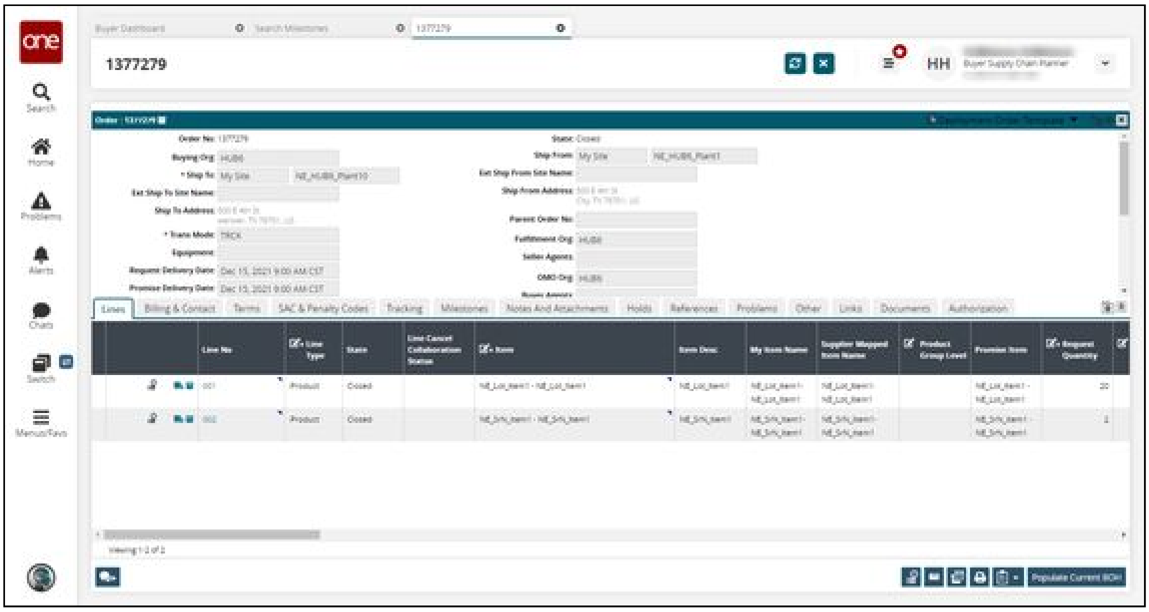
3. Fill out the following fields. Fields with an asterisk (*) are required.

Field	Description
State	Select the states you wish to view. To disable a milestone, select **Completed**.
Customer	Select a customer using the picker tool.
*Delivery Date	Select a delivery date range using the calendar and clock buttons.
Failed ETA	Select this checkbox to see milestones that did not hit their ETA.
Order Number	Select an order number using the picker tool.
Ship To Site	Select a ship to site using the picker tool.
Order Type	Select an order type using the dropdown menu.

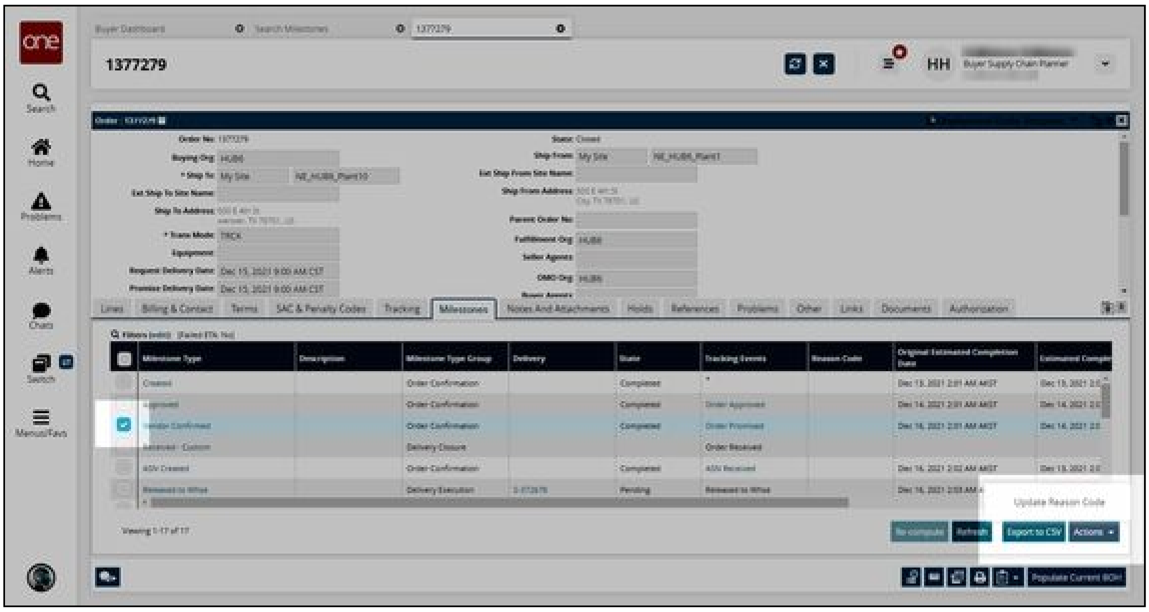
4. Click **Search**.
   The search results appear.



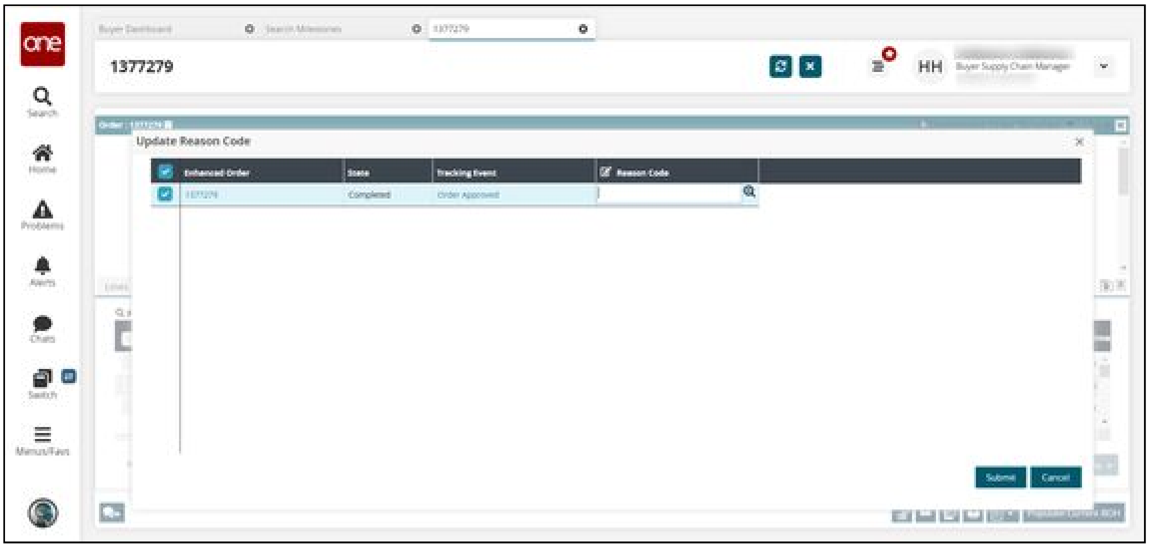
5. In the **Order Number** column, click an **Order Number** link.
   The order details page appears.



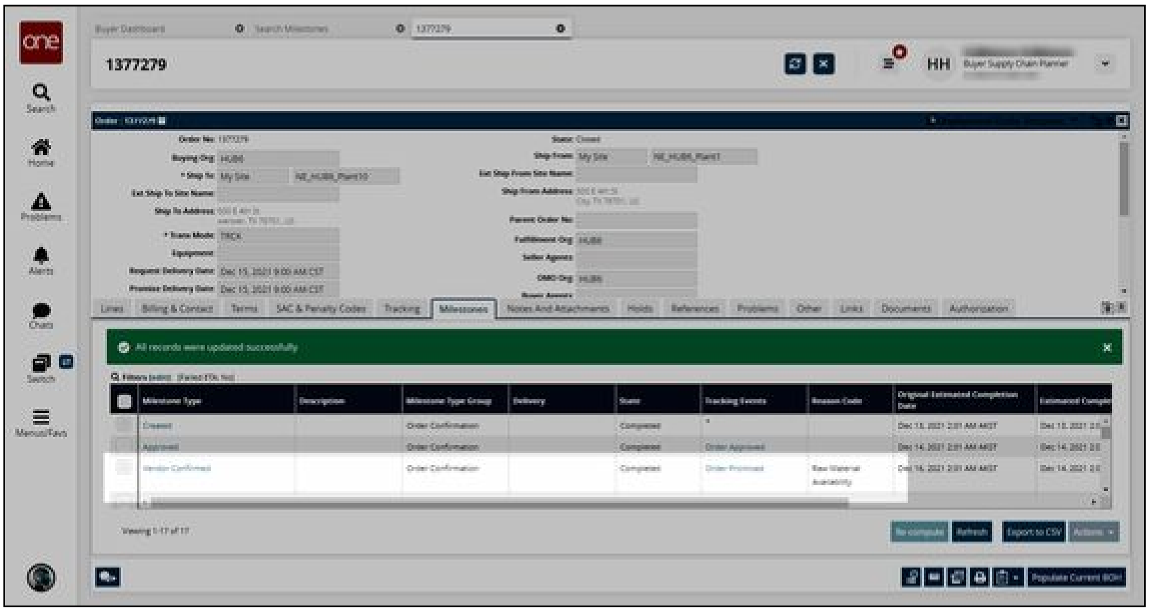
6. Click the **Milestones** tab.
   The Milestones tab appears.
7. Select a Completed state milestone and then click **Actions > Update Reason Code**.



The Update Reason Code popup appears.



8. In the **Reason Code** column, enter a new **Reason Code** or click the picker tool to select a **Reason Code**.
9. Click **Submit**.
   A success message appears and the Reason Code for the specified milestone is updated.



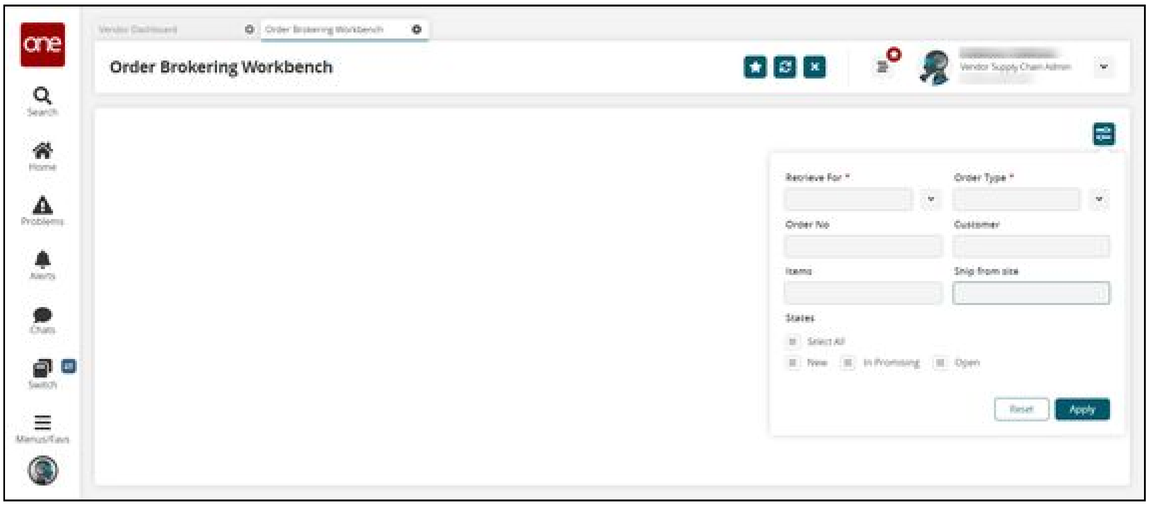
See the "Add Reason Codes for Failed Order Milestones" section in the current version of the *Release Notes* for more information.

2.8.9 Order Brokering Workbench

Complete the following steps to access the Order Brokering Workbench:

1. Log in to the ONE system in a Vendor role.
2. Click **Menu/Favs > Order Mgmt > Workbenches > Order Brokering Workbench**.
   The Order Brokering Workbench appears with the filter options displayed. If the

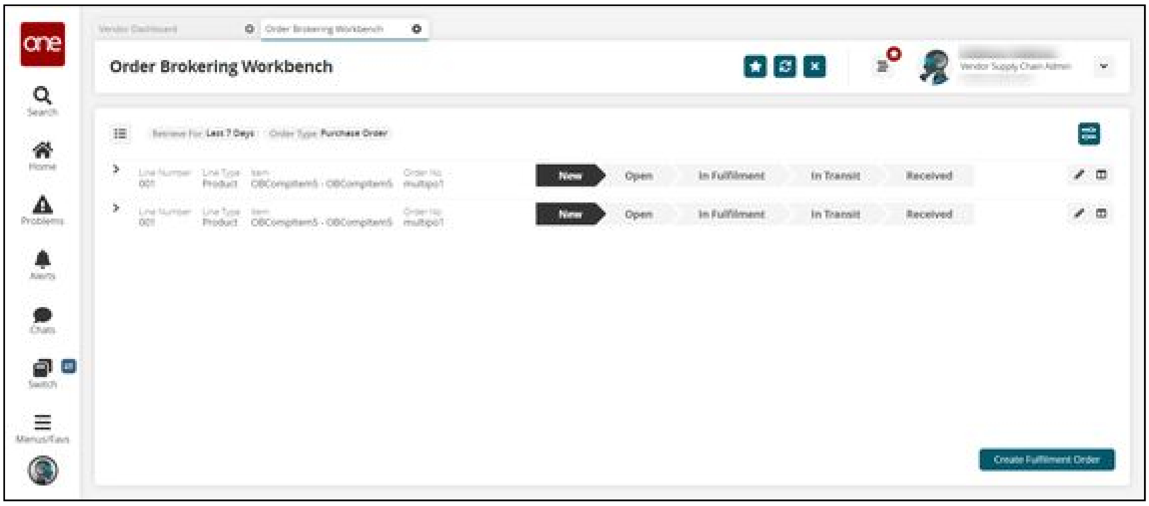
filter options are not visible, click the icon at the top right corner of the workbench to display the filters at any time.



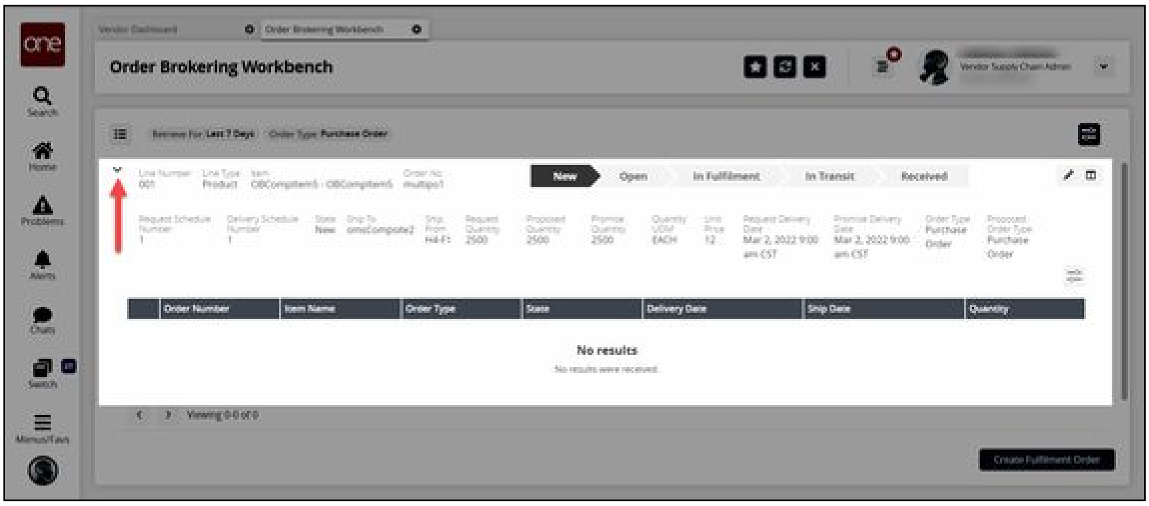
3. Fill out the following fields. Fields with an asterisk (*) are required.

Field Name	Description
*Retrieve For	From the dropdown list, select the time period for which you want to retrieve orders.
Order No	Enter the order number. Begin typing and select the items from the matching results that appear below the field.
Items	Enter the items you want to view in the workbench. Begin typing and select the items from the matching results that appear below the field.
States	Click the checkboxes for the states of the orders you want to view in the workbench.
*Order Type	From the dropdown list, select the order type you want to view in the workbench.
Customer	Enter the customer. Begin typing and select the items from the matching results that appear below the field.
Ship From Site	Enter the Ship From site. Begin typing and select the items from the matching results that appear below the field.

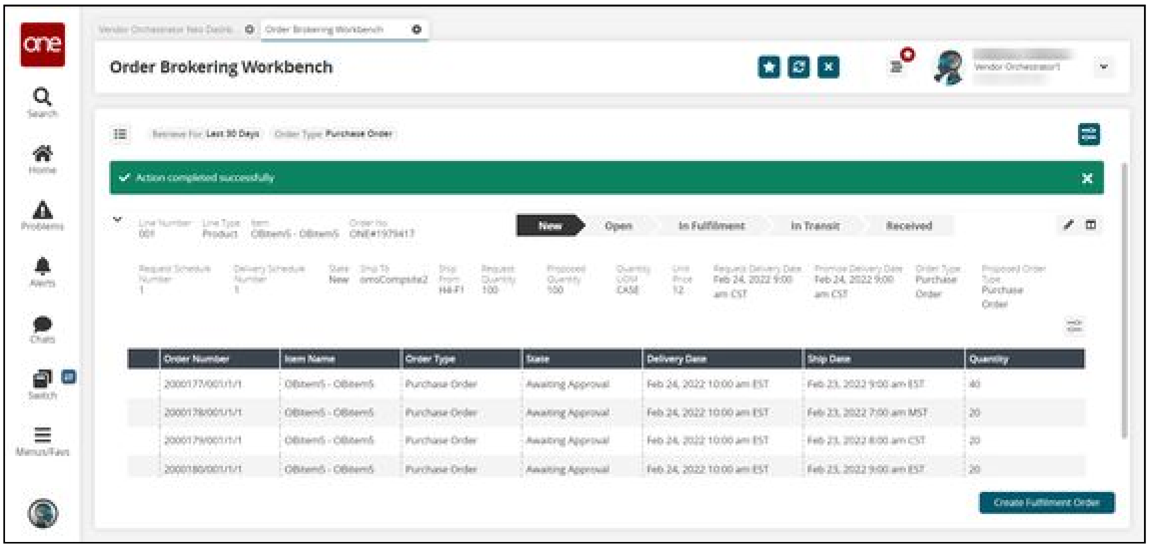
4. Click **Apply**.
   The Order Brokering Workbench appears with orders that match the selected criteria.



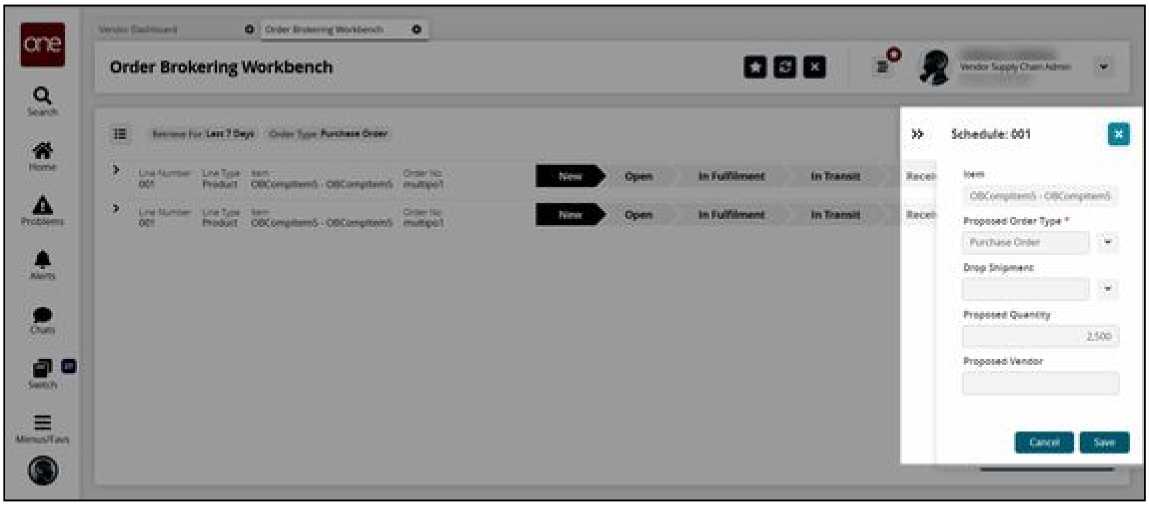
5. Click the arrow on the left to expand information about a line.



6. Click the **Create Fulfillment Order** button to create fulfillment orders.
   A green success message appears, and the new fulfillment orders are displayed below the order line.



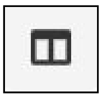
7. Click the pencil icon to edit the schedule for a line.
   The schedule slideout appears.

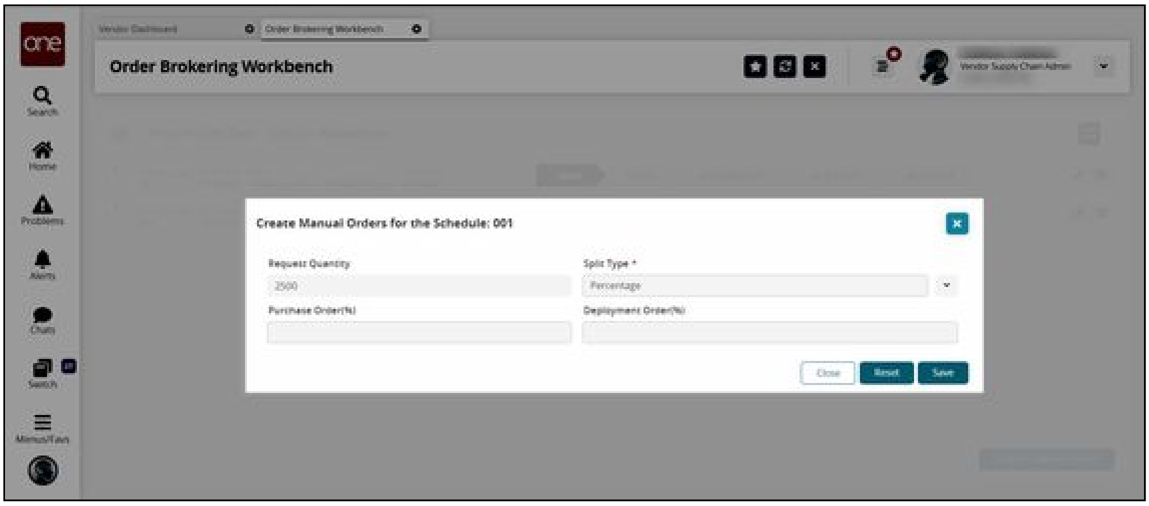


8. On the schedule slideout, fill out the following fields if you wish to edit the schedule. Fields with an asterisk (*) are required.

Field	Description
Item	This field is automatically populated.
*Proposed Order Type	Select the proposed order type from the dropdown list.
Drop Shipment	Select YES or NO to mark whether this order as a drop shipment.
Proposed Quantity	Enter the proposed quantity change.
Proposed Vendor	Enter the proposed vendor change.

9. Click the **Save** button to save changes to the schedule.
   The slideout closes.

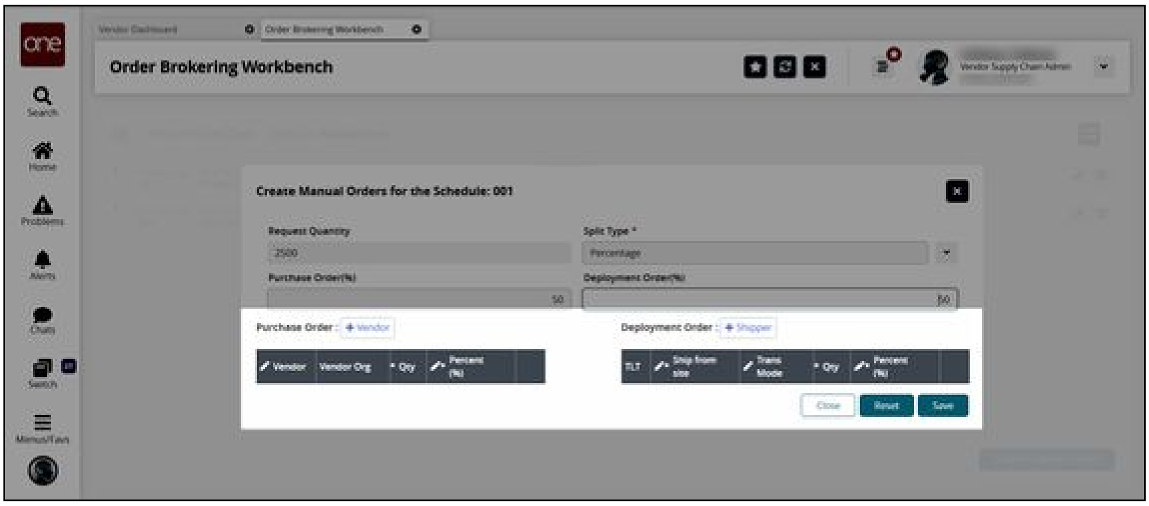
10. Click the  icon to open the popup window to manually create orders for the schedule.
    The Create Manual Orders for the Schedule popup window displays.



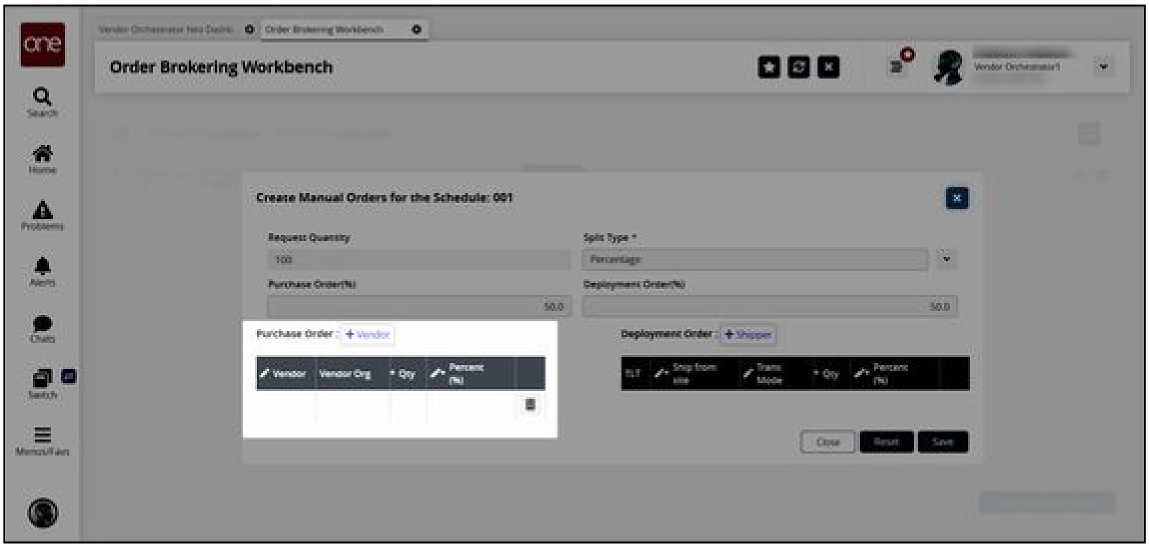
11. Fill out the following fields to create manual orders. Fields with an asterisk (*) are required.

Field	Description
Request Quantity	This field is populated automatically.
*Split Type	Select the split type from the dropdown list. The options are percentage and absolute. The selection determines the labels for the remaining two fields.
Purchase Order (%) or PO Qty	Enter the purchase order percentage or quantity.
Deployment Order (%) or DO Qty	Enter the deployment order percentage or quantity.

When the Purchase Order (%) or PO Qty and the Deployment Order (%) or DO Qty fields are completed, the Purchase Order and Deployment Order sections display.



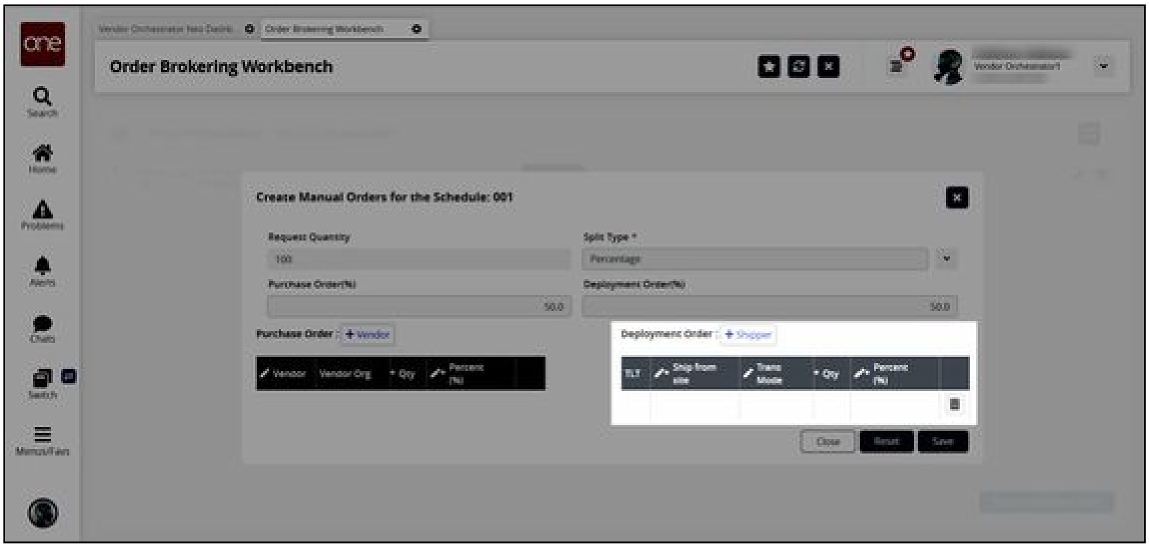
12. In the **Purchase Order** section, click **+Vendor.**
    A new row appears.



13. Fill in the following fields. Fields with an asterisk (*) are required.

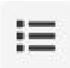
Field	Description
Vendor	Begin typing the vendor name and select from the results that appear below the field.
Vendor Org	This field is populated based on the vendor selected.
*Qty	Enter a quantity.
*Percent (%)	Enter a percent.

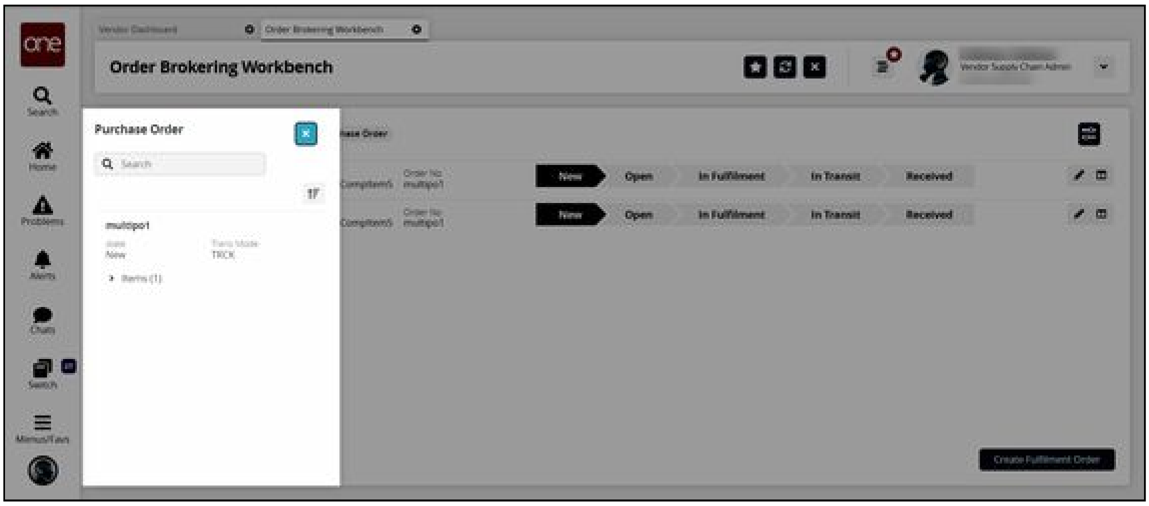
14. In the **Deployment Order** section, click **+Shipper.**
    A new row appears.



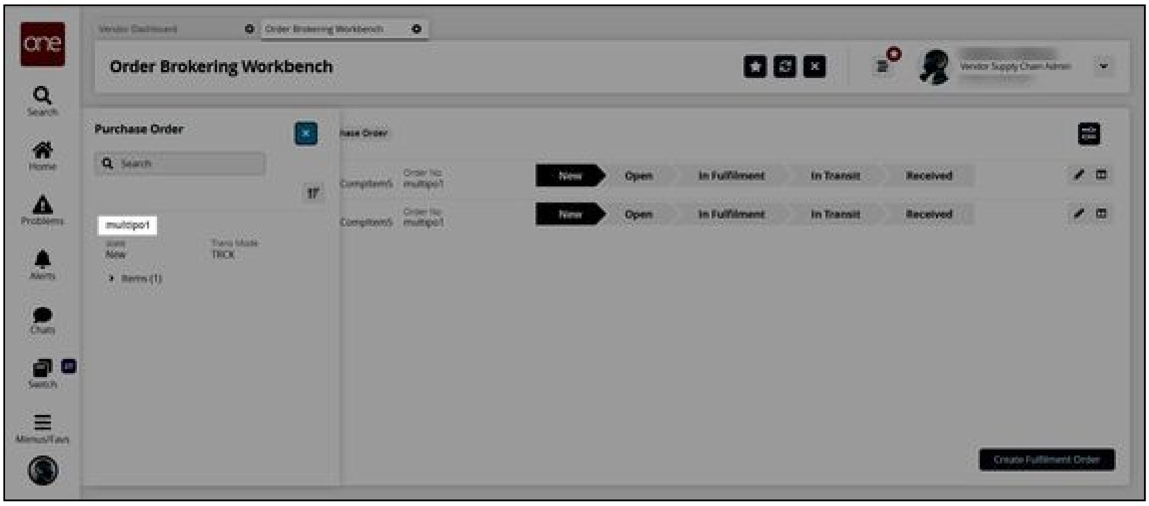
15. Fill in the following fields. Fields with an asterisk (*) are required.

Field	Description
*Ship from site	Begin typing the Ship From site and select from the results that appear below the field.
Trans Mode	Begin typing the transportation mode and select from the results that appear below the field.
*Qty	Enter a quantity.
*Percent (%)	Enter a percent.

16. Add additional vendors and shippers as desired.
17. Click the trash icon to remove a vendor or shipper.
18. Click the **Save** button to save your changes and return to the Order Brokering Workbench.
19. Click the  icon in the top left corner to view the searchable slideout. The searchable slideout appears.



20. In the **Search** field, enter a value to find a specific order in the workbench.
21. In the results on the slideout, click the order number.



The selected order displays in the Order Brokering Workbench.

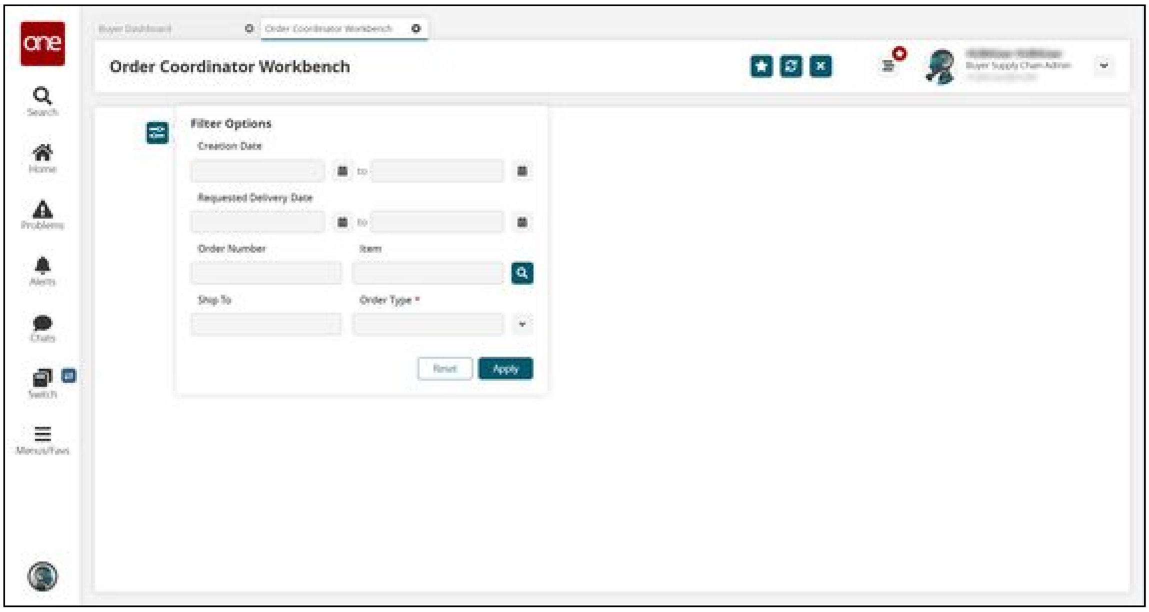
See the "Order Brokering Workbench" section in the current version of the *Release Notes* for more information.

2.8.10 Order Coordinator Workbench

With the Order Coordinator Workbench, buyer users can view a graphic display of details and the current status of the purchase, deployment, and sales orders in one convenient location.

Complete the following steps to access the Order Coordinator Workbench:

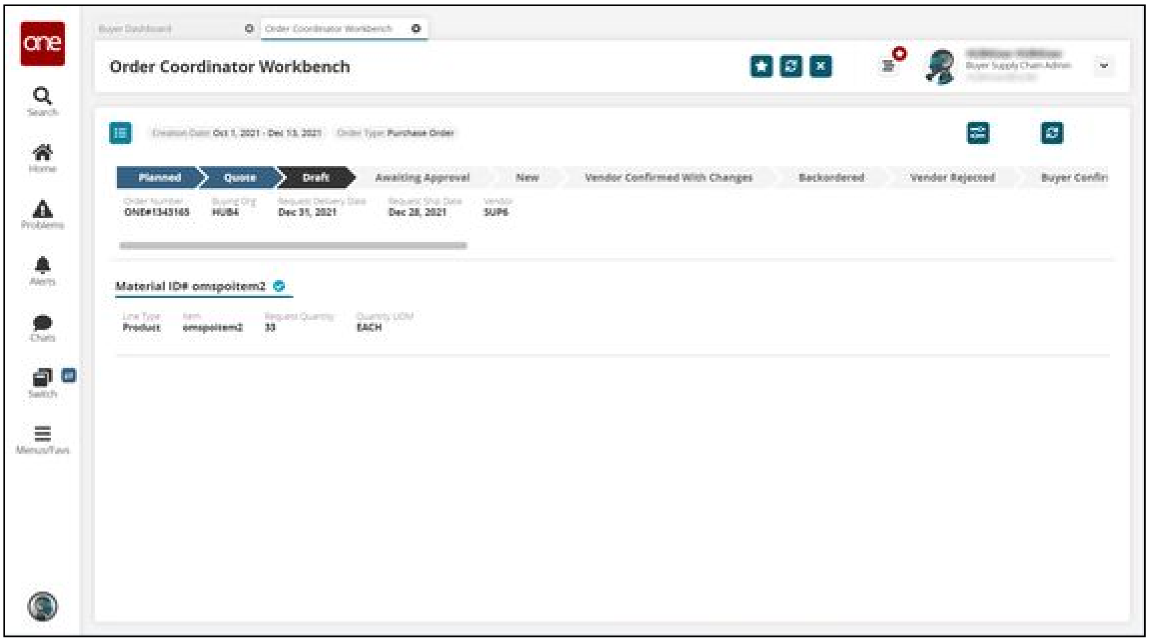
1. Log in to the ONE system.
2. Click **Menu/Favs > Order Mgmt > Workbenches > Order Coordinator Workbench**. The Order Coordinator Workbench appears with the Filter Options displayed. If the Filter Options are not visible, click the icon at the top left corner of the workbench to display the filters.



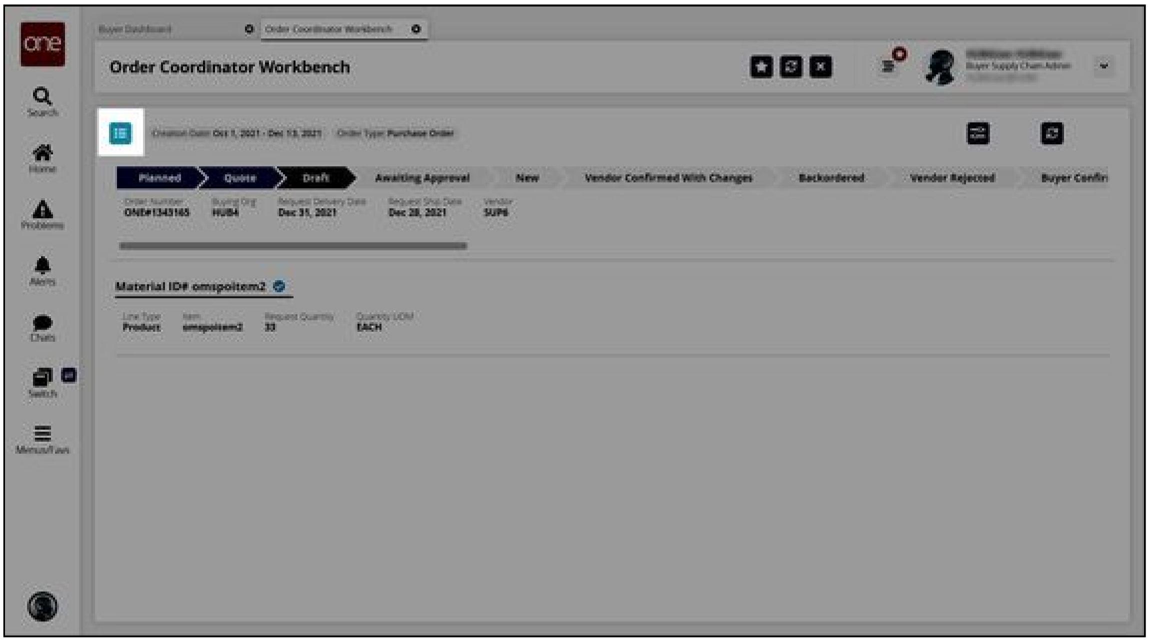
3. Fill out the following fields. Fields with an asterisk (*) are required.

Field Name	Description
Creation Date	Click the calendar icons to select the creation date range of the orders you wish to view in the workbench.
Requested Delivery Date	Click the calendar icons to select the requested delivery date range of the orders you wish to view in the workbench.
Order Number	Enter the order number to search for a specific order.
Item	Begin typing the item and select from the matches that appear below the field or click the search icon to bring up a list of items.
Ship To	Begin typing the Ship To location and select from the matches that appear below the field.
*Order Type	Click the arrow beside the field and select an order type.

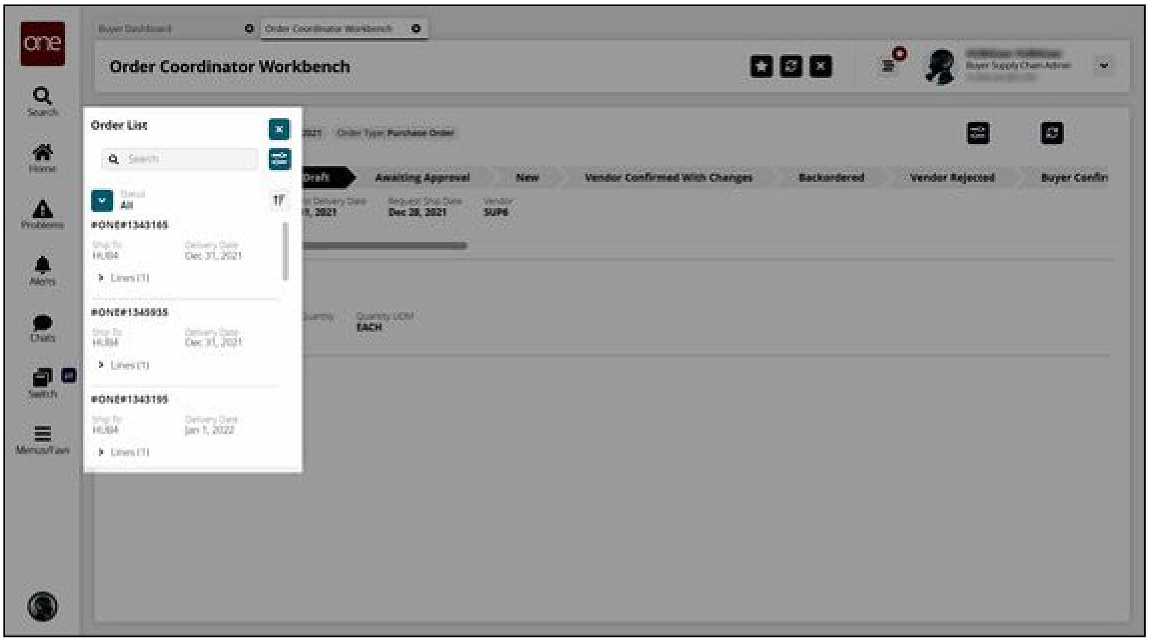
4. Click **Apply**.
The Order Coordinator Workbench displays an order matching the selected criteria.



5. To view a different order in the workbench, click the icon in the top left corner of the workbench.



The Order List of orders matching the filter criteria appears.



6. From the **Order List**, click the order number for the order you wish to view in the workbench.
   The Order List closes, and the selected order and its details are visible in the workbench.
7. From the workbench, the user can view details and track orders in the following states:
   Create Order Workflow States
   - Awaiting Approval
   - Draft
   - New

   Collaboration Workflow States
   - Open
   - Vendor Confirmed with Changes
   - Buyer Confirmed with Changes

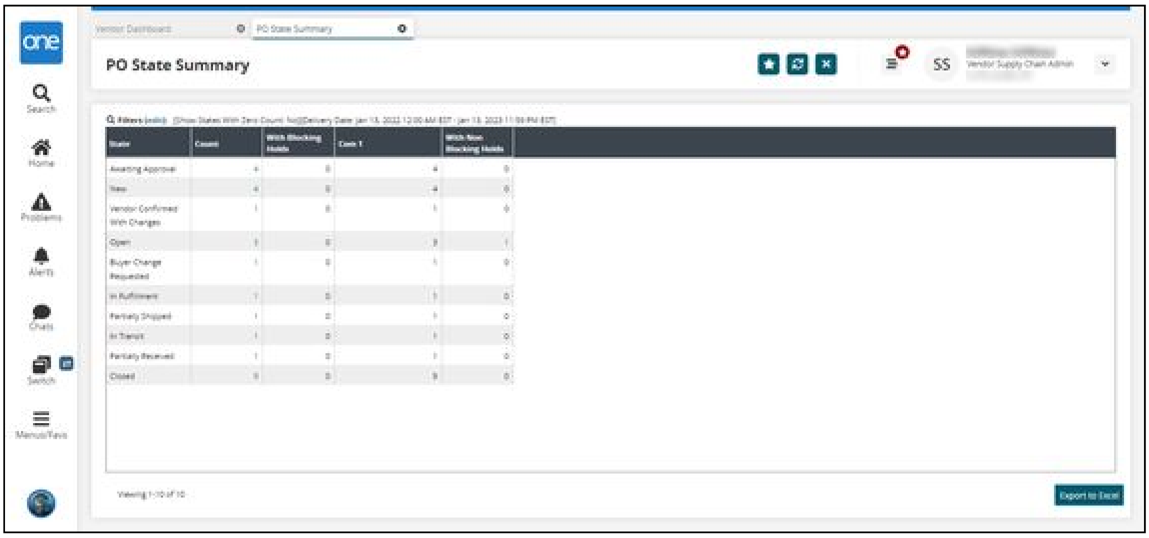
See the "Order Coordinator Workbench" section in the current version of the *Release Notes* for more information.

2.8.11 Providing a Backorder Reason Code For Orders

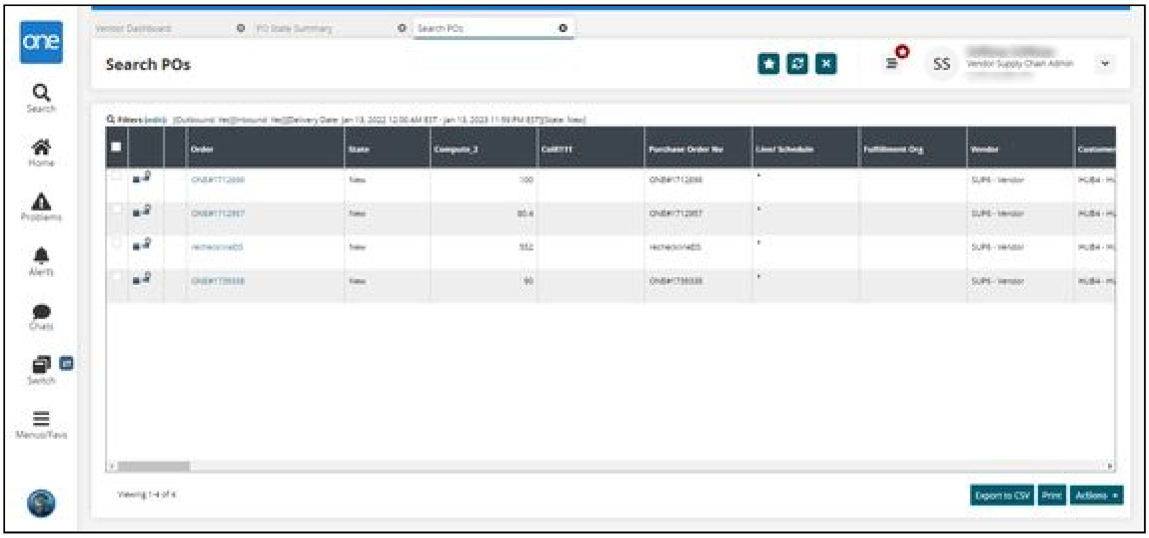
When an order is placed on backorder, vendor users can optionally provide a reason code for the backorder after a backorder quantity is provided; the available backorder reason codes are dynamic and can be defined by customers through integration uploads. Because the Reason for Back Order field is optional and user-configurable, no validation is included on the field. If the provided reason code conflicts with any other reason code, the system prompts the user to clarify the overlap. Note that this enhancement does not involve updating the state of the order, only a field associated with the order.

Complete the following steps to provide a backorder reason code for purchase orders, deployment orders, or sales orders:

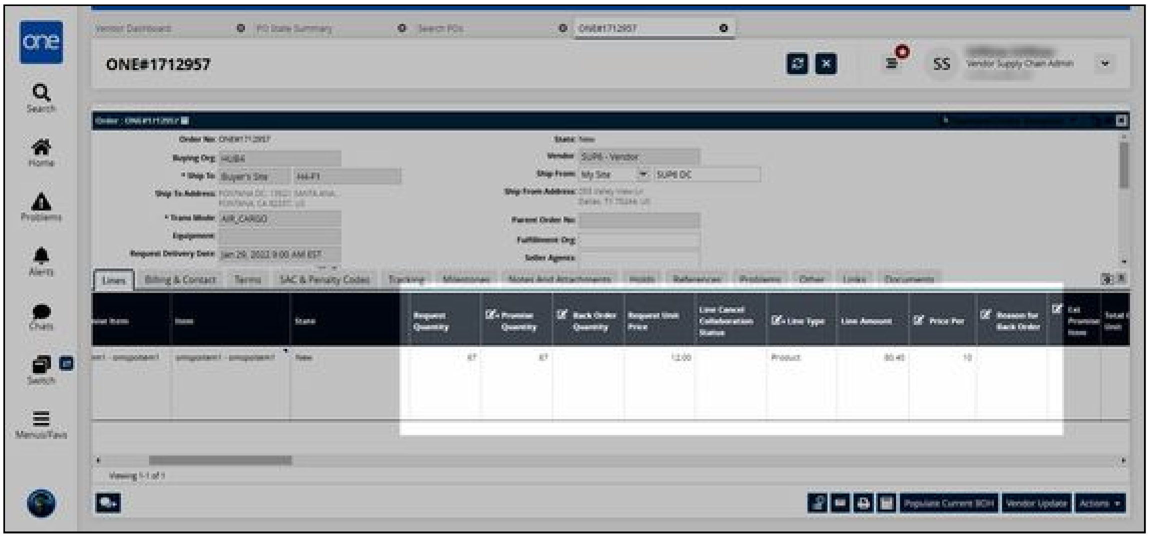
1. Log in to the ONE system as a Vendor Supply Chain Admin.
2. Click **Menu/Favs > Order Mgmt > Purchase Order > PO State Summary**. Note that the following process is identical for deployment orders and sales orders.
   The PO State Summary screen appears. If the screen displays with the filters open, enter values in the filter fields if desired and click the Search link. To view all purchase orders (POs), click the Search link.



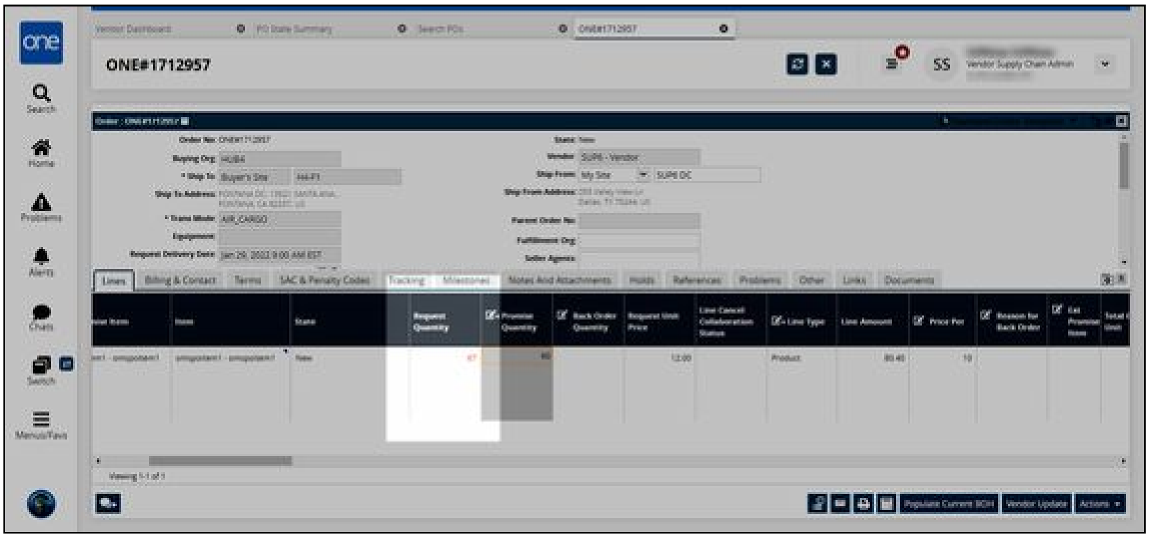
3. In the **Count** column, click the **Count** link for New state orders.
   The Search POs screen appears displaying all available New state POs.



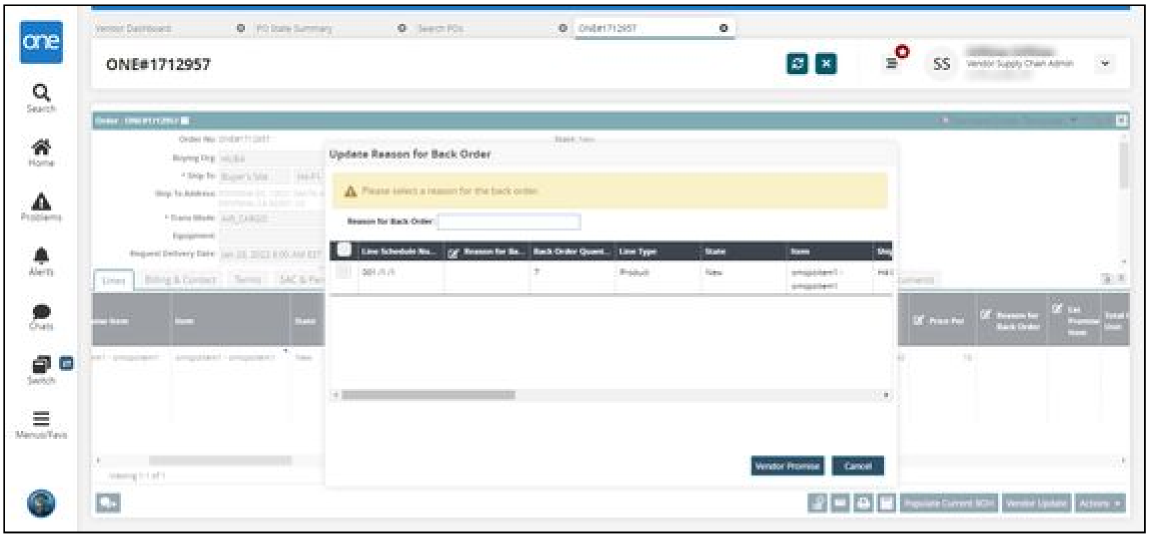
4. Click an **Order** link.
   The order details screen appears with the Lines tab visible. Take note of the Request Quantity, Promise Quantity, Back Order Quantity, and Reason for Back Order fields.



5. Modify the **Promise Quantity** to less than the current value. In this example, we will change it to **60**. Note that changing the value to anything less than 67 means the vendor cannot promise the full requested quantity.
   The Request Quantity field turns red, denoting a mismatch.



6. In the **Back Order Quantity** field, input the number of items that will be backordered. In this example, we will input **7**.
7. Click **Actions > Vendor Promise**.
   The Update Reason Code for Back Order popup appears.



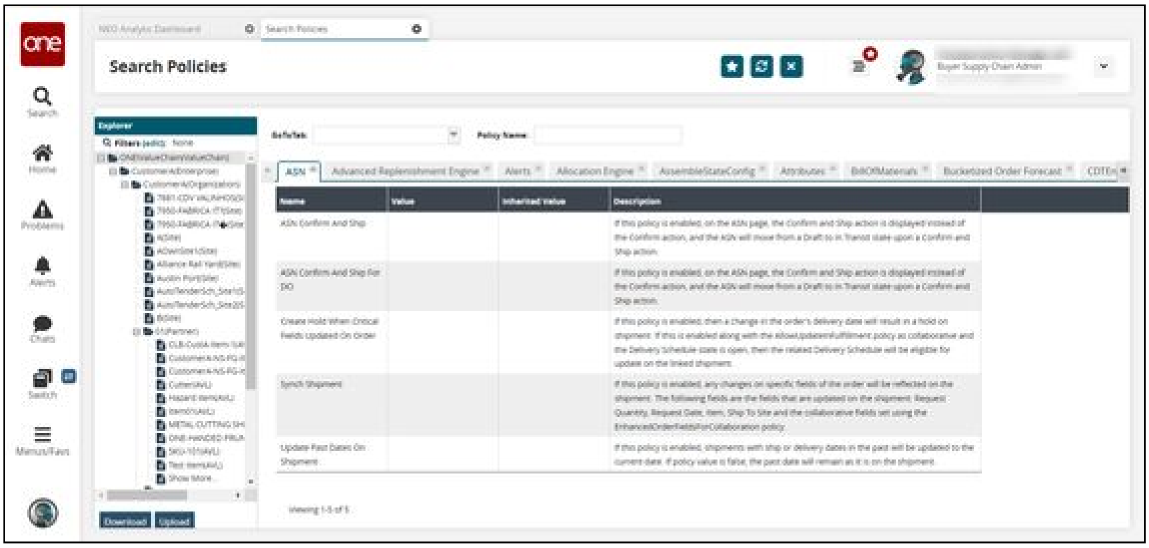
8. In the **Reason for Back Order** field, enter a backorder reason by using the down arrow on your keyboard to view available options.
9. Select the line(s) to apply the backorder reason code to and then click the **Vendor Promise** button.
   A success message appears.

See the "Backorder Reason Code for POs, DOs, and SOs" section in the current version of the *Release Notes* for more information.

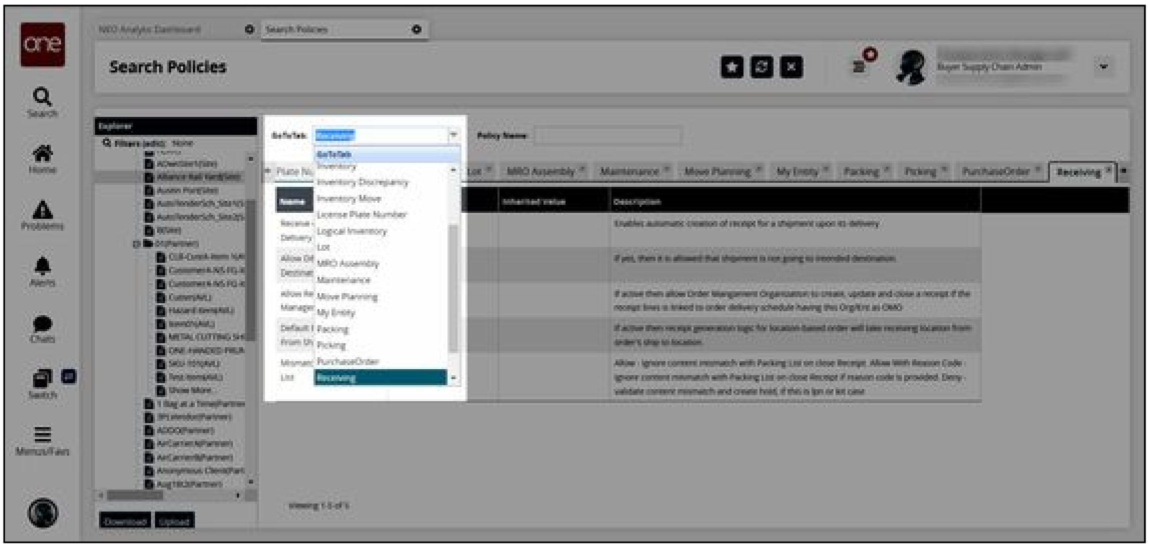
2.8.12 Setting the Allow Receiving For Order Management Organization Policy

Complete the following steps to set the Allow Receiving For Order Management Organization policy:

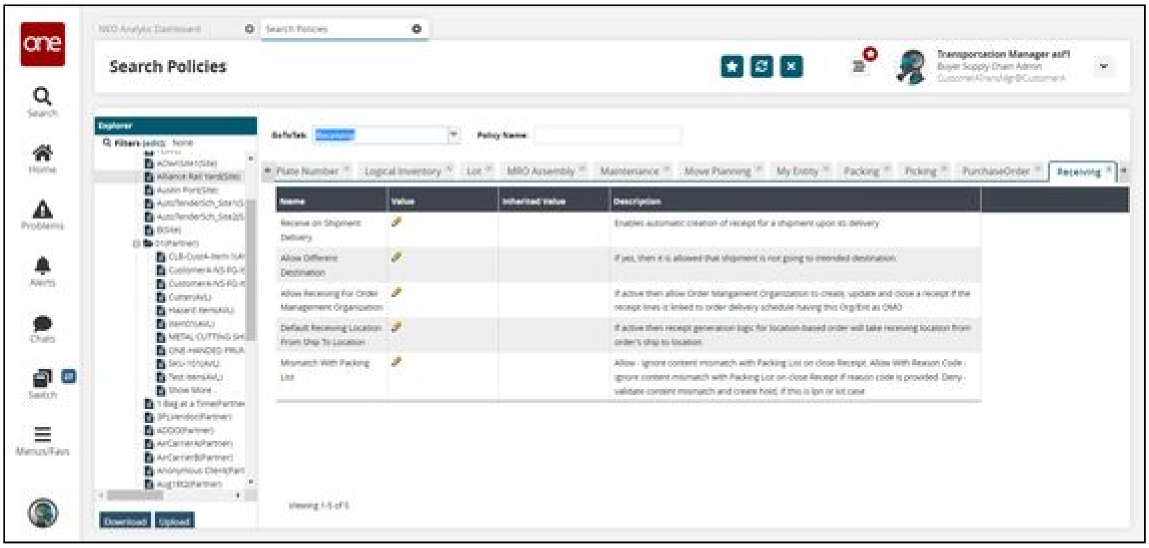
1. Log in to the ONE system.
2. Click **Menu/Favs > Administration > Search Policies**.
   The Search Policies screen appears.



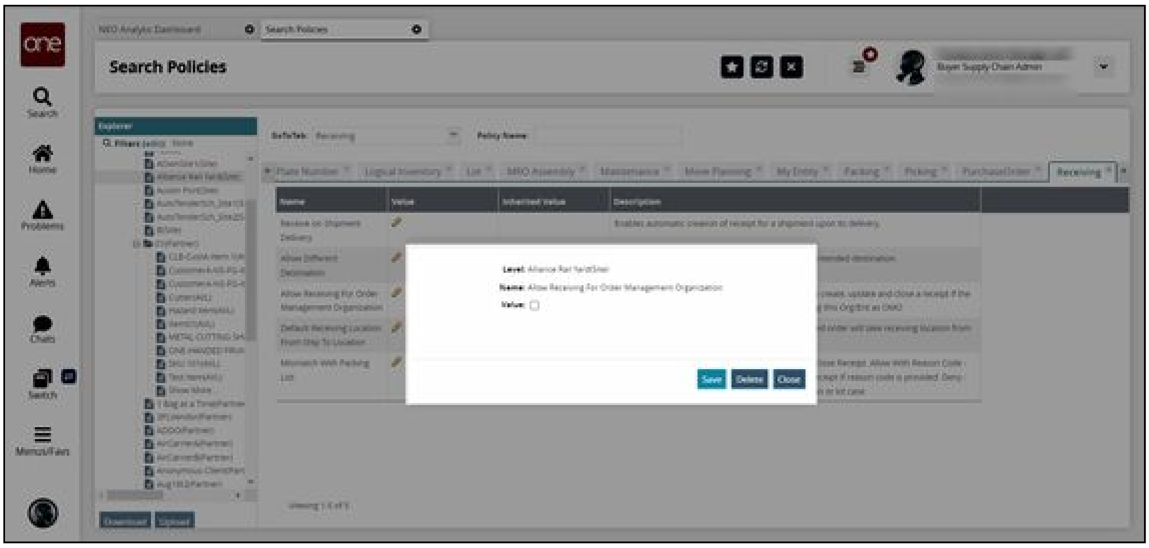
3. In the **Explorer** pane on the left, scroll to locate and click the name of the Order Management Organization (OMO) for whom you want to set the Allow Receiving For Order Management Organization policy. You can also click the **Filters (edit)** link to search for the desired organization.
4. In the **GoToTab** dropdown list, select **Receiving**.



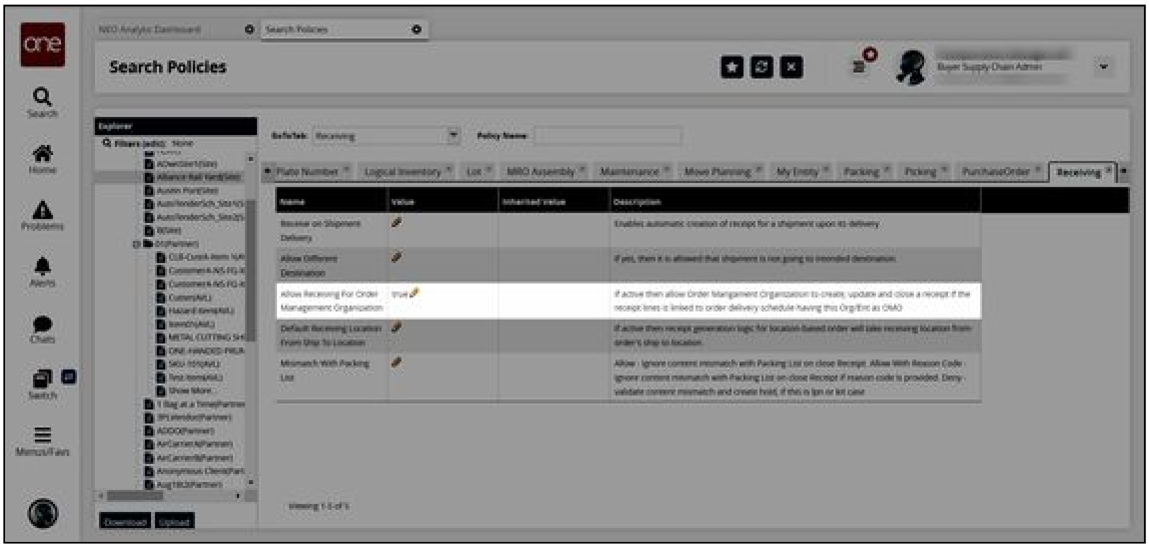
The Receiving policies tab appears.



5. In the **Value** column, click the pencil icon beside **Allow Receiving For Order Management Organization**.
   A popup window appears.



6. In the **Value** field, click the checkbox to enable the policy.
7. Click the **Save** button.
   The screen refreshes with the value for the Allow Receiving For Order Management Organization policy updated.



See the "New Policy Allowing Order Management Organizations to Create, Update, and Close Receipts" section in the current version of the *Release Notes* for more information.

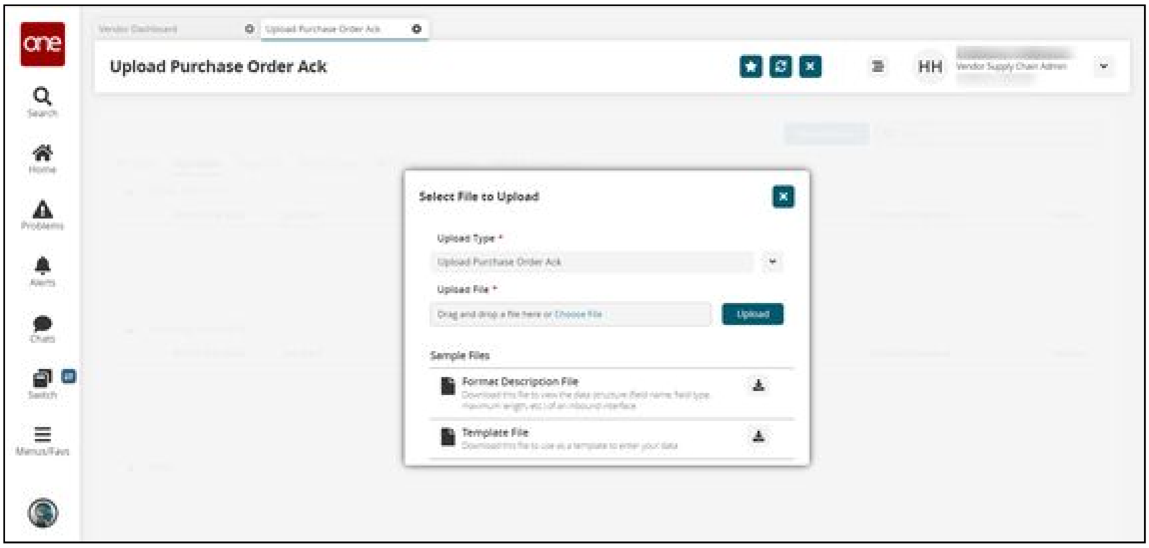
2.8.13 Uploading Cancellation Approvals and Rejections for Lines and Schedule Requests

Vendors can approve or reject line and request schedule cancellations by uploading order acknowledgment files for purchase orders (POs) or deployment orders (DOs) in CSV format.

> The following steps reflect the process for POs, but the process is the same for DOs. The path for DOs is Menu/Favs > Order Management > Upload > Upload Deployment Order Ack.

Complete the following steps to upload cancellation approvals or rejections for lines and request schedules:

1. Log in to the ONE system.
2. Click **Menu/Favs > Order Management > Upload > Upload Purchase Order Ack**.
   The Upload Purchase Order Ack screen appears with the Select File to Upload popup displayed.



3. Click the download icon for the **Template File.** You can also download the **Format Description File**, which gives you specific information about the data structure required for the file you upload, including field names, maximum length, etc. The Template File downloads to your computer.
4. Open the downloaded template file.
5. In the **Child Level Action** column, enter one of the following values for each line: OMS.ApproveCancelLineRequest, OMS.RejectCancelLineRequest, OMS.RejectCancelRequestScheduleRequest, or OMS.ApproveCancelRequestScheduleRequest.
6. Complete the information in the other columns in the template file as desired. Download the **Format Description File** for more information on the columns.
7. Save the file.
8. Click the **Choose File** link for the ***Upload File** field.
9. Select the file from the user's computer.
10. Click the **Upload** button.
    The file is uploaded and the Upload Purchase Order Ack screen appears.

See the "Cancel Collaboration for Vendors via Integration for Lines and Request Schedules" section in the current version of the *Release Notes* for more information.

2.8.14 Viewing Additional Item Characteristics on Order Details Screens

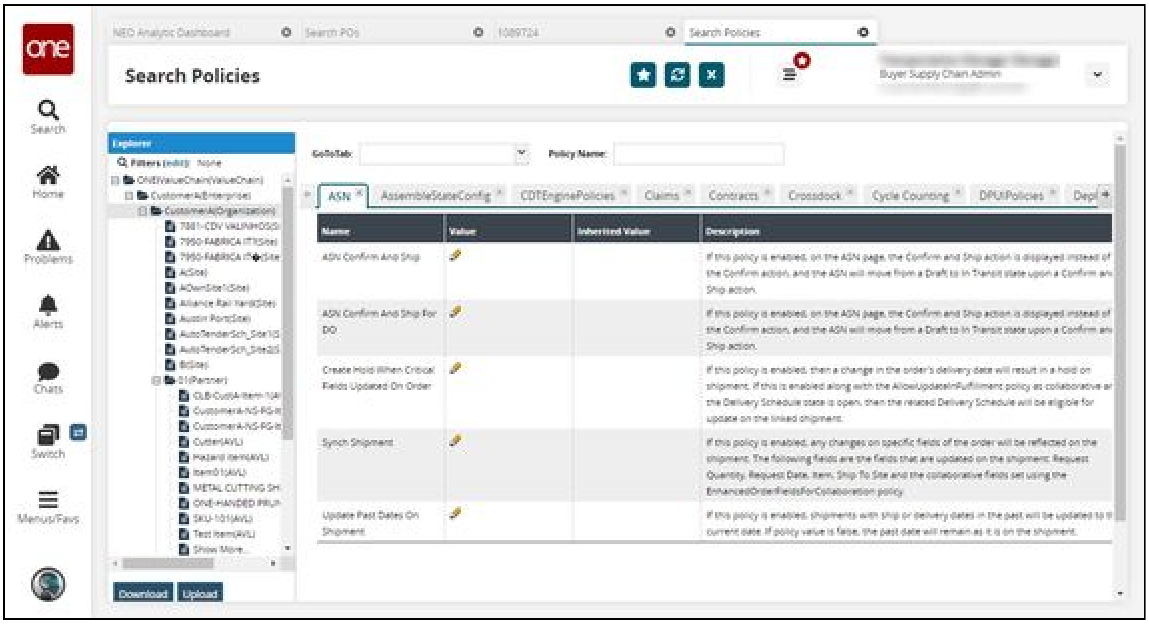
Users can view more item characteristics on order detail pages for purchase orders, deployment orders, and sales orders. An order typically only includes the item name and a brief item description; now users can add more information such as color, fabric details, original manufacturer, and so on. Users can specify any number of additional item characteristics.

To facilitate this, the Item Info Attributes policy is available on the Purchase Order, Deployment Order, and Sales Order tabs of the Search Policies UI. When enabling these policies, users can specify any number of item attributes, and those selected attributes will appear on the Item Info popup. After enabling the policy, the Item Info menu option is visible on order details pages. Item characteristics are not editable in the popup; to edit specific item values, do so from the relevant item details screen. Note the popup is not visible for orders that are not yet saved.

All roles that can update policies at the organization level can configure the Item Info Attributes policies, and all roles that can open orders can access the Item Info popup. With this feature, users can get a better sense of what items are on the order without navigating to the item detail page.

Complete the following steps to configure the Item Info Attributes policy:

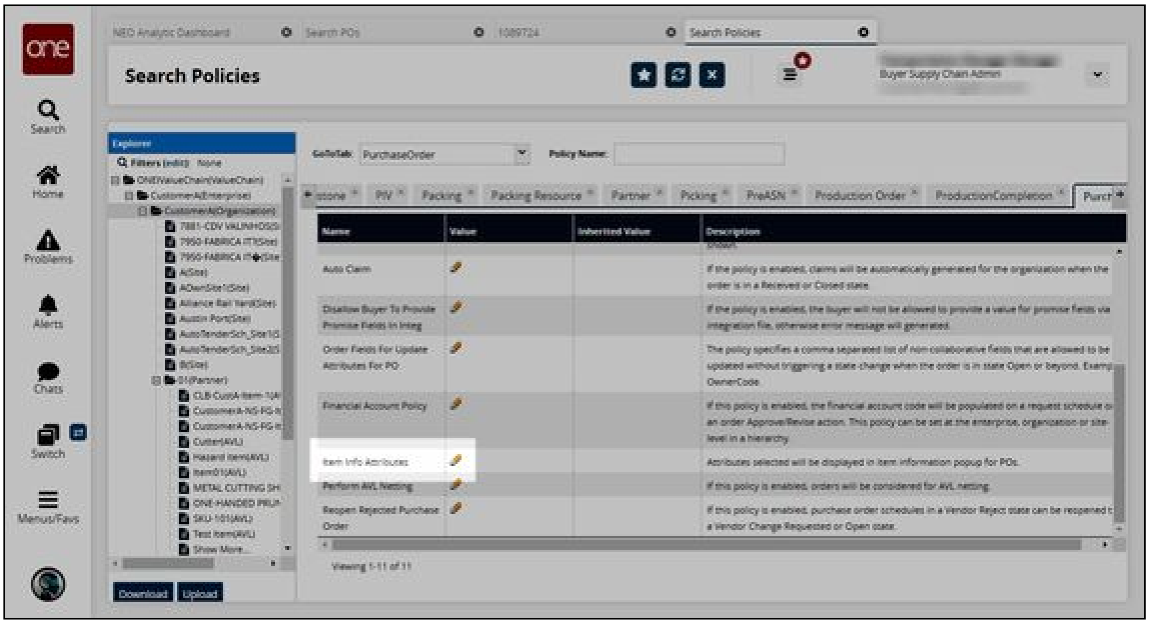
1. Log in to the ONE system.
2. Select **Menu/Favs > Administration > Search Policies**.
   The Search Policies screen appears.
3. In the **Explorer** pane on the left, navigate to the desired organization.
   The right pane updates.



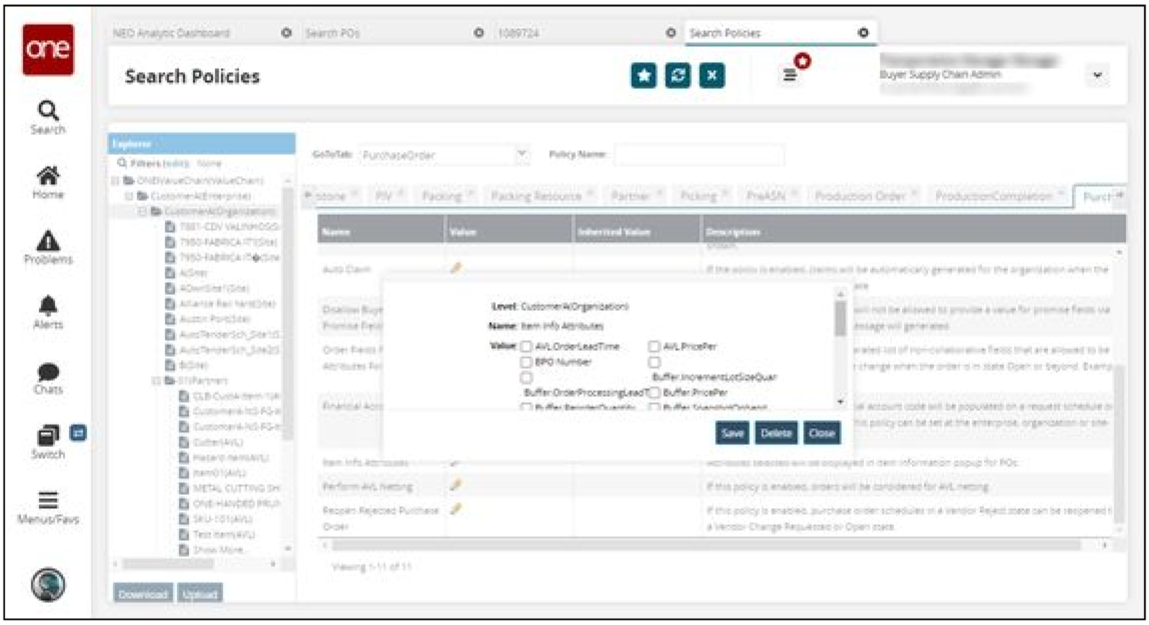
4. Use the **GoToTab** to go to the **Purchase Order** tab.
   The Purchase Order tab appears.

> The following workflow functions identically for sales orders and deployment orders, just begin on the Sales Order or Deployment Order tabs.

5. Find the **Item Info Attributes** policy and click the pencil icon.



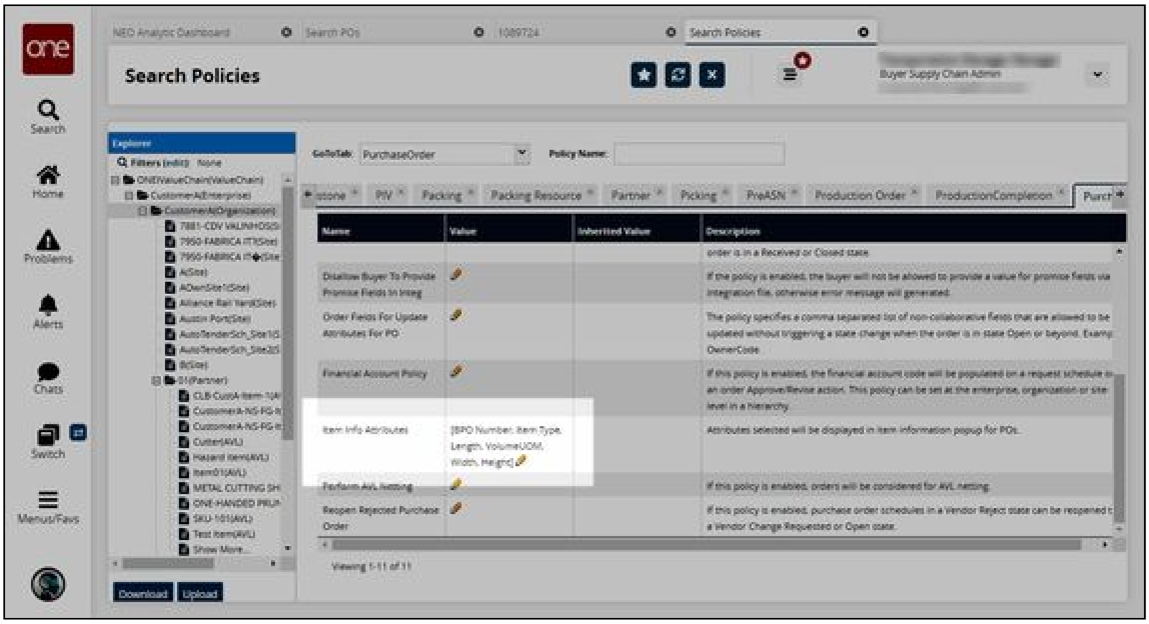
A popup appears.



6. In the **Value** field, select any item attributes you want to appear on the item info popup.

> To add more item attributes, please contact your ONE representative

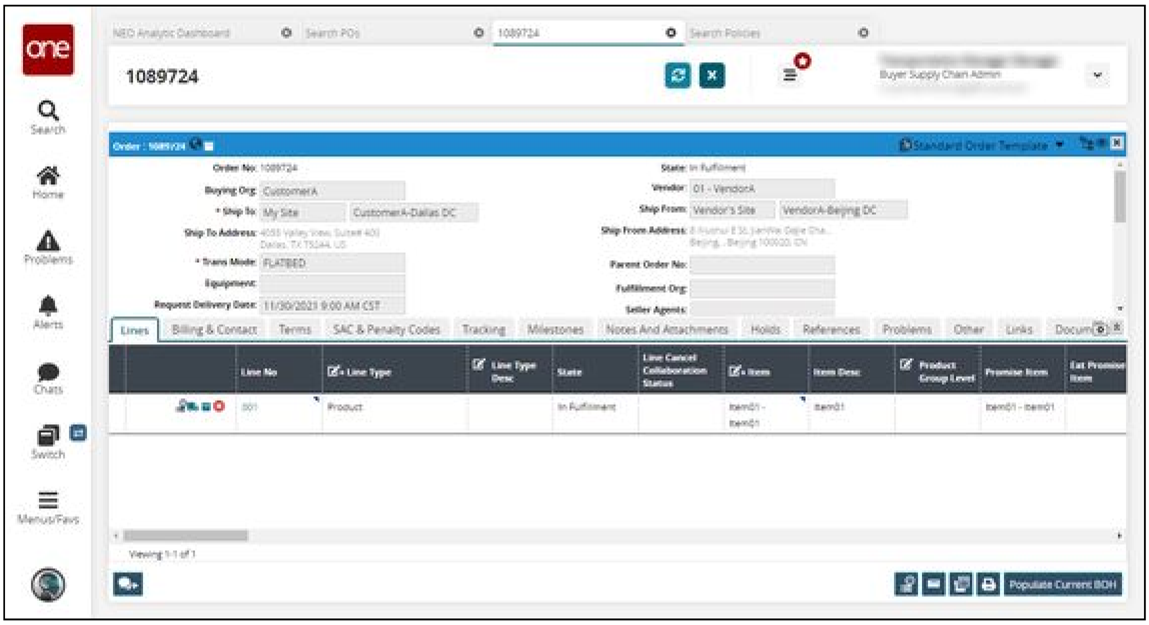
7. Click **Save**.
   The selected values appear in the table.



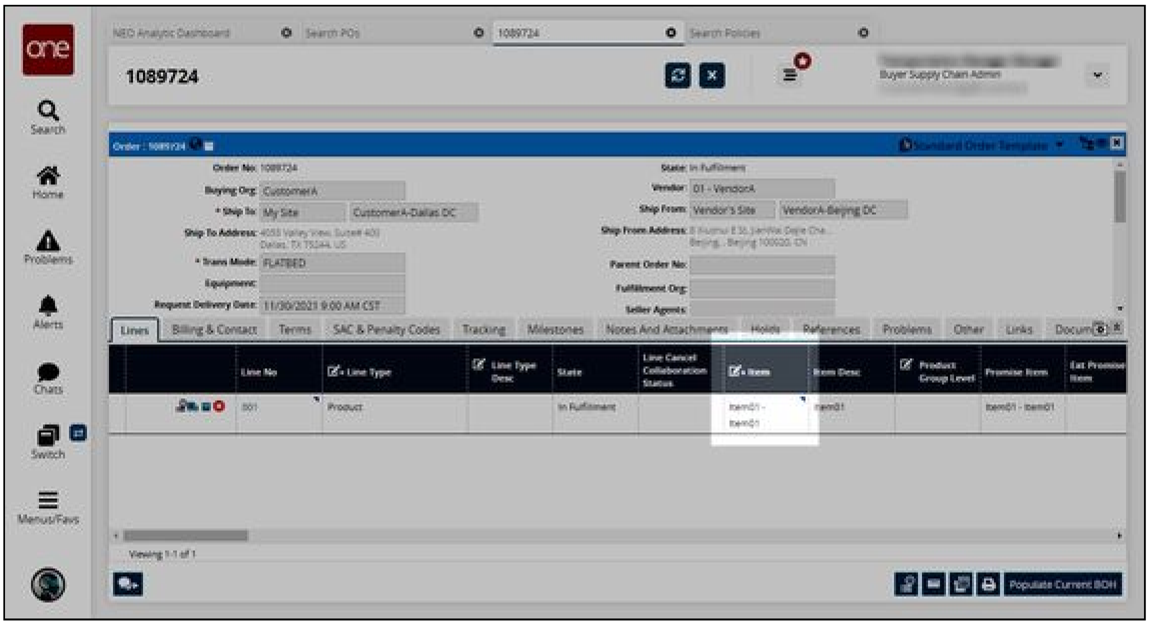
Complete the following steps to use the Item Info popup:

> The following workflow describes the process for purchase orders but functions identically for sales orders and deployment orders as long as the corresponding policy is enabled.

1. Log in to the ONE system.
2. Search for the desired purchase order. See the "Searching Purchase Orders" section of the *Online Help* for more information.
   The purchase order details screen appears.

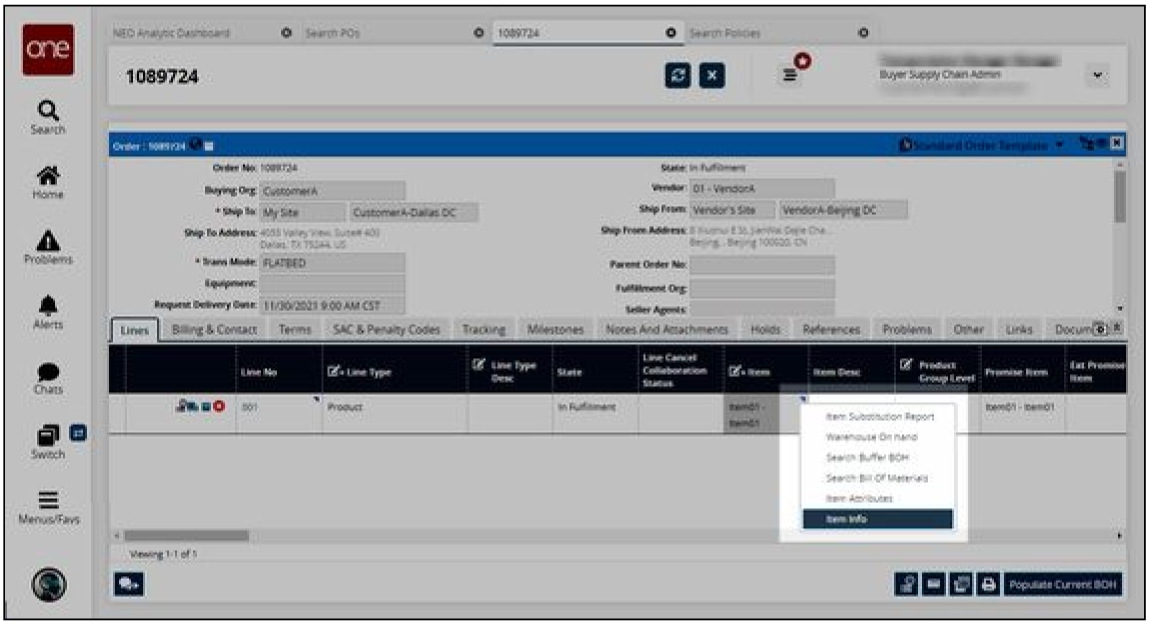


3. Click the small triangle in the **Item** column.

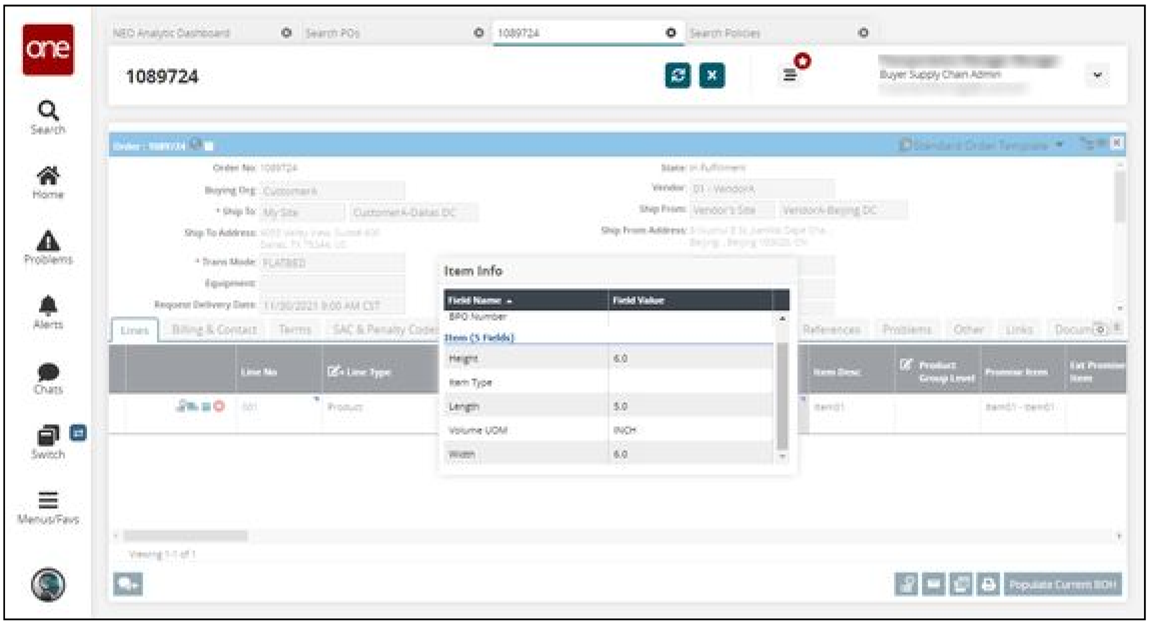


A menu appears.

4. Click **Item Info**.



The Item Info popup appears.



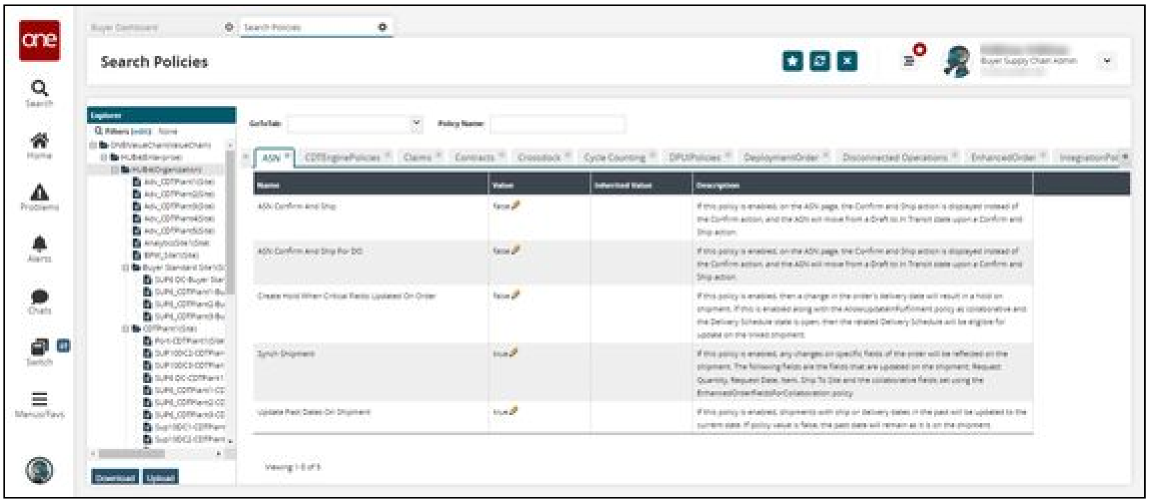
See the "Include More Item Characteristics in Various Order Types" section in the current version of the *Release Notes* for more information.

2.8.15 Viewing Blanket Orders in Projected Inventories

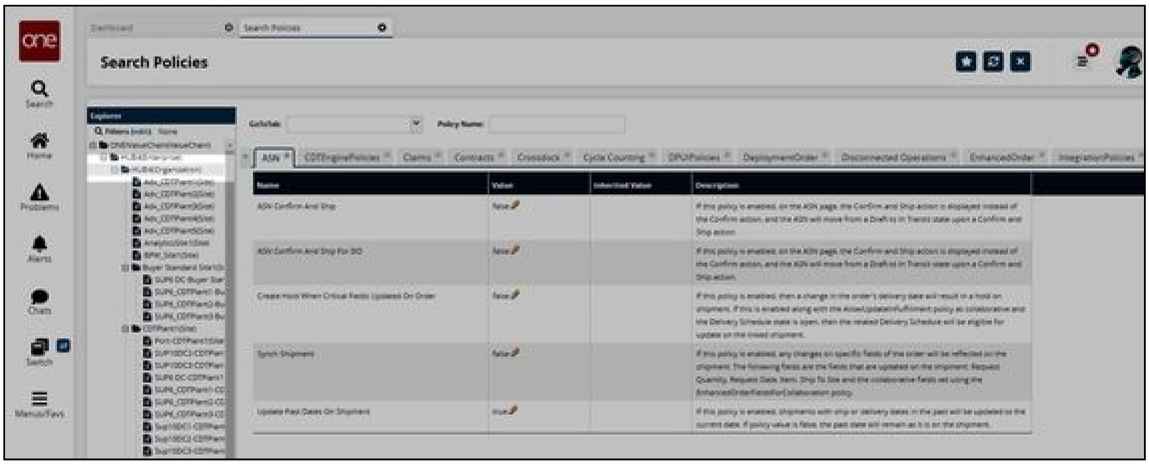
Users can view blanket order shipments in the distribution center projected inventory view (PIV), material PIV, and plant finished goods PIV using the Show Blanket Order Shipments policy in the Inventory Policy group. When this policy is enabled, blanket orders are visible as a data measure on the PIVs listed above.

Complete the following steps to enable the Show Blanket Orders Shipments policy:

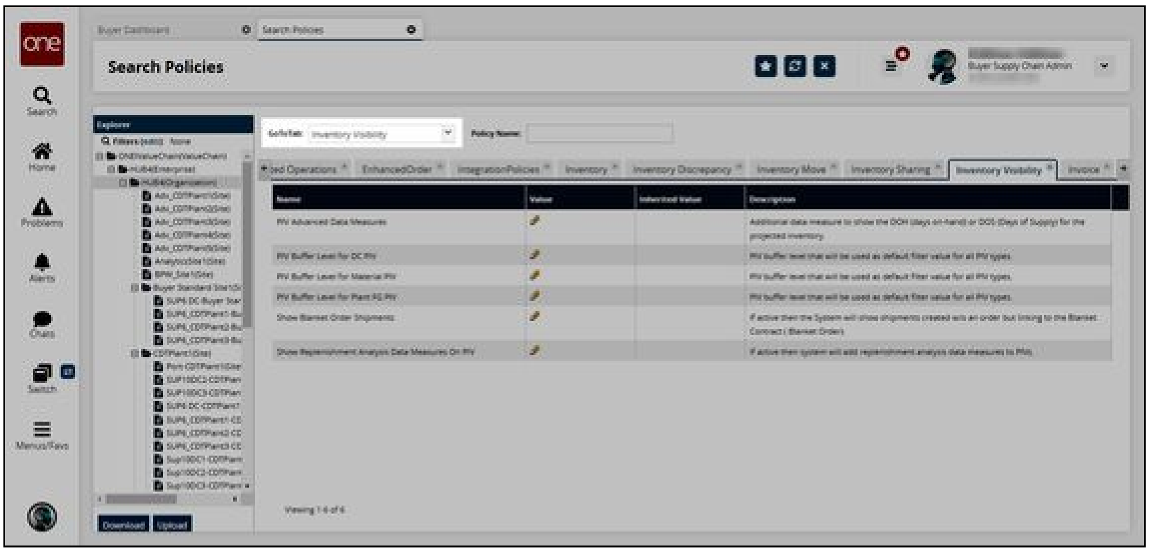
1. Log in to the ONE system.
2. Click **Menu/Favs > Administration > Search Policies.**
   In the NEO UI, users can click the Menu/Favs icon on the left sidebar and type in the name of a menu item in the menu search bar. For more information, see "Using the Menu Search Bar."
   The Search Policies screen appears.



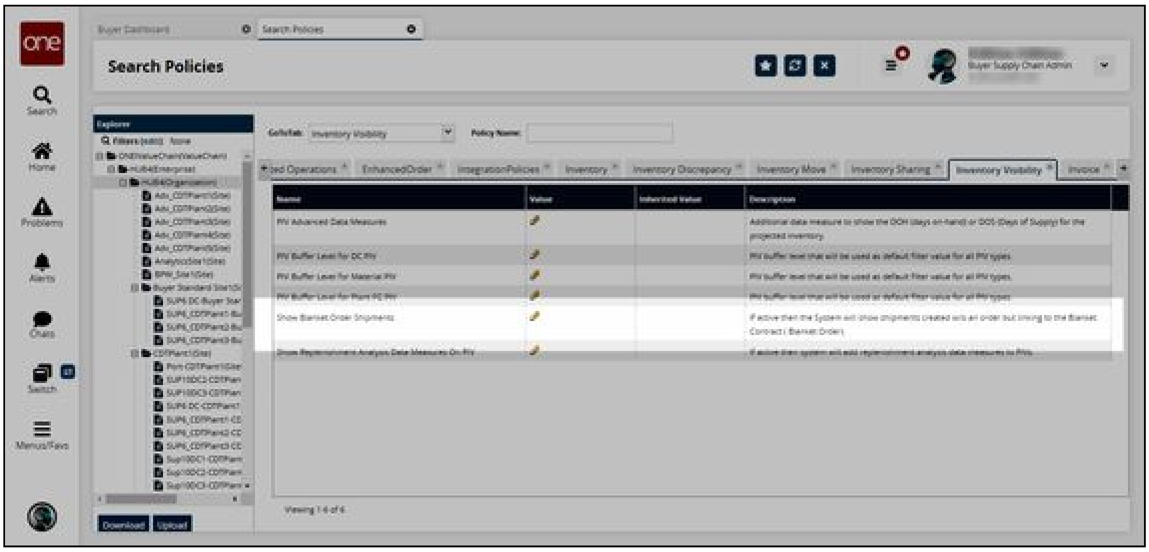
3. In the **Explorer** pane on the left side of the screen, click the name of your organization. When selected, the organization name is highlighted in gray.



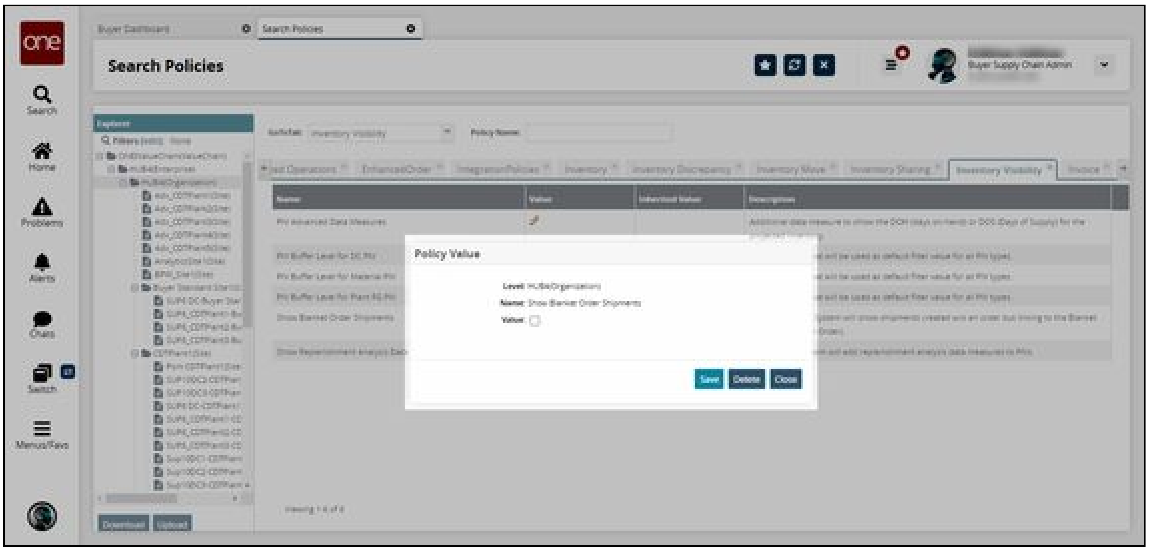
4. In the **GoToTab** field, select **Inventory Visibility** from the dropdown list and press enter.
   The Inventory Visibility tab displays the production order policies.



5. In the **Name** column, locate the **Show Blanket Order Shipments** policy.
6. In the **Value** column, click the pencil icon to edit the policy configuration.



A policy configuration popup window opens.



7. In the **Value** field, click the checkbox to set the polity to true.
8. Click **Save**.
   The policy is configured to override date formatting.

See the "Blanket Order Visibility in Projected Inventory Views" section in the current version of the *Release Notes* for more information.

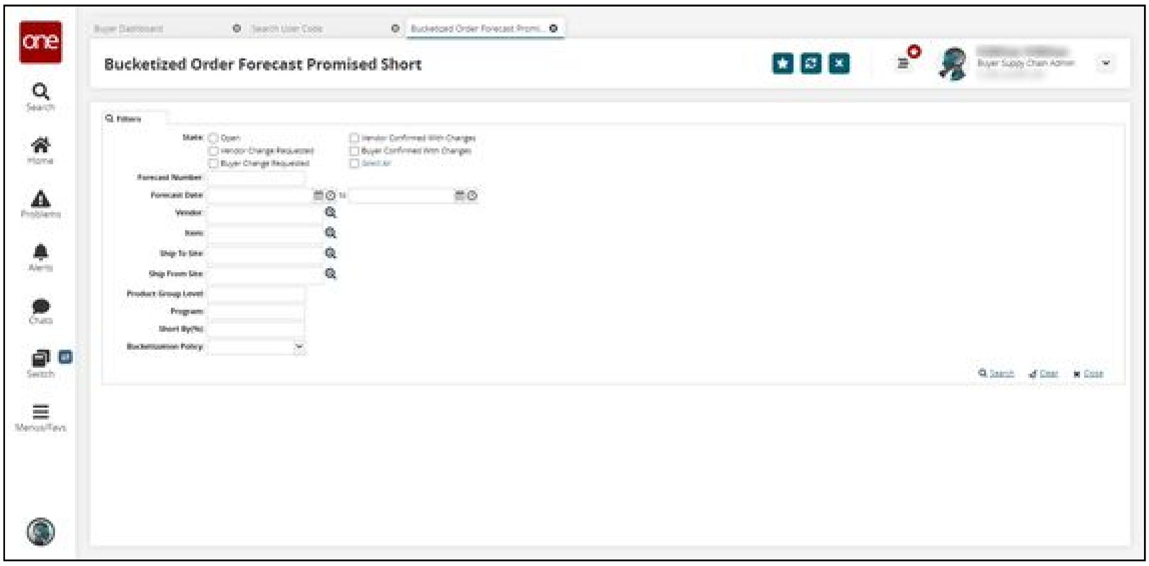
2.8.16 Viewing Bucketized Order Forecast Reports

Buyer and Vendor Supply Chain Admin users have two new reports and widgets that provide visibility to bucketized order forecasts that have any overage or underage in the promised vs. requested quantities:

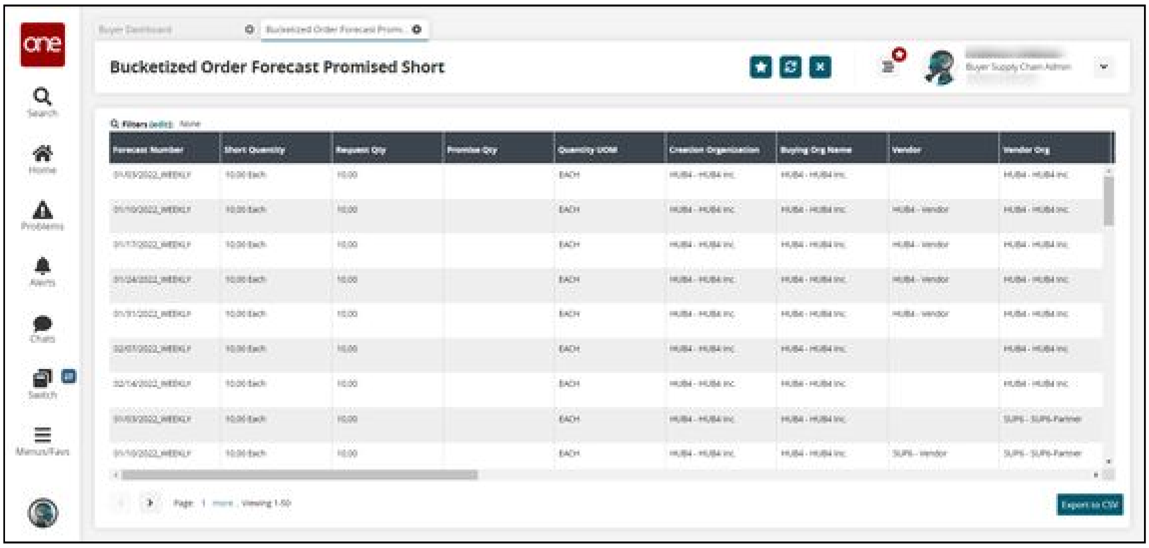
- Bucketized Order Forecast Promised Short
- Bucketized Order Forecast Promised Discrepancy

Complete the following steps to view the Bucketized Order Forecast reports:

1. Log in to the ONE system.
2. Click **Menu/Favs > Replenishment > Bucketized Order Forecasts > Bucketized Order Forecast Promised Short** or **Bucketized Order Forecast Discrepancy**
   The Filters screen appears (the example screenshot below shows the Filter screen that displays if the user chooses **Bucketized Order Forecast Promised Short**).



3. Fill out the filters as desired and click the **Search** link.
   The Bucketized Order Forecast Promised Short report appears.



4. Click the **Export to CSV** button to export the report to a CSV file.

See the "New Bucketized Order Forecast Reports and Widgets" section in the current version of the *Release Notes* for more information.

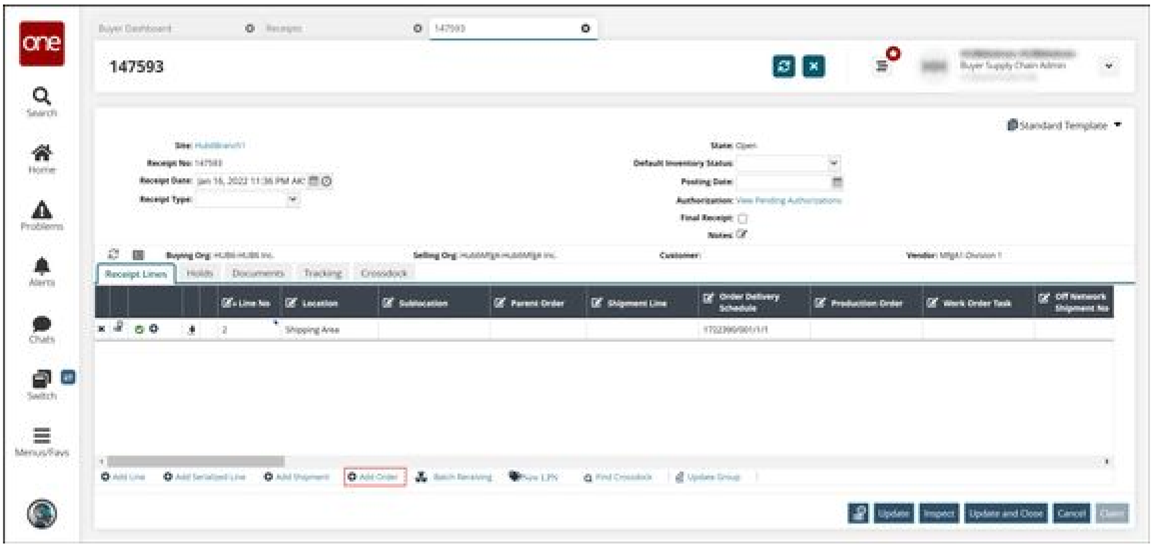
2.9 Warehouse Management System (WMS)

2.9.1 Adding Orders from Receipts Details Screen

Users can add orders or order lines from the receipt details screen.

Complete the following steps to add orders from the Receipt details screen:

1. Log in to the ONE system.
2. Navigate to **Menus/Favs** > **Warehouse Mgmt** > **Receipts**.
   The Receipts screen appears.
3. In the **Explorer** pane, select the desired site.
   The Receipt List Report screen appears in the right pane.
4. To update the existing record, click the receipt number link under the **Receipt** column.
   The Receipt details screen appears.
5. To create a new receipt, click **Create Receipt**.
   The Create Receipt screen appears.
6. On the **Receipt Lines** tab, click the **Add Order** link.



   The Add Order dialog box appears.
7. Select the desired order or order lines and click **OK**.
   The receipt lines table displays the selected order lines.
8. Click **Create** to create a new receipt.
9. Click **Update** to update the existing record.
   A success message appears,

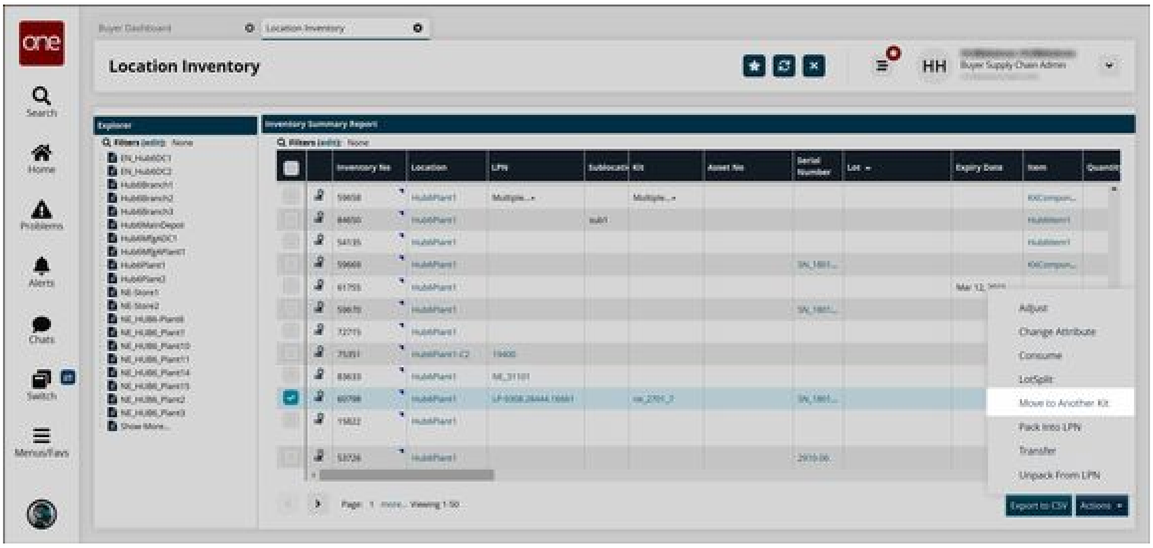
See the "Add Order Link on Receipts Details Screen" section in the current version of the *Release Notes* for more information.
See the "Creating Receipts" section in the current version of the *Online Help* for more information.

2.9.2 Transferring Kit Components within Site

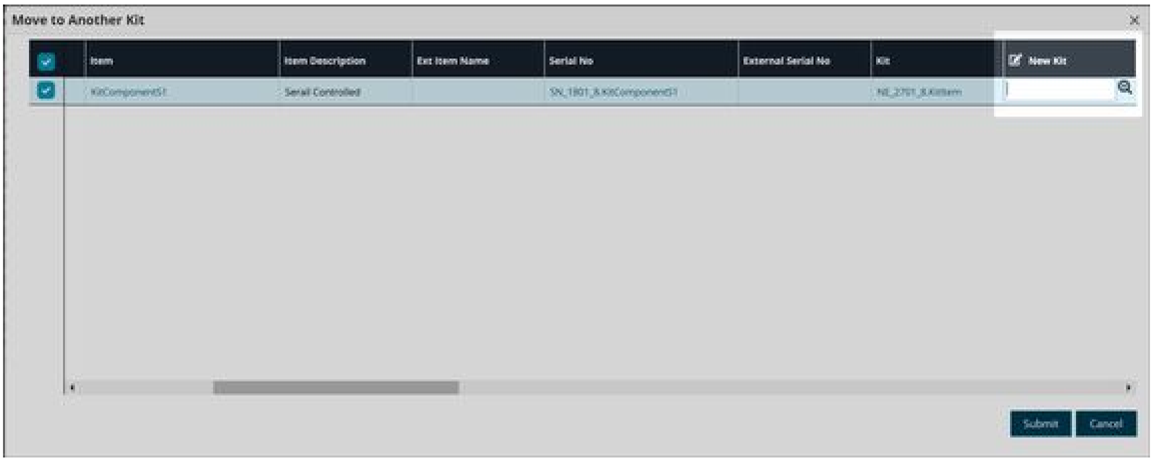
Users can move kit components from one kit to another within a single site.

Complete the following steps to transfer kit within a site:

1. Log in to the ONE system.
2. Navigate to **Menus/Favs** > **Warehouse Mgmt** > **Location Inventory**.
   The Location Inventory screen appears.
3. Select the desired site in the **Explorer** pane in the left pane.
   The Inventory Summary Report screen appears in the right pane.
4. Select the desired record which contains one or more kits.
5. Click the **Actions** button.
6. Select the **Move to Another Kit** option.



The Move to Another Kit dialog box appears.



7. In the New Kit field, type the kit name or select an existing one using the picker tool.
8. Click **Submit**.
   A success message appears.

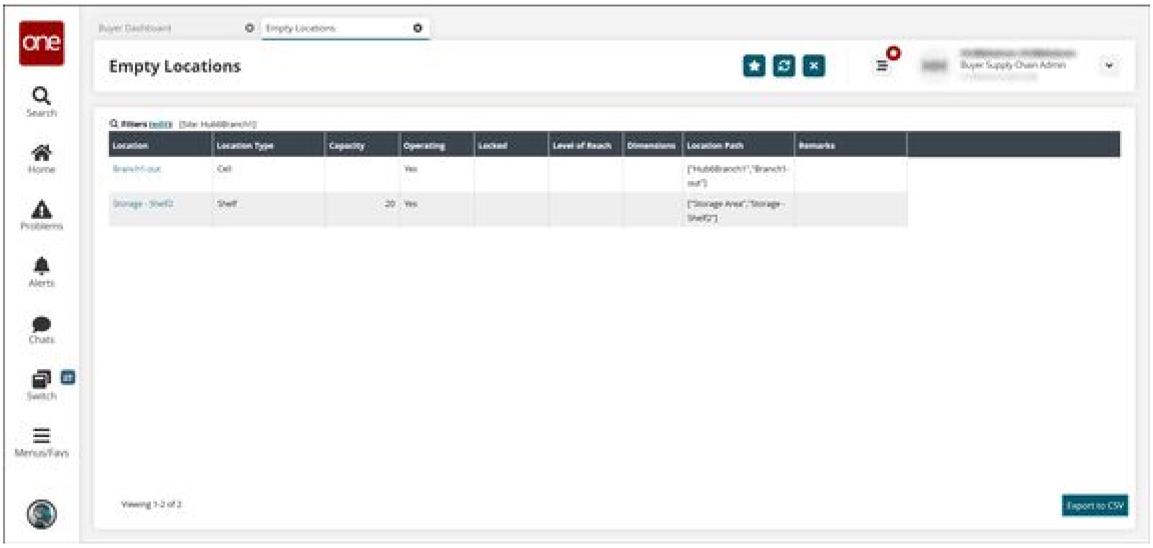
See the "Ability to Transfer Kit Components within Site" section in the current version of the *Release Notes* for more information.

2.9.3 Viewing Empty Locations Report

Users can view the empty locations on the site to use the warehouse space effectively.

Complete the following steps to view the Empty Locations report:

1. Log in to the ONE system.
2. Click **Menus/Favs >Warehouse Mgmt** > **Reports** > **Empty Locations**.
   The Empty Locations screen appears.
3. For the **Site** field, select the desired value using the picker tool. Fields with an asterisk (*) are required.
4. For the **Location** field, select the desired value using the picker tool.
5. Click the **Search** link.
   The report screen appears.



6. Click **Export to CSV** to export the report to the CSV format.

See the "Empty Locations Report" section in the current version of the *Release Notes* for more information.

2.10 Spare, Maintenance, Repair, And Overhaul (SMRO)

2.10.1 Administration

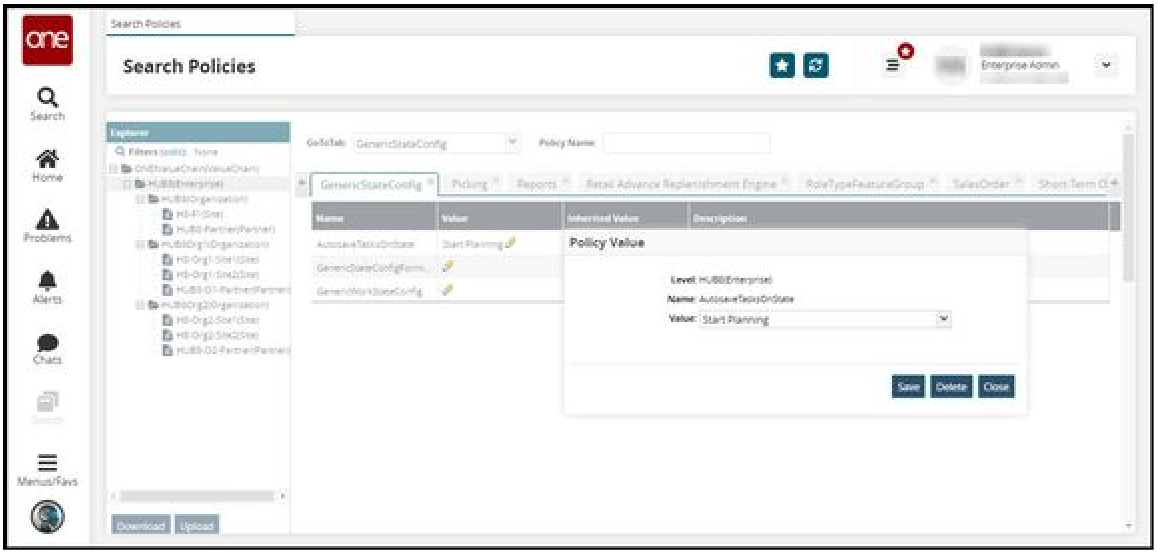
2.10.1.1 Auto Save Tasks on State Policy

This policy enables users to repair lot-controlled items during the Repair Work Order. Once enabled the system populates a task that allows users to initiate and complete the repairs of selected quantity of lot items.

> **Prerequisite**
>
> Not all users and roles have access to this feature. It is mandatory for an Enterprise Admin role user to initiate the Auto Save Tasks on State policy at the enterprise level or organization level.

Complete the following steps to enable the policy:

1. Log in to the ONE system.
2. Click **Menus/Favs** > **Administration** > **Search Policies**.
   The **Search Policies** screen displays.



3. Click the expand icon to navigate to the hierarchy level in the left explorer pane. The policies by type are displayed.
4. In the **GoToTab** drop down list, select the **GenericStateConfig** policy or type the name of the policy in the Policy Name field.
5. In the **GenericStateConfig** tab, the respective policies and details are displayed.
6. In the **Auto Save Tasks On State** policy row, click **Start Planning** button.
   The **Policy Value** dialog box displays.
7. By default, the values in the **Level** and **Policy Name** fields are auto populated.
8. In the **Value** drop down list, select **Start Planning**.
9. Click **Save** to save the details and configure the policy.

> **Note**
>
> Only after enabling the policy, the **Asset Maintenance Admin** role user can create a repair work order for lot-controlled items.

See the "Allow Lot based Inventory to be Repaired in Repair Work Order" section in the current version of the *Release Notes* for more information.

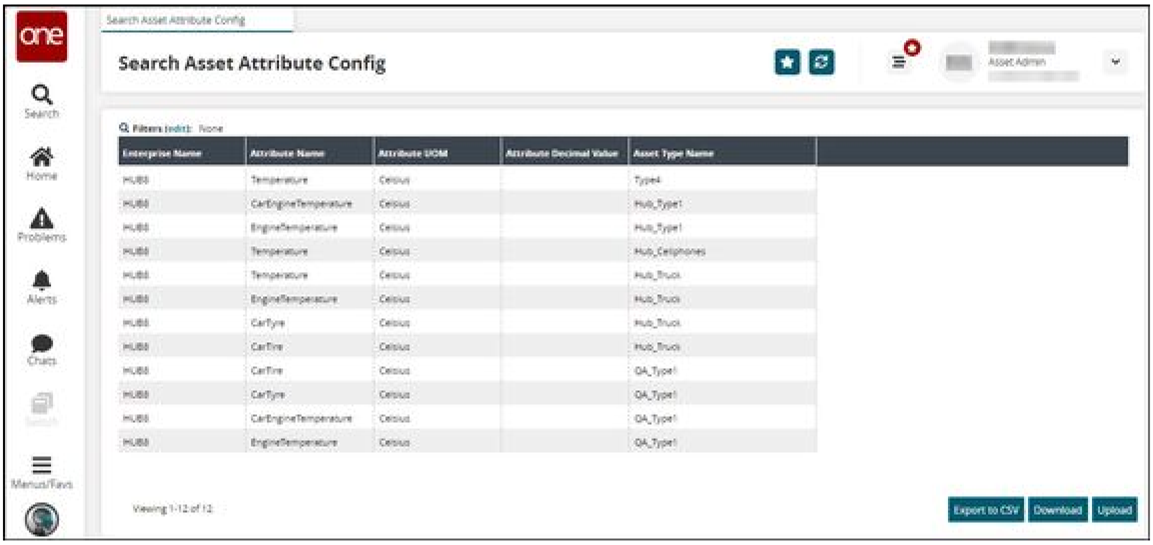
2.10.2 Asset Management

2.10.2.1 Search Asset Attribute Configurations

This section helps users to configure and update attribute information for that asset type. By enabling the Asset Attribute Configuration, the Attribute Name and Attribute Unit of Measurement are made available under the Attributes tab when creating an Asset.

Complete the following steps to search for assets:

1. Log in to the ONE system.
2. Click the **Menus/Favs** > **Asset Management** > **Search Asset Attribute Config**.
   In the NEO UI, users can click on the Menu/Favs icon on the left sidebar and type in the name of the screen in the menu search bar. For more information, see "Using the Menu Search Bar."
   The Search Asset Attribute Config screen appears.



3. Click the **Filter (edit)** link to apply filters.
   The Filters header appears.
4. Enter values in the desired filters and click the **Search** link.
   The search result screen appears.
5. Click the **Export to CSV** button to export the report in the CSV format.
6. Click the **Download** button to download the report for updating records.
7. Click the **Upload** button to upload the updated Search Asset Attribute Config CSV file.

See the "Asset Metering Enhancements" section in the current version of the *Release Notes* for more information.

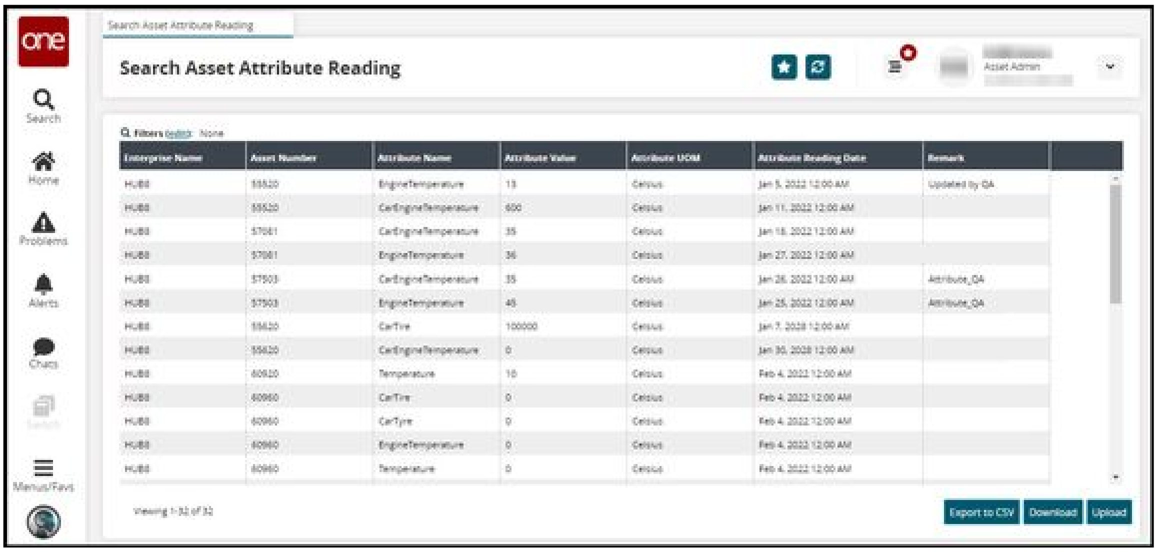
2.10.2.2 Search Asset Attribute Reading

The Asset Attribute Reading report provides attribute information that allows users to add the attribute name, value, unit of measurement, reading date by asset number.

Complete the following steps to search for assets:

1. Log in to the ONE system.
2. Click the **Menus/Favs** > **Asset Management** > **Search Asset Attribute Reading**.
   In the NEO UI, users can click on the Menu/Favs icon on the left sidebar and type in the name of the screen in the menu search bar. For more information, see "Using the Menu Search Bar."

The Search Asset Attribute Reading screen appears.



3. Click the **Filter (edit)** link to apply filters.
   The Filters header appears.
4. Enter values in the desired filters and click the **Search** link.
   The search result screen appears.
5. Click the **Export to CSV** button to export the report in the CSV format.
6. Click the **Download** button to download the report for updating records.
7. Click the **Upload** button to upload the updated Search Asset Attribute Reading CSV file.

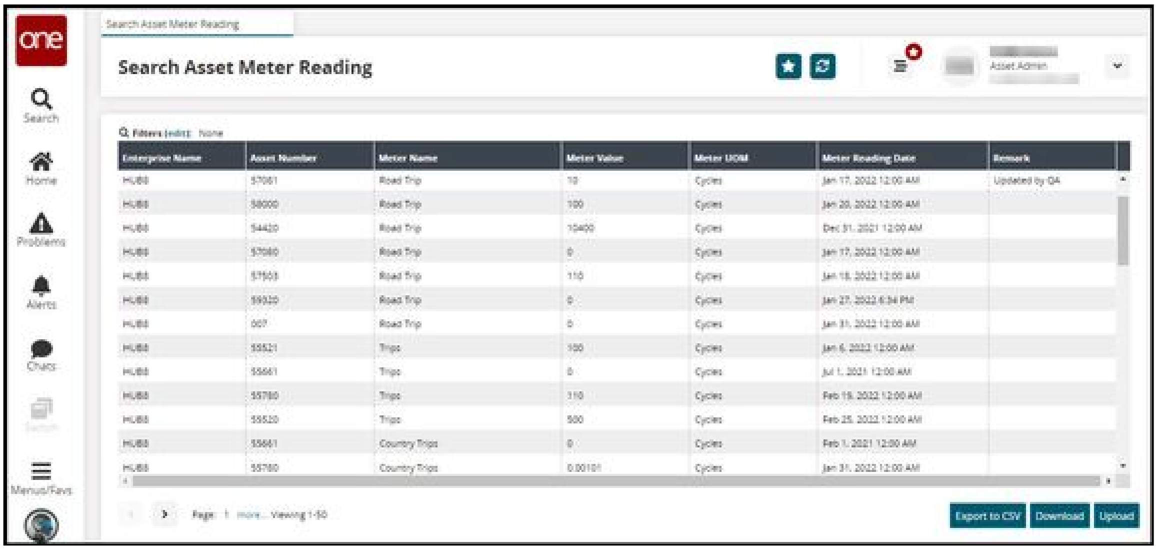
See the "Asset Metering Enhancements" section in the current version of the *Release Notes* for more information.

2.10.2.3 Search Asset Meter Reading

The Asset Meter Reading report provides meter reading information that allows users to add and update meter readings with respective values.

Complete the following steps to search for assets:

1. Log in to the ONE system.
2. Click the **Menus/Favs** > **Asset Management** > **Search Asset Meter Reading**.
   In the NEO UI, users can click on the Menu/Favs icon on the left sidebar and type in the name of the screen in the menu search bar. For more information, see "Using the Menu Search Bar."
   The Search Asset Meter Reading screen appears.



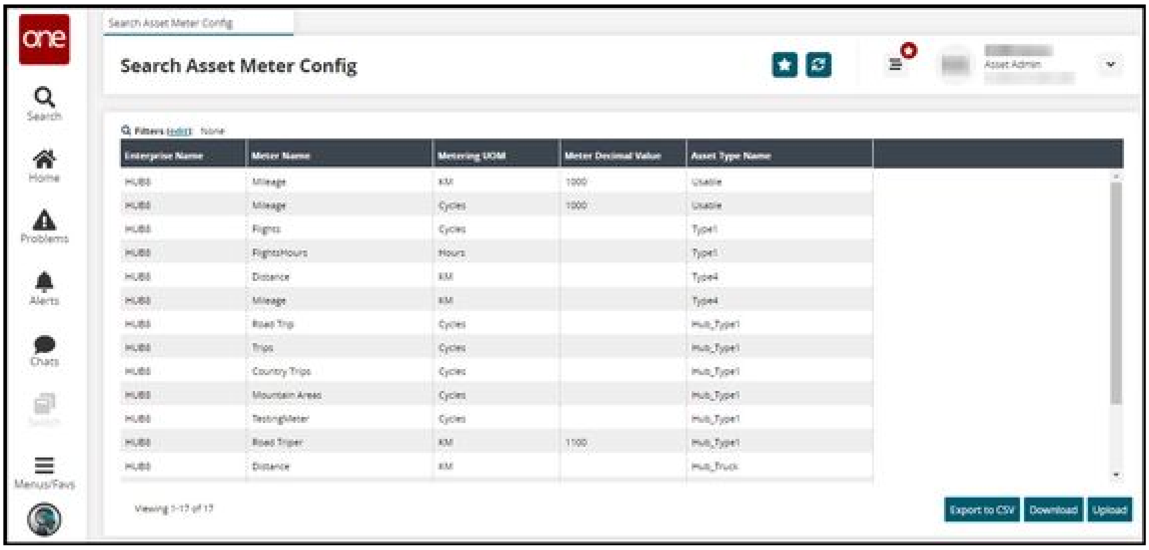
3. Click the **Filter (edit)** link to apply filters.
   The Filters header appears.
4. Enter values in the desired filters and click the **Search** link.
   The search result screen appears.
5. Click the **Export to CSV** button to export the report in the CSV format.
6. Click the **Download** button to download the report for updating records.
7. Click the **Upload** button to upload the updated Search Asset Meter Reading CSV file.

See the "Asset Metering Enhancements" section in the current version of the *Release Notes* for more information.

2.10.2.4 Search Asset Meter Configurations

Complete the following steps to search for assets:

1. Log in to the ONE system.
2. Click the **Menus/Favs** > **Asset Management** > **Search Asset Meter Config**.
   In the NEO UI, users can click on the Menu/Favs icon on the left sidebar and type in the name of the screen in the menu search bar. For more information, see "Using the Menu Search Bar."
   The Search Asset Meter Config screen appears.



3. Click the **Filter (edit)** link to apply filters.
   The Filters header appears.
4. Enter values in the desired filters and click the **Search** link.
   The search result screen appears.
5. Click the **Export to CSV** button to export the report in the CSV format.
6. Click the **Download** button to download the report for updating records.
7. Click the **Upload** button to upload the updated Search Asset Meter Config CSV file.

See the "Asset Metering Enhancements" section in the current version of the *Release Notes* for more information.

2.10.3 Work Order Management

2.10.3.1 Adding Tools to Tasks on Work Orders

Users can add tools for tasks during the Work Order execution process. This provides flexibility to return and add tools during the planning and progress of the work order.

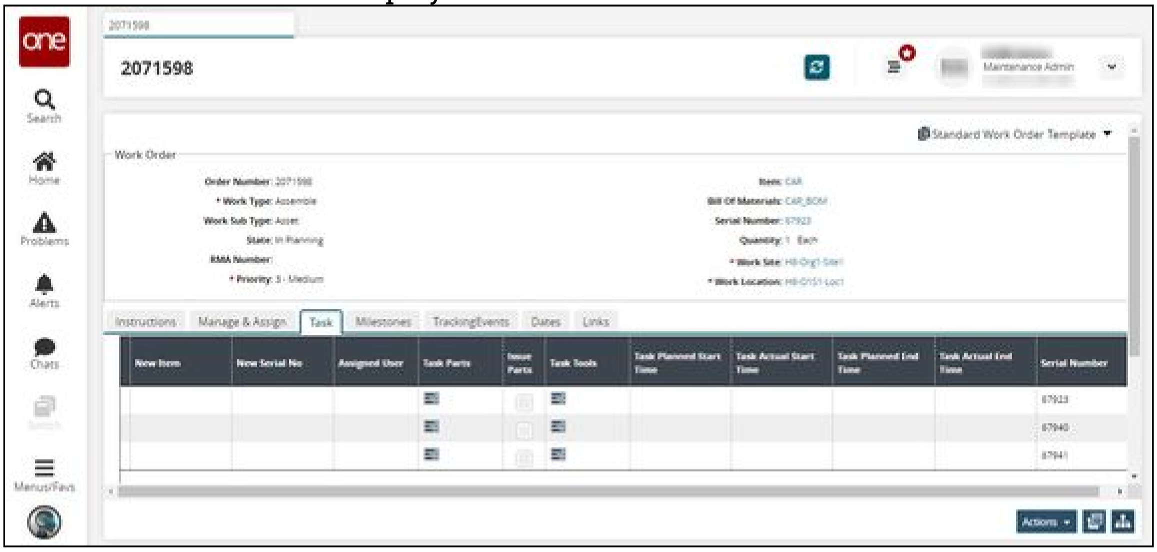
Prerequisite

- Bill of Materials (BOM) should exist in the system with a valid date range for an Assemble Work Order.
- Applicable only for serialized assets defined with a tool item type.

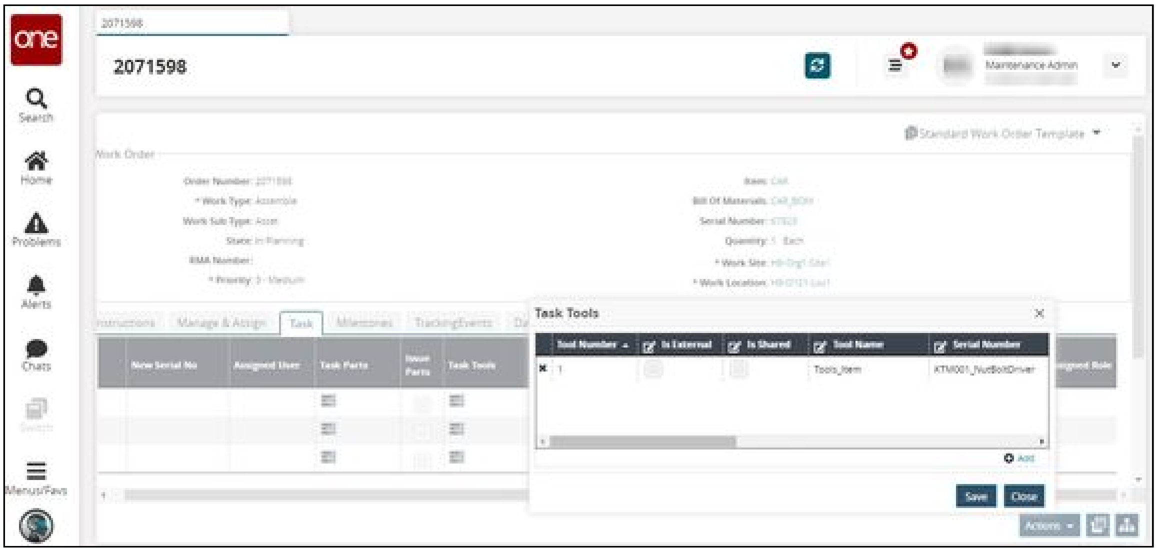
Complete the following steps to add tools to tasks on Work Order:

1. Log in to the ONE system.
2. Select **Menu/Favs** > **Work Order Management** > **Search Work Orders**.
   The Search Work Order screen appears.

3. Click the **Filter (edit)** link.
   The filters header displays.
4. Click the **In Planning** state checkbox.
5. Click the **Search** link.
   Work orders in the In Planning state display. See the "Creating Work Orders" or "Searching Word Orders" sections in the *Online Help* for more information.
6. Click the link for a work order link in the **Work Order Number** column.
   The order details screen displays.



7. Click the **Task** tab. The tasks will be created based on the Bill of Materials (BOM) structure defined.
8. Use the horizontal scroll bar to navigate to the **Tasks Tools** column and then click the **Task Tools** icon ( ) to add tools for that particular task.
   The Task Tools popup appears.



9. Click the **Add** link to add a row for enabling tools item for that task.
   A new row displays in the popup.
10. Complete the fields described in the table below. Fields with an asterisk (*) are required.

These are the most relevant fields for this process. You may see additional fields based on the Task Type or the Task Part values.

Field	Description
Tool Number	A tool record number is displayed.
Is External	Click to issue the tool externally. (This is not yet implemented)
Is Shared	Click to share the tool in between tasks. (For example, a screwdriver item tool can be shared among tasks.)
Tool Name	Enter a tool name. The value is also populated by selecting the Serial Number.
Serial Number	Type the unique serial number for the tool.
Req Qty	Enter the required quantity.
Issued Qty	Enter the issued quantity.
Qty UOM	Enter the respective unit of measurement for that tool.
Tool Start Time	Click the calendar and clock icons to select the tool start time.
Tool End Time	Click the calendar and the clock icons to select the tool end time.
Duration	Enter the duration in days, hours, and minutes. (D denotes days, H denotes hours, and M denotes minutes)
Standard Price	Enter the appropriate numeric amount.
Cost Currency	Select the currency country code.

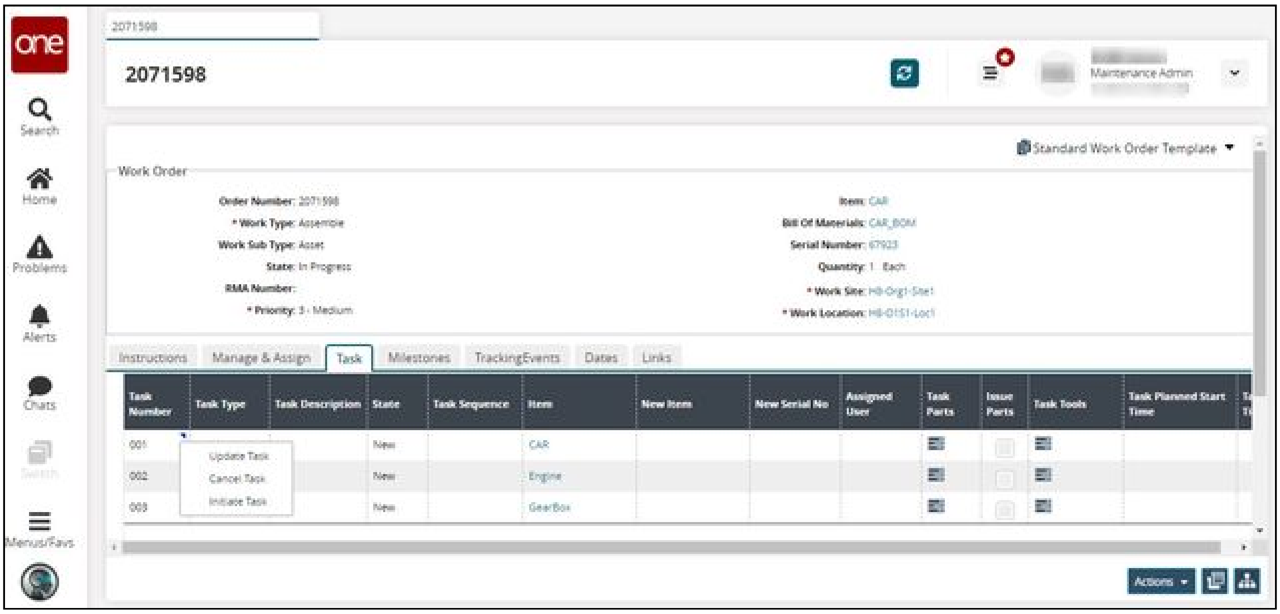
11. After adding tools to the tasks, click the **Save** button to save the details.
    A green success bar displays.
12. Click the **Close** button on the popup.
    The tool is added to the task.

From this point, users can complete or update the plan to submit it and move it to the Planned state.

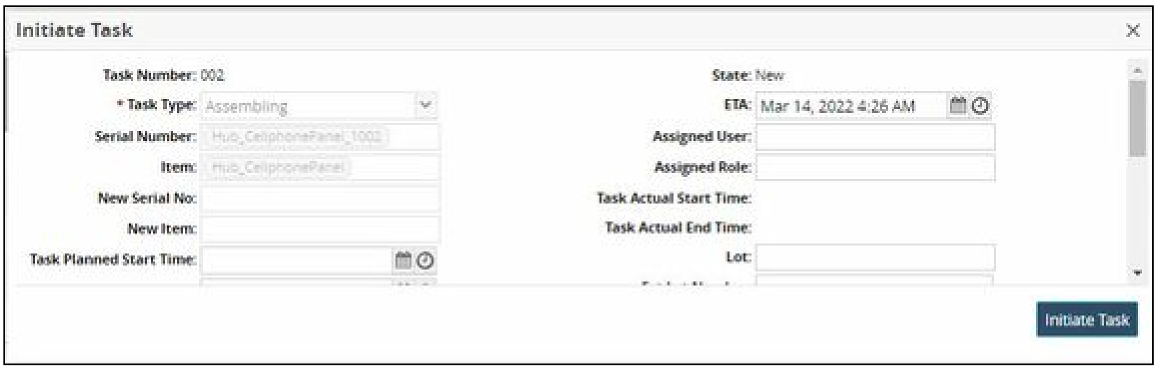
See the "Work Order Enhancements" section in the current version of the *Release Notes* for more information.

Initiating Tasks

This is a prerequisite stage that enables users with the capability to issue tools and parts required for starting a task.



1. Click the contextual menu (blue triangle) icon under the **Task Number** column and then click the **Initiate Task** option.
   The Initiate Task popup appears.



2. Fill out the following fields. Fields with an asterisk (*) are required.

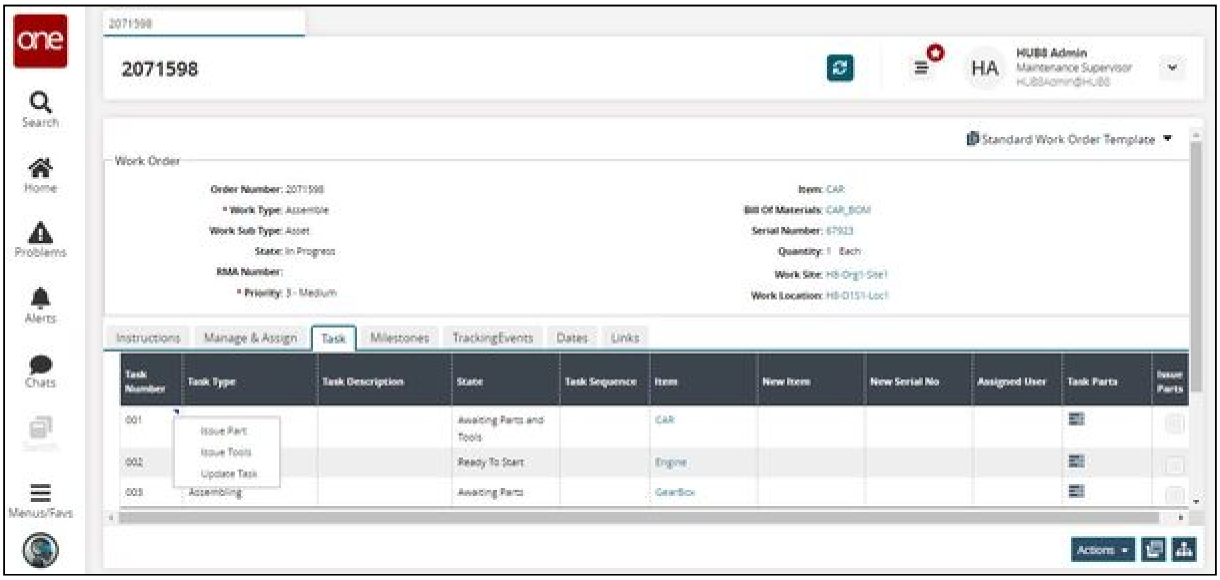
> These are the most relevant fields for this process. You may see additional fields on the screen which are not described in the following table.

Field Name	Description
* Task Number	The task number is auto-populated.
* Task Type	The task type value is auto-populated.
Serial Number	The asset item serialized number is displayed.
Item	The item type is auto-populated.
Task Planned Start Time	Click the calendar and date icon to update the details.
Task Planned End Time	Click the calendar and date icon to update the details.
Parts Cost	This value is auto-populated.
Parts Cost Currency UOM	The unit of measurement for that currency is displayed. (For example: USD / CAD)
State	The present state of the task is auto-populated. (New)
ETA	Click the calendar and date icon to provide an ETA for the task.
Assigned User	If desired, type the name of the user.
Assigned Role	If desired, type the role of the user.
Task Actual Start Time	This value is system generated.
Task Actual End Time	This value is system generated.

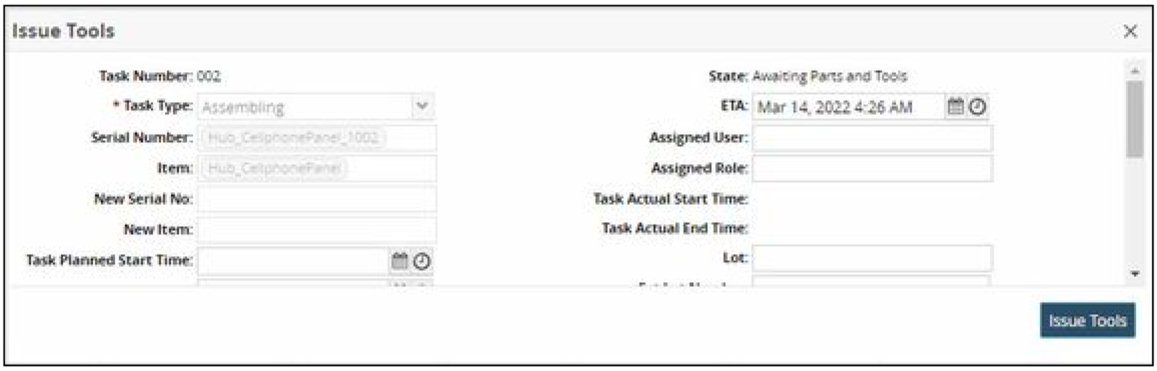
3. Click the **Initiate Task** button.
   The state of the task changes from **New** to **Awaiting Parts and Tools**.

Issuing Tools and Parts

Providing the users with the capability to issue tools and issue part for relevant tasks during the In Progress state of the work order.



1. Click the contextual menu (blue triangle) icon under the **Task Number** column and then click **Issue Tools** to issue tools for that specific task.
   The Issue Tools popup displays.



2. Fill out the following fields. Fields with an asterisk (*) are required.

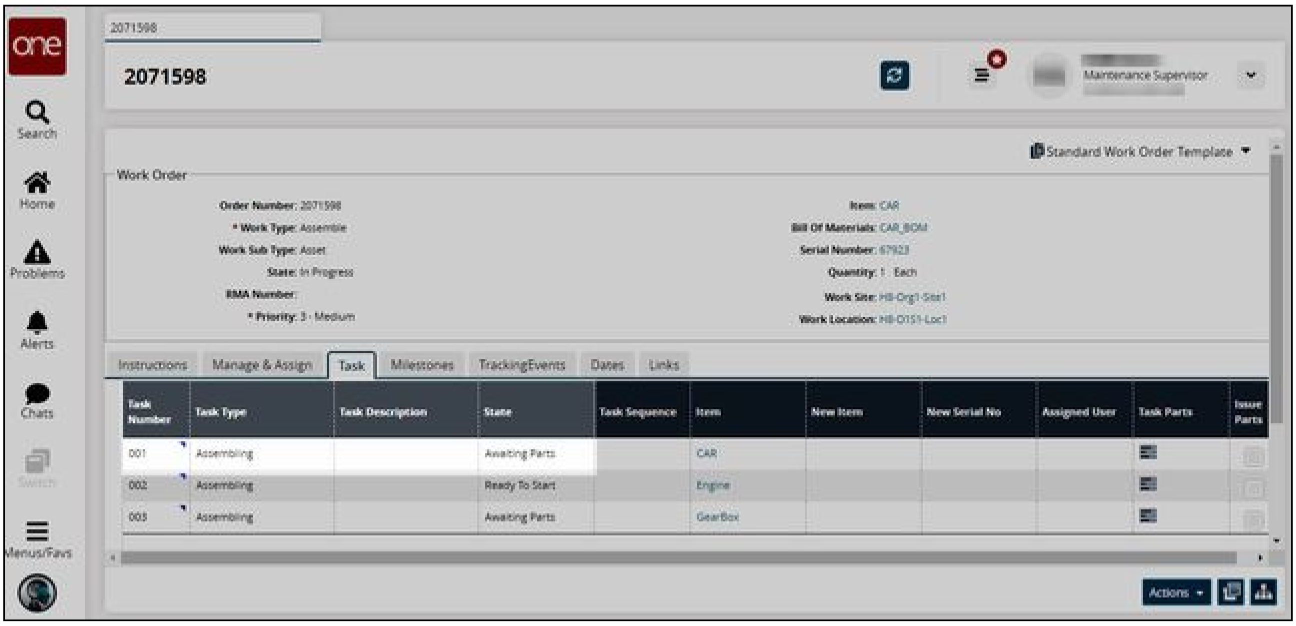
> These are the most relevant fields for this process. You may see additional fields on the screen which are not described in the following table.

Field Name	Description
* Task Number	The task number is auto-populated.
* Task Type	The task type value is auto-populated.

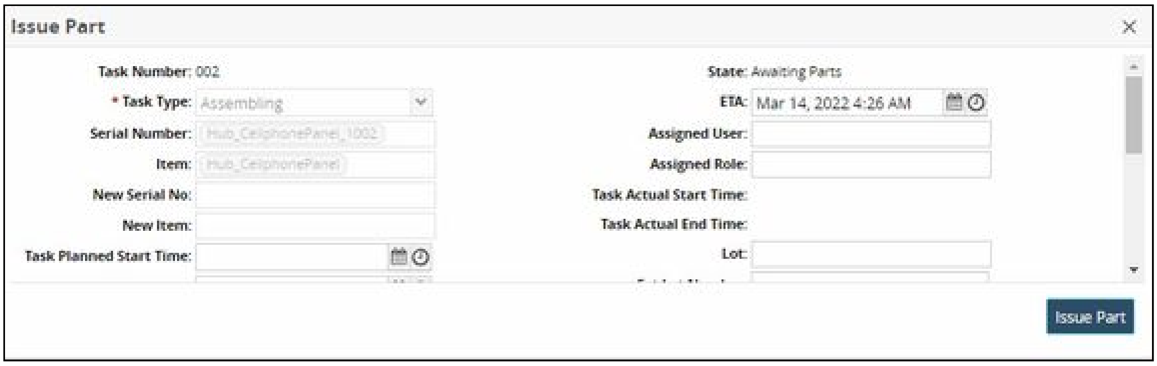
Field Name	Description
Serial Number	The asset item serialized number is displayed.
Item	The item type is auto-populated.
Task Planned Start Time	Click the calendar and date icon to update the details.
Task Planned End Time	Click the calendar and date icon to update the details.
Parts Cost	This field value is auto-populated.
Parts Cost Currency UOM	The unit of measurement for that currency is displayed. (For example: USD / CAD)
State	The present state of the task is auto-populated. (Awaiting Parts and Tools)
ETA	Click the calendar and date icon to provide an ETA for the task.
Assigned User	If desired, type the name of the user.
Assigned Role	If desired, type the role of the user.
Task Actual Start Time	This value is system generated.
Task Actual End Time	This value is system generated.

3. Click **Issue Tools**.
   The task tools are issued to the task and a success message appears. The state of the task changes from **Awaiting Parts and Tools to Awaiting Parts.**

Issue Part



1. Click the contextual menu (blue triangle) icon under the **Task Number** column and then click the **Issue Part** button to issue parts for that task.
   The Issue Part popup displays.



2. Fill out the following fields. Fields with an asterisk (*) are required.

> These are the most relevant fields for this process. You may see additional fields on the screen which are not described in the following table.

Field Name	Description
* Task Number	The task number is auto-populated.

Field Name	Description
* Task Type	The task type value is auto-populated.
Serial Number	The asset item serialized number is displayed.
Item	The item type is auto-populated.
Task Planned Start Time	Click the calendar and date icon to update the details.
Task Planned End Time	Click the calendar and date icon to update the details.
Parts Cost	This field value is auto-populated.
Parts Cost Currency UOM	The unit of measurement for that currency is displayed. (For example: USD / CAD)
State	The present state of the task is auto-populated. (Awaiting Parts)
ETA	Click the calendar and date icon to provide an ETA for the task.
Assigned User	If desired, type the name of the user.
Assigned Role	If desired, type the role of the user.
Task Actual Start Time	This value is system generated.
Task Actual End Time	This value is system generated.

3. Click the **Issue Part** button.
   The task parts are issued to the task and a success message appears. The state of the task changes from **Awaiting Parts** to **Ready to Start**.

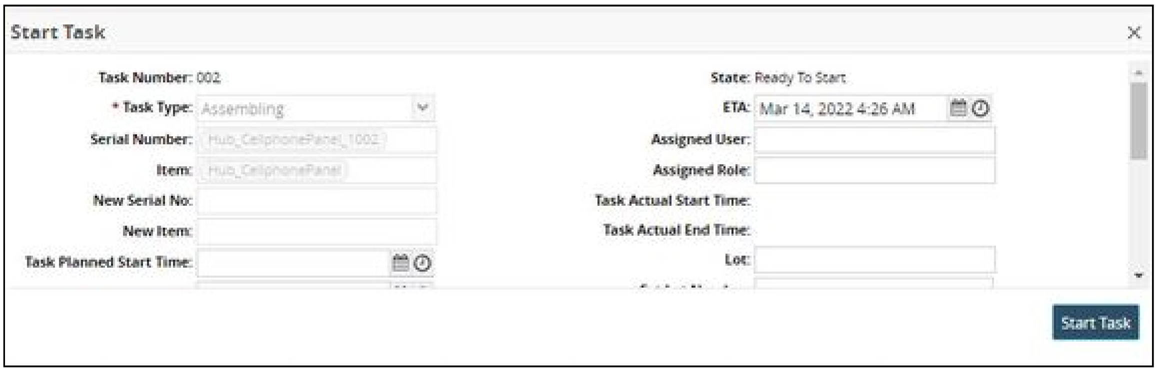
   Note

   The task tools and task parts are picked from the inventory via the pick list from Warehouse Management > Issue Inventory.

Starting and Completing Tasks

In these states, the user needs to perform and complete that particular task. If desired, users can also opt to update the task details.

1. Click the **contextual menu (blue triangle)** icon under the **Task Number** column and then click the **Start Task** button.
   The Start Task popup displays.



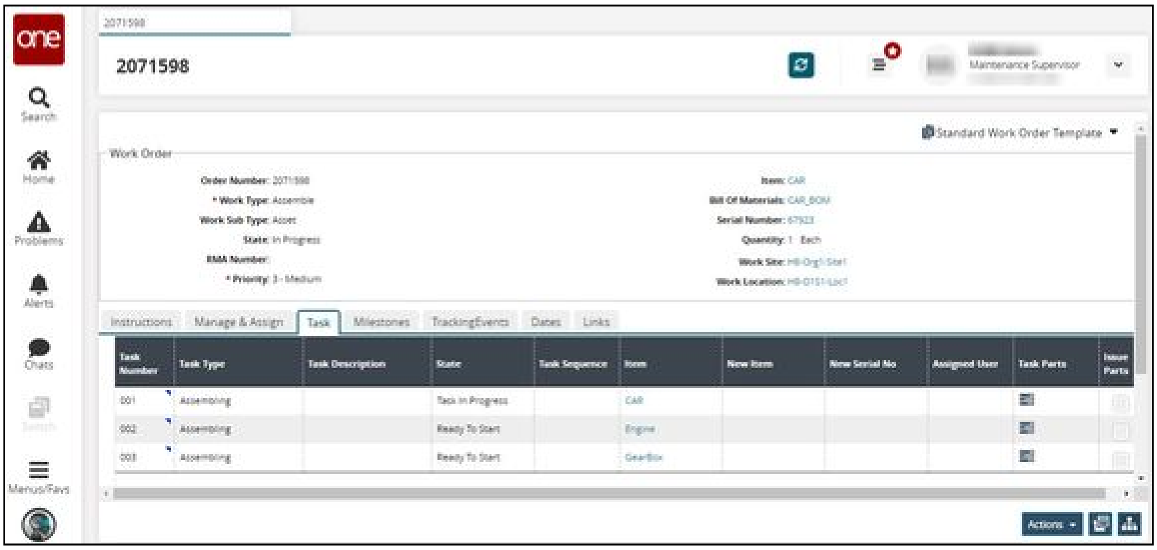
2. Fill out the following fields. Fields with an asterisk (*) are required.

> These are the most relevant fields for this process. You may see additional fields on the screen which are not described in the following table.

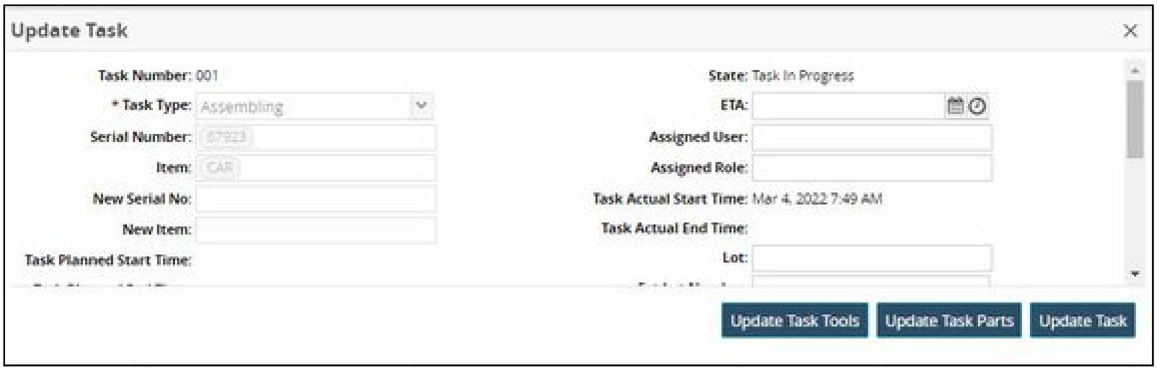
Field Name	Description
* Task Number	The task number is auto-populated.
* Task Type	The task type value is auto-populated.
Serial Number	The asset item serialized number is displayed.
Item	The item type is auto-populated.
Task Planned Start Time	Click the calendar and date icon to update the details.
Task Planned End Time	Click the calendar and date icon to update the details.
Parts Cost	This field value is auto-populated.

Field Name	Description
Parts Cost Currency UOM	The unit of measurement for that currency is displayed. (For example: USD / CAD)
State	The present state of the task is auto-populated. (Ready to Start)
ETA	Click the calendar and date icon to provide an ETA for the task.
Assigned User	If desired, type the name of the user.
Assigned Role	If desired, type the role of the user.
Task Actual Start Time	This value is system generated.
Task Actual End Time	This value is system generated.

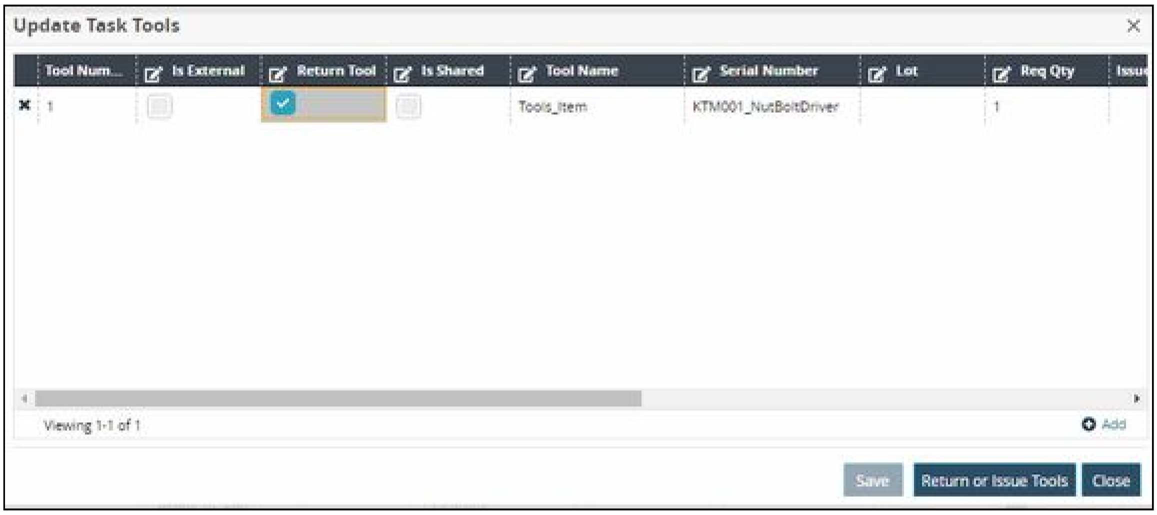
3. Click the **Start Task** button.
   The state of the task changes from Ready to Start to Task in Progress.



4. If desired the user can update the details for that specific task. Click the contextual menu (blue triangle) icon under the **Task Number** column and then click the **Update Task** button.
   The Update Task popup displays.



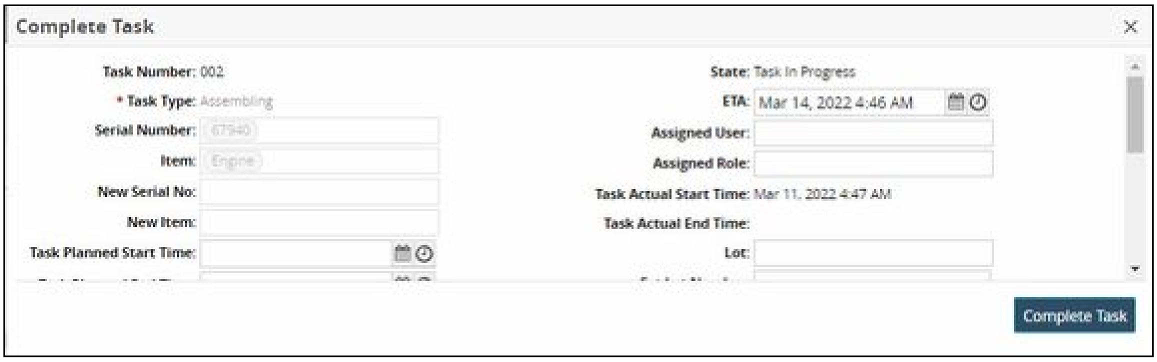
5. Click **Update Task Tools** button.
   The Update Task Tools window displays.



6. In the **Update Task Tools** window, select the **Return Tool** column check box and then click **Return or Issue Tools** button to return the tools issued for that particular task.
7. Click **Update Task** button to save the updates.

> **Note**
>
> If the user does not explicitly return the issued tools via the Update Tasks Tools window, then the system returns the issued tools once that particular task is completed.

8. Click the contextual menu (blue triangle) icon under the **Task Number** column and then click the **Complete Task** button.
   The Complete Task popup displays.



9. Click the **Complete Task** button.
   The state of the task changes from Task in Progress to Task Completed.

2.10.3.2 Repair Lot Controlled Items with Repair Work Order

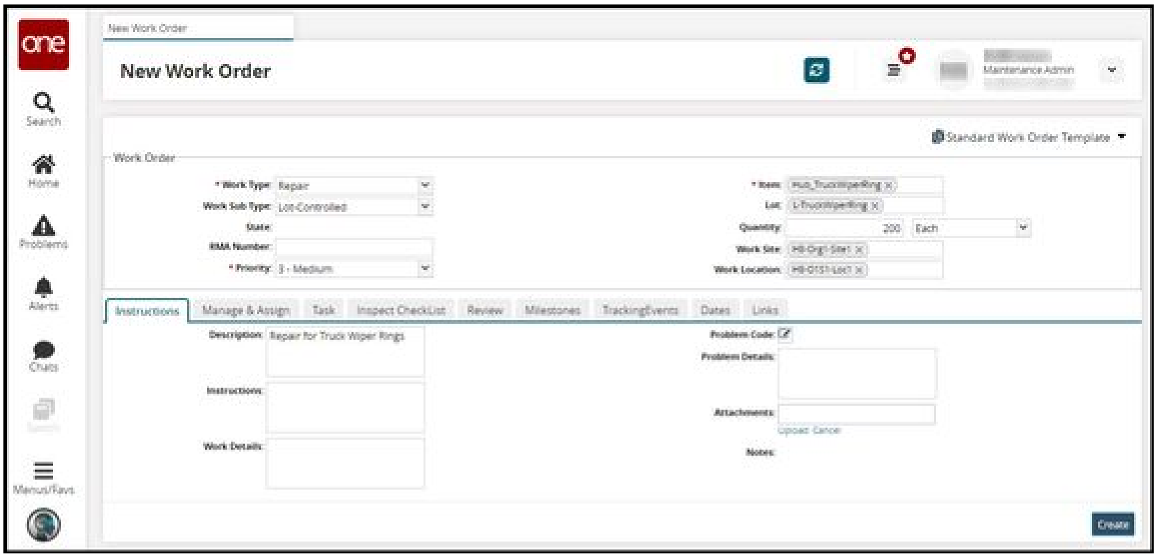
Users can create a Repair Work Order for lot-controlled items. The capability provides users with better visibility in tracking and managing multiple quantities of lot-based inventory. It also helps users to repair any number of inventory items based on lot-controlled transactions. Users can select the quantity and the unit of measurement which is auto-populated in the Work Order Task.

Prerequisite

Not all users and roles have access to this feature. It is mandatory for an **Enterprise Admin** role user to initiate the **AutoSave Tasks on State** policy at the enterprise level from the **Search Policies** under the **Menus/Favs** menu. By applying this policy, during the **Start Planning** state, a task is system-generated for users to repair the selected lot-controlled items.

Complete the following steps to create a repair work order for lot-controlled items:

1. Log in to the ONE system.
2. Click **Menus/Favs > Work Order Management > New Work Order**.
   The **New Work Order** screen displays.



3. Fill out the following fields. Fields with an asterisk (*) are required.

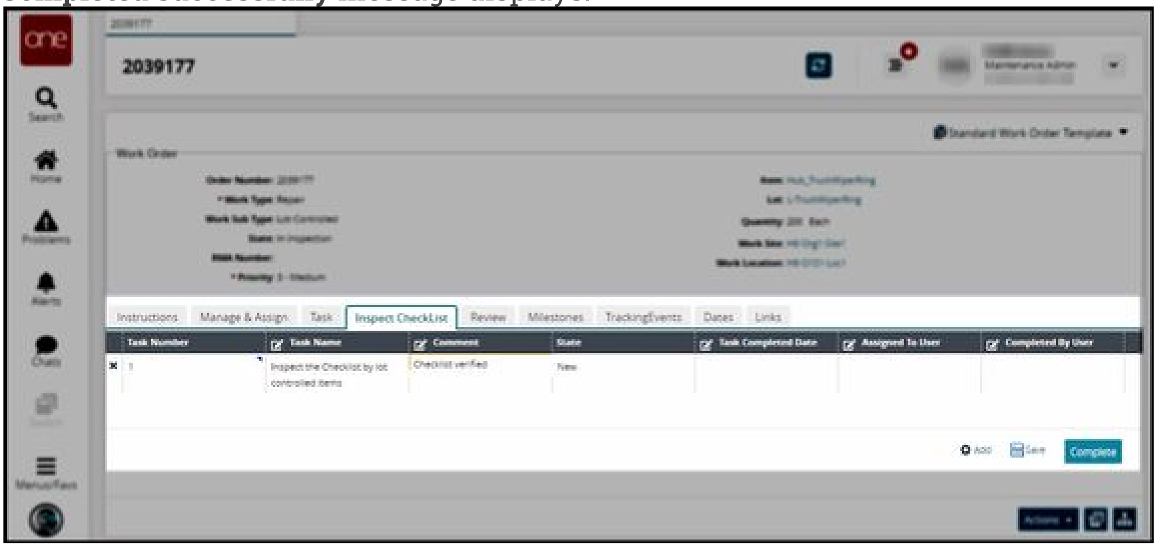
Field Name	Description
*Work Type	In the drop-down list, select the **Repair** work order.
Work Sub Type	In the drop-down list, select the **Lot Controlled** subtype.
*Item	Enter the item name. Predictive text will help narrow your search.
Lot	Enter the lot number associated with the lot-controlled item.
Quantity	Enter the number of items that need to be repaired.
Work Site	Type the worksite at which the work order is performed. Predictive text will help narrow your search.
Work Location	Type the work location at which the work order is performed. Predictive text will help narrow your search.
State	Displays the present state of the work order.
RMA Number	Enter the Return Material Authorization number.
*Priority	By default, **Medium** priority is selected. In the drop-down list, select another priority level if desired.

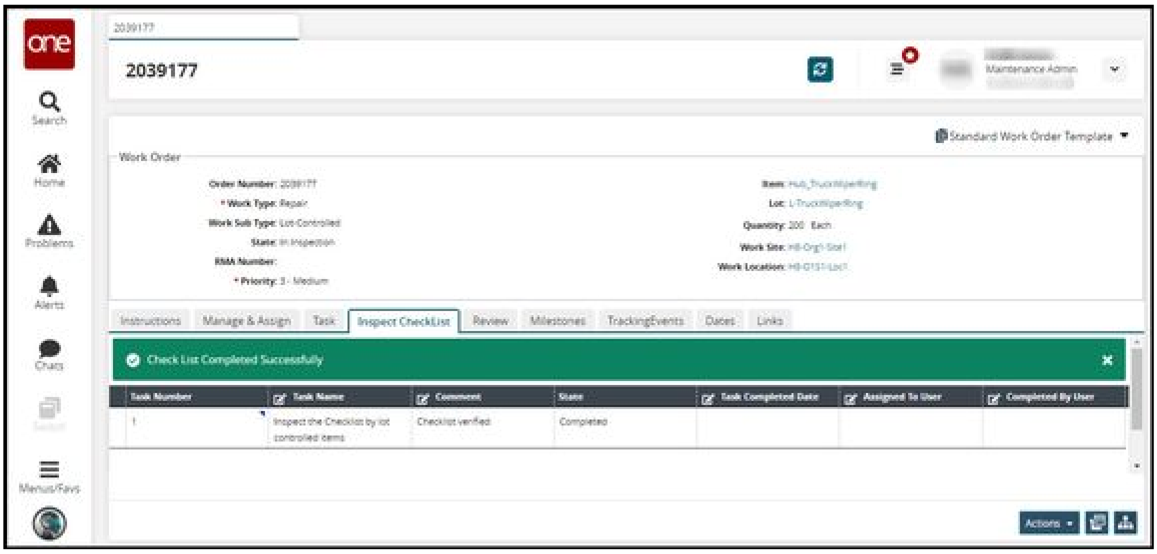
4. Click **Create** button to create a Repair Work Order. The screen refreshes with the success message. The work order is created in the **Draft** state.

Note

See the "Creating Work Orders" or "Searching Word Orders" sections in the Online Help for more information. Move or ensure that the work order is in the In Inspection state.

5. Click Add button to add an inspection checklist for lot-controlled items in the repair work order. The checklist state displays New state.
6. Enter appropriate details in the **Task Name**, **Comment**, **Task Completed Date**, **Assigned to User**, **Completed by User** fields respectively.
7. Click Complete button. The checklist's state changes to **Completed**. The **Checklist Completed successfully** message displays.



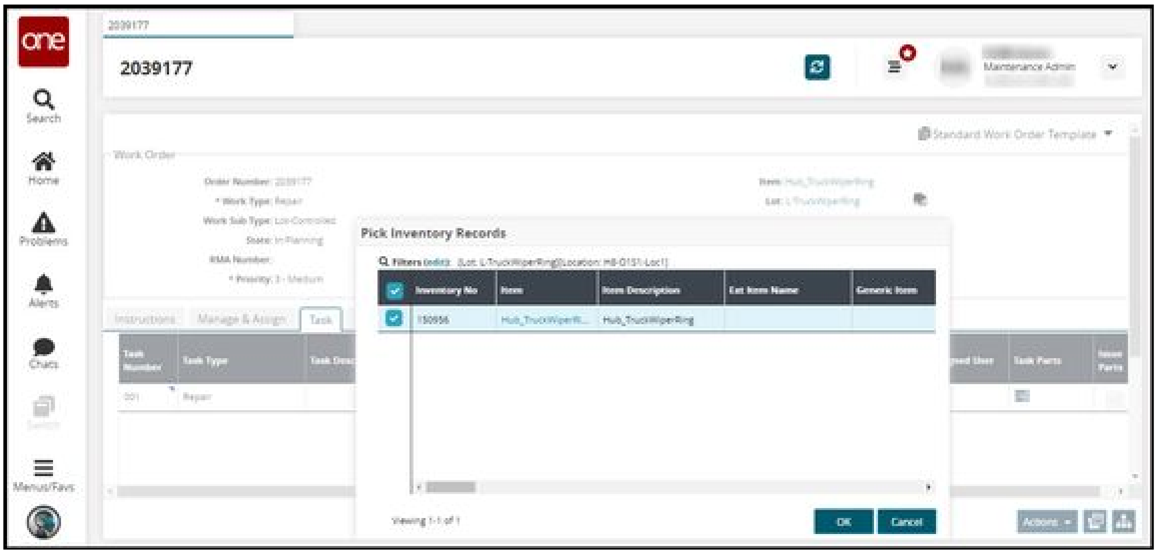


Note

Move the work order states to the next stages as **Completed Inspection**, **Accepted**, **In Diagnosis**, and then **Completed Diagnosis** state.

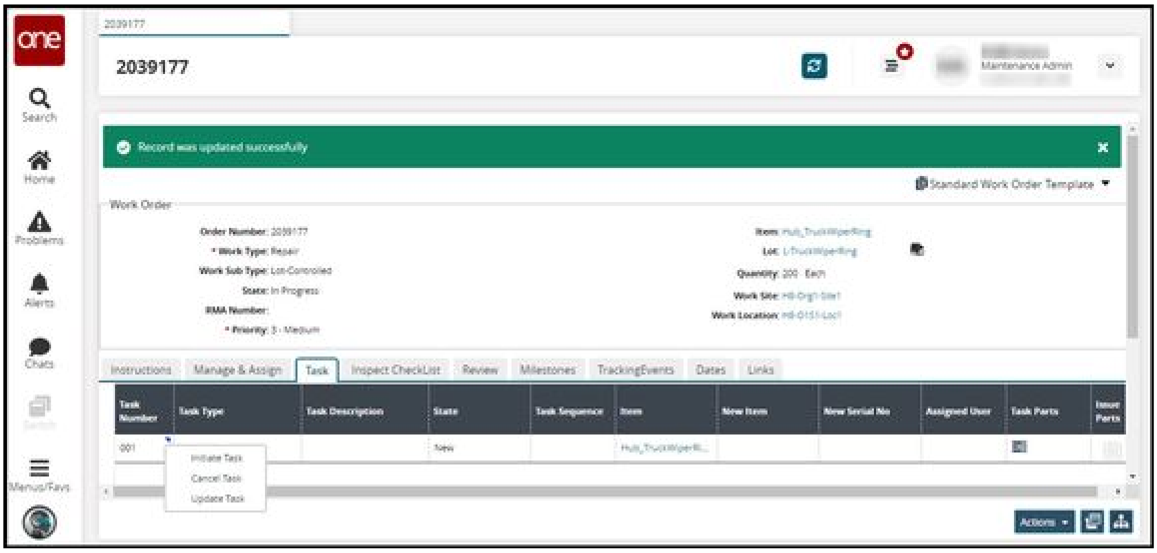
8. Go to the **Tasks** tab. Click **Actions** > **Start Planning**.

9. Click **Submit** button. The state of the work order changes to **In Planning**. Per defined policy, a task is auto-populated with Task state **New**.

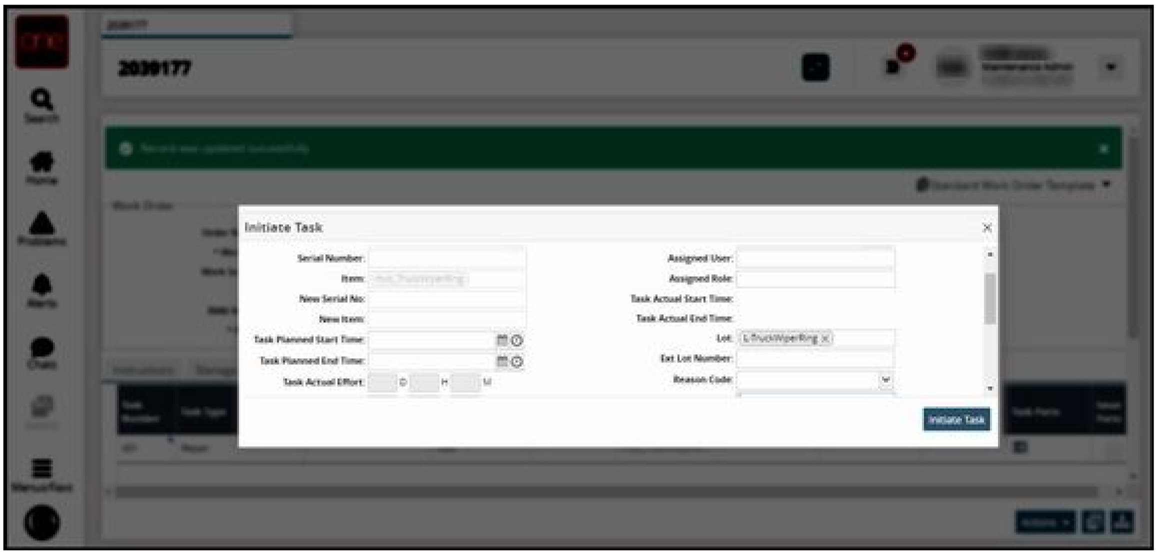


10. Navigate to the **Lot** field value and click  icon (Inventory picker) to pick the items from the inventory.
    The **Pick Inventory Records** window displays.
11. Select the item's row and then click **OK**.
12. Click **Actions** > **Complete Plan**.
13. Click **Submit** button. The state of the work order changes to **Planned**.

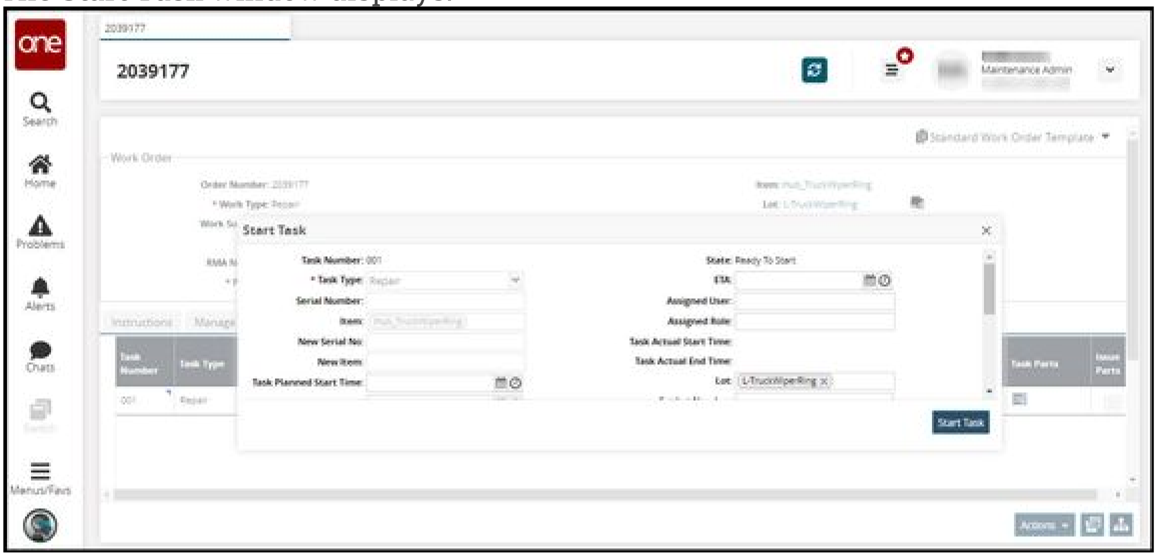
> **Note**
>
> Move the work order states to the next stages as **Approved**, **Accepted**, **Scheduled**, and then **In Progress** state.



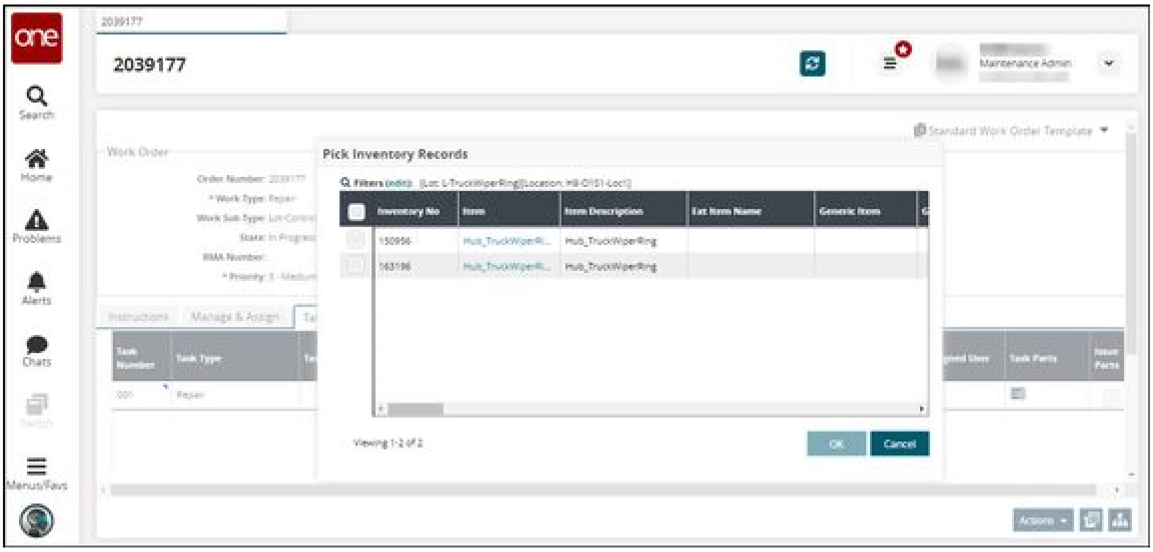
14. Click the **Expand** icon under the **Task Number** column and click the **Initiate Task** button.
The **Initiate Task** window displays.



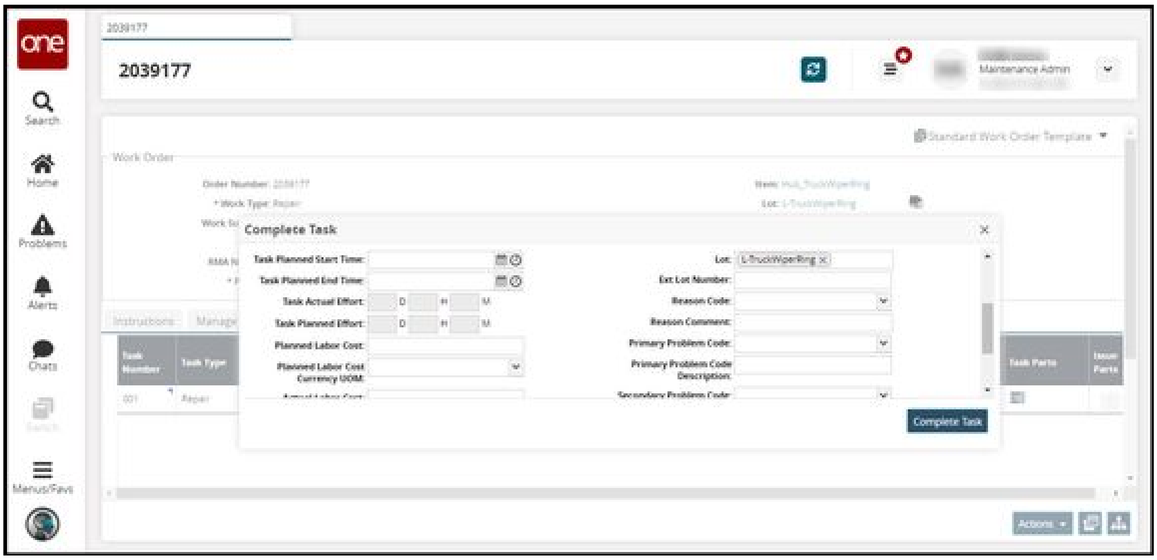
15. Fill in the required details and click the **Initiate Task** button. The state of the task changes from **New** to **Ready to Start**.
16. Click the **Expand** icon under the **Task Number** column and click the **Start Task** button.
The **Start Task** window displays.



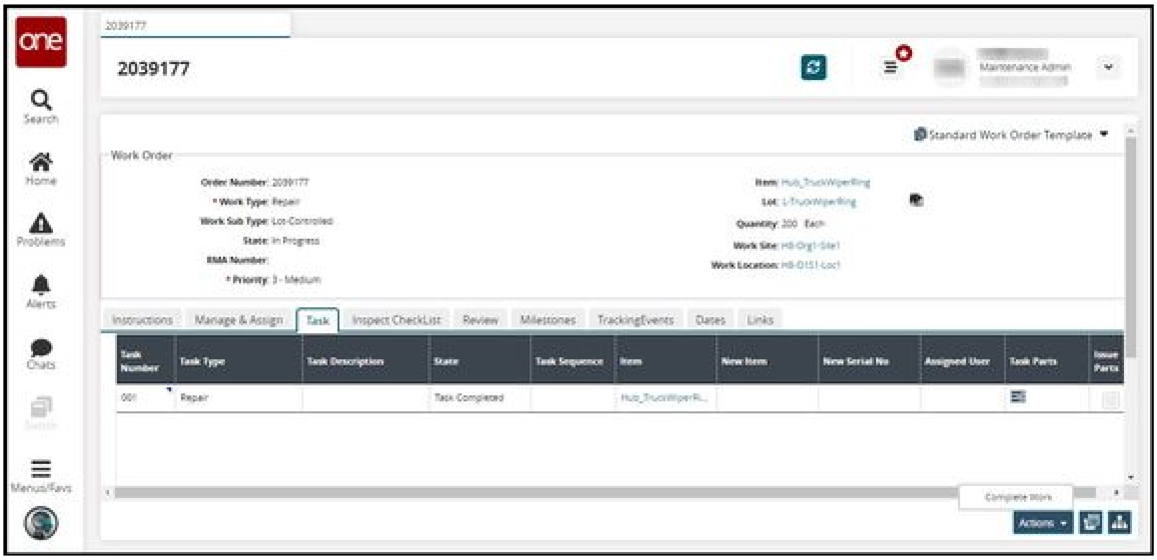
17. Fill in the required details and click the **Start Task** button. The state of the task changes from **Ready to Start** to **Task in Progress** state.
18. In this state the lot-controlled items are picked up and in repair. Navigate to the Lot field value and click  button(Inventory picker) to view the repair of items.
The **Pick Inventory Records** window displays. The quantity entered for lot items is displayed in a separate row with a **WIP** state (Work in Progress).



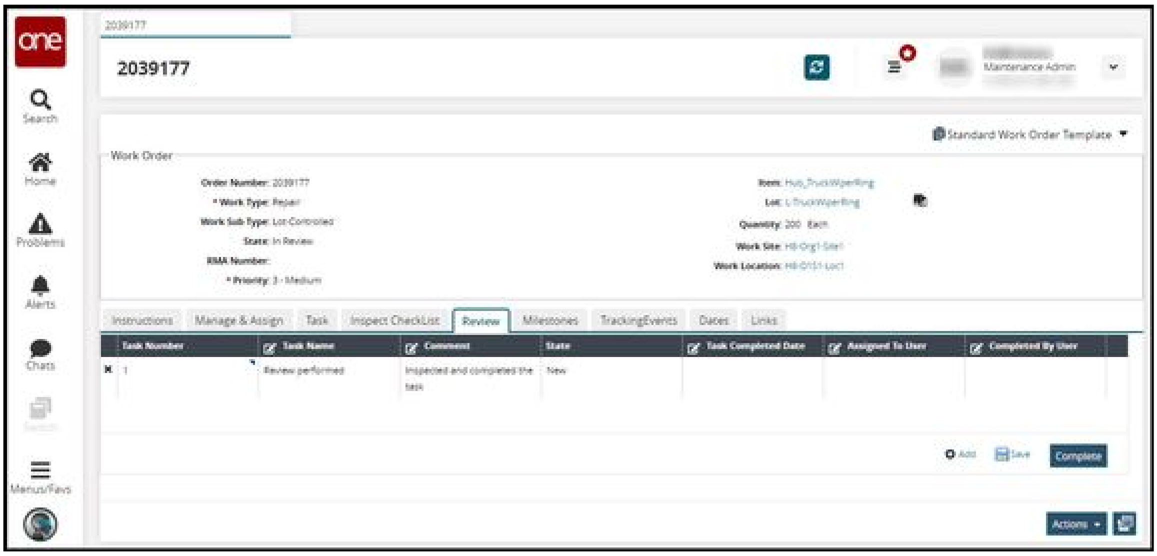
19. Click the **Expand** icon under the **Task Number** column and click the **Complete Task** button.
    The **Complete Task** window displays.



20. Fill in the required details and click the **Complete Task** button. The state of the task changes from **Task in Progress** to **Task Completed** state. In this state, the lot items repair is completed.

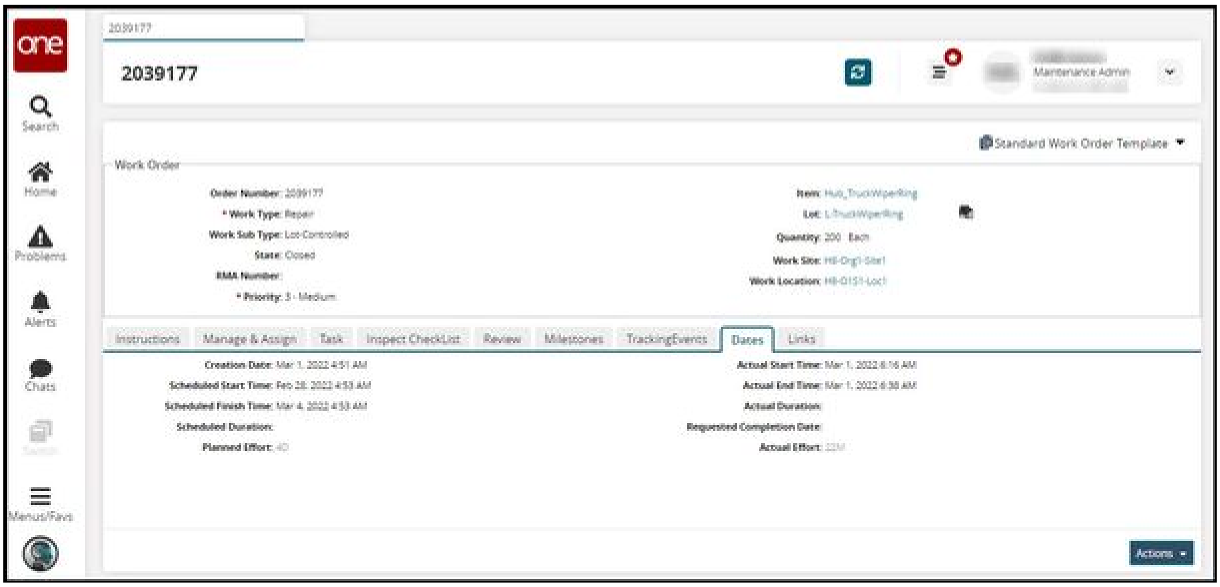


21. Click **Actions**> **Complete Work**.
22. Click **Submit** button. The state of the work order changes to **Work Completed**.
23. Click **Actions** > **Start Review**.
24. Click **Submit** button. The state of the work order changes to **In Review**.
25. Go to the **Review** tab to provide and submit the details and review comments on the repair task performed.



26. Click Add button to add review details for the lot repaired items in the repair work order. The review checklist state displays **New** state.
27. Enter appropriate details in the **Task Name**, **Comment**, **Task Completed Date**, **Assigned to User**, **Completed by User** fields respectively.
28. Click Complete button. The checklist's state changes to **Completed**. The **Checklist Completed successfully** message displays.
29. Click **Actions** > **Complete Review**.
30. Click **Submit** button. The state of the work order changes to **Review Completed**.

> **Note**
>
> The Asset Maintenance role user can then move the repair work order to the next stage in the workflow (**Work Ended**, **Asset Delivered**, and then **Closed**).



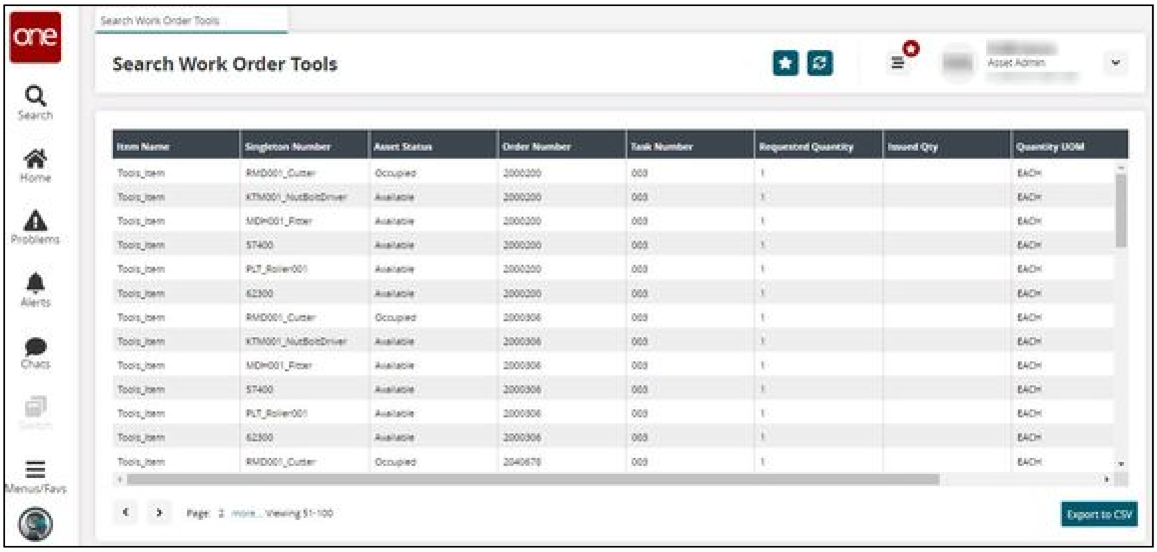
See the "Allow Lot-based Inventory to be Repaired in Repair Work Order" section in the current version of the *Release Notes* for more information.

2.10.3.3 Search Work Order Tools

This report captures tools information that is retrieved from the respective work order where the tool is utilized.

Complete the following steps to search tools applied for work order:

1. Log in to the ONE system.
2. Click the **Menus/Favs** > **Work Order Management** > **Search Work Order Tools**.
   The Search Work Order Tools screen displays.



3. Click **Export to CSV** to export the list into a spreadsheet.

> **Note**
>
> The Asset Status displayed in the report represents the current status of the tool in the work order.

See the "Work Order Enhancements" section in the current version of the *Release Notes* for more information.

About One Network

One Network is the intelligent business platform for autonomous supply chain management. Powered by NEO, One Network's machine learning and intelligent agent technology, this multi-party digital platform delivers rapid results at a fraction of the cost of legacy solutions. The platform includes modular, adaptable industry solutions for multi-party business that help companies lower costs, improve service levels and run more efficiently, with less waste. This SaaS and aPaaS platform enables leading global organizations to achieve dramatic supply chain network benefits and efficiencies across their ecosystem of business partners. One Network offers developer tools that allow organizations to design, build and run multi-party applications. Leading global organizations have joined One Network, helping to transform industries like Retail, Food Service, Consumer Goods, Automotive, Healthcare, Public Sector, Defense and Logistics. To date, more than 75,000 companies have joined One Network's Real Time Value Network™ (RTVN™). Headquartered in Dallas, One Network also has offices in Japan, Europe, and India.

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