



One Network Enterprises

NEO 3.3 Release Notes

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1 Important Announcements

1.1 End Of Support For Windows 7 In The NEO 3.3 Release

In the NEO 3.3 release (Spring 2021), One Network no longer supports systems running our products on the Windows 7 and 8 Operating Systems.

1.2 NEO UI Replaces Command Center UI In The NEO 3.3 Release

In the NEO 3.3 release, the NEO user interface officially replaces the Command Center user interface. The Command Center UI is no longer available.

1.3 Routine MariaDB Upgrade To Version 10.4

For the NEO 3.3 release, we are performing a routine upgrade of Maria DB. We are upgrading from version 10.0 to version 10.4.

Existing MariaDB Clients should continue to work with version 10.4 without issue, but you should validate your particular client.

2 System And Network Information

2.1 System Requirements

OS Requirement: Windows 10

Browser Requirement:

- Chrome (verified on version 87.0.4280.88)
- Microsoft Edge (verified on version 87.0.664.66)

Hardware Recommendation: For optimal performance, ONE recommends 4GB of RAM; capable of graphics resolution 1366 X 768 or better.

3 Enhancements And New Features

3.1 Cross-Module Enhancements

3.1.1 Enhanced Header Colors

Header colors for actionable reports, timeline views, and react tables are enhanced in this release. The headers now have a higher contrasting background color to increase visibility and user experience. Previously, the colors for headers offered less contrast to the data rows and were, therefore, less distinguishable.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	None

3.1.2 Keyboard Shortcut for Closing Perspectives

This release includes a keyboard shortcut for closing perspectives in the NEO UI. Previously, users clicked an icon on the screen to close a perspective, which decreased efficiency for users who are proficient with keyboard-based screen tasks. The enhancement allows users to continue with their workflow without moving from the keyboard to the mouse to close a perspective. Users press Ctrl + Alt + W to close the active perspective.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	None

3.1.3 Enhancements to the Integration Summary Report

This release includes enhancements to the Integration Summary Report, which provides a daily summary of integration activity. The current summary is enterprise-specific, and the enhancement supports value chain-level data with a null value for the enterprise. In addition, a new table on the Inbound EDI tab displays the following information:

- Count (number of messages which match this exact content)
- Business Error
- Format
- Transaction Set
- Sender
- Receiver

The enhancement to the report provides users with more flexibility to view data at different levels and more information on Inbound EDI errors. ONE's Integration Product Support team is responsible for configuring the report; therefore users contact ONE for changes to reports or requesting new reports.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Integration Summary Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.1.4 Support VC-level, Inclusion, and Exclusion Filters for the Integration Message Monitor Alert

This release adds support for the Integration Message Monitoring alert at the value chain-level for all users. Previously, this alert subscription was supported at the enterprise level. As part of this feature, two additional filters, which users can populate, are added for the Integration Message Monitoring alert subscription.

- **Message Failed with Error Patterns:** Replaces the existing filter Message Failed With Error. The old filter was lacking wildcard and multiple patterns support. For this new filter, the user can provide multiple patterns separated by a new line. If any of these patterns match with an error then the alert will be generated, otherwise, no alert is generated. This is an optional filter.
- **Message Failed excluding Error Patterns:** Users can provide multiple patterns separated by a new line. The alert will only generate if none of the patterns match with an error. This is an optional filter.

The pattern is a string which can contain wildcard characters like * (to match one or more character) and ? (to match any single character). This pattern matching is case insensitive, and each individual line of these filters supports a global pattern. These enhancements to the alert subscription provide specific alert customization for users.

Analytics Impact	None
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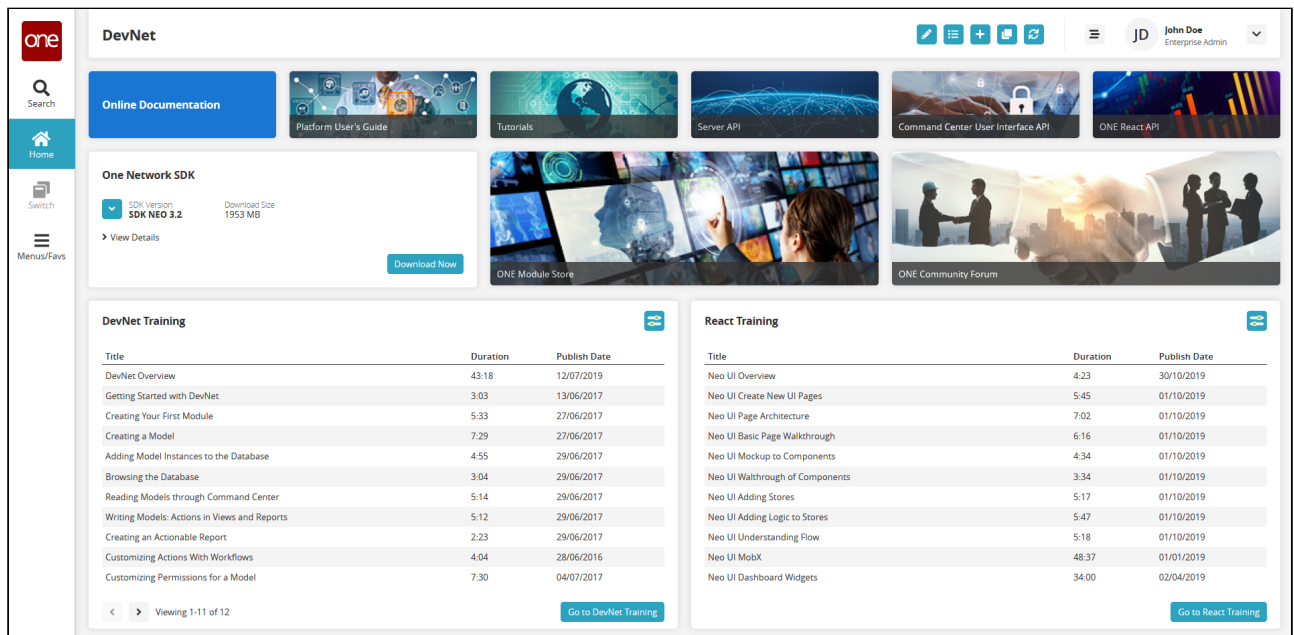
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Using Global Pattern Filters for Alerts" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.2 DevNet

3.2.1 DevNet Dashboard Enhancement

We enhanced the Dev Net Dashboard to increase the usability of the DevNet portal and make it easier for users to locate self-help materials.

Check out DevNet at: devnet.onenetwork.com



3.3 Logistics And Transportation Management

3.3.1 Execution

3.3.1.1 Add Accessorial Type and Tax-Related Information on Individual Invoice Lines

This release adds a new column, Additional Info, to individual invoice lines. The Additional Info column displays the accessorial type and tax-related information. The column is updated for carrier invoices, client invoices, allowance invoices, and value-added invoices and is visible to the Transportation Manager, Carrier, Supplier, and Client roles. Previously, the accessorial type and tax-related information were not available on the invoice lines. This enhancement helps to segregate the invoices on the basis of accessorial type and tax-related information and helps to avoid confusion among the users. The available accessorial types are:

- Allowance Accessorial Cost
- Freight Accessorial Cost
- Freight Site Accessorial Cost
- Shipment Accessorial Cost
- Shipment Site Accessorial Cost

The available taxes are listed below. For each, the tax percentage and tax code are listed.

- Allowance Tax
- Freight Tax
- Shipment Tax

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Adding Invoice Lines" section in the current release of the <i>Online Help</i> for more information.

3.3.1.2 Add Tender Expiration Time in Service Level Definitions

This release adds a tender expiration time in the service level definition. Whenever a shipment is not accepted within the allowed response time, the system re-tenders it to a different carrier. Earlier, this tender response time was defined at the site, organization, or equipment level under Tendering Policies. This enhancement adds support for a variable

tender expiration time or tender response time according to the service level definition. Users can specify the expiration time in the Expiration Time field on the Service Level user interface. The system gives the highest priority to the tender expire time defined at the service level.

Prerequisite:

1. Set the service level with an expiration time.
2. Set any tendering policy with an expiration time.
3. Create a shipment with the above service level.

Analytics Impact	None
Integration Impact	Yes. The Service Level can be updated with a CSV file.
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>Online Help</i> for more information.</p> <ul style="list-style-type: none"> • "Managing Service Levels" • "Managing Tendering Policies" • "Creating Shipments using a Standard Template"

3.3.1.3 Configure Static Routes Across Weeks

Starting this release, users can configure static routes across weeks. The Arrival Day and Departure Day fields on the Static Route user interface are changed to Arrival Day Offset and Departure Day Offset at the stop level. Previously, static routes were restricted by Arrival Day and Departure Day fields at the stop level defined the actual day of the week, for example, Monday, Tuesday, and so on. This restricted the duration of a static route to a single week. The enhancement provides flexibility to users in defining static routes. Users set the fields to configure the routes across weeks.

Analytics Impact	None
Integration Impact	The Static Routes CSV format is changed; the users need to use this new format. The column names Arrival Day and Departure Day are changed to Arrival Day Offset and Departure Day Offset in the CSV file, and the columns accept integer values instead of string values.
Related Functionality	None
Usage and Configuration	See the "Working with Static Routes" section in the current release of the <i>Online Help</i> for more information.

3.3.1.4 Select Multiple Tenders on Tender Plan Screen

Starting this release, users can select or deselect multiple tender plans on the Tender Plan screen. Previously, the users had to manually select or deselect each tender taking too much time and effort. This enhancement makes it easier and more efficient to select or deselect multiple tenders using the checkboxes added to the list of tenders on the Tender Plan screen. All tender plans are selected by default.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing Tenders and Tender Details" section in the current release of the <i>Online Help</i> for more information.

3.3.1.5 Bulk Download Feature for Shipment Attachments

Starting this release, users can download multiple attachments on shipments from a single screen. Previously, users had to open every shipment associated with the movement to view and download the attachments. This feature eliminates the need for navigating through multiple screens. To support this enhancement, a new Download Attachments report screen is introduced that displays all attachments on the shipments. Users can view a list of attachments by clicking the Download Attachments option on the search shipment report context menu.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Downloading Multiple Attachments from Shipments" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.1.6 Suppliers can Select Parcel Carriers and Service Levels

Starting this release, customers can allow their suppliers to select parcel carriers and set service levels. A new tab, Carrier, is added to the Shipment details screen where suppliers can set the Equipment field to Parcel and set the appropriate service level and other details. To use this feature, the Enable Carrier Tab to Supplier for Parcel policy must be enabled

under Transportation Policies and the Reverse Freight Forwarder Partnership option must be present between supplier and customer.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Creating Shipments using a Standard Template" section in the current release of the <i>Online Help</i> for more information.</p> <p>See the "Working with Transportation Policies" section in the current release of the <i>Online Help</i> for more information.</p>

3.3.1.7 Approve Tender Costs by Email

Starting this release, carrier users can approve tender costs without logging into the system. Previously, users had to log in and follow the cost approval process. With this enhancement, users only need to click the link in the received alert email to approve the tender cost, saving carrier users time. Users must have already subscribed to the Approval Requested alert to take advantage of this new feature.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Approving Tender Costs through Email" section in the current release of the <i>Online Help</i> for more information.

3.3.1.8 Add Demurrage Time Duration Field on Shipment UI

Starting this release, users can calculate demurrage time based on the time difference between two configurable events. This helps users apply the correct price per time rate. Previously, users had to manipulate the pickup and delivery windows manually to get the desired result. To use this feature, users must add the Demurrage time duration field on Shipment UI when creating shipments using a Client Shipment template. The Demurrage field is available on the Price tab of the shipment details screen.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	None

3.3.1.9 Add DOT Parameters on Movement Details

Starting this release, new parameters are added to the stops grid on LoadBuilding UI. The Department of Transportation (DOT) parameters are as follows. Previously, there was no way for users to enter these movement-level details, but this update makes it much easier to track the total transit time. Users must navigate to the Load Building UI to enter the Load-Stop details (movement details).

- Wait Time
- Break Time
- Load Time
- Unload Time

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Adding DOT Parameters" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.1.10 Add Stop-Off Rates in Spot Tenders

The system now considers stop-off rates as a cost component for linehaul-based spot tenders. Users can configure stop-off rates at the carrier contract level. If the stop-off charge is defined both at the carrier contract and global contract levels, the system will take into account both. A stop-off rate is an additional cost to cover any stops between the origin and the final destination.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Configuring Stop-off Rates for Carrier Contracts" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.1.11 Approve Costs through Email

Starting this release, users who are already identified as approvers in the cost approval hierarchy can approve tender costs and escalations via a link in an alert-generated email. Previously, users had to log in to the system and follow the cost approval process through the UI. With this enhancement, users can click the link they receive in the email to approve the tender cost without logging into the system. Users must have already subscribed to the Approval Requested alert with an email.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating Alert Subscriptions for Cost Limits" section in the current release of the <i>Online Help</i> for more information.

3.3.1.12 Conditionally Accept a Tender through Email

Starting this release, carrier users can conditionally accept a movement without logging into the system. Previously, users had to log in to the system and follow the process, but with this enhancement, users only need to click the received link in the alert email to conditionally accept the movement. Users must have already subscribed to the Approval Requested alert.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Accepting Tenders Conditionally through Email" section in the current release of the <i>Online Help</i> for more information.

3.3.1.13 Display Negative Amounts in Transaction Report

Starting this release, Transportation Manager users can see the negative cost on the transaction report if any negative additional charges are added to the movement. Previously, in cases of negative charges incurred, the system displayed no cost on the transaction report. Moves are created by distribution codes, and one of these will generally have a negative amount. With this enhancement, users can add the negative additional charge on the movement for credit invoices. The negative amount is visible in the Transaction report.

Analytics Impact	None
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Integration Impact	None
Related Functionality	None
Usage and Configuration	None

3.3.1.14 See Next Stop ETA for Non-Controlled Shipments

The Shipment report now displays the estimated time of arrival (ETA) at the next stop for non-controlled shipments. Previously, the system did not display the ETA and users could not sort the report by ETA. The ability to see ETA at the next stop helps customers with a large number of multi-stop shipments track individual shipments. Users must create an ETA tracking event to see the next stop ETA on the shipment report.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Searching Shipments" section in the current release of the <i>Online Help</i> for more information.

3.3.1.15 Support Cost Plus Base Rate for Client Multi-Modal Shipments

This release adds the capability to support cost plus base rate for multi-modal 3PL shipments. Previously, the system did not support this feature. To support this feature, this update also adds the generation of price quotes when legs are in the Awaiting state, and cost plus currency support. For price quote generation, prices are calculated using the first carrier in the tender plan.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	None

3.3.1.16 Upload Site Equipment Compatibility Details

Transportation users can now upload a CSV file with equipment compatibility details like equipment type and any applicable restrictions for multiple sites and/or equipment types. Prior to this release, users had to manually enter details through the UI, which was time-consuming. The new functionality enables them to bulk upload site-equipment compatibility

details from a single file upload. The CSV upload functionality can be accessed via the Site Equipment Compatibility screen.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Uploading Site Equipment Compatibility Details" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.1.17 Use Street-Level Coordinates in Distance Policies

The system now uses street-level coordinates for calculating distances and transit times when the default distance source is set to PC Miler. Users can select a new flag, Is Premium, while configuring a new distance policy using PC Miler as the default distance source. Previously, the system displayed this data using only the city-level coordinates. This enhancement helps produce better transportation decisions by giving customers more accurate distance and transit time data. Customers must have an active PC Miler Premium license.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating Distance Policies" section in the current release of the <i>Online Help</i> for more information.

3.3.1.18 Carrier Bid Response Report

This release introduces a new report, Carrier Bid Response, for Shipper users, which shows data related to Market Maker competitiveness. The newly added report enables users to view bid responses and bid status on a single screen. Previously, users had to switch between two different screens to review these details. This update makes it a lot easier to analyze bid responses.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the "Viewing Carrier Bid Response Report" section in the current release of the *New Feature Usage and Configuration Guide* for more information.

3.3.1.19 Enhancements to Carrier Movement and Shipment Reports

Starting this release, carrier users will continue to view conditionally accepted tendered movements and tendered shipments in reports. The enhancement provides visibility of the movements until the shipper takes action on the tender. It provides visibility of the shipment until the tender expires or it gets awarded to another carrier. Previously, these movements and shipments disappeared from the carrier reports preventing them to analyze their bidding accuracy, which is part of a carrier's scorecard. Carrier users will continue to access these reports as before.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Spot Bid Tender" section in the current release of the <i>Online Help</i> for more information.

3.3.1.20 Enhancements to Client Shipment Cost Allocator

Starting this release, users can define cost allocation based on group shipment lines present under the client contract. The cost allocation method enables organizations to validate and correctly assign associated expenses to various departments based on how they use the service. Earlier, the system considered Group Based Allocation policy to derive price allocation for client shipment. Now, users can define price allocation based on the Group Shipment Lines under the client contract page. This enhancement allows users to have better control over the price split ratio on group shipment lines.

Pre-requisites:

Users must ensure to configure client contracts, if not the system sets the weight ratio as a default cost allocator.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration	<p>See the following sections in the current release of <i>Online Help</i> for more information.</p> <ul style="list-style-type: none"> • "Managing Pricing Policies" • "Searching for and Viewing Client Contracts"
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3.3.1.21 Enhancements to Multi-Modal Shipment

This release adds a base rate for multi-modal 3PL shipments to calculate the shipment cost. A new column, Cost Plus, is added to the Itinerary page of the multi-modal shipment to support this. Previously, this functionality was not supported. This enhancement improves currency conversion, default carrier confirmation on client routing guides, and price quote generation.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Multi-Modal Shipment" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.1.22 Enhancements to Parcel Execution Policies

This release updates the CSV file used for uploading Parcel Execution policies with new columns, adding information specific to UPS. The following columns are added at the Organization level:

- UPS Username
- UPS License Key
- UPS Password

The following columns are added at the Site level:

- UPS Site Username
- UPS Site License Key
- UPS Site Password

With this enhancement, users can easily bulk upload UPS details at the Organization level or for a specific site.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Configuring Parcel Execution Policies" section in the current release of the <i>Online Help</i> for more information.

3.3.1.23 Enhancements to Spot Tender Plan

This release adds the Carrier Arrival ETA field on the Tender Plan UI and Tender Plan details UI. The field is visible on the Tender Plan UI even after performing the Accept Tender or Conditionally Accept Tender actions. Previously, users could not provide carrier arrival ETA details while submitting a bid for a spot quote. This enhancement adds convenience by allowing users to perform related actions in the same workflow, thus saving time. Users can view the details about the carrier arrival ETA in the Carrier Arrival ETA field on the Tender Plan details UI and while accepting a tender or conditionally accepting a tender.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Tenders" sections in the current release of the <i>Online Help</i> for more information.

3.3.1.24 Enhancements to Tender Summary Report

This release introduces new columns and filters in the Tender Summary report. Users can now enter date and time details on the Tender Summary Reports screen to fetch specific reports. For example, run a report to see all the Tenders sent out between 12:00 PM yesterday and 01:00 PM today. Previously, users could not search Tender Summary reports based on the date and time filter. This enhancement makes it easier to drill-down and search for the desired results.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing Tender Summary Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.1.25 Enhancements to the Default Bill of Lading Template

This release adds a new field, PRO Number, to the default Bill of Lading (BOL) document for shipments in the Less Than Truckload (LTL) mode. A PRO (Progressive) number is issued by the carrier and used by the shipper to track an LTL shipment. LTL is a method for shipping smaller shipments that is usually more affordable than a truckload. Previously, the PRO number was visible only in the archive BOL, meaning the driver sometimes assigned a new PRO number during the pickup, overriding the original. This prevented the PRO number from being used to track the shipment.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	To print a Bill of Lading (BOL) document, users can select a movement that is in Confirmed or a later state and click Actions > Print BOM.

3.3.1.26 Enhancements to the Tender Plan History Page

This release adds a new column, Expiration Time, to the Tender Plan History screen to display all the tender expiration time updates. Prior to this release, the Tender Plan History screen displayed activities only until movement tendering. There was no way to see the expiration time initially set or any subsequent updates to it. This update enables a better audit trail for reviewing and analyzing a tender plan at a later stage.

Prerequisites

- Routes and corresponding base rates must be created.
- Set an expiration time in the tendering policy at the Organization level.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing Tender Plan History" section in the current release of <i>Online Help</i> for more information.

3.3.1.27 Enhancement to Approval Plan Model

The Approval Plan model has been updated in this release to include a Canceled state for approvers. Previously, when users processed tender plans, the approval process escalated approvals where approvers were designated to approve the plan after an established time frame or based on a cost limit. If one user in this process approved a plan, the plan changed to an Approved state. However, the state for the plan did not change when other subsequent approvers viewed the plan. This enhancement changes the plan to the Canceled state for the subsequent users in the approval process. The change eliminates confusion between users on the state of a plan. Users do not need to take any action for this enhancement.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Configuring Approvals for Costs Limits" section in the current release of the <i>Online Help</i> for more information.

3.3.1.28 Added Weight Information to EDI 214

This release adds weight support on shipment and movement with EDI 214 for events picked up and delivered. EDI 214 now supports weight information as part of the AT8 segment as follows:

- AT801 - Weight Qualifier
- AT802 - Weight Unit Code (UOM)
- AT803 - Weight Value

Previously, transportation carrier users could only enter the shipment packaging and quantity information. This enhancement helps track the entire shipment status message efficiently. If the movement is SSM, the system records both the shipment and movement weight, and in the case of MSM movement, only the movement weight is recorded.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	None

3.3.1.29 Enhancement to Expiration Time by Equipment Type

This release adds a new column, Tender Expiration Time, to the Equipment Setting screen to display all the tender expiration time updates. Prior to this release, the Tender Plan History screen displayed activities only until movement tendering. There was no way to see the expiration time initially set or any subsequent updates to it. This update enables a better audit trail for reviewing and analyzing a tender plan at a later stage. To use this feature, routes and corresponding base rates must be created and an expiration time must be set in the tendering policy at the organization level.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Adding a New Equipment Setting" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.1.30 Enhancement to Shipment Cost Allocator

This release updates the cost allocation methods to support cost allocations based on quantity and quantity distance. Earlier, the system excluded distance measurability while calculating the cost of the shipment for deployment orders. Now, when calculating a shipment cost, the system considers quantity and quantity distance as the cost allocation method.

This enhancement helps users to consider different cost allocation methods on the Carrier Contract page and calculate the correct shipment cost. Users must select a contract to modify the cost allocation details.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Configuring Cost Allocator" section in the current release of the <i>Online Help</i> for more information.

3.3.1.31 New Data Filters in RFQ Wizard

This release brings the following filters to the Carriers Advanced Search tab in the RFQ Wizard:

- **Carrier Group:** Shipper users can now filter the list of carriers by specific carrier groups making it easier to see the available relevant choices and select one. Previously, the system displayed all carriers from all groups. Users had to scan through the list and select a carrier.
- **Carrier Partners Only:** This release also enables shipper users to submit RFQs to non-partner carriers. A non-partner carrier is a carrier listed in the system but has no transaction history with the hub. This enhancement enables more carrier options to choose from, unlike before, when the choice of the carrier was restricted to partner carriers only. By default, this option is selected.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating an RFQ" section in the current release of the <i>Online Help</i> for more information.

3.3.1.32 New Field on Content Tab

This release adds a new checkbox field, Duty Free, to the Content tab of the shipment details screen. Previously, the Duty Free field was present on the Header tab. Users can either select the Duty Free checkbox or enter a value in the Declared Value field.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating Shipments" section in the current release of the <i>Online Help Guide</i> for more information.

3.3.1.33 Rate Shopping Tenders

This release adds the capability to tender a movement to spot carriers alongside contract carriers, irrespective of the sequence of carriers on the tender plan. This enhancement adds the following options to Organization-level and Partner-level tendering policies. This feature

enables customers to obtain the best rates for every movement by leveraging multiple carriers without any contract.

Screen Name	Field Name	Description
Tendering Policies (Organization-level)	Initiate Spot Tender Group	<p>A drop-down menu with the following options:</p> <ul style="list-style-type: none"> • On Initiate Tendering: When selected, the movement is tendered to contract carriers and spot carriers in a synchronous manner. • On First Tender Reject/Expired: When selected, the movement is tendered to spot carriers after the first contracted carrier rejects the tender or the response time for the first contract carrier expires.
	Auto-Tendering Time	This option works in tandem with the Auto-Tender Based on Quote option added to the Partner-level tendering policy.
Tendering Policies (Partner-level)	Auto-Accept Spot Tender Time	When enabled, if the shipper does not respond to the spot bid within this time frame, a spot bid with the least cost is auto-confirmed.
	Auto-Tender Based on Quote	When Auto-Tendering Time is defined at the organization-level and Auto-Tender Based on Quote is enabled at the partner-level, if the shipper does not respond to the bid in time, a new tender group is created with spot carriers that responded to the bid and sent for approval. The state of the existing tender is closed. The new tender group is created with only those carriers that have Auto-Tender Based on Quote flag set to True.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Comparing Carrier Bids for a Movement" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.1.34 Spot Bid Trends by Carrier Widget

This release introduces a new widget, Spot Bid Trends by Carrier, to the NEO Analytics Dashboard. Earlier, users couldn't see spot bid information on carriers in a report or widget form. This widget helps users to view and analyze carriers' spot bid data from a single report. Users can find the following information from the Spot Bid Widget:

- Total Spot Bids Invited
- Conditionally Accepted Bids
- Total Spot Bids Awarded
- Average Response Time in Minutes

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Configuring Spot Bid Trends by Carrier Widget" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.1.35 Enable or Disable a Shipper for GLG Integration

With this release, support is added to enable or disable shippers for Global Logistics Gateway (GLG) integration into ONE's transportation management system. A flag at the enterprise level allows users to designate if third country operators (TCOs) should be integrated with GLG. Previously, the process required multiple steps and configurations. Users now set a single flag to True or False.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Enable a Shipper for GLG Integration" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.1.36 View Rates from External Services

This release adds a new report, Dynamic Rating, under the Transportation module to view rate data fetched from an external service. Earlier, Shipper or Transportation users sometimes faced inconsistency issues in fetching these details and could not view the rates from an external service. There was no way for the users to identify the cause and take corrective steps. The new report enables users to view more details and fix any issues with the data fetched from an external service. Users access the report from the Transportation menu.

Fields include:

- Movement Number
- Quote Date
- Quote Expiry Date
- Base Cost
- Accessorial Cost
- Total Cost

Filters include:

- Movement Number
- Carrier
- Tender Creation Date
- Movement Pickup Date
- Movement Delivery Date

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing the Dynamic Rating Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.2 Financials

3.3.2.1 Receive Alerts on Reject Event in Invoices

This release adds a new configurable Invoice Reject alert that notifies the users when an (Allowance Invoices, Carrier Invoices, Client Invoices, VAS Invoices) invoice is rejected. Earlier, when an invoice was rejected, alerts were not generated. This enhancement allows other users in the supply chain (customers, clients, vendors, carriers, shippers) to subscribe to the alert and track the invoice further along its lifecycle to document efficiencies or address issues. The users need to subscribe to the alert type Invoice Reject Alert to receive the alerts.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	See the "Creating Invoice Reject Alerts" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.2.2 Enhancement to Distribution Code Policies

This release updates the Distribution Code policy to support codes by state and city. The following fields are added to the Distribution Code policy user interface:

- Origin State
- Origin Postal
- Origin City
- Destination State
- Destination Postal
- Destination City

Prior to this release, the distribution code policy did not support codes by state and city. This posed a problem when partner users created shipments with multiple temporary sites. The temporary sites should have separate distribution codes that were not possible to set up in the current system. Users can add the Origin State or Destination State or Postal or City codes to configure distribution codes for state, postal, and city on the Distribution Code Policy user interface.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Distribution Code Policies" section in the current release of the <i>Online Help</i> for more information.

3.3.2.3 Enhancement to Invoice Line Popup Window

This release includes an enhancement to the invoice line popup window to show additional fields. The fields below are already supported by EDI 210 and stored in the ONE database; however, the information did not display on the UI for users. These fields are now available for all invoices like Carrier, Client, Value Added, and Allowance invoices, and they are editable in New and For Review state invoices. The fields will now display on the popup with no additional user action.

- Ship From Address Compl
- Ship From Address Comp2

- Ship From Address Comps
- Ship From Address Country
- Ship To Address Comp1
- Ship To Address Comp2
- Ship To Address Comps
- Ship To Address Company

Visibility of the fields provides information that would otherwise have to be searched for, thus saving users time.

Analytics Impact	None
Integration Impact	The EDI 210 already supports the address data but was updated to also support FAK.
Related Functionality	None
Usage and Configuration	See pages covering different invoices in the <i>Online Help</i> for more information.

3.3.3 Fleet Management

3.3.3.1 Shipper Users can Upload Models

This release enables shipper users to upload model data through the UI. Previously, shipper users could not upload model data from the UI and had to use a third-party approach; they can now upload directly from the UI for some models like Skills, Vehicles, and Tools. This enhancement makes it easier and more efficient to upload files using the skills, vehicle, and tools option on the Upload menu of the shipper user UI.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Uploading Files" section in the current release of the <i>Online Help</i> for more information.

3.3.4 Global Trade

3.3.4.1 Control Tower Workbench

This release includes the Control Tower Workbench to provide users with a single point of contact in the UI to track and optimize shipments within global trade, which was not available before. Prior to this update, users performed tasks on different screens in the ONE system, whereas the new workbench gives more data and functional access on a single screen.

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, as well as the container details for each shipment. Users can monitor the progress of cargo from packing to clearing export customs along a progress bar with status indicators for each step. Users 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 Control Tower Workbench provides users with the NEO It option that suggests recommendations for the next step in solving any problems or optimizing the shipment.

Transportation users access the Control Tower Workbench through the Transportation menu.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with the Smart Control Tower Workbench" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.4.2 New Accessorial Type for Combined Detention and Demurrage

For the NEO 3.3 release, ONE has developed a new accessorial type that combines both detention and demurrage (DETMUR). Demurrage is a site-level accessorial rate applied between the states of Unloaded to Out Gate. Detention is a lane-level accessorial rate applied between the Out Gate state and the Equipment Returned event. DETMUR is applied between Unloaded to Equipment Returned Event. This enables a shipper, consignee, or PSA Client to combine the free days across both measures, and when summed, if the combination of each doesn't exceed a particular metric, neither are charged. For example:

- The client has 7 days free for detention.

- The client has 5 days free for demurrage.
- The client incurs 9 days of detention but only 2 days of demurrage, totaling 11 days. Because the total did not exceed a combined 12 days, nothing is charged.

Users configure DETMUR using a site accessorial rate. The DETMUR calculation period is from the time the container is unloaded from the vessel until it is returned to the terminal. DETMUR is calculated using the cost method: Per Time by Day.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating a DETMUR Accessorial Rate" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.5 Logistics Gamification

The ONE system now includes a gamification feature that offers a game-like incentive to drive competition and better efficiencies among users. The benefit of gamification is providing users with an external motivation for performance improvement within an enjoyable environment. Users will also have prompts for the next step to an achievement level and visual progress-monitoring.

Admin/Managers configure the achievement measurements for users and roles based on daily, weekly, and/or monthly time buckets (called cadences), as well as thresholds for the top three performance-based ranks: bronze, silver, and gold.

Users use dashboard widgets to view their own achievements, how their achievements compare to other users, and their individual progress toward additional achievements. Users also receive notifications as they complete their achievements. The two user widgets are the My Awards widget and the Team Awards widget.

This release includes the following logistics achievements:

Efficiency

- Number of tenders confirmed with least cost
 - For spot tendering, the user is able to confirm to least-cost tender response
 - For regular tender, the least-cost carrier confirmed the tender initiated by the user
- Number of movements confirmed on-time before the planned pickup window

Throughput

- Number of movements tendered per day
- Number of movements confirmed per day
- Number of shipments scheduled per day
- Number of shipments picked up/received per day (done on behalf of the carrier)
- Number of problems resolved per day
- Number of shipments created per day
- Number of invoices approved per day (Subnet is not supported)

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Gamification" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.6 Scheduling

3.3.6.1 Carrier Users can Cancel Appointment Requests

This release enables carrier users to cancel an online appointment request. Previously, carrier users had to contact the shipper to cancel an appointment request on their behalf. They can now cancel one or more appointment requests using the new Cancel Appointment Request button on the Appointment Request report for carrier users. Appointment requests can be canceled before appointments are scheduled. This enhancement makes it easier to cancel appointment requests that are no longer needed and saves time for both carriers and shippers.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Cancelling Appointment Requests" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.6.2 Upload Variable Capacity Settings for an Organization

Users can now bulk upload Organization-level Variable Capacity settings in a CSV file. Users can populate the CSV file with all Variable Capacity definitions in the prescribed format and then reference these settings in the Capacity Settings column in the Workshift Policy CSV file. This enhancement provides a quicker way for users to configure Variable Capacity Settings when dealing with a large number of settings involving multiple policy variations, each with distinct limits.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Uploading Variable Capacity Settings for an Organization" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.6.3 Enhancements to Auto Scheduling Policies Screen

This release updates the auto-schedule feature to exclude partners from auto-scheduling based on partner profiles configured at the site level. In previous releases, the auto-scheduling feature was limited, and users were only able to include partners. This enhancement makes it easier for users to configure auto-scheduling to suit their specific needs.

The users can include or exclude partners on the Auto-Schedule Policies screen using:

- **Excluded Partners:** The users can add the partners in the Excluded Partners panel to exclude from auto-scheduling.
- **Partner Variation:** The users can specify using the drop-down if Partner or Partner Profile is selected to include or exclude from auto-scheduling. The drop-down is in both Included Partners and Excluded Partners panels.
- **All:** The users can select the All option in the Included Partners panel to selectively exclude Partners or Partner Profiles specified under the Excluded Partners panel and vice versa. The option is in the Included Partners panel as well.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the "Setting Site Policies" section in the current release of the *Online Help* for more information.

3.3.6.4 Enhancements to Predictive Scheduling

This release updates the estimated time of arrival (ETA) workflow to auto-cancel a resolved problem. For example, if the pickup vehicle is stuck in a traffic jam and the ETA is after the pickup appointment start date, a problem is raised. When the traffic starts moving again and the new ETA is before the pickup start date, the problem raised earlier is now auto-canceled. Previously, a predictive problem was auto-canceled only upon rescheduling. Also, there is now a new field, Apply Lead Time, on the Site Profiling page under Administration. Transportation Managers can use this field to decide if lead times apply to pickups, deliveries, or both types of operations. These enhancements improve the Predictive Scheduling logic and make it more useful for customers.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Site Profiling" section in the current release of the <i>Online Help</i> for more information.

3.3.7 Third-Party Logistics

3.3.7.1 Combine or Remove Legs at Shipment Level

Starting this release, users can perform the following actions on shipment legs of a multi-modal shipment:

Action	Description	Prerequisite
Combine Legs	Combines one or more shipment legs of a multi-modal shipment. This action is available only on the parent shipment.	The parent shipment must have more than two shipment legs. Shipment legs must have a state prior to the In-transit state.
Remove All Legs	Removes all the shipment legs of the multi-modal shipment. When performed, this action removes all shipment legs and saves the multi-modal shipment as a single shipment.	All shipment legs must have a state of Confirmed or a state prior to Confirmed.

This feature helps users update shipment legs from a single screen. Users can perform these actions on the Global Shipment Search report.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Shipment Legs" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.7.2 Capture External Contract Numbers on Base Rates Screen

This release introduces the ability to capture external contract number on the Base Rates. While sending a booking request, the ocean carriers need to share the external contract number as they have different contract numbers by lane. Carriers need this information to process the booking request. Users can enter the external contract number on the Base Rates tab of the Carrier Contracts screen.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating Carrier Contract Base Rates" section in the current release of the <i>Online Help</i> for more information.

3.3.7.3 Submit Shipping Instructions

Starting this release, shippers, third-party logistics service providers, or freight forwarders can submit shipping instructions for carriers after booking an ocean container. Shipping instructions for carriers typically include booking details, shipment details, and packing lists. These instructions can be specified after the packing list is assigned to the container. When a carrier confirms a booking, users must create a packing list for each container in the shipment.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration	See the "Submitting Shipping Instructions" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.
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3.3.7.4 Client-Specific Carrier Contracts

Starting this release, users can create client-specific carrier contracts in the ONE system. This feature is helpful when specific rates are applicable to specific clients on a given lane. Therefore, users can create different base rates on the same lane for different clients. A new field, Client, is also introduced to support the enhancement. Users can create client-specific contracts on the Carrier Contracts screen.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating Carrier Contracts" section in the current release of the <i>Online Help Guide</i> for more information.

3.3.7.5 Container Bookings from Client Roles

Starting this release, users can initiate a container booking request from a client role. In some cases, client users generate the booking request using freight forwarder (FF) carrier partner or vessel schedule services. This feature helps client users to create and manage container booking requests. The Global Trade feature should be enabled for client users to handle container bookings.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating a Booking" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.7.6 Enhancements to Container Booking Process

Starting this release, the system creates a single booking request for multiple container types. Previously, the system generated separate booking requests for each type of container. This update helps users track booking requests for multiple containers through a single booking request. As part of this enhancement, a single EDI 300 file will be generated containing information about all container types.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	None

3.3.7.7 Enhancements to Container Bookings

Starting this release, shipper users can select vessel schedules for containers when initiating an ocean booking request. All the major ocean carriers have their own vessel schedules. This feature helps users select a particular vessel schedule for their container shipment, provides more visibility, and provides access to vital tracking information such as the vessel name and voyage number. Users need to provide information such as the Booking Origin Site, Booking Destination Site, and ETA/ETD details on the Bookings screen; the system then uses this information to fetch vessel schedule details from third-party systems. A new picker field, Vessel Schedule, is also introduced on the Vessel Schedule tab of the New Booking screen. The picker field helps users to select the required schedule for a container. Vessel schedules are available only with a licensed third-party service subscription.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating Booking Requests" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.7.8 New Containers Tab on Shipment Details Screen

This release introduces a new tab, Containers, on the shipment details screen. Previously, users had to switch to the movement details screen to view container details to create a packing list. This feature helps users view container details from the shipment screen and assign a packing list to the containers from the same screen, thus reducing the time from switching screens. Users access the Containers tab from the shipment details screen.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the "Working with Containers Tab" section in the current release of the *New Feature Usage and Configuration Guide* for more information.

3.3.7.9 New Field Added on Update Booking Information Action

This release introduces a new field, Offnetwork Schedule, on the Update Booking Information action. The Offnetwork Schedule field contains the voyage number of the shipment. Previously, this field was present on the Shipment header but not available on the Update Booking Information dialog box. Now, users can update the voyage details while updating the booking information. Users select the Update Booking Information option by clicking the Actions button on the shipment header.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Updating Booking Information" section in the current release of the <i>New Usage and Configuration Guide</i> for more information.

3.3.7.10 Container View Screen Enhancements

This release adds the following new fields to the Container Move Report:

- Vessel Name
- Voyage Number
- Shipment
- Parent Shipment

These fields provide more visibility about trans-shipment vessel voyage details. The Vessel Name field fetches the Vehicle No from the shipment header. Similarly, the Voyage No field fetches the Off-Network Schedule field value from the shipment header. Users can click the expand button on the Container View report to see more details. When an ocean carrier accepts a booking request, the carrier may not send exact container details, like the container number. In this scenario, the ONE system creates a temporary container number and assigns it to the container. This feature allows users to update the temporary container number with a permanent one when received from the ocean carrier. Users can update the Container Number field using the Update Container Details option on the Container View screen. Apart from Container Number, users can also update the following container details:

- Booking Number
- Serial Number

- Vessel Name
- Voyage Number
- Is Override Vessel Details (Checkbox)

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Container View Screen" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.7.11 New Bookings Screen

This release introduces a new report, Bookings, under Transportation, that displays existing booking requests with details like booking number, state, and actual delivery date. Users can now view, update, cancel, and delete existing booking requests or create new bookings. This feature helps users manage booking requests from a single screen. The following actions are available on the Bookings screen:

- **Create:** Create a new booking request using the Booking button.
- **Update:** Update existing booking requests and send them to a carrier for confirmation.
- **Cancel:** Cancel booking requests by entering the BOL No on the Cancel Booking Request dialog box.
- **Delete:** Delete booking requests that are no longer required.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Managing Bookings" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.7.12 Skip Client Quoting Policy

This release introduces a new policy, Skip Client Quoting, to skip client quotes when creating a shipment. When a client user creates a shipment, the user needs to select client quotes. If client quotes are not available or a customer has external rates, a client user cannot create a

shipment. This policy makes client quoting optional when not available and allows users to create a shipment without a quote. To use this enhancement, users can set the Skip Client Quoting policy on the Execution Policies screen.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Setting Skip Client Quoting Policy" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.7.13 Support for IFTMIN Inbound Interface

Starting this release, the system supports IFTMIN inbound messages. Previously, only IFTMIN outbound messages were supported. The IFTMIN standard details the structure and contents of messages regarding transportation services for a consignment under agreed-upon conditions between two parties. This feature was added to better support our European customer that heavily utilize the IFTMIN standard.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	None

3.3.7.14 Support for Split Container Action

This release introduces the ability to split shipment by container on multi-modal shipments. Users can split shipments into separate legs so that containers can be transported in different vehicles at the origin or destination point. This feature provides more visibility on the container move operation for multi-modal shipments. To use this enhancement, users can perform the Split Container action on multi-modal shipments using the Context menu.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Splitting Shipments by Container" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.7.15 Verified Gross Mass (VGM) Submission

This release allows shipper users to submit Verified Gross Mass (VGM) information for containers. It is mandatory for every shipper to provide VGM information for every container loaded on a vessel. Shipper users can now share the VGM document in PDF format from within the ONE system instead of having to send a separate email. Users submit the VGM information on the Container View screen, or alternatively, users can upload a CSV file with VGM information.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Submitting Verified Gross Mass (VGM) Information" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.8 Visibility

3.3.8.1 Added Line Item Summary Fields to Alert Notifications

Two new fields have been added to the alerts detail notification and the alert email. The Total Spaces and the Total Half spaces fields now display under the Line Item Summary on the two notifications. Users have direct visibility to cargo space information on the alerts, whereas previously they would have to research the shipment information in the system. The enhancement will save users time and improve their efficiency. Users need to subscribe to a shipment alert.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating Alert Subscriptions" section in the current release of the <i>Online Help</i> for more information.

3.3.8.2 Audit Trail for Non-Controlled Shipments

Starting this release, users can track details of changes made to the shipment lines in non-controlled shipments. Earlier, users received notifications about the shipment update but couldn't view details of the changes made to the shipment lines. With the help of this

feature, the system now maintains an audit trail for non-controlled shipments. Users can view the changes under the History tab of the shipment header.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing Changes in Non-Controlled Shipments" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.8.3 Auto-Generate Shipment Numbers on Copy Shipment Window

Starting this release, users can automatically assign shipment numbers while copying shipments. Previously, users had to enter a shipment number manually for the new shipment. Now, users can select the Auto Generate Shipment Number check box on the Copy Shipment screen to automatically generate and assign a shipment number. This helps reduce the time and manual effort involved in entering unique shipment numbers each time a shipment is copied.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Auto-Generating Shipment Number while Copying Shipments" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.8.4 Automated Allocation of Problems to Users

Transportation managers can now define rules for automatic problem allocation in the ONE system. Earlier, users had to assign each problem to users manually. Now with the help of predefined rules, the system automatically assigns problems to the most relevant user in the organization. This feature simplifies the problem allocation process and helps users to resolve issues efficiently.

Transportation managers can define these rules on the Policies screen.

Analytics Impact	None
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Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Setting Problem Assignment Rules" section in the current release of the <i>Online Help</i> for more information.

3.3.8.5 Shipper Users can Add TCN Number

This release adds a new field, TCN, to the Shipment Header section of the Movement Shipment report screen. The new field enables users to create and allocate a Transportation Control Number to a shipment, making it easier to manage each shipment unit during the transportation pipeline and payment processing stages. Users can search for the TCN number using the global search bar.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating Shipments using a Standard Template" section in the current release of the <i>Online Help</i> for more information.

3.3.8.6 Enhancements to Tender Plan Level KPIs

This release introduces a new bar chart to check carrier performance, helping users review carrier performance related to the tendering process. Previously, there was no way to verify the carrier performance, but with this enhancement, users can check a carrier's past performance related to the tendering process. For example, how many tenders they have accepted and rejected. Users can access the bar chart icon on the Tender Plan detail page.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing Carrier Performance" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.8.7 Enhancements to Movement Shipment Search Report

This release introduces a new set of filters and a field, Bill To Site, on the Movement Shipment search and report screen. Previously, the visibility of the Bill To Site information was limited to shipment pages. Users can now configure a variety of inclusive and exclusive operations in the search panel by adding up to six separate Bill To Site filters. The Bill To Site field helps users view the site each shipment was billed to on the report itself, instead of navigating to each shipment separately.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Searching Shipments" section in the current release of the <i>Online Help</i> for more information.

3.3.8.8 Enhanced Shipment Search Includes Time Zones Using Pickup/Delivery Filters

The shipment search filters now include adjustments for time zones when using pickup and/or delivery date filters. Previously, when users performed shipment searches using pickup and/or delivery dates as part of the filter, the search results did not account for different time zones. Now, when a user enters these dates as filters, the search results will include shipments that have been entered using different time zones. The enhancement applies to reports and timeline views that offer shipment searches. Users will continue to search for shipments as before.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Searching Shipments" section in the current release of the <i>Online Help</i> for more information.

3.3.8.9 Enhancements to BOL Display

This release introduces a new column, Spaces, on the Bill of Lading (BOL) document. Previously, space information was not included in the BOL, but now cargo space specifications entered on the shipment line display on the BOL PDF in the Spaces column. The enhancement provides more shipment information on the BOL to ensure requirements for shippers are displayed. Users have no new actions.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	None

3.3.8.10 Enhancements to Carrier Scorecard

This release updates the carrier scorecard policy to support multiple events for one organization and the carrier scorecard now displays how early or late a pickup or delivery was scheduled. Previously, customers could only add single events while configuring the scorecard. The ability to add multiple events improves the scorecard accuracy. This enhancement also improves the usefulness of the scorecard by showing the tardiness value for a movement, and this tardiness value is also displayed in the Movement Shipment CCMA report.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Configuring Carrier Scorecard Policy" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.8.11 Enhancements to Milestone Type

Starting this release, users can add a new field, Working Days, when working with Milestone Types. Previously, there was no way to add working days and lead time policies, but now Transportation Manager users can edit, upload, and download the Milestone Type file directly from the UI. This makes it easier for users to manage working days and lead time policies for shipments during the transportation milestone planning process. Users must log in with Transportation Manager credentials and navigate to Milestone Process from the Transportation menu.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the "Add a Milestone Process to a Milestone Configuration" section in the current release of the *Online Help* for more information.

3.3.8.12 Enhancements to Movement Event Alerts

This release adds the following new options while creating a new Movement Event alert:

- Shipments: Shipment Number
- Shipments: Ship From
- Shipments: Ship To
- Shipments: Vehicle Number

If the user selects one or more of these fields as part of the alert subscription, the Alert Details screen and the alert-generated email display details of each shipment associated with the movement in a table. This enhancement adds more information to the alert subscriptions to help easily see details of all shipments in a movement.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<ul style="list-style-type: none"> • See the "Adding Shipment Details to Movement Event Alerts in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. • See the "Creating Alert Subscriptions" section in the current release of <i>Online Help</i> for more information.

3.3.8.13 Enhancements to Real-Time Transportation Execution

This release the following updates to the Real-Time Transportation Execution screen.

Users can click the Movement Information icon to view the following details in a card view:

- Asset ID
- Driver Details
 - DriverContact
 - Service Level
 - Carrier
- Location Details
 - Current Location Lat/Long
 - All Stops

- Next Stop
- To Next Stop
- Previous Stop
- Travel Direction
- Movement Details
 - Movement Number
 - Commodity
 - Origin
 - Destination
 - Pickup Date and Time
 - Delivery Date and Time

Users can click the Map icon to view the following details related to the origin and the destination:

- Movement State
- Shipment Pickup Status
- Delays, if any.

Users can now track past events, movements, and associated events on the RTTE map, which was not possible before. This helps users check every detail of an event efficiently.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing Movement Details on the Real-Time Transportation Execution Map" in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3.8.14 Enhancements to the Activity Stream Widget

This release makes the Activity Stream widget on the NEO home page interactive. Users can now click active links to navigate to the relevant assigned activity screen like Shipment, Movement, or Invoice Details. Previously, the updates displayed in the Activity Stream widget were text-only. Users had to search for or use an application menu to open a particular screen to see details of an activity. This update enhances the user's experience with the widget and overall efficiency.

Analytics Impact	None
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Integration Impact	None
Related Functionality	None
Usage and Configuration	None

3.3.8.15 Enhancements to the Premium Freight Details

This release adds information to the premium freight alert details. The additional information helps users view details about the premium freight movement and shipment information without the need for additional investigation. The details screen and email will now contain the following information:

- Pick Up
- Destination
- Bill To
- Freight Characteristics
- Pick Up Date Request
- Arrival Date Request

To populate the new information, users check the Bill To box when subscribing to a Shipment Event alert. The other bulleted items are set by checking the related boxes when subscribing to the Movement Event alert. The pick-up and destination are labeled Movement's First Stop and Movement's Last Stop.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating Alert Subscriptions" or the "Viewing and Updating Alert Subscriptions" sections in the <i>Online User Guide</i> for more information.

3.3.8.16 Enhancements to Tracking Events

This release adds the capability for the user to view live tracking events of the movement on the map. Earlier, the user had to manually contact the logistic partner to track the events. This update enables the user to better access the live movement information of either previous journey or associated events directly on the user interface. User must ensure to configure system-defined tracking events.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	See the "Configuring Tracking Events" section in the current release of the <i>Online Help</i> for more information.

3.3.8.17 Enhancement to Enterprise Role Type Settings for Contract Carrier Group Management

Starting this release, the Transportation Manager user can control the Update Contract Carrier Group functionality for enterprise role types. Previously, transportation managers could activate or deactivate only the Create and Delete functions for an enterprise role type, and the role type had update functionality as a default. This enhancement gives more control to transportation managers over contract carrier group management by restricting the ability to update a contract carrier group. Users must log in with transportation manager credentials to deactivate this functionality.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Managing Enterprise-Specific Roles" section in the current release of the <i>Online Help</i> for more information.

3.3.8.18 Generate Event on Document Upload

In this release, users can enable a custom tracking event to fire when uploading a defined document type. Previously, generic "Document Uploaded" events were created for document uploads making it difficult to differentiate between the various document types. Users enable the document tracking option on the document type screen, and the custom tracking event is generated when one of the document types is uploaded. Then in the movement or shipment tracking search page, the event displays the document type in the Event Type field and provides a message with the document type and name of the document.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the "Enabling Tracking Feature for Document Types" section in the current release of the *New Feature Usage and Configuration Guide* for more information.
 See the "Managing Document Types" section in the *Online Help Guide* for more information.

3.4 Manufacturing

3.4.1 Create and Update Routing Models

This release introduces a new Routing Model on the UI that enables users to generate multi-level work orders using BOM and routing details. Users can now accept routing-related models and load the routing master data directly from the UI, earlier it was an offline process.

With this enhancement, the user can perform the following action and helps users to easier manage, provides flexibility and transparency when creating a new routing model.

- Create Routing
- Search Routing

To create and update the routing model, the user must navigate to the production planning page from the Manufacturing menu.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Routing" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.4.2 Capability to Create Production Order from Bill of Material

This release adds the capability to create production work orders based on an existing bill of materials. The option is available to only approved production orders. This action creates the same number of task parts as the components in the BOM. Only a single-level BOM explosion is supported at this time.

This is helpful in speeding up the process of creating production work orders from the existing data.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating Production Order from Bill of Material" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.4.3 Create Work Orders Based on BOM

This release introduces a new template for production work order creation. The template enables users to generate parts requirements based on a bill of material (BOM) during Production Work Order creation. This update helps Production Manager and Factory Manager roles explore BOMs and create new work orders based on a BOM.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating Production Work Orders" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.4.4 Generate Production Orders from Production Order Forecast

Starting this release, users can generate production orders from the Production Order Forecast report. Also, a Batch Size field and a Convert To Prod Order button are added to the Production Order Forecast report. Previously, only one production order was created at a time with the Create Production Order user interface. This enhancement helps to create production orders in bulk from the production order forecasts. The number of production orders created depends on the provided batch size. Users can select one or multiple production order forecasts from the Production Order Forecast report and convert them to production orders with Convert To Prod Order button. The converted production orders are searched from the Production Order report. Users can generate production orders from the production order forecast in the Approved state.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	<p>See the "Viewing the Production Order Report" section in the current release of the <i>Online Help</i> for more information.</p> <p>See the "Viewing the Production Order Forecasts Report" in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p>

3.4.5 Upload Asset and Singleton Details

Starting this release, users can bulk upload asset details like the asset number or owning enterprise, and singleton details like the singleton ID and enterprise name to the system using a CSV file. These asset numbers and singleton IDs can then be selected on the UI when creating a new production work order. This enhancement streamlines the production work order process by allowing users to bulk upload existing data points instead of manually entering them for each work order.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Uploading Asset and Singleton Details" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.4.6 Clone Action Added to BOM Details Screen

The Bill of Materials (BOM) details screen now has a Clone action button. Previously, users were required to recreate similar BOMs, but the Clone action button allows users to clone a bill with all details replicated. Users are able to edit fields to create a unique BOM; however, the information on the BOM Components tab is not editable. Users simply click the Clone button, name the new BOM, and continue to complete the BOM as normal. This enhancement will save users time because they don't have to recreate every field for an entirely new BOM.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the "Creating a Clone of a Bill of Materials" section in the current release of the *New Feature Usage and Configuration Guide* for more information.

3.4.7 Configuring Alert Subscription for Stock Out

This release adds a new configurable StockOut alert that notifies users when the difference between the Planned Production Quantity and the Actual Production Quantity is greater than the threshold value defined in the system. This enhancement enables users to keep tabs on the planned and actual quantities for the enterprise that owns the schedule.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Configuring the Stock Out Alert Subscription" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.4.8 Constraints on Delivery Schedule Quantity

Starting this release, the quantity specified in a delivery schedule attached to a production order cannot exceed the production order quantity. There is no restriction on the number of delivery schedules that can be added to a production order. Two fields are also added to the Production Order Delivery Schedule model, Planned Allocated Quantity and Actual Allocated Quantity. Users can set and modify these fields from the Order Delivery Schedules tab on the Production Order UI. An error report is also available to show mismatches between production quantities and allocated quantities. This enhancement was added to avoid situations where the quantity offered for delivery is greater than the available quantity.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Associating a Delivery Schedule to a Production Order" section in the current release of the <i>Online Help</i> for more information.

3.4.9 Enhancement to Constrained Demand Translation (CDT) Engine

This release adds new bucketization options, Monthly and Weekly, to the Constrained Demand Translation (CDT) engine. Previously, only the weekly bucketization option was available and there was no way to manually set the bucketization option. Now, users can set either Weekly or Monthly bucketization using the Planning Bucketization field on the Constrained Demand Translation Engine screen.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Constrained Demand Translation Engine" section in the current release of the <i>Online Help</i> for more information.

3.4.10 New Fields Added to Production Work Order UI

This release adds multiple fields to the production order level hierarchy. Previously, production orders did not support production milestones or work orders with four-level tasks (purchase order, production order, production work order, and production execution work order). The following fields have been added to the Production Work Order UI:

- Planned Quantity
- Actual Quantity
- Quantity UOM in Task
- Item

In addition, a link to the Task Part Popup is now available allowing users to add task parts from BOM components, limited by items defined in a work order. These enhancements increase the usefulness of the Production Work Order UI by adding requested data fields.

Analytics Impact	None
Integration Impact	None
Related Functionality	Refer to "Production Order Enhancements" in the current Neo 3.3 Release Note.
Usage and Configuration	See the "Creating Production Work Orders" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.4.11 New BOM Site Association Policy

This release includes a new Bill of Materials (BOM) site association policy as well as the ability to make site association changes in the UI. Previously when users created a BOM, the site association mapping was optional. When the new policy is set at the enterprise level, the system automatically maps the site associated with the BOM at the time that the BOM is created. Users set the policy, `SCC.EnforceBOMSiteAssociation`, on the Enterprise Hierarchy under the `BillOfMaterials` policy group. In addition, users add or remove site associations in the UI on the BOM-Site Mapping tab on the BOM details page. The enhancement allows better management of site associations for BOM.

Analytics Impact	None
Integration Impact	<p>This enhancement updated the existing <code>SCC.BillOfMaterials_IB</code> of version 4.0 to add new fields:</p> <ul style="list-style-type: none"> • <code>AssociatedSiteEnterpriseName</code> • <code>AssociatedSiteOrganizationName</code> • <code>AssociatedSiteName</code> <p>In order to upload more BOM site associations, the user can use <code>SCC.BOMSiteAssociation_IB</code>.</p>
Related Functionality	None
Usage and Configuration	See the "Creating a BOM Site Association" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.4.12 Monthly Bucketization in Demand Translation

The Material Requirement Planning (MRP) engine, also known as the Demand Translation engine, helps customers meet the demand for finished good production by ensuring they have enough raw materials.

In this release, we added the ability for the MRP engine to accept monthly bucketized input data and to generate output data in monthly buckets when running in the Production Plan mode. The support for monthly bucketization is also added in the Raw Material and Search Demand Forecast reports when filtered by item (Finished Good/Work In Progress/Raw Material). It makes calculating monthly demand translation easier for users which helps users plan for longer time horizons. In this release, the system only supports monthly bucketization in Production Plan mode. To use monthly buckets, users need to set the MFG Planning Bucketization drop-down on the Manufacturing Policies > Site Policy screen to Monthly.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Create a Site Forecast Profile" section in the current release of the <i>Online Help</i> for more information.

3.5 NEO UI

3.5.1 Pivot Table Chart Support

NEO UI now supports the use of pivot tables and charts to display data on many reports. This release adds five more chart types that will help users analyze data for business analysis. These additional charts can be selected in reports by users with permissions according to their role; to add the additional charts, users must click the View Pivot button in selected reports and then select and customize the appropriate chart.

The following new chart types are included in this enhancement:

Column	Bar	Line	Pie Chart
A column chart shows a comparison of data using vertical columns. Multi-column charts cluster groups of data columns to make comparisons.	A bar chart shows a comparison of data using horizontal bars, similar in nature to the column chart. Multi-bar charts cluster groups of data bars to make comparisons.	A line chart typically shows data trends over a period of time.	A pie chart shows data as part of the whole, as part of a 100% total.
Scatter	Bubble	Area	Pareto
A scatter chart displays values for two different variables where each dot is a data point and is used to observe relationships between variables.	Bubble charts are used to emphasize specific values, most frequently used with financial data.	An area chart is similar to a line chart, typically showing values over time. However, the area chart fills in the chart with color	The Pareto chart helps count and categorize data so users can perform a business analysis based on the 80/20 rule.
Heat Map	Stacked Column	Stacked Bar	Combination

Column	Bar	Line	Pie Chart
A heat map provides a table of data with cells colored to show data status. For example, red cells may show bad or critical status. Yellow cells may show average or warning status. Green cells may show good or satisfactory status.	A stacked column chart shows columns of data with multiple data points aggregated within each column.	A stacked bar chart shows bars of data with multiple data points aggregated within each bar.	The combination chart allows users to combine multiple chart types within a single view. The example below shows a column chart with stacked columns.
Simple KPI	Complex KPI	Leaderboard - Simple KPI	Leaderboard - Complex KPI
A simple KPI chart displays a single data point value.	A complex KPI chart displays a data point at current, previous, and target values.	The Simple KPI Leaderboard allows users to view customers, sites, districts, etc. with a selected data point.	The Complex KPI Leaderboard allows users to view customers, sites, districts, etc. for a selected data point at current, previous, and target values.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating a Custom Analytic Widget" section in the New Feature Usage and Configuration Guide for more information.

3.5.2 Global User Preference for Rounding Decimals

This release offers users a preference in setting a default number when displaying numbers with decimals. Previously, different displays (widgets, for example) might display a variety of digits after the decimal point. Users set the minimum and maximum numbers to display for decimals globally across the UI by entering values in the Minimum Fractional Digits and Maximum Fractional Digits fields in the UI Preferences tab in the User Settings popup window. The enhancement enables users to make personal adjustments to create numbers

that are meaningful and consistent.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Setting User Preferences" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.5.3 NEO Gamification and Gamification Widgets

The NEO UI now includes a gamification feature that offers a game-like incentive to drive competition and better efficiencies among users. The benefit of gamification is providing users with an external motivation for performance improvement within an enjoyable environment. Users will also have prompts for the next step to an achievement level and visual progress-monitoring.

Admin/Managers configure the achievement measurements for users and roles based on daily, weekly, and/or monthly time buckets (called cadences), as well as thresholds for the top three performance-based ranks: bronze, silver, and gold.

Users use dashboard widgets to view their own achievements, how their achievements compare to other users, and their individual progress toward additional achievements. Users also receive notifications as they complete their achievements. The two user widgets are the My Awards widget and the Team Awards widget.

3.5.3.1 My Awards Widget

The My Awards widget is a flexible widget added to the columnar layout of a dashboard. It displays the current cadence date(s), the number of awards already achieved (bronze, silver, and gold), and the next suggested achievement tasks to win an award. Users can adjust filter options in the settings to select the cadence, start date, and achievement. The title and the autorefresh duration are also configurable.

3.5.3.2 Team Awards Widget

The Team Awards widget is a flexible widget added to the columnar layout of a dashboard. It displays users within the same team and their awards. Users can adjust filter options in the settings to select the cadence, start date, and achievement. The title and the autorefresh duration are also configurable.

3.5.3.3 Achievement Measurements

This release includes the following achievements:

Order Management

- Purchase orders confirmed by the user
- Deployment orders confirmed by the user
- Purchase orders promised by the user
- Deployment orders promised by the user

Logistics

Efficiency

- Number of tenders confirmed with least cost
 - For spot tendering, the user is able to confirm to least-cost tender response
 - For regular tender, the least-cost carrier confirmed the tender initiated by the user
- Number of movements confirmed on-time before the planned pickup window

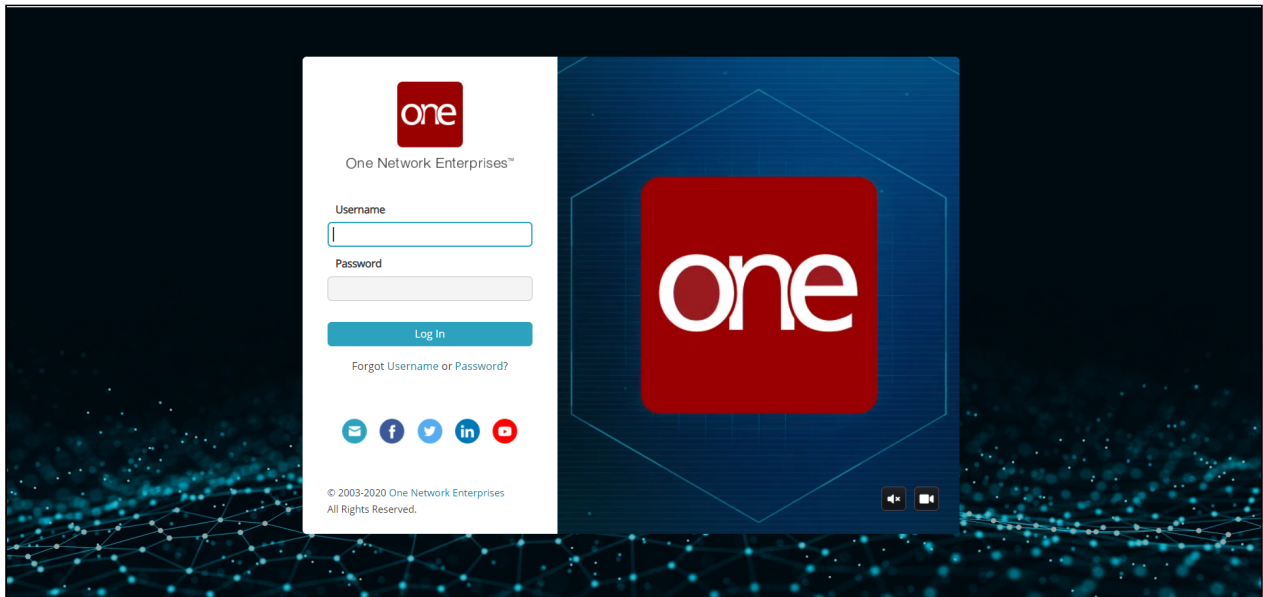
Throughput

- Number of movements tendered per day
- Number of movements confirmed per day
- Number of shipments scheduled per day
- Number of shipments picked up/received per day (done on behalf of the carrier)
- Number of problems resolved per day
- Number of shipments created per day
- Number of invoices approved per day (Subnet is not supported)

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Gamification" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.5.4 New Single Sign-On Screen

This release features a new single sign-on screen that incorporates an animated ONE logo. Updated designs for error screens and password reset screens are also included in the release. The design incorporates light and dark modes based on user preferences and provides an updated user experience. Users only need to access the login page from www.onenetwork.com. The sound and animation can be turned off.



Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Authentication" section in the current release of the <i>Online Help</i> for more information.

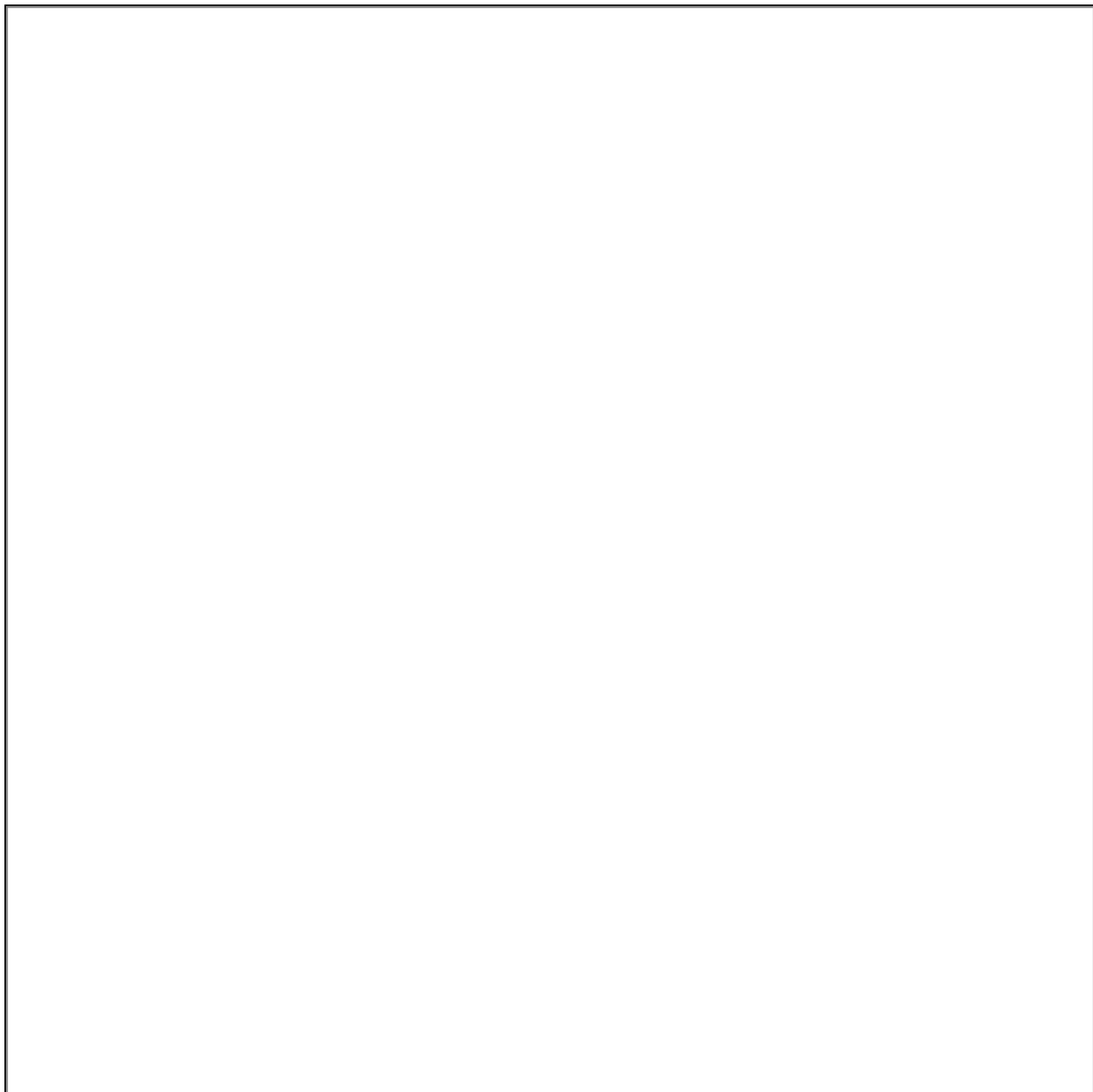
3.5.5 Notifications

This release adds a Notification system and icon to NEO UI. This notification icon is used to communicate important system announcements to users and to display any awards users received from the [new gamification system](#). The notifications give users advanced notice of system changes that may impact their interactions with the NEO UI or inform users of events that have occurred in the system. When there is a notification for users to read, the UI displays a notification in the top right corner of the screen.



When users click on the icon, they see an expanded list of notifications. The expanded list shows the five most recent notifications overall followed by the five most recent notifications for each category. If there are additional unread notifications, the user can click the "Show More" link to view all notifications in a given category.

Notifications are cleared from the list four days after they appear. Unread notifications are marked as read once the notification display is expanded. Users can clear a specific notification, notifications in a specific category, or all notifications using the x icon at the top of the window.



Analytics Impact	None
Integration Impact	None
Related Functionality	See the NEO Gamification and Gamification Widgets section for more information on gamification.
Usage and Configuration	See the "NEO UI Notifications" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

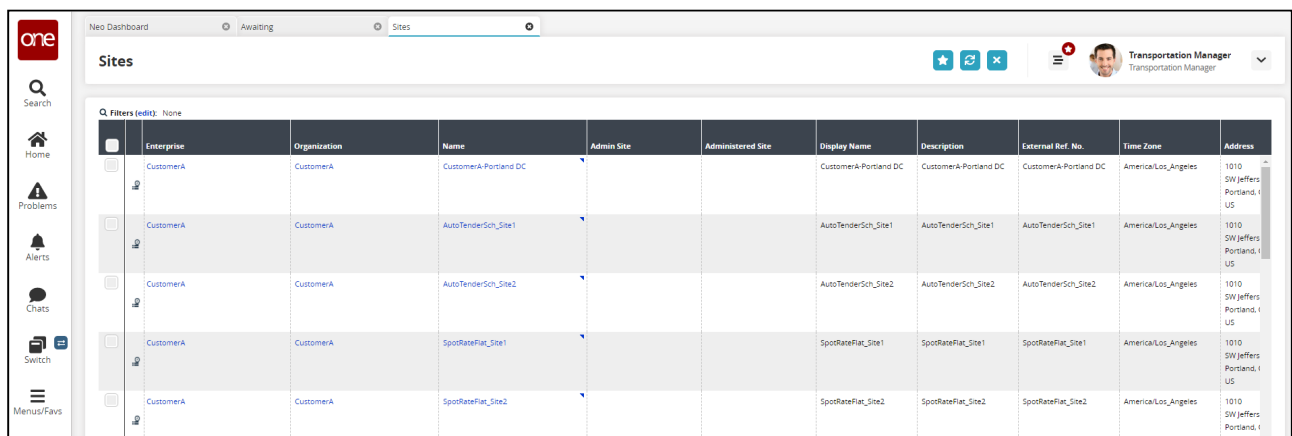
3.5.6 Online Help Changes

This release changes the way users interact with the integrated online help included with NEO UI. Now, when users click to open the help, a new browser tab opens inside NEO. This will allow users to switch between tabs for their work and the help docs more easily, improving the users' workflow efficiency when they need to access the help system.

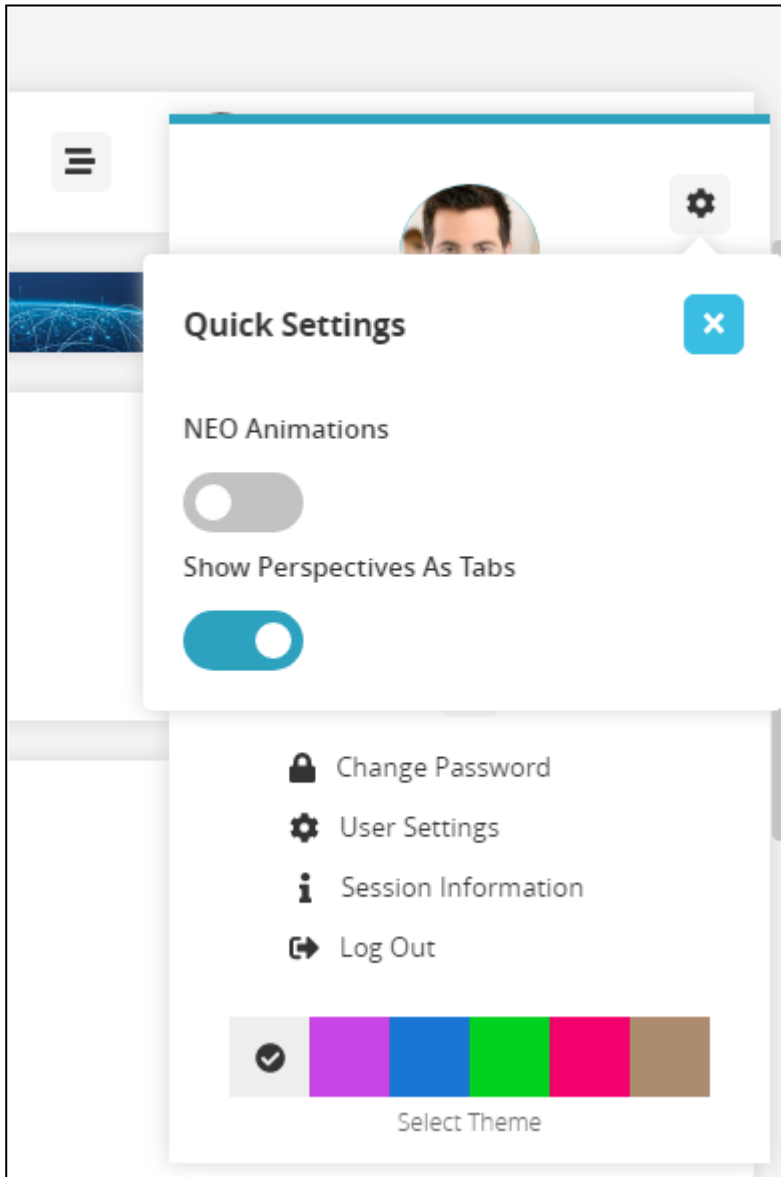
Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	None

3.5.7 Perspective Tabs

In this release, NEO UI adds the ability for users to switch to a tab-based screen, similar to what existed in Command Center. Some users may find this setup more efficient and easier to navigate.



Users can enable or disable this setting from their user profile menu.



Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	To enable tabs, access quick settings from your user menu and enable Show Perspectives as Tabs.

3.5.8 Problems and Problems Workbench

3.5.8.1 Add Alerts for Problems

This release adds the Problem Update, Problem Expiry, and Problem Inactivity alerts to the Problems Workbench. The alerts are described below:

- **Problem Update alert:** Alerts the user if there is a change in a problem created by or assigned to the user.
- **Problem Expiry alert:** Alerts the user if a problem created by or assigned to the user is expiring soon.
- **Problem Inactivity alert:** Alerts the user if there is no activity on a problem created by or assigned to the user.

This enhancement helps users keep track of problems they have created or problems assigned to them, removing the need to check them manually. Users can subscribe to alerts and take appropriate action once they receive an alert, like assign the problem for resolution or collaborate with other users.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Subscribing to Problems Alerts" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.5.8.2 Enhancements to Problem Analytical Report

This release adds a new column and a filter, Days Since Opened, to the Problem Analytical Report. The column displays the days since the problem was created for the problem in any state. Users can use the Days Since Opened filter on the Problem Analytical Report to filter the long pending problems and take appropriate actions like assign to other users or collaborate with the other users in the system for resolution. This enhancement helps the users to track the number of days since the problem was created.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration	See the "Viewing the Problem Analytical Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.
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3.5.8.3 Enhancements to Problem Audit Trail

This release updates the Audit Trail user interface. The audit and notes views are combined based on the creation timestamp in the problem audit and the time difference is highlighted between the two audits. This allows users to process all the information related to the audit trail of a problem on a single screen and view the time gap between two audits, even when the gap is more than 24 hours. This enhancement helps users easily track the audit trails for a problem. Users can view the Audit Trail user interface to track the audit trails for a problem.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing a Problem's Audit Trail" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.5.9 Support Advanced Filters on Custom Analytic Widget Workbench

With this release, all dimension attributes with the "date" datatype are available as an advanced filter in the UI when creating a custom analytical widget. This enhancement also enables the system to determine dates, in a variety of ways, based on patterns when creating a custom analytical widget. This update was made to allow users to filter data on custom analytical widgets based on absolute or relative dates. Users can set a pickup date relative to the current date, for example, five days from the current date; this is particularly useful if the user wants data to be populated on the custom analytical widget dynamically. To use this feature, users only need to click the newly-enabled Filter button while creating a custom analytical widget, select the date attribute, and apply the advanced filter.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration	See the "Advanced Filters on Custom Analytical Widgets" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.
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3.5.10 Widgets

3.5.10.1 Authorization Summary Widget in NEO UI

A new widget is added to the NEO UI in this release that provides similar information to the Authorization Summary portlet found in the ONE Command Center UI. The Authorization Summary widget provides a barline for authorization types, or users can change the view to an authorization count widget. Users can hover over the bar to get an exact count of the authorizations and can click the bar to display the Authorizations screen. The widget provides added visibility and one-click access to authorizations to save users time and increase efficiency.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with the Authorization Summary Widget" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.5.10.2 View Widget Details

In this release, we added the ability for users to view a description of a widget and which filters are currently applied to the widget by right-clicking the widget. This allows users to quickly understand the widgets on their dashboard.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing Widget Summary and Filters" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.5.10.3 Enhancements to the Shortcut Widget

This release updates the Shortcut widget with an option to support opening external URLs in a new browser tab. The enhancement allows more flexibility within the NEO UI for users to customize their dashboard with commonly used links external to the One Network. When creating a shortcut widget, users select the external link option and add a URL; the option to select a menu item from the system is still available.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Adding an External Link in a Shortcut Widget" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.5.10.4 New Custom Analytic Widgets

In the NEO UI, users have access to many predefined widgets for viewing data on dashboards. This release enables users the ability to create Custom Analytic widgets where they select the data subset and then select and customize the presentation in a table or one of many available charts. The functionality mirrors the pivot table/chart functionality that many reports offer in the ONE system, but provides the additional benefit of constant visibility to the data from the dashboard. Users add a widget in the columnar or fixed layout and select the tab for Custom Analytic Widgets on the Add Widgets popup window.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Custom Analytic Pivot Tables and Charts" section in the current Release Notes for more information on the chart types available. See the "Creating a Custom Analytic Widget" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

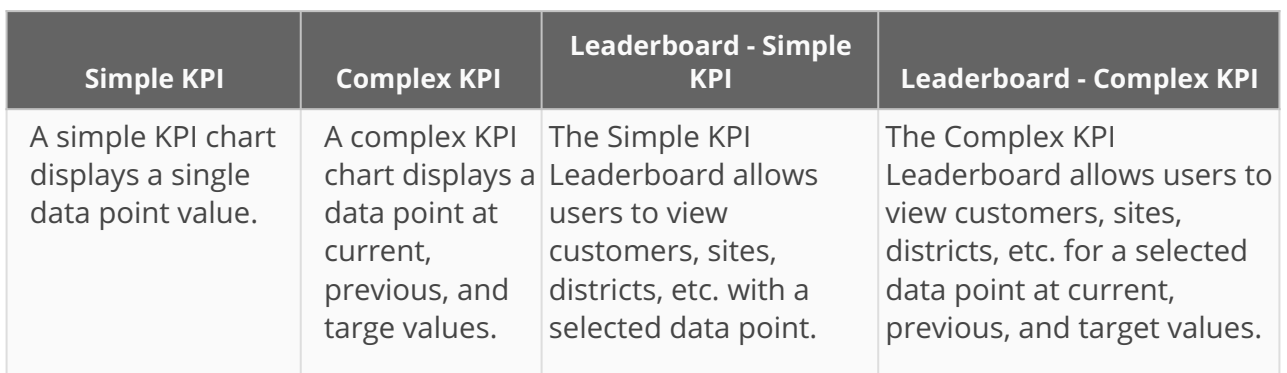
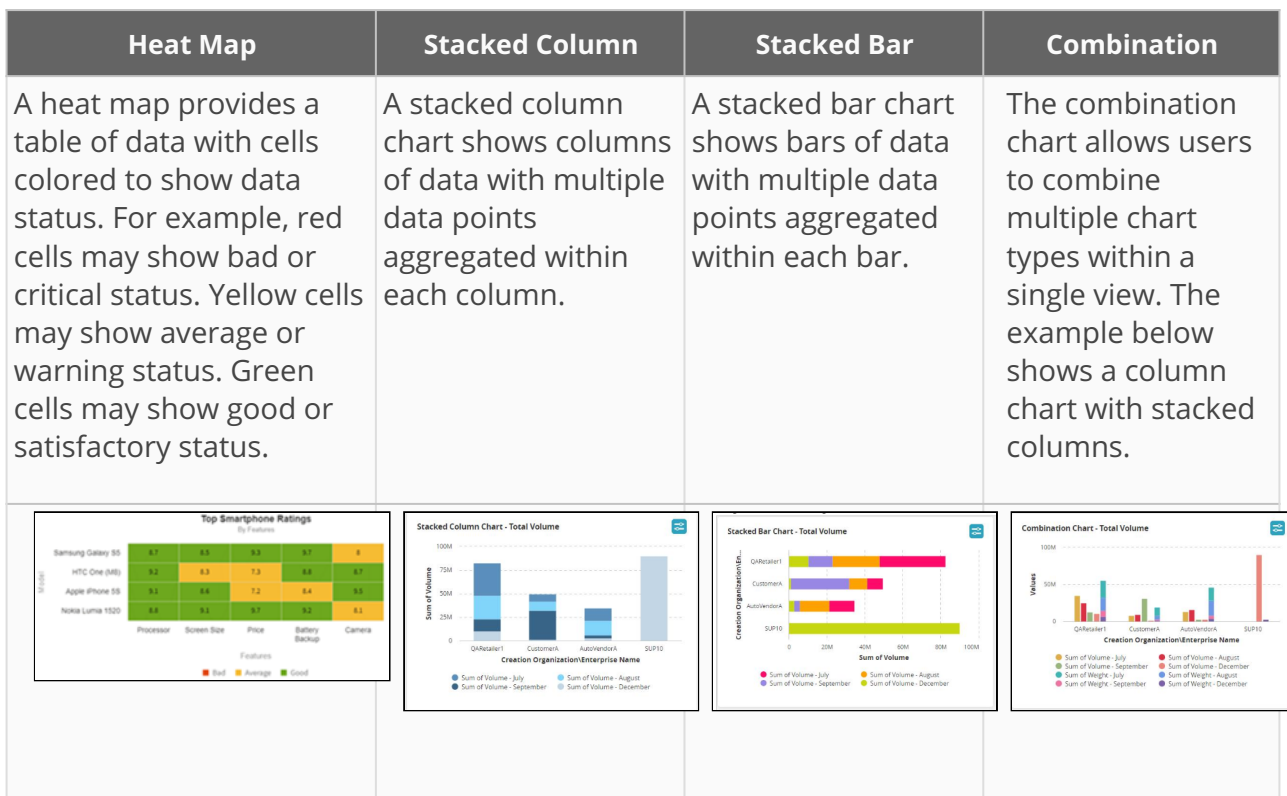
Custom Analytic Widget Pivot Table and Charts

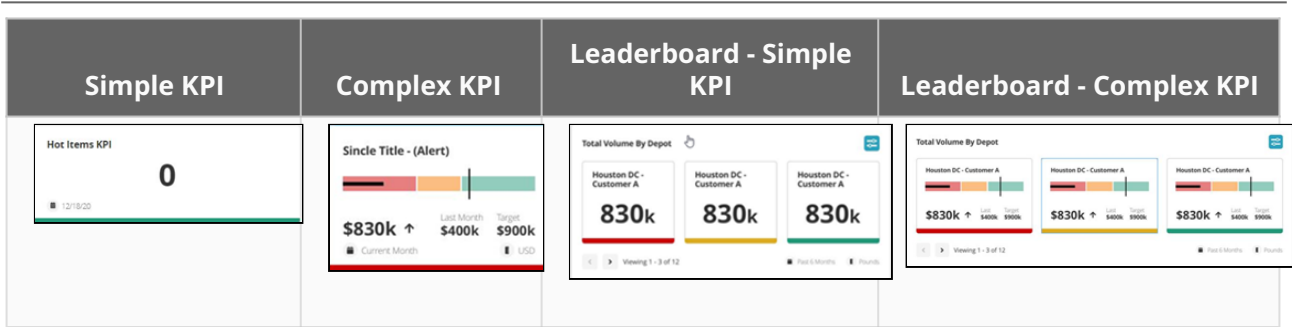
The NEO UI supports the use of pivot tables and charts for business analysis. This release adds the ability to create Custom Analytic widgets that will help users analyze data directly on their dashboard. The widget is designed to mirror the pivot functionality found in many reports in the ONE system. In addition to a pivot table, the following chart types are included in this enhancement:

Column	Bar	Line	Pie Chart
<p>A column chart shows a comparison of data using vertical columns. Multi-column charts cluster groups of data columns to make comparisons.</p>	<p>A bar chart shows a comparison of data using horizontal bars, similar in nature to the column chart. Multi-bar charts cluster groups of data bars to make comparisons.</p>	<p>A line chart typically shows data trends over a period of time.</p>	<p>A pie chart shows data as part of the whole, as part of a 100% total.</p>

Scatter	Bubble	Area	Pareto
<p>A scatter chart displays values for two different variables where each dot is a data point and is used to observe relationships between variables.</p>	<p>Bubble charts are used to emphasize specific values, most frequently used with financial data.</p>	<p>An area chart is similar to a line chart, typically showing values over time. However, the area chart fills in the chart with color.</p>	<p>The Pareto chart helps uncover</p>

Scatter	Bubble	Area	P a r e t o
			t a n d c a t e g o r i z e d a t a s o u s e r s c a n p e r f o r m a b u s i n e s s a n a l y s i s b a s e d o n t h e 8 0 / 2 0 r u l e.





Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating a Custom Analytic Widget" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.5.10.5 New NEO Analytics Widgets

This release adds support for the following widgets and dashboards in the NEO Analytical Dashboard:

Widget Name	Description	Filters
PO Promise Cut %	Vendor-wise percentage of delivery schedules where promised quantity is short of the requested quantity.	<ul style="list-style-type: none"> Vendor Date Range
PO Promise Late %	Vendor-wise percentage of delivery schedules where the promised delivery date is later than requested date.	<ul style="list-style-type: none"> Vendor Date Range
PO Vendor Accuracy	Vendor-wise percentage of delivery schedules where the actual delivery date is not later than the requested delivery date.	<ul style="list-style-type: none"> Vendor Date Range
Expedite/Non-Expedite PO Summary	Vendor-wise count of expedited and non-expedited orders per vendor either as a bar chart or a simple table.	<ul style="list-style-type: none"> Vendor Ship Date Delivery Date
PO On Time Ship %	Percentage of delivery schedules received on or before the Agreed Ship Date. Buyer Org must be the same as the Current Org.	

Widget Name	Description	Filters
Expedite / Non-Expedite PO Count	The pie chart view of the Expedite/Non-Expedite PO Summary widget. By default, the chart displays data on expedited orders.	<ul style="list-style-type: none"> • Vendor • Ship Date • Delivery Date
Total PO Volume / Total PO Amount	Total volume or amount per vendor in a bar chart. By default, the chart displays an order count.	
PO Count	Total order count and total ordered quantity per vendor in a bar chart	

These widgets are available to the Buyer Supply Chain Admin user.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Analytics Widgets" section in the current release of the <i>Online Help</i> for more information.

3.5.10.6 New Problem Summary Table Widget

The NEO UI features a Problems slideout that users access from the navigation sidebar. This release includes a new Problem Summary Table widget to provide users constant visibility to a table view of problems on their dashboards. Users no longer have to open the slideout each time to view problems, which saves high-frequency users a significant amount of time and clicks. Users add this widget to a dashboard in the columnar (flexible) layout.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with the Problem Summary Table" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.5.10.7 New Alert Summary Table Widget

The NEO UI features an Alert slideout that users access from the navigation sidebar. This release includes a new Alert Summary Table widget to give users constant visibility to a table view of alerts on their dashboards. Users no longer have to open the slideout each time to

view alerts, which saves high-frequency users a significant amount of time and clicks. Users add this widget to a dashboard in the columnar (flexible) layout.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with the Alert Summary Table" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.6 Optimization

3.6.1 Demand Planning

3.6.1.1 Create Multi-Dimension Events

Starting this release, when creating an event, users can add multiple event dimensions to the event, such as site groups, product groups, partners, sites, and items. One of the following dimensions must be present to create multi-dimension events:

- **Product Group Level**
- **Item**
- **Site Group Level**
- **Site**

The system creates multi-dimensional events using a combination of values and attributes at the same level. If an Event Dimension does not have a value at its level, the value at the Event Header level is combined with the available value at the Event Dimension level to create an event. For example, given the below scenario described in the table, there is an Event Header and three Event Dimensions. Event Dimension 1 has an item value of "Item 1" and a site group value of "GeoLevel 2", therefore the created event will these values are used to create an event with the attributes "Item 1 - GeoLevel 2". Similarly, Event Dimension 2 will produce an event with the attributes of "Item 2 - GeoLevel 3". Because Event Dimension 3 only has an item value of "Item 3" and does not have a site group value, it will inherit the site group value of the Event Header, therefore producing an event with the attributes "Item 3 - GeoLevel 1".

	Item	Site Group	Created Event
Event Header		GeoLevel 1	N/A

	Item	Site Group	Created Event
Event Dimension 1	Item 1	GeoLevel 2	Item 1 - GeoLevel 2
Event Dimension 2	Item 2	GeoLevel 3	Item 2 - GeoLevel 3
Event Dimension 3	Item 3		Item 3 - GeoLevel 1

UI Changes

This enhancement brings the following UI changes:

- **Event Dimension:** New button on the Event Details screen. Users can click this button to view event details in a separate report.
- **Event Dimensions Report:** New report that shows event details like corresponding enterprises, sites, partners, and so on.
- **Add Event Dimension:** Enables adding multiple dimensions to an event.

This enhancement reduces the need to create a large number of individual events for similar dimensions and greatly boosts workflow efficiency.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Adding Dimensions to Events" section in the current release of the <i>Online Help</i> for more information.

3.6.1.2 Enhanced Manual Demand Forecast Creation

Starting this release, demand planner users can enter the demand forecast value for multiple items and capture the last update details through the UI. With this enhancement, these users can enter the following details on the UI:

- Date Range
- Product Group
- Site Group
- Bucketization Period

Previously, there was no way for the user to choose an attribute, attribute value, and channel, but with this update, the system enables the user to dynamically group similar items. To enter the demand forecast details, users must navigate to the Demand Planning UI.

Analytics Impact	None
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Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Demand Forecast" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.6.1.3 New Forecast Accuracy KPIs Reports

This release adds a set of key performance indicators (KPI) relating to Forecast Accuracy to perform forecast analysis. The following reports are added or enhanced as part of the forecast accuracy KPIs:

Forecast Accuracy KPIs	Description	UI Change
Item Forecast Top Difference report	Compares stat forecasts and demand plans.	Item Forecast Top Difference report
Future Adjustment report vs Forecast	Measures the accuracy of the adjusted forecast versus the consensus forecast.	<ul style="list-style-type: none"> • Demand Forecast Accuracy By Item report • Two new columns Final Forecast Qty and Final Quantity are added to the report • Columns are renamed in the report as: Forecast Qty= Original Forecast Qty Accuracy Error(APE) Percentage=Original Accuracy (APE) Reference Accuracy Error(APE) Percentage=Reference Accuracy(APE) Reference 2 Accuracy Error(APE) Percentage=Reference 2 Accuracy (APE)

Forecast Accuracy KPIs	Description	UI Change
Forecast Accuracy Cost	Measures the forecast accuracy cost according to the Forecast Accuracy Calculation formula.	<ul style="list-style-type: none"> • Demand Forecast Accuracy By Item • Aggregated Item Accuracy By Product Group
Tracking Signal	Measures the bias in the last six months per part of the selling location.	Forecast Rolling Bias By Product Group Widget
Forecast Change	Compares the consensus forecasts between two different time lags and shows the demand forecast change.	Forecast Change Report
Outliers report	Measures the extended cost due to a particular outlier for an item at a site.	<ul style="list-style-type: none"> • Search Outliers report • Cost Column and Extended Cost Column added in the Search Outliers report

The enhancement helps to perform a statistical analysis of the forecast parameters and increases the forecast accuracy. Users can use the reports and user interfaces used to establish the forecast accuracy KPIs to perform forecast analysis.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the following section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <ul style="list-style-type: none"> • "Viewing the Item Forecasts Top Difference Report" • "Viewing the Aggregated Item Accuracy By Product Group Report" • "Viewing the Forecast Change Report" <p>See the following section in the current release of the <i>Online Help</i> for more information.</p> <ul style="list-style-type: none"> • "Demand Forecast Accuracy By Item" • "Adding Widgets" • "Search Outliers"

3.6.1.4 New and Enhanced Demand Planning Alerts

In this release, new alerts and alert enhancements for demand planning provide users with better information management for forecasting accuracy. These enhancements automatically alert the user if the quality of the forecast drops below the user-defined threshold. The alerts inform users of items with issues, allowing them to manage by exception without having to actively search out problem items.

The new demand planning alerts include the following:

- Forecast Changes (user-defined) vs Previous Forecast
- Metrics on the Forecast Method (High MAPE Alert)

The following demand planning alerts will now support monthly and fiscal monthly bucketization:

- Baseline Forecast Error
- Demand Forecast Deviation
- Forecast vs Sales Alert (Weekly Forecast vs Weekly Sales Deviation)
- Forecast Without Sales
- Forecast Trend Deviation
- Item Seasonality Wrong Allocation
- Item History Stats Populator
- Previous Week Forecast Accuracy Error
- New Site History Similarity Deviation
- Similar History Scale Issue
- Traffic Previous Week Forecast Accuracy Error

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Demand Planning Alerts" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.6.1.5 New Demand Planning Widgets in the NEO UI

In this release, the demand planning portlets from the Command Center UI are now available as widgets in the NEO UI. Previously, visibility of these reports and data was available in the Command Center, and they have now been converted to widgets. Users have

access to all of the demand planning data for quick reference and analysis once they add the widgets to their NEO dashboard. The following demand planning widgets are available:

- Demand Forecast vs Order Forecast
- Forecasting for Recently Launched Items
- Forecast Rolling Bias
- Forecast Rolling Bias by Product Group
- Forecasts Without Sales Alert
- Forecast Trend Deviation
- Previous Forecast Accuracy Error
- Baseline Forecast Error
- Item Seasonality Wrong Allocation
- Items with Enabled Traffic Forecasting
- New Events Effects
- New Outliers
- New Site History Similarity Deviation
- New Stores Without Similar History Alert
- Foot Traffic: New Outliers
- NPI Items
- Foot Traffic: Previous Forecast Accuracy Error
- Running Problematic Promotions
- Sales for Disabled Forecast Alert
- Significant Autonomous Adjustment
- Similar History Scale Issue
- Foot Traffic: Forecast vs History Deviation
- Demand Forecast Deviation
- Forecast vs Sales Deviation

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Widgets" section in the current release of the <i>Online Help</i> for more information.

3.6.2 Inventory Planning

3.6.2.1 New MEIO Engine Created to Optimize by Average Desired Safety Stock

We created a new MEIO (Multi-Echelon Inventory Optimization) Engine that calculates safety stock and runs for all items and all sites. This approach balances the network towards an average desired safety stock instead of the other MEIO engine, which focuses on service levels. The new engine produces a lower cost safety stock by targeting an average service level instead of forcing all items to the same service level. The lower costs help to create a competitive edge for users. The system must be configured to use the new engine, calculating for average desired safety stock instead of being configured to run Multi-tier Inventory Planning or Single-tier Inventory Planning.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Run the MEIO Engine to Optimize by Average Desired Safety Stock" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.6.3 Replenishment

3.6.3.1 Generate Deployment Orders in Sourcing Engine

This release adds the ability to generate deployment orders in the Sourcing Engine. A Create Deployment Orders flag is added to the Sourcing Engine user interface. Prior to this, the order aggregation engine was to generate deployment orders from order forecasts that have a complex logic of order aggregation. This was a time-consuming process and had some major drawbacks. This enhancement aims to overcome those drawbacks and create deployment orders directly from the Sourcing Engine. Users can set the Create Deployment Orders flag to create deployment orders from the Sourcing Engine. By default, the flag is not set. The generated orders can be searched from the Search Order Forecasts with the state filter set to Converted and order number in the Order Number column.

Prerequisite:

- Users must run the Advanced Replenishment Engine to generate order forecasts prior to generating deployment orders from the Sourcing Engine.
- Verify that the Order Creation Action Name field is set as OMS.CreatedO on the Site Lane details screen

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Sourcing Engine" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.6.3.2 Conversion of RPL Portlets to NEO UI Widgets

Portlets were used in the ONE Command Center User Interface (UI) to view a snapshot of data. With the update to the NEO UI, portlets are converted to widgets that allow for increased customization and data filtering. Replenishment Planner users can add the new replenishment widgets to their dashboard in the UI (see the section references in the table below) for access to the information relevant to the following:

- Order Allocation - provides unpromised and under promised forecasts and orders by site and customer
- Push Engine - provides the impact of order replenishment by site
- Root Cause Analysis - provides an analysis by week of replenishment information for data such as excess stock, stock violations, and several types of variabilities

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with the Order Allocation Widget," "Working with the Push Engine Widget," and the "Working with the Root Cause Analysis Widget" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.6.3.3 Modeling Many-to-One Items at the Distributor

This new feature allows users to replenish an item by breaking a bulk item into pieces for delivery to stores. Both the bulk item and the piece item have separate buffers that are managed separately, allowing the Break-Bulk transaction to be predicted and managed.

Users can more easily understand their inventory in bulk and piece items, allowing them to visualize break-bulk transactions.

To use this feature the following conditions must be met:

- The Replenishment Engine needs SupportOneToManyItemMapping ixm engine config set (set by ONE Prod Support team).
- Item 1 (small item) and Item 2 (bulk item) must be mapped to a Retailer Item (i.e. retailer orders coffee cups, coffee cups are mapped to suppliers Item 1 and Item 2).
- Item 1 (small item) must have a flag enabled indicating it will be replenished by another Item (Item 2 would be the only other item).
- Running the engine on Item 1 will result in Break-Bulk transactions from Item 2 to Item 1.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Enabling Many-to-One Item Mapping at the Distributor" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.6.3.4 Replenishment Engine Enhanced to Consider Work Orders as a Form of Demand

The Replenishment Engine is enhanced to use work orders from ONE's Manufacturing product. This change allows the replenishment engine to generate order forecasts and calculate projected on-hands while considering the detailed execution processes within a plant. This enhances the Manufacturing user's understanding of available on-hand for both the finished goods and the raw materials consumed to make those goods.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	None

3.6.4 Transportation Planning

3.6.4.1 Canceling a Load Consolidation Process

With this enhancement, users can now cancel a load consolidation run. Canceling a run allows users to abort the current process and rerun it with simplified parameters, solve a smaller portion of the problem, or manually resolve the problem without assistance from the system algorithms. Any user or role that can create a load consolidation process can abort a load consolidation process.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Canceling a Load Consolidation Process" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.6.4.2 Enhancements to the Cost Calculation Methods

This release adds more options for calculating shipment costs while generating optimized routes for selected shipments. Users can now calculate the cost of a shipment on a per-space, per-weight, or per-volume basis. Prior to this release, the planning engine supported only specific cost types such as distance, transit time, and flat. This enhancement increases the accuracy of the cost calculation methods by enabling users to specify the most suitable cost type as the basis for the shipment cost calculation.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Adding Enhanced Shipment Cost Allocation" section in the current release of the <i>Online Help</i> for more information.

3.6.4.3 Google Connect Supported as a Distance Source

This enhancement adds Google Connect as another source of distance information to support existing agreements clients may already have with distance providers. This feature can be enabled by setting the distance cache to `GOOGLE_CONNECT`.

Analytics Impact	None
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Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Configuring Google Connect as a Distance Source" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.6.4.4 Incompatibility Functionality for the Planning Engine

This enhancement allows users to define an incompatibility rule for commodity codes and shipments. If two or more commodity codes are incompatible (such as groceries and heavy equipment) and should not be transported together, this can be defined in an incompatibility rule so that the planning engine can use it as a parameter during calculation. Using this feature allows incompatible shipments within the same run without fear of contamination.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Configuring Incompatibility Rules" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.6.4.5 New Enterprise Admin Configuration Flag for Static Only Route Optimization

Enterprise administrators now have a configuration flag that will only use static routes during route optimization. This feature is useful for users that want to reduce problem complexity and problem runtime; some, but not all, routes may be solved with static routes only. Using the Static Route Configuration flag will not affect other users.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Using the Static Route Configuration Flag" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.6.4.6 Private Fleet Vehicles Can Be Used from their Last Stop

This enhancement enables private fleet vehicles to be used from their last stop rather than waiting for them to deadhead back to their domicile. This option is meant to improve route planning for vehicles with multiple movements in a day; rather than assuming a vehicle will deadhead back to its domicile at the end of the day, the system will assume the vehicle will end the day at its last drop location. This lowers costs by eliminating unnecessary deadheads and opens up options to use vehicles that would otherwise be unavailable. Any private fleet can enable this option by setting the Back to Domicile flag to false and using incremental planning on movements created for this fleet.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Configuring a Private Fleet with Back to Domicile Option Set to False" and "Using Incremental Planning on Movements" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.6.4.7 Shipment Splitting Logic Expanded to Work with Additional Units of Measure

This release extends the Shipment Splitting logic to include the ability to split additional units of measure. The change allows users to split spaces as well as the other units of measure for shipments and equipment (weight, volume, and quantity). Spaces are a common simplification of how much a truck can carry. By allowing splitting logic to consider spaces, the system algorithms can use this increased granularity to make better optimization suggestions. Users must configure shipments and equipment to use spaces as a unit of measure before shipments can be split using spaces as the UOM.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Configuring Shipment UOM" and "Configuring Equipment UOM" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.6.4.8 Temporary-Site Shipments

This new feature introduces the ability to schedule a pick or drop location using a temporary site by manually entering an address on a shipment. This makes the load consolidation process much more flexible as users no longer have to enter a permanent location into the system to set the pick or drop locations. This feature only works with addresses in the United States and Canada.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	None

3.6.4.9 Transportation Optimization Engine Support for Daylight Savings Time

This release adds daylight savings time support to the Transportation Optimization Engine, giving the engine the ability to account for daylight savings time automatically. The ability to account for daylight savings time improves the accuracy of transportation optimization plans when they include a region that is switching in or out of daylight savings time during the course of the optimization plan. No additional configuration is required to use this feature; run the engine normally, and it automatically accounts for changes in time due to daylight savings.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	

3.6.4.10 Update Throughput by Considering Approved Movement Throughput UOM Values

This enhancement allows users to extend the throughput calculation by considering approved movement throughput UOM values from previous runs. These approved movements lower the remaining available throughput. Increasing the accuracy of the throughput calculation improves the incremental planning capability of the engine and allows better support of sites with limited throughput.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Configuring Site Throughput" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.7 Order Management

3.7.1 Blanket Order (BPO) Enhancements

3.7.1.1 Auto-Create Shipments for Blanket Orders

Starting this release, the system creates ASNs automatically from blanket orders, blanket purchase order releases, and blanket deployment order releases based on the schedule defined in the order scheduler.

This enhancement also adds support for lead times on the Blanket Order details page. Lead times help in creating automatic shipments for blanket orders. As part of this, the following fields are added under Lead Times at the blanket order line level.

- Order Lead Time
- Target Order Lead Time
- Order Ship Confirm Lead Time
- Order Commit Lead time

Prior to this update, ASNs were not automatically created against blanket orders; the order scheduler only checked if the shipment was created according to the defined schedule.

To view the shipment and ASNs, vendor users can search the shipment using the Blanket Order number.

This enhancement reduces the user's efforts with respect to shipment creation.

Prerequisites:

Users must enable the following policies to enable automatic ASNs:

- Policy for Purchase Order Blanket Release: The "Auto-Create Shipment and "Pres ASN State" policies should be set to AVL or Vendor.
- Policy for Deployment Order: The enterprise policy "Pre ASN State" should be set.

- Policy for Deployment Blanket Release: The "Pre ASN State" and "Auto Pre ASN Lead Time" values are set on the Deployment Order Owning Org or the Ship From Site policy. The "AutoCreateASN" value is set for the Deployment Owning Org.
- Policy for Blanket Release: The Buyer sets the "Auto Pre ASN Lead Time" value at the Vendor level and the "Pre ASN State" and "Auto-Create Shipment" values as well.

Analytics Impact	None
Integration Impact	Yes. The BlanketContract_IB file is used to manage the blanket orders via integration.
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>Online Help</i> for more information.</p> <ul style="list-style-type: none"> • "Searching Policies " • "Scheduling a Blanket Order"

3.7.2 General OMS Enhancements

3.7.2.1 Added Dynamic Configurable Vendor Profile Templates

This release includes vendor profile templates at the partner level so that vendors can manage their own attributes associated with the buyer-side partner model. The UI for the profile template and the configurable attributes are determined by the vendor group that the vendor is associated with. Users are also able to upload and download CSV files to provide updates. This enhancement allows vendors to update their own attributes in addition to the buyer; both the vendor and the buyer users will see more efficiencies in their business processes.

Analytics Impact	None
Integration Impact	Integration will handle dynamic, configurable attributes by vendor type from the vendors.
Related Functionality	None
Usage and Configuration	See the "Updating Vendor Attributes in Vendor Profile Templates" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.7.2.2 Enhancements to Manual Holds on Blanket Orders, Contracts, and Invoices

Starting this release, users can add and configure multiple manual holds with different reason codes for blanket orders, contracts, and invoices. The UI for creating holds for blanket orders, contracts, and invoices is updated with a new field, Hold Reason Code, and two new flags, Blocking and Rollback State. The default reason code for manual holds is set to Other. Previously, manual holds were created with blocking or non-blocking type reason codes. Users could create only non-blocking holds with the Others type for blanket orders, contracts, and invoices. Users can create multiple manual holds with different reason codes on the Holds tab of the Blanket Orders, Invoice, and Contract user interface.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>Online Help</i> for more information.</p> <ul style="list-style-type: none"> • "Adding Holds on Blanket Orders" • "Viewing Invoices " • "Creating Contracts"

3.7.2.3 New Policy Name

Starting this release, the Order Quantity Split Between Vendors by % policy is renamed to Avl Split by Order Quantity between Vendors %.

Users can configure Avl Split by Order Quantity between Vendors % as a sourcing policy on the following screens:

- Item Policies
- Buffer Policies

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	None

3.7.2.4 Buyer Planner Workbench

This release introduces a new workbench, Buyer Planner Workbench, that allows users to view how a site is doing in terms of supply, and to modify orders and forecasts to fix potential supply issues. The Buyer Planner Workbench contains the following UI elements:

Subnet Picker

The Subnet Picker is the entry point into the workbench and enables users to pick a Vendor and a Site. Selecting these values determines which items and buffers can be worked on in the workbench. If any items are valid to be used in the workbench, the first in the list is picked after selecting the subnet. By default, the system sets the Site to the user's primary User-Site-Association, if one exists. The system sets the Vendor by default to the Vendor with the "DEFAULT_PARTNER" flag set to true, if one exists.

Item Picker

The Item Picker enables users to pick which item to work with. By default, the system picks the first item on the list after a subnet has been selected. Selecting an item from the list causes the workbench to load the data necessary to work with that buffer. The Item Picker also has options for sorting and filtering which items will show in the list.

Buffer Details

Once a subnet and an item have been selected, the rest of the workbench should load. Assuming the data is set up correctly, users can see the Buffer Details panel near the top of the page. This panel shows details about the buffer, such as lot sizes and quantity on hand.

Projected Inventory View (PIV) Chart

The PIV Chart shows the current and projected inventory of the current buffer. It contains a green bar showing the minimum and maximum inventory range. Each point on the chart shows the projected on-hand quantity at that date. Hovering over the point shows a tooltip with an exact value that can be easily read. Below the chart is the date axis, made up of the following parts:

Component	Description
Date	MM/DD representation of the date.
New Order Icon	This is always present. A plus icon (+) can be clicked to open the New Order Slideout to create a new order on that date.

Component	Description
Arriving Order Icon	Circle icons with a quantity next to them. These represent an order arriving on that day. The circle should be filled to the capacity percentage the order's transportation mode allows. Hovering over the icon changes the text from the quantity to the percentage of capacity. If the order is below 100%, the circle is blue. When at 100% capacity, the circle is red. Clicking on these opens the Order Details Slideout allows the user to modify the order.
Order Forecast Icon	Page icons with a number next to them. These represent an order forecast projected to arrive on that day. Hovering over the icon transforms the order icons to show their percent capacity and the amount this forecast would represent. The circle indicator fills up as though this forecast were added to the order, becoming red if the order reaches 100% or more of the total capacity. Clicking on these opens the Forecast Details Panel to create an order from this forecast or add this forecast to an existing order.

Demand and Supply Tables

These tables give a tabular view of demand and supply at the current buffer. They are shown in the same space as the PIV Chart and can be toggled using the toggle button at the top of both.

Prescription Panel

This panel contains the prescriptions that are generated for the current buffer. There are two prescription types: Create Order and Add Forecast To Order. Clicking on the NEO It! button for the prescriptions opens the New Order slideout and Add Forecast To Order popup, respectively.

Add Forecast To Order Popup

This popup can be opened by clicking the NEO It! button on a prescription for Add Forecast To Order. It includes basic information about the order, including the transportation mode and delivery date. Below that, it shows the percent of the order's capacity utilization after adding the forecast to the order. Clicking the "Yes, Add to Order" button adds that forecast to the order.

New Order Slideout

The New Order Slideout can be opened by clicking the Create Order button at the bottom of the page, by clicking the NEO It! button for Create Order prescriptions, or by clicking the plus icon (+) on the date axis on the PIV Chart. This slideout allows the user to create a new

order with a delivery date by adding forecasts to the order. The system prevents users from adding forecasts, which would push the order over its capacity.

Order Details Slideout

The Order Details Slideout can be opened by clicking on an Order icon on the PIV Chart's date axis. This slideout is similar to the New Order Slideout, allowing users to update an existing order by modifying its delivery date, transportation mode, and adding forecasts to the order.

Scratchpad

The Scratchpad is a common component of many NEO workbenches. It represents a workspace that the user can use to handle issues that the workbench is dealing with and see how those changes affect the system without actually committing such changes to the system. Users can create new scratchpads to view how different plans would impact the system and compare those plans. Once the user is satisfied with the plan, they may execute it by clicking the lightning button on the Scratchpad.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Buyer Planner Workbench" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.7.3 Invoice Enhancements

3.7.3.1 Add Additional Costs to Order Invoices

This release adds additional costs to purchase orders, deployment orders, sales orders, blanket release purchase orders, and blanket deployment release order invoices. If the Additional Cost or Charge Type is Tax, the Line Type is set to Tax. If the Additional Cost or Charge Type is Shipping or Expedite, the Line Type is set to Other under Invoice Lines on the New Invoice screen. Previously, additional costs were not included on order invoices. This enhancement helps the users to consider additional costs incurred while creating orders.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	See the "Creating Deployment Order Invoices" section in the current release of the <i>Online Help</i> for more information.

3.7.3.2 Create Invoices for Blanket Orders

Starting this release, users can create invoices on blanket orders, blanket release purchase orders, and blanket release deployment orders. This enables users to create an invoice before the actual order is created. The following new fields are added to the Lines tab of the New Invoice screen when creating a Product Line invoice:

- **Contract No:** The blanket order number
- **Contract Line No:** The blanket order line number

These fields can also be used as filters on the Search Invoice and Search Invoice Line reports. Before this release, users could only create invoices only for a Purchase or Deployment order in the Open state.

Prerequisites:

Users must enable the following policies for blanket contracts to use this feature:

- Payment Term
- Auto Invoice
- Invoice Active Code
- Auto Approve Invoice
- Tax Allowed
- Tax Provider
- Auto Compute Tax
- Generate Detailed Invoice
- Invoice Tolerance Limits

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating an Invoice" section in the current release of <i>Online Help</i> for more information.

3.7.3.3 Create Non-Purchase Order Invoices

Starting this release, users can create a new Invoice Template for External Order Invoice along with the existing shipments. This enables users to populate data on External Order.

This enhancement adds the following fields that will be added on Invoice Line:

- **External Order No** - This field will be used to store the external order number for which the invoice is created.
- **IsExternalOrderInvoice** - This flag will be used to state where the invoice is created for the External order and also there is no related shipment in the system for it.

The following New Filters are added:

- Search Invoice
- Search Invoice Line
- Spends By Vendor
- Spends By Ship To Site
- Spends By Item
- Spends By Item Category
- Spends By Item and Site

Filter by

- Shipment no
- Shipment Line No
- Is External Order Invoice

Before this release, users could create only a Non-PO Invoice.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating an Invoice" section in the current release of <i>Online Help</i> for more information.

3.7.3.4 Generate Invoice on Shipment Confirm Action

This release adds a new invoice code, Active on Shipment Confirm, to enable users to generate invoices, either manual or automatic, once the shipment is confirmed but not

actually shipped. The ability to generate an invoice upon shipment confirmation applies to the following types of shipments:

- AVL PO
- Contract-based purchase
- Deployment
- Sales
- Vendor-managed orders (VMI orders)
- Blanket purchase orders (BPO)

This enhancement does not apply to external orders and Spot POs. The newly created invoice begins in the Discrepancy Hold state and a new Pending Order Ship Hold is generated until the shipment is not actually shipped. The invoice can be submitted and marked Valid only when the shipment moves to the In Transit state. If a shipment ID is present, the line quantity is fetched from the shipment. If only a delivery schedule ID is present, the agreed quantity is considered as the line quantity. This enhancement also introduces a mechanism to synchronize the updates to the shipment or shipment lines with the corresponding invoice. If a shipment or a shipment line is canceled, the corresponding invoice or invoice line is automatically canceled. If a new line is added to the shipment, a new invoice line is automatically added, and costs are recalculated. Invoices will not sync when the invoice state changes from New or once the shipment moves into the In Transit state. Previously, invoices were generated only after a shipment moved to the In Transit state. This enhancement is useful for fulfilling compliance or procedural requirements by printing an invoice as part of the documentation a transporter receives while taking ownership of the shipment and uses to confirm its contents.

Prerequisite:

The invoice active code must be set to Active on Shipment Confirm under AVL Details.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating Approved Vendor Lists" section in the current release of the <i>Online Help</i> for more information.

3.7.3.5 Delete Invoice Line and Line Details on Invoices in a New State

In the release, Order Management gives users the ability to delete invoice lines and invoice line details when the invoice is in a New state. This provides users more flexibility when updating invoices. After the invoice is submitted, the option to delete lines is removed.

Analytics Impact	None
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Integration Impact	None
Related Functionality	None
Usage and Configuration	Please see the "Creating an Invoice" section in the <i>Online Help</i> for more information.

3.7.3.6 Enhancements to Purchase Order Invoicing

Starting this release, users can add an invoice line to different service types such as an order line and a blanket order line. This enables users to create and add a policy for discount line-type services. Prior to this release, users could not create invoices for individual service types. This enhancement also adds the following new fields to the Lines tab of the New Invoice screen when creating a Purchase Order invoice:

- **Invoice Report:** Added new filter to search Service Type Invoice.
- **Invoice Integration:** Added integration support via OMS.Invoice_IB 4.0 file.
- **Auto Invoice:** On auto Invoice, the service type order line/ blanket order line will be added as a service type invoice line.

These fields can also be used as filters on the Search Invoice and Search Invoice Line reports.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating an Invoice" section in the current release of <i>Online Help</i> for more information.

3.7.3.7 Enhancements to the Invoice Lines

This release introduces a new read-only field, Country of Origin, to the invoice lines. This field inherits the value of the line-level Country of Manufacturing field on the Purchase Order screen. The Country of Origin field is visible on the Invoice and Invoice Line reports. The newly added field helps users track the country of origin of the item.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	None

3.7.4 Order Enhancements

3.7.4.1 Cancel Remaining Quantity for Orders in Partially Received State

Starting this release, the line-level action, Cancel Remaining Quantity, is available for orders only in the Partially Received state. Previously, this line-level action was only available for orders in the Partially Shipped state; this resulted in the wrong order quantity calculation on the PIV. This enhancement helps to curb problems related to incorrect order quantity calculations on the PIVs. Users can view and perform the Cancel Line Remaining Quantity action under the Lines tab on the order details screen for the Purchase Orders, Deployment Orders, Blanket Orders, and so on in the Partially Received state.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating a Purchase Order" section in the current release of the <i>Online Help</i> for more information.

3.7.4.2 Define and Utilize Working Days for Order Milestones

This release enables users to define and utilize Working Days for processing order milestones. Previously, the system processed order milestones without considering non-working days. Users can select the Working Days checkboxes on the order milestone process page. This enhancement helps in curbing delays in warehouse actions like picking. For example, if the supplier's warehouse does not work on certain days then those days are not selected as working days.

Analytics Impact	None
Integration Impact	Yes
Related Functionality	None
Usage and Configuration	See the "Create a New Milestone Process" section in the current release of the <i>Online Help</i> for more information.

3.7.4.3 Authorization Tab on Sales Order Details Screen

This release introduces a new tab, Authorization, to the Sales Order details screen. Previously, the Authorization tab was available only for purchase orders. The Authorization tab displays a list of authorizations generated for the order along with the authorization state, assigned user, and the next approver. Users can approve an authorization request on the same tab. This feature helps users to process authorization requests from the Sales Order details screen.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Authorization Tab" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.7.4.4 Enhancements to Re-Sourcing of Purchase Order Releases

Starting this release, if there is an update to the Ship To Site address and the system is unable to find the relevant contract terms in the same contract, the system will scan all existing contracts to find the most relevant match. Values like FOB Code, FOB Point, and Payment terms from the matched contract or contract terms will overwrite the old values. Prior to this update, whenever there was a change in the Ship To Site address, the system looked for relevant terms in the same contract, but if no relevant terms were found, the system displayed an error message. This enhancement greatly reduces the possibility of the system failing to update the Ship To Site address.

Prerequisite:

Users must enable the OMS.allowResourcingRelease_PO policy on the Organization Hierarchy user interface under the Purchase Order policy group to change the resourcing process.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Searching Policies" section in the current release of the <i>Online Help</i> for more information.

3.7.4.5 Enhancements to Visibility of Order Links Tab

This release updates the layout of the Order Links tab, which displays all order updates. The new layout enables users to select only relevant updates and hide the rest. The previous layout could not accommodate all order updates beyond a point; users were not able to view the details of the related transactions properly.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Searching Purchase Order Schedules" section in the current release of the <i>Online Help</i> for more information.

3.7.4.6 Enhancements to Packing Resource Algorithm

This release enables the Packing Resource algorithm at the enterprise level. Previously, the Packing Resource algorithm was only available at the organization level. The packing requirement was generated using packing resources belonging to the current organization. This enhancement enables users to view the packing resource at the enterprise level irrespective of the organization the enterprise belongs to. The following improvements have also been made to the algorithm:

- Added an external reference to the CSV file that determines whether the Packing Resource algorithm is supported at the organization level or at the enterprise level.
- A new mandatory Enterprise field is added to the Packing Resource user interface.
- The Organization field present on the Packing Resource user interface is not mandatory.
- The Packing Resource Policy is set at the enterprise level.
- The packing requirement is calculated using Packing Resource at the enterprise level.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing the Packing Resource Screen and Setting the Packing Resource Policy" section in the current release of the <i>Online Help</i> for more information.

3.7.4.7 Enhancements to Sales Order Search Report

This release adds a new column, Fulfillment Order Count, to the Sales Order Search report to show the number of fulfillment orders for a particular sales order. Users can click this number to see order details like the order number, order type, state, and so on. When users click the Create Fulfillment Order button, a read-only pop-up screen displays basic line details. Users can select the fulfillment order type (Purchase or Deployment) for each line and create fulfillment orders. The default fulfillment order type is set to Purchase Order. This enhancement brings a significant improvement in the order brokering workflow.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Searching Sales Orders" section in the current release of the <i>Online Help</i> for more information.

3.7.4.8 Enhancement to Orders Interface

This release adds the Promise Item Name and Promise Item Enterprise Name fields to CSV files for all types of purchase orders and sales orders. Specifically, the two new fields are added to the following CSV files:

- OMS.PurchaseOrder v 5.0
- OMS.PurchaseOrder_Synch_IB v 1.0
- OMS.SalesOrder_IB V 4.0
- OMS.SalesOrder_UI_Upload V 1.0
- OMS.SalesOrder_Synch_IB v 1.0

Prior to this update, users had to enter these details through the user interface. This enhancement eliminates the need to upload information using two different methods.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Uploading Orders" section in the current release of the <i>Online Help</i> for more information.

3.7.4.9 Item Attribute Visibility from Search Order and Order Details Screens

Starting this release, users can view item attributes from the Search Order report screen and Order details screen using the context menu. Previously, item attributes were only accessible through the Item screen. This feature helps users view item attributes on the same screen, eliminating the need to switch screens.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing Item Attributes" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.7.4.10 Sales Order Authorization Report

This release introduces a new report, SO Authorization, for buyer users. Users can view a list of authorization requests pending with them. Users can approve or reject a pending authorization from the report screen. This feature helps users to quickly access and process pending authorizations on sales orders from the report screen.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with SO Authorization Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.7.4.11 Support for Order Brokering

Starting this release, the system adds support for order brokering.

Order brokering is to convert a sales order into one or more purchase orders for multiple vendors. For example, a customer raises a sales order for multiple items. The buyer then needs to identify vendors who can supply the required goods. The Buyer user then generates multiple purchase orders for all the vendors who will supply the goods. The vendors can choose to ship these goods either to the Buyer who can collect all the goods and ship them to the customer as one or more shipments. Or, they can choose to ship their goods directly to the customer (Drop Shipments).

New Policies

- **AllowFulfillmentForSalesOrder:** Users can enable this Sales Order policy to create fulfillment orders from a sales order.
- **AllowFulfillmentOrdertoAutoSync:** Users can enable this Enhanced Order policy to sync a fulfillment order to the parent sales order to update its status. This is applicable only for Drop Ship arrangements. If this policy is disabled, a new action, **Populate Estimates from Fulfillment Order**, is displayed under the Actions menu to synchronize the parent and the child orders.
- **AllowFulfillmentOrdertoCreateNewDS:** Enabling this policy allows a fulfillment order to create new delivery schedules in the parent sales order. The parent sales order will be split into multiple delivery schedules to sync with the fulfillment order. If this policy is disabled:
 - The delivery date for the parent sales order will be set to the farthest delivery schedule in the fulfillment order.
 - The shipment date for the parent sales order will be set to the earliest delivery schedule in the fulfillment order.
 - Promise quantity will be set to the sum of quantities across delivery schedules.

Drop Ship flag

A new flag, Drop Ship, is added to the sales order page both at the header level and line level to identify a line as a drop shipment. The fulfillment orders created as part of a drop shipment are marked as drop shipments.

Related Orders

A new page, Related Orders, shows details of all the fulfillment orders created for a parent order. The Related Orders page is accessible from the Links tab of a sales order or a fulfillment order.

This feature offers a better overview of and better manage the entire order brokering workflow by improving the customer visibility of various stages of the process.

Analytics Impact	None
Integration Impact	None
Related Functionality	To set policies, see the "Searching Policies" section in the current release of the <i>Online Help</i> for more information.
Usage and Configuration	See the "Sales Order" section in the current release of the <i>Online Help</i> for more information.

3.7.4.12 Visibility of Tracking Events and Milestones on Order Search UI

Starting this release, users can view tracking events and milestones associated with an order on the Order Search report. The tracking events and milestones can be viewed on the respective search reports for purchase orders, deployment orders, sales orders, and return orders. Previously, the capability to view the tracking events and milestones could be viewed only on the Order Details screen.

The enhancement helps the users to directly view the tracking events and milestones details associated with an order on the search report without navigating to the order details screen. Users can click the Tracking Events and Milestones icon on the Order Search Reports to view the tracking events and milestones details.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>Online Help</i> for more information.</p> <ul style="list-style-type: none"> • "Searching Purchase Orders" • "Search Deployment Orders" • "Searching Sales Orders" • "Searching Return Orders"

3.7.5 RFQ Enhancements

3.7.5.1 Subscribe to RFx Alerts

This release adds support for RFQ, RFP, and RFI (now grouped as "RFx") alerts. Previously, only RFQ Bid alerts were supported. This enhancement enables users to independently subscribe to different RFx alert subscriptions. Users can subscribe to RFQ Responded, RFP Responded, RFI Responded, RFQ Submitted, RFP Submitted, and RFI Submitted from the Alert Subscription user interface. This update allows users to only subscribe to the RFx alert type they care about and reduces unnecessary alerts.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the "Creating RFX Alert Subscriptions" section in the current release of the *New Feature Usage and Configuration Guide* for more information.

3.7.6 OMS Gamification

The ONE system now includes a gamification feature that offers a game-like incentive to drive competition and better efficiencies among users. The benefit of gamification is providing users with an external motivation for performance improvement within an enjoyable environment. Users will also have prompts for the next step to an achievement level and visual progress-monitoring.

Admin/Managers configure the achievement measurements for users and roles based on daily, weekly, and/or monthly time buckets (called cadences), as well as thresholds for the top three performance-based ranks: bronze, silver, and gold.

Users use dashboard widgets to view their own achievements, how their achievements compare to other users, and their individual progress toward additional achievements. Users also receive notifications as they complete their achievements. The two user widgets are the My Awards widget and the Team Awards widget.

This release includes the following order management achievements:

- Purchase orders confirmed by the user
- Deployment orders confirmed by the user
- Purchase orders promised by the user
- Deployment orders promised by the user

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Gamification" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.7.7 New Databot Component

This release adds a databot functionality to the Order Management module as a digital platform for enhanced interaction and information exchange. ONE's databot is an inquiry tool for collecting data in a consistent format, which gives extensive analytical capabilities from the data responses. Data can be gathered by means of many inquiry types, including but not limited to text, numbers, dates, ratings, radio button selections, dropdown menus,

matrices, checkboxes, and uploaded files from both non-network participants and ONE network users. Current and future use cases include the following:

- Enhance and maintain master data
- Streamline and standardize RFQs
- Schedule routine compliance documentation updates (ex: insurance or certificates)
- Engage external resources and prospects
- Onboard new partners
- Collect feedback (ex: human resources, marketing, inter/intra-department, customers)
- Manage project updates
- Manage documentation

Databot Builder

Users create databots using the Databot Builder in the NEO UI or by uploading a CSV file. All databots are stored in the ONE system for historic analysis and reuse; users can also pull individual inquiry types and questions for use in future databots.

Databot Analytics

The Databot Analyzer collates and displays data in a variety of charts and graphs, which can aid users' decision-making. Users can analyze responses to individual questions or the entire databot.

Analytics Impact	None
Integration Impact	Integration updates support inbound files for uploading CSV files for questions, responses, and participant information.
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <ul style="list-style-type: none"> • "Working with the Databot Explorer" • "Working with the Databot Builder" • "Uploading Databot Details, Databot Questionnaire, and Databot Participant"

3.7.8 Asynchronous Order Update

This release enables an asynchronous mode of updating the order whenever the shipment is updated. Prior to this release, the shipment update was synced to the order in synchronous mode. This change was to done for performance reasons, so that the shipment transaction can function independently and not wait for the order to be updated. This helps end users to see better performance on the shipment transaction. The implementation is based on a policy in the "external value" table being set to true.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	No user action required.

3.8 Spares, Maintenance, Repair, And Overhaul (SMRO)

3.8.1 Access to the Asset Analytics Engine

This release provides access to the Asset Analytics Engine for the Asset Administrator, Maintenance Administrator, and Asset Manager roles through the Tools menu. Previously, access to this engine did not exist in the menus. The enhancement enables these roles to run the engine for all organizations within their enterprise, thus allowing them to analyze assets for better decision-making.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Running the Asset Analytics Engine" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.8.2 Added Filters for Assign Users and Assign Roles to New Work Orders

This release supports filters for Assign User and Assign Role based on the execution organization. Previously when populating these fields for new work orders, all results were populated from the enterprise-level. This change restricts the options to only users and roles within the selected execution organization and site, which decreases mistakes when assigning users and roles and increases the user experience. There is no change in the user's actions for this enhancement.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating and Searching Work Words" section in the current release of the <i>Online Help</i> for more information.

3.8.3 Added Task Sequence Field to Tasks in Work Order

This release adds a new field, Task Sequence, to the Tasks tab on the Work Order screen. A work order has several tasks to be executed that should have a definite sequence. This enhancement helps users in prioritizing task execution based on the sequence given in the Task Sequence column. Users can add numerical sequencing in the Task Sequence column under the Tasks tab on the Work Order screen to follow the task sequencing for the work order execution.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating and Searching Work Order" section in the current release of the <i>Online Help</i> for more information.

3.8.4 Calculating Issue Inventory on Requested Quantity

Users can now add the requested quantity for serialized or non-serialized items or parts. The requested quantity is auto-populated from the planned quantity, can be edited by users, and is used to issue inventory. During the execution, users can change the requested quantity to reflect the actual demand. When there is a deviation in the planned quantity, this enhancement can give preference to the requested quantity instead of the planned quantity.

Analytics Impact	None
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Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Calculating Issue Inventory on Requested Quantity" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.8.5 Download Work Order Report and Work Order Task Details

Starting this release, users can upload and download a Work Order report. The Download button downloads two different CSV files, one for work order details with task details and the other for task part details of the same work order. This helps when changing the work order details and task part details separately using a CSV file and enables users to reuse the same files to change the details of the work order in bulk. Users can select one or multiple work orders and select the Download button on the Search Work Orders screen to download the work order details and task part details.

Analytics Impact	None
Integration Impact	Yes
Related Functionality	None
Usage and Configuration	See the "Searching Work Orders" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.8.6 Issue Inventory from WMS Module for Work Orders Raised in SMRO Module

Starting this release, users can issue inventory from the WMS module for a work order raised in the SMRO module. Previously, work orders in SMRO and issued inventory in WMS were not connected and users could not issue or pick inventory based on the work order. This enhancement helps pick and issue the correct inventory from the warehouse requested in work orders. Users can add the requested quantity in the new Requested Quantity column in the Task tab of the Work Order UI and issue the inventory from the Issue Inventory UI.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration	<p>See the "Creating and Searching Work Orders" section in the current release of the <i>Online Help</i> for more information.</p> <p>See the "Creating Issue Inventory" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p>
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3.8.7 Simplify Asset As-Built Hierarchy

Starting this release, users can download the complete inbound (IB) interface details for the Asset As-Built Hierarchy. The Asset As-Built Hierarchy feature allows users to download complete assets, along with their associated singleton and singleton lines. With this update, users can reuse IB interface details for asset creation and modification. Users can select Asset As-Built Hierarchy from the menu and then download the complete asset details in three files: Asset IB, Singleton IB, and Singleton Lines IB.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing the Asset As Built Hierarchy Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.8.8 Enhanced Support for Item Maintenance Schedule

This release supports the maintenance schedule for item auto-population during asset creation for preventive work orders. Previously, the maintenance schedule of an item was entered manually at the asset level, but now that schedule will auto-populate (if it exists) when an item is selected for the asset. The enhancement reduces repetitive entry for items and reduces the risk of introducing errors into the system. On the Asset Creation page in the Maintenance and Repair tab, the following fields are added:

- **Maintenance Schedule:** Select the service name of the maintenance schedule available on the item.
- **Operation Duration:** This value auto-populates if the selected maintenance schedule value is operation duration.
- **Operation Distance and UOM:** This value auto-populates if the selected maintenance schedule value is operation distance.
- **Recurring Period:** This value auto-populates if the selected maintenance schedule value is a recurring period.

When the asset is associated with a work order, the maintenance schedule will populate as before. The maintenance schedule can be changed at the asset level, but not at the work order level.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating an Item Maintenance Schedule" section in the current release of the <i>New Feature Usage and Configuration Guide</i> and "Creating and Searching Assets" in the <i>Online Help</i> for more information.

3.8.9 Enhancements to Work Order Inbound

This release updates the existing Work Order CSV file to capture Task-level details associated with the work order, and adds a separate CSV file for the Task part. When uploading or downloading a complete work order, including the task parts and task-level details associated with the work order in a CSV file, the existing inbound work order is updated. This enhancement enables users to load a detailed work order along with its associated tasks and tasks parts. Users can download an inbound work order from the Search Work Order report.

Analytics Impact	None
Integration Impact	Yes
Related Functionality	None
Usage and Configuration	See the "Viewing the Work Order Report" section in the current release of the <i>Online Help</i> for more information.

3.8.10 Enhancement to the Work Orders Search Report

This release provides the ability to print work orders from the Work Orders search reports. Users now have a convenient means of printing one or more work orders directly from the search report screen by checking the box next to the work order and clicking the Print button. The work order is downloaded to the user's computer as a pdf.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

See the "Viewing the Work Order Report" section in the current release of the *Online Help* for more information.

3.8.11 General Work Order Enhancements

This release includes enhancements to the work order screen for Bills of Materials (BOMs), tasks, and task parts. The previous work order workflow required more screens and lacked efficiency for users.

The work order header now includes the following:

- Added a picker component for BOM selection for an Assemble work order
- Disabled the Asset picker for an Assemble work order
- User can create assets and singletons for an Assemble work order from the work order UI
- Asset and singleton items auto-populate from the BOM's primary item

Work order tasks have been enhanced to include the following:

- Added a task type option called Assemble for an Assemble work order
- The item placeholder/picker will fetch items that are associated with the BOM selected at the header level, including the primary item as well as components for an Assemble task type
- Added a field called Task Duration where users manually add required durations for tasks
- Added a field called Task Sequence where users define a sequence for task execution

Task parts have been enhanced to include the following:

- Users can add task parts needed to complete a task
- If a BOM is available on the Assemble work order, the task part will fetch only items that are associated with the main item added at the task level
- If a BOM is not present on the Assemble work order and for other types of work orders, the task part will fetch all the items within pre-defined scenarios
- Once the user completes the task, the system will check how many serially-tracked items that have serial numbers are used in the task and assign task-level singletons as parent singleton to singletons used in the task part
- This process will create a singleton hierarchy by default once the work order gets completed

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	See the "Creating and Searching Work Order" section in the current release of the <i>Online Help</i> for more information.

3.8.11.1 Assembly and Sub-Assembly Work Order Enhancements

The following enhancements are added to the assembly and sub-assembly work order process:

- While assembling, work orders support the creation of serial numbers in sequence, from existing serial numbers, or by creating new serial numbers.
- Multi-level BOM explosions to create Assembly-type work orders.
- Users can add unlimited tasks to build an asset for an Assemble work order.
- The BOM can explode all the tasks and task parts for work orders in the InPlanning state.
- Users can additionally add or remove tasks and task parts on a case-by-case basis.
- Sub-assemblies are supported by creating serial numbers in tasks that can be back into inventory and used to assemble the primary component.
- Primary assembly tasks can not be performed until all of the sub-assembly tasks are completed, all of the sub-assembly serialized parts are created, and all of the task parts are created and completed for the primary assembly.
- A new asset state, Assembling, is added for assets in the assembly process.
- During an Assembly work order, any serialized supply items are set to Incomplete and Inactive until the assembly task is complete.
- Once an Assembly work order completes, the singleton and asset as-built hierarchies are created.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Create Assembly Work Orders" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. See the "Create Sub-Assembly Work Orders" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.8.11.2 Disassembly Work Order Enhancements

The following enhancements are added to the disassembly work order process:

- Existing decommissioned assets are currently supported for disassembly.
- A Disassembly work order in the planning stage explodes the asset as-built hierarchy into a work order with tasks and task parts for all of the components and sub-components.
- Work order tasks have items and associated serial numbers with respect to the as-built asset, as described in the exploded view, with respect to the as-built asset.
- Users can add and remove any task or task part during the work order planning.
- Users can update the requested quantity to negative values for the respective part to put that part back into inventory and select the reuse flag in the task part.
- Parts marked with a negative quantity and the reuse flag are put back into inventory, while the remaining parts are shown in inventory as "BAD" items.
- Once the disassembly task is complete, the singleton detaches from the asset, and the singleton lines are detached from the singleton.
- A new asset state, Disassembling, is added for assets in the disassembly process.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating Disassembly Work Order" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.8.11.3 Work Order OB File Support

Work orders now support standard time-based OB support that includes the work order header and work order task information. This can be further tailored for action and event-based outbound messages depending on the customer requirement. The generated OB file can be viewed on the Message Queue screen, which is visible to the Enterprise Admin role.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	See the "Working with Work Orders" section in the current release of the <i>Online Help</i> for more information.

3.8.11.4 Work Order Template Creation Enhancements

The following enhancements are added to the work order template creation process:

- Work orders now support template task explosions in the InPlanning state.
- Users can see previously saved data and can perform appropriate action based on the work order workflow.
- Users can update the data at the time of execution.
- Work order templates can be saved at any point of execution and be reused when creating other work orders, minimizing rework for similar types of work orders.
- Work order templates support all types of work orders, such as Assembly, Disassembly, Repair, and Replace.
- For assembly, users can use the template without the BOM explosion to avoid overriding the task and task parts.
- For assembly, the asset and singleton are removed as each new assembly work order supplies a different singleton and asset.
- To create a work order, users can select a specific template for an item or asset.

Analytics Impact	None
Integration Impact	None.
Related Functionality	None
Usage and Configuration	See the "Creating Work Order Template" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.8.12 New User Interface for Asset Hierarchy

This release adds a new asset hierarchy user interface, Asset As-Built Hierarchy that includes an expandable and collapsible asset hierarchy and a right-click function to display asset details on the asset hierarchy. This enhancement gives users better visibility and readability of as-built asset details. Users can search the respective asset, download a detailed CSV file

for the as-built asset, and expand and view the details of the primary asset on the Asset As-Built Hierarchy user interface.

Analytics Impact	None
Integration Impact	Yes
Related Functionality	None
Usage and Configuration	See the "Viewing the Asset As Built Hierarchy Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.8.13 Schedule Tab Displayed Only for Preventive Work Orders

Starting this release, the Schedule tab is only displayed for Preventive work orders. Previously, when users created any kind of work order, the Schedule tab displayed. This release restricts the Schedule tab with fields for establishing reoccurring maintenance only for the work order type that requires schedule information. Restricting this tab helps users avoid mistakes and unnecessary tasks when creating work orders. No additional user prerequisites or actions are required.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating and Searching Work Orders" section in the <i>Online Help</i> for more information.

3.9 Supply Chain Core (SCC)

3.9.1 Access Mode Removed from UI and Integration

The Access Mode designation for user permissions has been removed in this release. Previously, users were provided with All, UI, or Batch options for their Access Mode permission for system access upon login. However, as the ONE system and customer's needs evolved, this particular access designation is no longer required. The UI field for user details and user reports is no longer displayed, and the inbound interface has been updated. The enhancement removes unnecessary information, thus reducing any confusion. No user action is required.

Analytics Impact	None
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Integration Impact	Access Mode was removed from the inbound interface.
Related Functionality	None
Usage and Configuration	None

3.9.2 Added an Organization Filter to the Partner and Partner Site Reports

The Partner and Partner Site reports now contain a search filter for organizations to include child organizations. Previously, there was no filter for parent and child organizations within an organizational hierarchy; the search results were based on a single organization only (the parent). Users now select the parent or child organizations with the new filter, Organization. The additional filter allows users to drill down into the organizational hierarchy when pulling reports on partners and partner sites for a better view of organization-specific data. Users select from a list of organizations using the picker tool.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Searching Partner Sites" section in the current version of the <i>New Feature Usage and Configuration Guide</i> and the "Searching Partners" in the <i>Online Help</i> for more information.

3.9.3 Allow Role-Based Entity Group to Filter My Entities

The new release provides a new policy that controls whether or not role-based entity filtering is applied to reports which support it. Previously, administrator users did not have the ability to apply filtering permissions to role-based entities. Now, they have the ability to enable or disable the role-based filtering, giving more control over permissions for entire entity groups. Admin users set the EnableRoleBasedPreferences policy value in the My Entity tab to True at the enterprise or value chain level.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration	See the "Setting the Role-Based Preferences Policy for My Entities" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.
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3.9.4 Edit Icon for Bill To Address on Orders

This release adds an Edit icon for the Bill To Address field on the Billing and Contact tab of orders. Each site has a composite profile containing address information that is typically displayed automatically in this field on orders; previously, however, users had no way of making changes to the address if necessary. Now, users can click on the Edit icon and a popup will display with the address information that can be edited directly on the order. This enhancement enables users to make ad hoc changes when needed as they work with orders, thus improving their ability to include the correct information for billing.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the various order sections section in the <i>Online Help</i> for more information.

3.9.5 Enhanced Support for Dangerous Goods in RTVN

This release enhances the attributes for dangerous goods in RTVN to support multi-leg, multi-modal transportation. In this scenario, carriers have different regulation types associated with the same items, but the system did not capture all of the hazardous attributes. New fields capture these attributes using an item-regulation combination applied to shipments during shipment creation. New fields in the Hazardous tab of the Item details page include:

- Hazard Inducing Substance 1
- Hazard Inducing Substance 2
- Hazard Inducing Substance 3
- Flashpoint temperature
- Flashpoint temperature UOM

The fields display in a new grid called Item Regulation Hazmat Details with the ability to add and edit new data. The enhanced support enables carrier notification so that they can arrange for equipment and clearances accordingly.

Analytics Impact	None
Integration Impact	Created a new interface in the "ItemRegulationHazardousInfo" to capture data via CSV.

Related Functionality	None
Usage and Configuration	See the "Adding attributes for Dangerous Goods" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.9.6 Enhancement of Filters to Search Sites for Child Organizations

In this release, searching sites with filters now includes child organizations. Previously, child organizations were not populating as options for the organization name, managing organization, and owning organization filters. This enhancement includes the child organizations as filter options, which will help users search more effectively within an organization hierarchy. Users click the picker tool to locate the child organizations as before; the auto-complete feature displays child organizations as users type.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Searching Sites" section in the current release of the <i>Online Help</i> for more information.

3.9.7 Enhancement to Support Goods and Services Tax

In this release, ONE added support for tax definitions at state, regional, and national levels. This enhancement supports Goods and Services Tax (GST) definitions to help facilitate tax calculations for orders, shipments, invoices, and so on for our customers in India. Previously, the tax structure in the system did not support the needs of India's GST; now, ONE better supports all of our global customers and their unique tax structures. Users will supply the GST master data.

Analytics Impact	None
Integration Impact	New UI integration to support upload and download of CSV files
Related Functionality	None
Usage and Configuration	See the "Working with GTS Tax Definitions" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.9.8 Enhancement of Notes Added Alert

The Notes Added alert is enhanced to generate an alert when an existing note is updated. Previously, updated notes did not generate additional alerts. A note within an enterprise (public or private) will generate an alert. A note between enterprises (between a client and a vendor, for example) will not generate alerts if it is not a public note; however, when a note is changed from private to public, a new note is created with alerts generated going forward (keeping previous information private). The enhancement allows the alerts subscribers to continue to stay aware of updates through the lifecycle of the order, shipment, or movement.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with the Notes Added Alert" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.9.9 Multiple Commodity Codes Available on Item Detail Screen

Multiple commodity codes are available in this release in the Item details screen. Users did not have the ability to add multiple commodity codes for items previously, so a new tab, Commodity Codes, was created to provide new fields: Primary Commodity Code and Other Commodity Codes. The tab replaces the single field for commodity codes that was on the detail screen. The system pushes the codes to the product hierarchy, which already stored multiple commodity codes. Allowing multiple commodity codes provides flexibility for different sites within a company or different customers in an organization to use different codes for the same item.

Analytics Impact	None
Integration Impact	The SCC.ItemProductGroupAssociation_IB has been updated so that users can upload commodity codes.
Related Functionality	None
Usage and Configuration	See the "Working with Multiple Commodity Codes for Items" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.9.10 Search Buffer and Buffer BOH Managing Organization Filter Includes Child Organization

The Managing Organization filter on the Search Buffer and Search Buffer BOH screens now includes child organizations as an option. Previously, when a user created an organization hierarchy with a parent organization and child organizations, the managing organization filter for these two searches did not show the child organizations as an option. Users can search through an organization hierarchy with more granularity when buffers and buffer BOH are associated with child organizations. No additional actions are required from users.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Search Buffer" and "Searching Buffers BOH" sections in the current release of the <i>Online Help</i> for more information.

3.9.11 Site and Partner Site Active Flag Is Connected

This release enhances the system logic so a partner site and its associated site can be active or inactive at the same time. Previously, when users created a partner site, the corresponding site record's active flag did not update; the two sites were not linked. This enhancement links the active flag for both the site and partner site, helping users maintain consistency when working within the supply chain sites. Users have no additional action.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating Partner Sites" section in the current release of the <i>Online Help</i> for more information.

3.9.12 Upload and Download Files for the Organization Hierarchy

This release adds functionality to upload and download files on the Organization Hierarchy page for users with permissions to update the hierarchy. Previously, users made updates to the hierarchy manually in the system UI. With the upload enhancement, bulk changes can be made to the organization hierarchy with an uploaded CSV file, thus saving the user time. With the download enhancement, users can archive hierarchy information for historical data. Users must have proper permissions to access the functionality.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Upload and Download File for the Organization Hierarchy" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.9.13 Managing a Bank of Serial Numbers by Site

Enterprise Administrators and Supply Chain Administrators can manage a bank of serial numbers by site in this release. Serial numbers from the bank (created for tracking singletons) are used for serial-controlled items manufactured or repaired at the site. With this enhancement, users can easily assign serial numbers, manage singletons, and build reports for numbers within the bank. Using a bank of numbers helps users work more efficiently than randomly generated numbers. Users define the following key attributes via the UI, a UI CSV upload, and through an inbound interface.

- Owning Organization
- Starting Number
- Ending Number
- Site
- Effective Date Range
- Next Number
- Prefix
- Suffix
- Padding Length
- Padding Character
- Active

Analytics Impact	None
Integration Impact	A new inbound integration file was created to load serial number master data.
Related Functionality	None
Usage and Configuration	See the "Working with a Bank of Serial Numbers by Site" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10 Warehouse Management

3.10.1 Upload Serial Numbers Through UI

This release adds the ability to upload serial numbers through the Upload Serial Numbers user interface. Previously, all submodels like Serialized Item, Kit, LPN, and so on were linked with serial numbers and created through the Singletons user interface and CSV files. This enhancement enables users to separately bulk upload serial numbers through the Upload Serial Numbers user interface and track them in a separate Serial Numbers report.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Uploading Serial Numbers" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.2 Site Resource Field Added to Location Details

This release adds a new field, Site Resource, to the Location details screen in the Warehouse Explorer.

The Site Resource field defines the dock door group or dock door used in shipment appointment scheduling. The field helps to establish a link between a location (warehouse) and dock doors. The link is essential in identifying the location used to load a truck with an appointment.

This enhancement helps the system to identify the correct location for a shipment delivery or pickup, optimize dock door usage, and minimize truck loading time. Users can define the Site Resource field for a location in the Warehouse Explorer.

Analytics Impact	None
Integration Impact	Yes
Related Functionality	None
Usage and Configuration	See the "Working with Warehouse Explorer" section in the current release of the <i>Online Help</i> for more information.

3.10.3 Add Reason Codes for Incomplete Assembly or Kitting Work Orders

This release allows users to provide reason codes for incomplete work order holds. A reason code helps users identify the reason for incomplete work, such as missing inventory, lack of resources, and so on. This enhancement makes the assembly process more transparent.

Users with Assembly Supervisor and Warehouse Manager role can view the reason codes on two widgets under the Summary Widgets:

- **Pie chart:** The pie chart displays the summary of the number of orders completed and the number of orders closed but still incomplete
- **Work Order Top Incomplete Reasons:** The table displays the top reason codes for closing incomplete work orders.

The widgets have filters like:

- **Work Type:** Assembly, Kitting, or both or none.
- **Period:** Days, Months, and Years. Default is 3 Months
- **Work Site**

The Work Order Top Incomplete Reasons widget has an additional filter "Count" that shows the number of records on display. Default is top 5 records.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Adding Widgets" section in the current release of the <i>Online Help</i> for more information.

3.10.4 Request for Authorization in Inventory Discrepancy Approval

This release adds the capability to request for authorization as part of the inventory discrepancy approval process. This functionality provides better accountability in the discrepancy resolution process and also expedites the release of inventories without any discrepancy. Users can click the Request for Authorization action on the Inventory Discrepancy screen to request for authorization.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	See the "Viewing Inventory Discrepancies" section in the current release of the <i>Online Help</i> for more information.

3.10.5 Directly Consume Containerized Inventory on Location Inventory Report

This release adds the ability to execute inventory operations for containerized inventory. Prior to this update, users had to first apply the Unpack From LPN action to unpack part of the containerized inventory from a license plate number (LPN) and then consume the containerized inventory. Users can now directly select the inventory number and apply the Consume action on the Location Inventory report to automatically unpack part of the containerized inventory and consume it. This enhancement reduces the number of required clicks in the process.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Location Inventory" section in the current release of the <i>Online Help</i> for more information.

3.10.6 Support Sealed Structure for Cycle Count

This release adds the ability to seal the inventory location after a cycle count is completed, reducing the need to count the inventory repeatedly. This enhancement reduces manual efforts to recount the inventory. Users request a seal at the location during the cycle count on the Cycle Count UI and then provide the count quantity and seal number.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Cycle Counting" section in the current release of the <i>Online Help</i> for more information.

3.10.7 Synchronized Inventory Reservation in Discon Picking Process

This release adds support for synchronizing inventory reservation data when working with the Discon picking process. Previously users had to manually compare request and pick items detail, cancel the relevant pick list and issue inventory lines, and then add missing pick list and issue inventory lines. With this update, the system can auto-sync the data and simplify the warehouse under/over picking process. This enhancement improves user experience by reducing the number of clicks.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	None

3.10.8 Added Asset Filter to Location Inventory Report

This release introduces a new Asset filter on the Location Inventory report page. Previously users could not search for asset details. The Asset filter is now an option in the following fields:

- Dynamic (Diversified Report)
- Optional
- My Asset (Personalized Report)

This enhancement was implemented to simplify the management of inventory assets. Users can select the Asset filter on the Location Inventory report page.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Location Inventory Report" section in the current release of the <i>Online Help</i> for more information.

3.10.9 Added Include Work In Progress Inventory Filter to the Cycle Count Plan Request Page

This release adds the Work In Progress (WIP) Inventory filter to the Cycle Count Plan Request page. This update allows users to skip WIP inventory from being picked up for counting by the cycle count algorithm. Previously, if a cycle count included WIP inventory, a discrepancy for pinned inventory would develop and users could not adjust the count until the entire count was completed; now users can avoid this scenario.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Cycle Counting" section in the current release of the <i>Online Help</i> for more information.

3.10.10 Added Work Order Filter to Location Inventory Report

This release adds the Work Order filter to the Location Inventory report to reduce the time needed to identify inventory pinned to a particular work order. Users can identify parts pinned to a work order by providing a work order number on the Location Inventory report or select the Work Order filter on the Location Inventory report to see a list of parts pinned to a work order.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Using the Work Order Filter on the Location Inventory Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.11 Additional Filters for Adding Lines to an Issue Inventory

This release adds many filters to help select specific types of tasks or tasks that fall within a specified date range. Specifically, these filters are intended to be used when adding a new line from a work order when creating an issue inventory. Applying these filters when

selecting tasks while adding inventory lines speeds up the inventory issuing and inventory reservation workflows. The following filters are added:

Type	Filter
Work Type	<ul style="list-style-type: none"> • Assemble • Disassemble • Modification • Reconfigure • Calibration • Inspection • Preventive • Recovery • Decommission • Kitting • Production • Repair
Task Type	<ul style="list-style-type: none"> • Calibration • Install • Other • Preventive • Repair • Replace
Date Range	<ul style="list-style-type: none"> • Task Actual Time • Task Planned Time

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating Issue Inventory" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.12 Identify Cycle Count Lines and Plans with Pending Authorization Discrepancies

This release adds an inventory discrepancy authorization check to identify inventory discrepancies with pending authorizations. A new filter, Has Pending Authorization Discrepancy, is added to the Cycle Count Plan report and the Cycle Count Workbench report. This makes it easier to identify plans and lines that contain active cycle counts with pending authorization discrepancies. Users can select the Has Pending Authorization Discrepancy filter on the Cycle Count Plan report and Cycle Count Workbench to view the cycle count plans and lines pending authorization discrepancies.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Viewing the Cycle Count Plans" section in the current release of the <i>Online Help</i> for more information.</p> <p>See the "Working with the Cycle Count Workbench" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p>

3.10.13 Buffer Replenishment Policy Updated

This feature changes how the Buffer Replenishment policy values are shown on projected inventory views (PIVs). Now only policy values related to the buffer's Order Policy Type, on the PIV header, are shown. This update improves the user experience by removing policy values that are not related to the selected Order Policy Type.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Buffers" section in the current release of the <i>Online Help</i> for more information.

3.10.14 Add Production Work Order Data Measures to Plant Finished Goods Projected Inventory View

Starting this release, users can import the available production work order data measures when working with plant finished goods (FG) projected inventory view (PIV). Previously, users had to add data measures manually when working with plant FG PIVs and there was no way to import data measures from the production work order. This enhancement enables users to cover the production execution phase for short-term FG planning and provides more transparency to the process. Users must create a production work order and execute it to use this new feature.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Production Work Order" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.15 Assign Locations for Warehouse Operations

This release adds new fields, Assign Shipping Lane and Assign Receiving Lane, to the Warehouse tab of the Order details screen for assigning warehouse locations in shipping and receiving workflows. Warehouse workers need to plan the required time and resources for picking inbound goods or packing and delivering outbound goods, and these two new fields make this process more efficient. Users can define a designated area for specific warehouse operations under Site in Warehouse Explorer.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Assigning Warehouse Locations for Specific Operations" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.16 Capture Location Discrepancies caused by Physical Moves on Cycle Count Workbench

This release enables the Cycle Count Workbench to capture location discrepancies due to the physical movement of an item that were resolved during cycle counting. This enhancement captures location accuracy in analytics and improves warehouse processes based on analytics. Users can select the Move to Location checkbox on the Cycle Count Workbench to capture location discrepancies as part of the cycle counting process.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with the Cycle Count Workbench" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.17 Change the Configuration of Dynamic Cycle Count

To improve the cycle count planning workflow, users are now able to change the dynamic count configuration parameters after the creation of the cycle count plan request. The generated cycle count can then use a different set of parameters for each execution. This enhancement allows the use of a single cycle count plan over an entire year. Two filters, Request and Request Number, have also been added to the Cycle Count Plan Requests user interface; users can use these filters on the Cycle Count Plan user interface to change the configuration.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing the Cycle Count Plans" section in the current release of the <i>Online Help</i> for more information.

3.10.18 Disassociate Physical Movements from Stockpile Discrepancies

This release adds the capability to disassociate a physical movement from a stockpile discrepancy. To accomplish this, a separate column Move To Location is added to the Cycle Count Workbench user interface that enables users to correctly mark inventory as moved to a location. Users can enter the inventory location under the Move To Location column on the

Cycle Count Workbench and view the inventory accuracy calculation result under the Location Accuracy column on the Inventory Accuracy report. This enhancement helps to improve inventory accuracy.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <ul style="list-style-type: none"> • "Working with the Cycle Count Workbench" • "Viewing the Inventory Accuracy Report"

3.10.19 System Maintains Lot-Based Components

Starting this release, the system remembers lot-based component selections, both at the inventory level and the sub-inventory level, during the assembly or reconfiguration of multiple serial controlled assemblies and kits. Lot-controlled items usually do not vary from one assembly/kit to another. This enhancement improves user experience by enabling users to select lot-based components once and use them in similar assemblies and reconfigurations. When users no longer need the selected components, they can either select new components for other assemblies and kits, or they can complete the order.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Auto-selecting Lot-based Components" section in the current release of the <i>New Feature and Usage Configuration Guide</i> for more information.</p>

3.10.20 Start, Stop, and Cancel Cycle Counts by Location

Starting this release, the Cycle Count Workbench can start, stop, or cancel cycle counts according to the location. Prior to this update, when there were multiple cycle counts, the system was unable to start, stop, or cancel a single count with a discrepancy and then carry on processing the others. This update improves the cycle count workflow by enabling the system to narrow down cycle count processing according to the location. Users can provide a location and click the Start, Stop, or Cancel button on the Cycle Count Workbench screen.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	See the "Working with the Cycle Count Workbench" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.21 Support Complete Counting By One or Multiple Locations

This release allows users to complete counting at one or multiple locations in the Cycle Count Workbench. Previously, during a complete count, the system first generated the cycle count and then proceeded to each location to again generate cycle counts and submit data for each location. The system flagged inventory discrepancies only after completing the Complete Count process. Starting this release, the system finishes a complete count for one or multiple locations and then checks for inventory discrepancies. This way, users can submit the cycle count data for one or more locations and release inventories with no discrepancies faster. Users can select a location in the Cycle Count Workbench and click the Complete Counting action.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with the Cycle Count Workbench" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.22 Support Cycle Count Analytics

This release changed the calculation for the Inventory Accuracy in the system. To analyze the inventory and warehouse processes, the system captures cycle count analytics in terms of Inventory Accuracy, Location Accuracy, and Bulk Inventory Discrepancy Rate. This enhancement improves warehouse operations by incorporating cycle count analytics into the business process. Users can view cycle count analytics through the Inventory Accuracy, Location Accuracy, and Bulk Inventory Discrepancy Rate columns on the Inventory Accuracy report.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the "Viewing the Inventory Accuracy Report" section in the current release of the *New Feature Usage and Configuration Guide* for more information.

3.10.23 Support Federal Information Processing Standard

Starting this release, the One Network platform supports the FIPS140-2 standards. Previously, the One Network system followed a hashing inventory module for cryptocurrency that converted an input of letters and numbers into an encrypted output of a fixed length. With this update, Federal Information Processing Standard (140-2) specifies the security requirements that are satisfied by a cryptographic module providing four increasing, qualitative levels intended to cover a wide range of potential applications and environments. This also helps in avoiding backend errors for private instances that are FIPS compliant.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	None

3.10.24 Transfer Partial Quantity of Inventory Packed to LPN

This release adds the capability to transfer a portion of inventory packed to an LPN to another location. Two new columns, Split LPN and To Location, are added to the Transfer pop-up of the Inventory Summary Report. Previously, it was not possible to transfer partial inventory already packed to LPN to another location and then repack from the origin LPN to another location. This enhancement allows a quicker transfer operation for inventory packed to an LPN. Users can set the flag for the Split LPN column to transfer the partial LPN to another location mentioned in the To Location column on the Transfer pop-up of the Inventory Summary Report.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Location Inventory" section in the current release of the <i>Online Help</i> for more information.

3.10.25 Serial Numbers Report

This release introduces the Serial Number report, a standalone report that simplifies the track and trace method. Previously, users had to manually capture and manage serial number records. This enhancement enables users to view and manage serial numbers in a single report. Users can view and download the Serial Number report from the Report section on the Warehouse Management details page.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Serial Numbers Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.26 Renamed the Unpack Action to De-Containerize

This release relabels the Unpack action to the De-Containerize action when removing inventory from a container completely. The label change helps in distinguishing two scenarios: one scenario where inventory is partially removed from a container, and one scenario where all inventory is removed from a container. Users can click the De-Containerize action on the Cycle Count Workbench to empty a container.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Cycle Count Workbench" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.27 Cross-Docking Support

This release adds cross-docking support. Cross-docking is the practice of unloading the cargo of an incoming vehicle and directly loading that cargo on an outgoing vehicle to minimize storage requirements. This feature improves warehouse planning and operations by reducing warehouse labor and costs and speeds up the execution of inventory transfers between shipping and receiving areas. To use this feature, subscribe to the Cross-Docking feature, create a planned cross-dock using supply and demand orders, and skip the putaway operation upon receiving when the system suggests the execution of a cross-dock.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with the Cross-Docking Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.28 ABC Classifications for Inventory Velocity in Cycle Counting

This release enhances cycle counting by adding the inventory velocity parameter and ABC classifications. The system can now calculate the velocity of an inventory item based on various metrics such as frequency of movement, frequency of consumption, frequency of restocking, and so on.

A high-velocity item is consumed and resupplied the most frequently; a low-velocity item is consumed and resupplied the least frequently. In a default ABC configuration, high-velocity inventory is given the "A" classification, low-velocity inventory is given the "C" classification, and anything in between is given the "B" classification. This is done so high-velocity inventory can be counted more frequently than low-velocity inventory. Note that the system supports up to A to Z classifications, where Z would be the lowest-velocity classification.

The WMS system needs to maintain high inventory accuracy to reduce fluctuation in replenishment and inventory planning. ABC analysis-based cycle counting increases the acceptable inventory accuracy level. Users can set the percentile values that define the ABC classifications. For example, A can be configured as the top 20%, B as the middle 60%, and C as the bottom 20% with respect to inventory velocity. Each classification can have a different cycle count policy configured. Users can also enable cycle count analytics and provide the velocity parameter for the cycle count plan.

Prerequisite:

Users must set the Inventory Classification policy to implement this enhancement.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the following sections in the current release of the *New Feature Usage and Configuration Guide* for more information.

- "Working with the Inventory Classification Policy"
- "Viewing the Inventory Velocity Report"

3.10.29 Enhancements to Bill of Materials

Starting this release, the system populates components based on the selected bill of materials for a work order and the quantity of the finished goods. This enhancement simplifies BOM explosion and enables users to start over work requisition. The following new check boxes are added to the Request Components action of an approved work order:

- **Clear Existing Parts:** If selected, all existing components are removed from the task. Users must recalculate from scratch the total quantities needed for the target production quantities for finished goods. If this checkbox is not selected, an error message appears if the task part is not empty.
- **Reserve Inventory:** If selected, the system generates issue inventory for the work order. After the issue inventory is approved and the pick list is generated, the selected inventory moves into the Reserved state. If the inventory is not sufficient for the work order, the available parts are saved, and an error message indicates the missing components.

Prerequisites:

Inventory Status must be set to Distinct in the Inventory Management policies.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Updating Components of an Approved Work Order" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.30 Enhancements to Audit Report

With this release, users can now access the following types of audit reports: Issue inventory, Picklists, Packing lists, Receipts, and Putaway documents. Before audit reports were added, it was difficult to trace warehouse operations. With this update, users can fetch

the audit report statement and assess completeness and accuracy, as well as maintain transparency. Users must enable the audit reports.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Audit Reports" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.31 Enhancement to Cycle Count Workbench to Capture Outermost Container

This release adds a Container column to the Cycle Count Plan details page for the Cycle Count Workbench; this feature was added to capture the outermost container while counting. Prior to this update, the container columns only captured the innermost container of an inventory on the Cycle Count Workbench. This update gives better visibility for containerized inventory during a cycle count.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with the Cycle Count Workbench" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.32 Enhancement to Issue Inventory

With this release, users can request less inventory quantity from a warehouse if there are good or reconditioned parts identified during maintenance, repair, and operations (MRO). For example, if a technician is disassembling an engine and finds some components able to be reused, those reused components can reduce the overall quantity that would need to be pulled from a warehouse. To represent the difference between the planned quantity (the quantity listed on a BOM) and the requested quantity (the quantity listed on the BOM minus any reusable units) and to indicate a "demand" for a warehouse, the system now considers the requested quantity instead of planned quantity when generating an issue inventory for a warehouse. This feature simplifies the user experience and integrates work order management and warehouse management.

Analytics Impact	None
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Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Issue Inventory" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.33 Hyperlink to Cycle Count Plan Added to Cycle Count History

This release adds a hyperlink to the Plan column of the Cycle Count History report. Users can click the hyperlink to go directly to the Cycle Count Plan report. Previously, there was no direct access to the Cycle Count Plan information from the Cycle Count History report. Users could access the cycle count plans only through the Cycle Count Plan user interface. This enhancement helps users to easily navigate from one report to another.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Location Inventory" section in the current release of the <i>Online Help</i> for more information.

3.10.34 License Plate Number Automatically Generated at Picking

With this release, license plate numbers (LPNs) are automatically generated for inventory tracking purposes at the time of picking. This simplifies the track and trace of parts required for a work order, speeds up inventory transfers using the Drop LPN function, and helps find inventory picked for a specific work order. To use this feature, turn on the Auto-Assign LPN For Inventory Tracking policy on the Assembly tab, then use the Drop LPN functionality to transfer inventory to a work in progress location.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Setting License Plate Numbers to Automatically Generate" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.35 On Hold State Added to Inventory Discrepancy Pending Authorization Report

This release adds the On Hold state to the discrepancy authorization record and an On Hold state filter to the Authorizations report for pending authorizations for inventory discrepancies. Previously, the discrepancy authorization records only had a Pending state filter. This caused confusion if the user did not immediately approve or reject the discrepancy authorization record on the Authorizations report. This enhancement gives better visibility to discrepancies that require additional approval or authorization. Users can set the On Hold filter to view pending authorizations of inventory discrepancies in the On Hold state.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing the Authorizations Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.36 Inventory Analytics Report at the Enterprise Level

Starting this release, the Inventory Analytics report is available at the enterprise-level. Previously, this report was not available at the enterprise-level. This report is dynamic inventory accuracy statistical performance report that improves warehouse processes by using analytics. Users can access the Inventory Analytics report through the Inventory Accuracy report page.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing Inventory Accuracy Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.37 Upload Existing Kits

This release adds the ability to create new kits by uploading a CSV file, enabling customers to load existing kits that were assembled outside of the ONE system or prior to its implementation. This enhancement also enables the ONE system to integrate with external systems for creating and processing assembled kits.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Uploading Existing Kits" section in the current release of the <i>Online Help</i> for more information.

3.10.38 Work Order Inventory Automatically Locked

Beginning this release, users can lock inventory tied to a work order once work has been started. Locked inventory cannot be modified in any way unless done through the work order execution workflow. This feature was added to prevent reserved inventory from changing states or disappearing before work is completed. No additional steps are required by the user to use this feature.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Automatically Lock Work Order" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

4 Bug Fixes

4.1 Logistics And Transportation Management Bug Fixes

4.1.1 Add Support for Litter Unit of Measure - PDS-34145

Problem:	The planning engine is failing when the volume unit of measure is set to liter.
Cause:	Error in code.
Resolution:	The liter unit of measure is now supported.

4.1.2 Alerts Received in Creating Language Instead of Receiving Language - PDS-33832

Problem:	Alerts generated by a Spanish user are sent to the receiver in Spanish, regardless of the receiver's language settings.
Cause:	Alerts are hardcoded in the generation language, not softcoded to appear in the receiving user's language.
Resolution:	All users now see alerts in their native language.

4.1.3 Approve Button on the Production Work Order Not Working - PDS-35036

Problem:	When attempting to approve a production work order, if task parts are not present, clicking the Approve button produces an error message: "Index 0 out of bounds for length 0."
Cause:	Error in code.
Resolution:	When approving a production work order without task parts, the Approve button now functions as expected.

4.1.4 Assigned Resource Not Saved - PDS-31841

Problem:	Resources are not saving on movements.
Cause:	The sys_asset_id column from tms_skill is set to null.

Resolution:	Added an additional check so an error message appears to notify the user.
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4.1.5 Carriers Cannot Create Users Containing Numbers - PLT-23270

Problem:	A Carrier Manager role is unable to create a driver user with numbers in the username.
Cause:	Stricter validation on the username field was added in a previous update, only allowing usernames to begin with an alpha character (a to z).
Resolution:	Username validation has been relaxed, allowing the usernames to begin with a numeric character (0 to 9).

4.1.6 Checkboxes Aligning Incorrectly in Planner Workspace - PDS-31901

Problem:	On the Planner Workspace, checkboxes are not correctly aligning with shipment rows.
Cause:	Error in code.
Resolution:	Checkboxes now correctly align with shipment rows.

4.1.7 Cost Approval Plan Shows Incorrect Data if Cost Limit is Approved

Problem:	The cost limit status and approval plan state are not showing the same information. If the cost limit status is Completed, the approval plan can still show the state as Pending.
Cause:	The Completed state is only shown to users that have approved the request.
Resolution:	The cost limit states now behave as expected and show their appropriate state across the UI.

4.1.8 CSV File Exporting with Line Breaks for Temporary Address - PDS-34880

Problem:	The exported CSV file for shipments exports with the temporary address containing line breaks.
Cause:	The temporary address is not being cleaned up by the system.

Resolution:	The temporary address will no longer export in the CSV with line breaks.
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4.1.9 Cycle Count Error Messages Report Incorrect Line Number - PDS-28330

Problem:	For cycle counts with multiple lines, if the Actual Qty field is not populated, the resulting error message indicates the incorrect line number, making troubleshooting difficult.
Cause:	When the error conditions are true, the system attempts to set the line number by the record number instead of the cycle count line number.
Resolution:	The error message now indicates the correct cycle count line.

4.1.10 Distribution Code Field is Disabled For Carrier Users - PDS-33877

Problem:	Carrier users are able to update the Distribution Code field on the Movement details screen. This is not intended.
Cause:	Error in code.
Resolution:	Carrier users cannot update the Distribution Code field.

4.1.11 Error After Clicking Date Picker when Ship From or Bill To is Location - PDS-35536

Problem:	An error message appears when a user creates a shipment with the location as either the Ship From or Ship To sites and then clicks the date picker.
Cause:	A GraphHopper key is missing, causing issues with the date picker.
Resolution:	The error message no longer appears.

4.1.12 Error When Updating Claims After Deleting Claim Lines - PDS-32906

Problem:	Attempting to update a claim after deleting claim lines produces an error.
Cause:	Error in code.
Resolution:	Users are now able to delete a claim line after updating a claim.

4.1.13 Exporting Movement Shipments with Multiple Items in Portuguese is Broken - PDS-34608

Problem:	If a user attempts to export movement shipments with multiple items with the language set to Portuguese, some data is lost in the resulting CSV file.
Cause:	A semicolon (;) is used as the separator.
Resolution:	A hyphen (-) is now used as the separator, correcting the issue.

4.1.14 Failed Delivery Attempt and Failed Pick Up Attempt Actions Do Nothing - PDS-35472

Problem:	The Failed Delivery Attempts and Failed Pick Up Attempts actions do nothing to the shipment.
Cause:	Error in code.
Resolution:	Tracking events are now created on each pickup attempt and delivery attempt. A new tracking event policy, Failed Pickup, is available as well.

4.1.15 Forecast Inbound and Outbound Tab Not Displaying - PDS-30745

Problem:	The inbound and outbound links in the Forecasts columns produce an error when clicked.
Cause:	The link is not populated with a valid URL.
Resolution:	Updated code to grab the correct inbound or outbound link for transportation forecasts if there is SiteRsrc table for the corresponding site.

4.1.16 Generate Packing List Button Remains Visible on Picklist Screen - PDS-33428

Problem:	When the Generate Packing List button on the Picklist screen is disabled for certain roles, it remains visible.
Cause:	Permissions are not successfully saving to the server, causing UI elements to appear that should not.
Resolution:	Permissions are now verified on the server-side, similar to how Actions buttons are handled.

4.1.17 Latitude and Longitude Only Captured for Delivery - PDS-35176

Problem:	Latitude and longitude values are only captured for delivery, but not for pickup.
Cause:	Latitude and longitude values for delivery are being captured, but not displayed.
Resolution:	Latitude and longitude values are now captured for both delivery and pickup.

4.1.18 Milestone Link Visible for Shipments with no Linked Milestone - PDS-32402

Problem:	The milestone link is visible for shipments that have no linked milestone process.
Cause:	Error in code.
Resolution:	The milestone link is now only visible if a milestone process is linked with a shipment.

4.1.19 Milestone Process Filter Unavailable - PDS-28112

Problem:	The Milestone Process filter is not available under Transportation > Shipment Milestone > Milestone report.
Cause:	The underlying CCM report does not have the relevant filter linked to it.
Resolution:	The Milestone Process filter is now available on the Transportation > Shipment Milestone > Milestones report menu and related CCM report.

4.1.20 Movement Inbound Messages Fail if Shipment and Movement Messages Received at Same Time in Same Queue - PDS-32668

Problem:	If shipment messages and movement messages are received at the same time in the same queue, movement inbound messages fail to appear.
Cause:	Files are processed asynchronously and in parallel, then submitted to the same queue.
Resolution:	Rewrote code to allow expected behavior. If shipment messages and movement messages are received at the same time in the same queue, movement inbound messages now appear.

4.1.21 Negative Values Appearing in Various Fields - PDS-35794

Problem:	Negative values appear in the quantity, weight, volume, and spaces fields.
Cause:	Negative values are allowed.
Resolution:	If negative values are provided for quantity, weight, volume, and spaces fields in shipments CSV uploads, those values are rejected.

4.1.22 New Shipment Numbers Not Updated Through Shipment CSV - PDS-32361

Problem:	Attempting to update a shipment number through a CSV does not work.
Cause:	A null pointer exception is occurring.
Resolution:	Resolved the null pointer and added support for the InsertOrUpdateViaInteg action to update the shipment number.

4.1.23 No Confirmation Message When Additional Charge Request Submitted by User Without Permissions - PDS-30865

Problem:	If a user without the proper permissions attempts to submit an additional charge, the system does not prompt a message stating the request will fail.
Cause:	The Additional Charge button is visible to roles without permission to perform the action.
Resolution:	Removed the Additional Charge button for roles that do not have permission to perform the action.

4.1.24 Query for Carrier On-Time Analytics Widget is Negatively Impacting Performance - PDS-34083

Problem:	A query from the Carrier On-Time Analytics widget is consuming a high number of resources, has a high execution time, and is impacting the overall performance of the dashboard.
Cause:	This error is caused by the Problems by Type widget in the Command Center UI. It is most likely due to a recent database refresh.
Resolution:	The widget now functions as expected and does not consume a high number of resources.

4.1.25 User Cannot Update Lot When User is from Creation Organization- SCC-5479

Problem:	A user cannot update a lot when the user is from the creation organization.
Cause:	Error in code.
Resolution:	Added a Javascript fix to only show the Update action to the Strategic Planner role.

4.1.26 Scheduled Appointments Report not Showing All Appointments - PDS-31834

Problem:	The Scheduled Appointments report does not show all expected appointments.
Cause:	The system is enforcing the incorrect timezone, making it look like some appointments are not included.
Resolution:	The system now enforces the pickup or delivery site timezone when displaying the Actual Appt Time values in the results table.

4.1.27 Selecting Item from Item Filter on Material PIV Causes Error - PDS-35475

Problem:	On the Material PIV screen, selecting an item from the Item Filter section produced an error.
Cause:	There is leftover code that from a previous version that supported constraining the item picker by a selected site and location using buffers.
Resolution:	Removed code remnants that previously supported constraining item picker by selected site and location using buffers.

4.1.28 Service Level for Cost Type Rateware is Unavailable - PDS-24761

Problem:	For the Cost Type of Rateware, the service level is greyed out and not selectable.
Cause:	The system is not picking up shipments that have a base rate with a blank service level. Rateware can only be selected if a base rate is selected.

Resolution:	For only Rateware and External Rating cost methods, a base rate with a blank service level is now applied to shipments.
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4.1.29 Service Levels of UPS and FedEx Confirmed Parcel Shipments Does Not Appear in Supplier-Side Report - PDS-35183

Problem:	Service levels for confirmed parcel shipments for UPS and FedEx do not appear on supplier-side reports.
Cause:	This error is caused when the service level on a shipment is not set when a user selects a service level from the Carrier Options UI.
Resolution:	Service levels for confirmed parcel shipments for UPS and FedEx now appear on supplier-side reports.

4.1.30 Ship From Address is Null on Alert Inbox and Email Details (Albertsons) - PDS-35608

Problem:	The Ship From Address is null in the alerts inbox and the alert email details.
Cause:	Error in code.
Resolution:	The proper ship from address will now show in the alert inbox and the alert email details.

4.1.31 Shipment Creation Fails with Null Pointer Exception Error - PDS-30531

Problem:	The shipment creation process can fail with a null pointer exception.
Cause:	The shipment creation process fails because the Ship-To site is inactive.
Resolution:	The null pointer exception no longer appears.

4.1.32 Shipment Quantities Reverting - PDS-35310

Problem:	If a user updated a shipped quantity, this is not saved and is overwritten with the original ordered quantity.
Cause:	Error in code.

Resolution:	If the user is using the standard shipment template and the shipped quantity is updated, the system will update the planned shipped quantity as well in both the Draft and Awaiting states.
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4.1.33 Shipment State Summary Widget Does Not Fetch Correct Results - PDS-33977

Problem:	The Shipment State Summary Widget does not show the correct results.
Cause:	The Show States With Zero Count filter is working only when the Show States with Empty Values filter value is marked Yes.
Resolution:	<p>The Show States With Zero Count filter is now hidden on the Shipment State Summary widget on the NEO UI for shippers, carriers, and client users because it works similar to the Show States With Empty Value filter.</p> <p>The Show States With Zero Count filter continues to be available on the Shipment State Summary portlet on the Command Center UI.</p>

4.1.34 System Creating Multiple Static Route Movements - PDS-30253

Problem:	The system is creating two different static route movements when it should be creating one.
Cause:	Static route movements are not following the same format in TMS and OMS. In TMS, the date/time format is "MMddyhhmm", whereas in OMS the date/time format is "MMddy".
Resolution:	Both TMS and OMS code blocks now use the "MMddy" format, eliminating the problem.

4.1.35 System Error When Creating New Financial Policy (Albertsons) - PDS-35812

Problem:	A system error appears when creating a new financial policy from the Financials > Financials Policies > New Financial Policy menu,
Cause:	Extra space characters are present in the Handler Class name, causing the system to not find the class.
Resolution:	Removed extra space characters from the Handler class.

4.1.36 Equipment Dropdown for Movements Incomplete - PDS-34155

Problem:	The Equipment dropdown during movement configuration shows "Box Truck" as the only option.
Cause:	When the equipment on a shipment is updated, the equipment on the corresponding movement is not updated.
Resolution:	If all shipments in a movement have the same equipment, the system will now update the movement equipment when shipment equipment is updated.

4.1.37 Two Tabs Open If User Clicks Copied Shipment Link from Confirmed Parcel Shipment to DHL Carrier - PDS-32068

Problem:	Two shipment tabs open, instead of only one, when the user clicks on a copied shipment link from the confirmed parcel shipment to DHL carrier.
Cause:	Error in code.
Resolution:	Only one tab opens now when the user clicks on a copied shipment link from the confirmed parcel shipment to DHL carrier.

4.1.38 Unable to Convert Shipment to Non-Controlled - PDS-31777

Problem:	An error message appears when a user attempts to convert a controlled shipment to a non-controlled shipment.
Cause:	Error in code.
Resolution:	Users are now able to convert a controlled shipment to non-controlled shipment when a temporary address is used for the shipment.

4.1.39 Unable to Mark Messages as Processed - PLT-22310

Problem:	An error appears when an instance admin user attempts to mark files as processed on the production message queue.
Cause:	Error in code.
Resolution:	Instance admin users can now mark files as processed in the production message queue.

4.1.40 Unable to Open Document Tab for FedEx Parcel Shipments - PDS-34433

Problem:	A null pointer exception occurs when a user attempts to open the Documents tab for FedEx parcel shipments.
Cause:	Error in code.
Resolution:	If there is no change in the address field, the system will not post an address validation request.

4.1.41 Unable to Save to Confirmed a Movement - PDS-36174

Problem:	When attempting to Save to Confirm a movement, a null error appears.
Cause:	The system is trying to get the sitieshipformId value from the renamed parent shipment, which does not exist in the database, therefore a null error is generated.
Resolution:	Users are now able to Save to Confirm a movement without a null error appearing.

4.1.42 Unable to Update Shipment Due to Invoice Action Error - PDS-33603

Problem:	When a shipment is updated and that update causes an invoice to auto-resolve all holds and move the invoice to the Approved state, an error appears.
Cause:	There are some recursive FIN_Update calls that are running forever.
Resolution:	Restricted recursive FIN_Update calls to limit infinite loops.

4.1.43 Planner Workspace Report Not Filtering Correctly - PDS-35351

Problem:	The Planner Workspace report does not filter shipments based on the selected pickup or delivery time range.
Cause:	Error in code.
Resolution:	The Planner Workspace report now filters shipments correctly based on the selected pickup and delivery time range.

4.2 NEO UI Bug Fixes

4.2.1 Cannot Create Favorites Widget on Dashboard - PDS-33302

Problem:	When attempting to create a Favorites widget, an error appears.
Cause:	This issue is caused when a user selects the State/Status column in the widget because it is a composite column field.
Resolution:	An error no longer appears when attempting to create a Favorites widget.

4.2.2 Cannot Switch to New Role Added to Account - PLT-22477

Problem:	After creating a new role, the user is unable to switch to that new role.
Cause:	The NEO UI is not updating the list of assigned roles.
Resolution:	Newly added roles now appear immediately in the NEO UI.

4.2.3 Firm Order Report Cannot Save Custom Layouts - PLT-22818

Problem:	The Firm Order report does not retain any customizations (such as removed columns) on save and reload.
Cause:	The system is loading the user's preferences for favorites instead of loading the data as needed.
Resolution:	The system now only loads favorite preferences when needed.

4.2.4 Force Refresh Unavailable - PLT-22127

Problem:	The Force Refresh menu option is unavailable under the Quick Links menu.
Cause:	Error in code.
Resolution:	The Force Refresh menu option is now available under the Quick Links menu.

4.2.5 Item Fields Being Changed - SCC-5532

Problem:	When updating an item with an inbound file, values are changing to zero when they should not.
Cause:	Partial values are not allowed from item dimensions in the UI but are allowed when uploading through an inbound interface.
Resolution:	Removed functionality to set default 0 value on fields.

4.2.6 Page Numbers Missing When Adding a Favourite Report Widget - PLT-22720

Problem:	When adding a Favorite Report widget on a NEO dashboard, the page numbers on the widget do not display.
Cause:	Error in code.
Resolution:	Page numbers now appear when adding a Favorite Report widget on a NEO dashboard.

4.2.7 Multiple Issues with Scope Field in Create Dynafield Page - PLT-22105

Problem:	<p>When an Enterprise Admin creates DynaField definitions, they should not see ValueChain as an option for the Scope field.</p> <p>If the Enterprise Admin selects "Enterprise" in the Scope field, the model link report shows all other Enterprises.</p>
Cause:	Errors in code.
Resolution:	<p>Fixed partially by removing ValueChain from the Scope dropdown for the DynaField definitions.</p> <p>If the Enterprise Admin role selects "Enterprise" in the Scope field, then the Scope field is made read-only and only shows the user's enterprise.</p>

4.2.8 User Format Preference for Date Caused Conflict - PLT-22513

Problem:	The user's preference for a 2-digit year displayed in the date format conflicted with the date assignment assumptions in the code when users selected dates in editable fields. For example, if users selected 99 assuming the year was 2099, the code could write the year 1999 in the data tables.
Cause:	The code assumes the century was supposed to be closest to the date selected.
Resolution:	Editable fields will now show year options with four digits for users to select the appropriate year. Display fields will continue to show the user preference.

4.3 Order Management Bug Fixes

4.3.1 BPO Number Does Not Update on Purchase Orders - PDS-30091

Problem:	Providing a new blanket product order (BPO) number when updating a purchase order does not update the BPO number.
Cause:	When updating the BPO number for a purchase order, the user does not first update the BPO number of the automatic vehicle location (AVL) with the new BPO number.
Resolution:	There is no code change to address this bug. The remedy is to educate the customer on the proper steps to update the BPO number on a purchase order; specifically, that a user must update the BPO number on the corresponding AVL first.

4.3.2 BPO Number Filter Fails When Using a Wildcard - PDS-35260

Problem:	When searching purchase orders, using a wildcard for the BPO No field causes the search to fail.
Cause:	Error in code.
Resolution:	Searches will not fail when using a wildcard in the BPO No field.

4.3.3 Missing Value on Deviation Reason Code Popup - PDS-34851

Problem:	Promise Qty Tolerance is a value set on automatic vehicle locations (AVLs) such that if a vendor performs the Promise action with a changed quantity beyond the specified tolerance, a pop-up appears requesting the user to enter a Deviation Reason Code. On this pop-up, the Qty UOM field is blank.
Cause:	The Qty UOM field is pulled from the rsjson file, where that value is missing.
Resolution:	Updated the code such that the Qty UOM field is now pulled from the dsjson file instead of the rsjson file.

4.3.4 Movement Category Unavailable in Alert Subscription Category Field - PDS-30248

Problem:	When selecting Tool> Alert Subscription, then clicking on New Subscription, then clicking the Category field, the Movement category is not visible for certain users.
Cause:	Permissions conflicts are being caused by users with an enterprise role type, a TMS base role, and an SCC base role.
Resolution:	Disabled the removal of default subscription categories when there is an enterprise role type and base roles of that enterprise role.

4.3.5 OMS_PDF_PRINT_TEMPLATE Field Not Populating at Organization Level - PDS-34176

Problem:	When creating an organization, the OMS_PDF_PRINT_TEMPLATE field is not populating with useful data.
Cause:	The JSON variable is defined as "{}", but it is not behaving as a null.
Resolution:	Explicitly defined the OMS_PDF_PRINT_TEMPLATE file as null in the JSON.

4.3.6 PO State Schedule Summary Widget Does Not Open Correct Report on Click - PDS-34283

Problem:	When a count is clicked, for any state, on the PO State Schedule Summary widget, the incorrect report opens.
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Cause:	Error in code.
Resolution:	When a count is clicked for any state on the PO State Schedule Summary widget, the correct report now opens.

4.3.7 Program Field Not Populated on Order Line from Order Forecast - PDS-35224

Problem:	The Program field is not populating on the order line for newly created orders on the Order Forecast report.
Cause:	Error in code.
Resolution:	The Program field now populates as expected on the order line for newly created orders on the Order Forecast report.

4.3.8 Purchase Order State Summary Widget Does Not Show Creation Date Filter - PDS-34397

Problem:	The Purchase Order State Summary Widget does not consider the Creation Date filter when processing, only the Delivery Date filter.
Cause:	Error in code.
Resolution:	The Purchase Order State Summary Widget now considers the Creation Date filter when processing.

4.3.9 Quantity UOM Field is Blank on Deviation Reason Code Pop-Up on Vendor Promise Action - PDS-34851

Problem:	When a vendor performs a promise action with a changed quantity beyond the specified tolerance, a pop-up appears prompting the user to enter a Deviation Reason Code. On this pop-up, the Quantity UOM field is blank.
Cause:	The Quantity UOM field is not being populated correctly.
Resolution:	Corrected the way the Quantity UOM field is populated; it now behaves as expected.

4.3.10 Ship From Site Field Sometimes Links to Another Vendor - PDS-31428

Problem:	If a user creates a requisition with two lines, adds a vendor to one line, saves the requisition, adds a vendor to line 2 without saving, and then selects the Ship From Site for line 1, then the Ship From Site on line 1 shows the Ship From Site from the vendor from line 2.
Cause:	Error in code.
Resolution:	Added a fix for the population of vendor-specific Ship From Site fields for requisition lines.

4.3.11 Stores Have Little to No Forecast in Comparison to Sales - PDS-36921

Problem:	For certain stores, sales forecasts are not generating.
Cause:	When the demand planning engine searches for the split ratio, it assumes the expected value is unique; but in this case, the system is finding two entries, causing a split ratio exception.
Resolution:	Added an active check while retrieving SGL split ratios.

4.3.12 Incorrect Error Message Related to Cancel Line Remaining Qty Action - PDS-32499

Problem:	The appropriate error message is not displayed when a user performs the Cancel Line Remaining Qty action for PR state purchase orders with an advanced shipment notice state of Intransit.
Cause:	Error in code.
Resolution:	The following error message now appears in the above-described situation: "This action cannot be performed as there are confirmed shipments for this order."

4.3.13 The Past Due Orders Report Considers Deleted Orders - PDS-33041

Problem:	Orders with the Deleted state appear on the Past Due Orders Report.
Cause:	Error in code.

Resolution:	Orders with the Deleted state no longer appear on the Past Due Orders Report.
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4.3.14 Unable to Confirm Copied Shipment to Parcel Carrier From Supplier Login - PDS-34455

Problem:	The supplier role is unable to confirm a shipment that is copied from an existing shipment.
Cause:	This error occurs if the template hides the estimated delivery date.
Resolution:	The supplier role can now confirm a copied shipment.

4.3.15 Unable to Create Order From Forecasts - PDS-23288

Problem:	An error appears when attempting to create an order from a forecast for a dual-sourced part.
Cause:	The error occurs if the request date is before the delivery date or if the request date is in the past.
Resolution:	Orders can now be created from forecasts as expected.

4.3.16 Unable to Open Parcel Shipment as Orchestrator Role - PDS-32845

Problem:	Opening a parcel shipment as the Orchestrator role produces an error.
Cause:	UPS templates do not have a state variable in the form, so a null error is occurring.
Resolution:	Updated code to perform a null check for UPS templates.

4.4 Platform Bug Fixes

4.4.1 New Users Defaulted to System Timezone - PLT-23193

Problem:	Admin roles are able to add new users, but can not specify the timezone of new users. When the new user first logs into the system, their timezone defaults to the system timezone. If the users work in a different timezone, it increases training time for the Admin to train the new user to update their timezone.
Cause:	This error is caused by an incomplete new user workflow.

Resolution:	As part of user creation, Admin roles can now specify the timezone of the new user. The specified timezone becomes the default timezone for the user when they first log into the system. Users can still change their timezone by updating their timezone preferences.
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4.4.2 Setting an Outbound Message Time Zone - PLT-21007

Problem:	INV files for international clients are not reflecting an accurate date and time on integration subscriptions.
Cause:	Client INV outbound messages display the date and time based on the US server, not the actual date and time for the shipment with international clients.
Resolution:	The integration subscription has a new dropdown field called Preferred Time Zone that is populated with all time zones.

4.4.3 Inactive User Role Info Fetched from USRO Table - PLT-23207

Problem:	Inactive user roles are being fetched from the URSO table.
Cause:	The system is fetching inactive user roles from the URSO table.
Resolution:	Added an IsActive check to the code to verify a user is active.

4.5 Service, Maintenance, Repairs, And Overhaul Bug Fixes

4.5.1 Added Task Duration Fields for Work Orders - PDS-33562

Problem:	Work order planners cannot compare estimated time and actual time for work order tasks.
Cause:	This data is not visible to users.
Resolution:	Added two fields, Actual Task Duration and Planned Task Duration, to the Work Order details page on the Task tab.

4.5.2 Create Tabbed UI for Singletons - PDS-32450

Problem:	The UI pages for singletons are not uniform with the enhancements made to other pages in the ONE system that include a header section with multiple tabs containing related fields.
Cause:	The design change was not implemented during the NEO 3.2 release.

Resolution:	The singleton UI pages are reformatted to follow the design changes made in previous releases.
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5 Revision History

Version	Release Date	Author	Comments
1.0	 28 Feb 2021	TechDocs	Initial UAT Draft Release



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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