One Network Enterprises

NEO 3.6 Feature Guide

Published
14 November, 2022

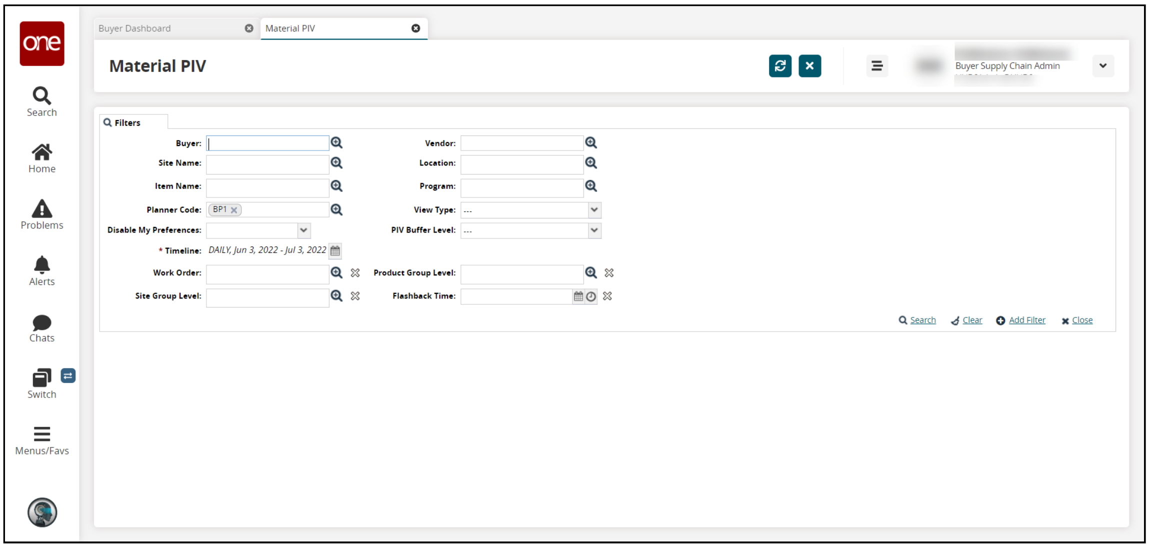
1 Enhancements And New Features

1.1 Cross-Solution Enhancements

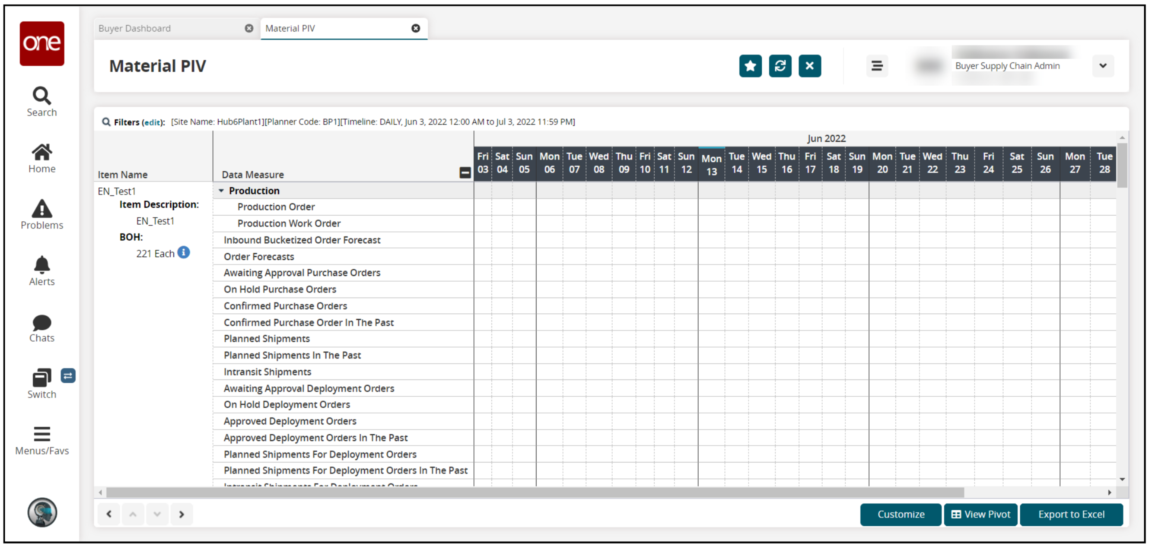
1.1.1 Running the Advanced Replenishment Engine from PIV Reports

Complete the following steps to run the Advanced Replenishment Engine from a Projected Inventory View (PIV) report:

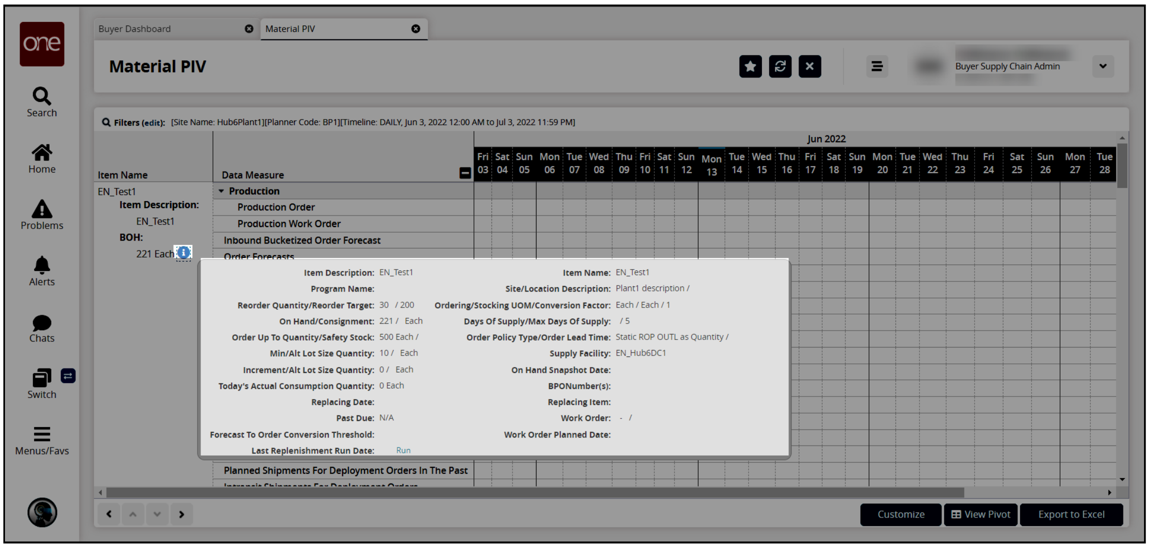
1. Log in to the ONE system.
2. Click **Menu/Favs > Inventory > Material PIV**. For this example, we use the Material PIV. Please note that the same steps apply to the other PIV reports: Plant FG PIV, DC PIV, and Retail DC PIV.
   The Material PIV screen appears with the filters displayed.



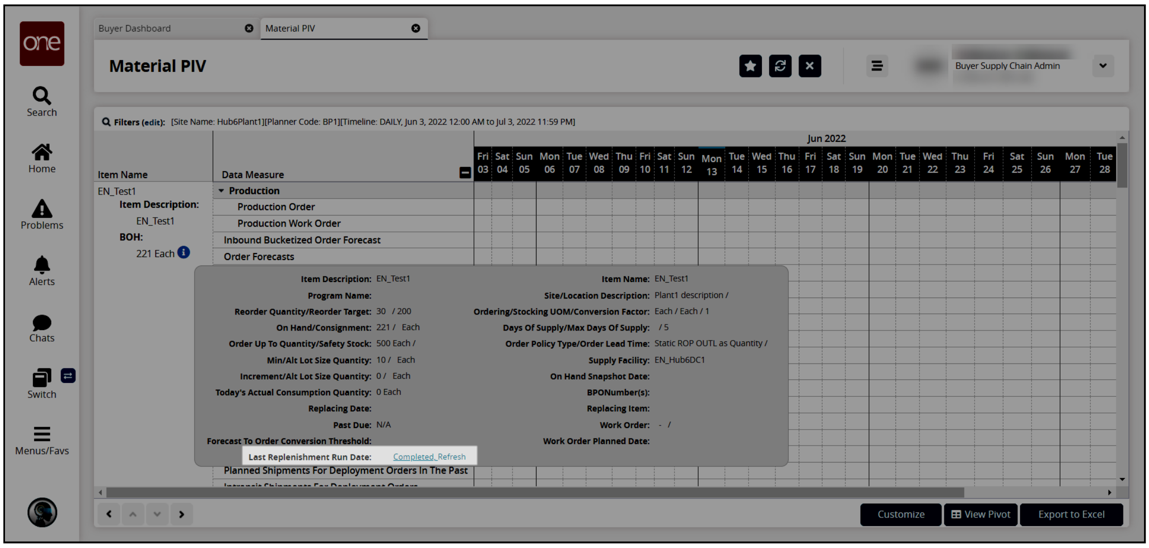
3. Complete the filters as desired. For information on the filters, see the "Viewing Material Projected Inventory" section of the *Online Help*. Fields with an asterisk (*) are required.
4. Click the **Search** link.
   The Material PIV appears.



5. Scroll to find the item for which you want to run the replenishment engine.
6. In the **Item Name** column for the desired item, hover the mouse over the information icon under the Buffer On Hand (**BOH**) field.
   The Buffer On Hand information popup appears.



7. In the **Last Replenishment Run Date** field in the popup, click the **Run** link. The Last Replenishment Run Date field with the Run link may also display in the header information.
   The engine runs, and the field displays a Completed status and Refresh link.



8. Click the **Refresh** link.
   The PIV report updates.

See the "Added Option to Run Advanced Replenishment Engine from PIV Reports" section in the current version of the *Release Notes* for more information. See the following sections in the *Online Help* for more information:

- "Viewing the Material Projected Inventory"
- "Distribution Center Projected Inventory Report"
- "Viewing Projected Inventory for Finished Goods at a Plant"
- "Searching Policies"

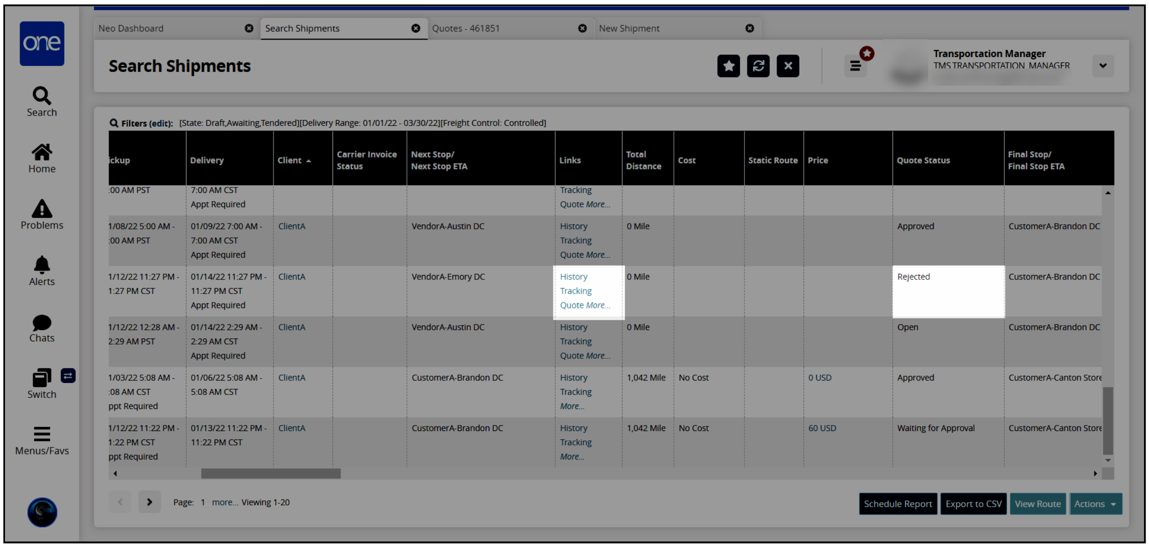
1.2 Logistics And Transportation Management

1.2.1 Execution

1.2.1.1 Adding a New Quote to a Rejected Quote

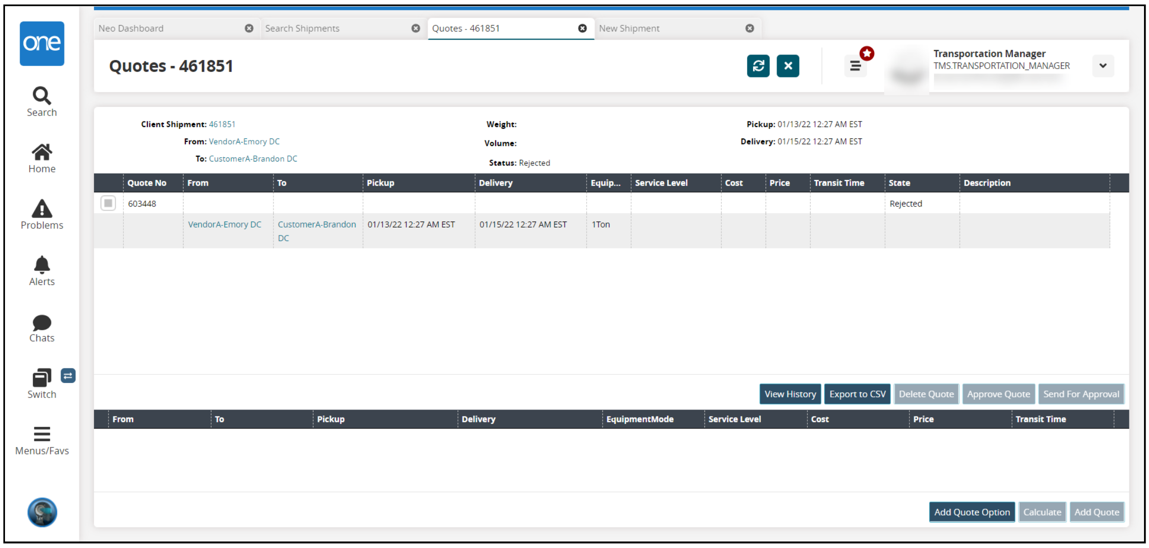
Complete the following steps to add a new quote to a rejected quote:

1. Log in to the ONE system.
2. Search for the desired shipment using Global Search or the Search Shipment screen. See the "Global Search" or "Searching Shipments" screens in *Online Help* for more information.
   The Search Shipments screen appears with the desired results.
3. Scroll to the right to view the **Quotes Status** column to locate a shipment with a rejected quote.

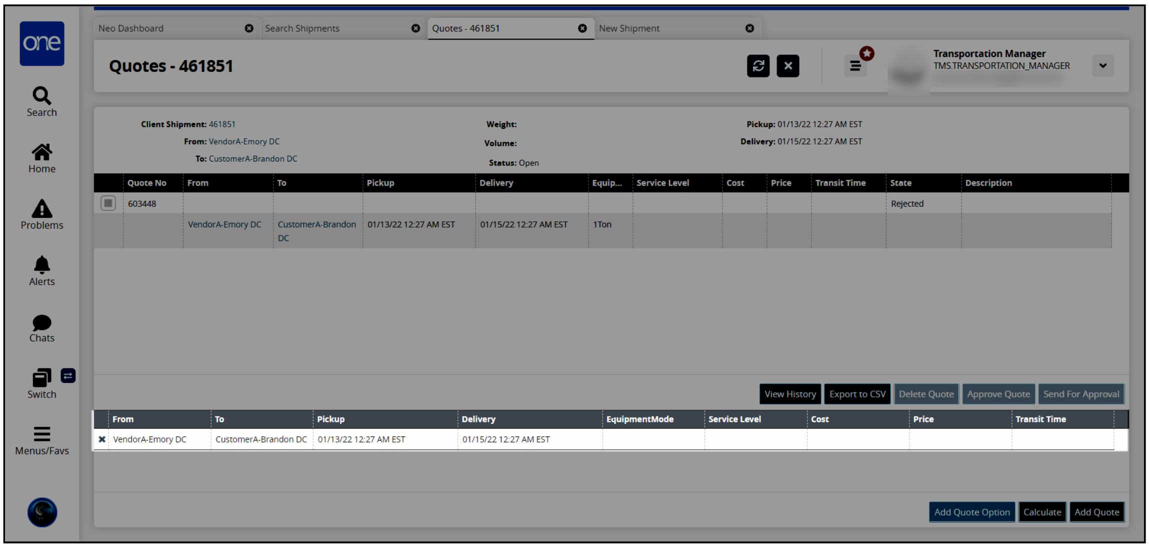


4. In the **Links** column, click the **Quote** link.
The Quotes screen appears for the selected shipment with the rejected quote.

> You may have to click the **More...** link to view the **Quote** link.



5. Click **Add Quote Option** button.
A new line appears in the bottom section with the From, To, Pickup, and Delivery columns pre-populated.

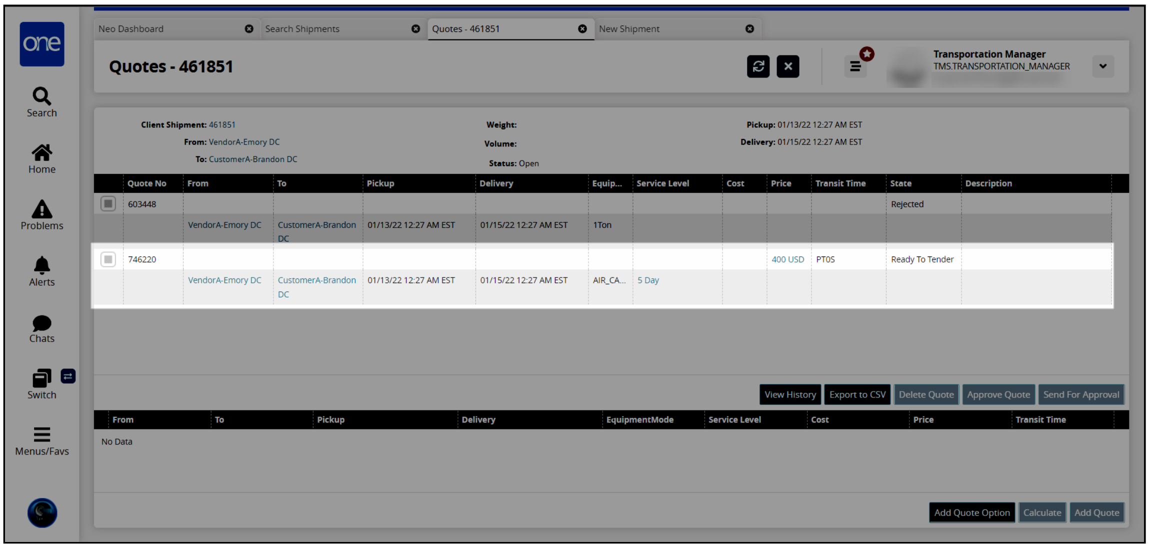


6. Complete the rest of the fields for the quote as desired. The following fields are available.

> The Cost field becomes editable once the quote is in an Open state. The Transit Time field auto-populates when the quote is added.

Field	Description
EquipmentMode	Select the equipment mode from the dropdown list.
Service Level	Click in the Service Level field and use the picker tool to select the service level.
Price	Enter the price.

7. Click the **Add Quote** button.
   A confirmation pop-up window appears.
8. Click **Yes**.
   A success message appears.
9. Click **OK**.
   The new quote moves from the bottom section to the top section of the Quotes screen.



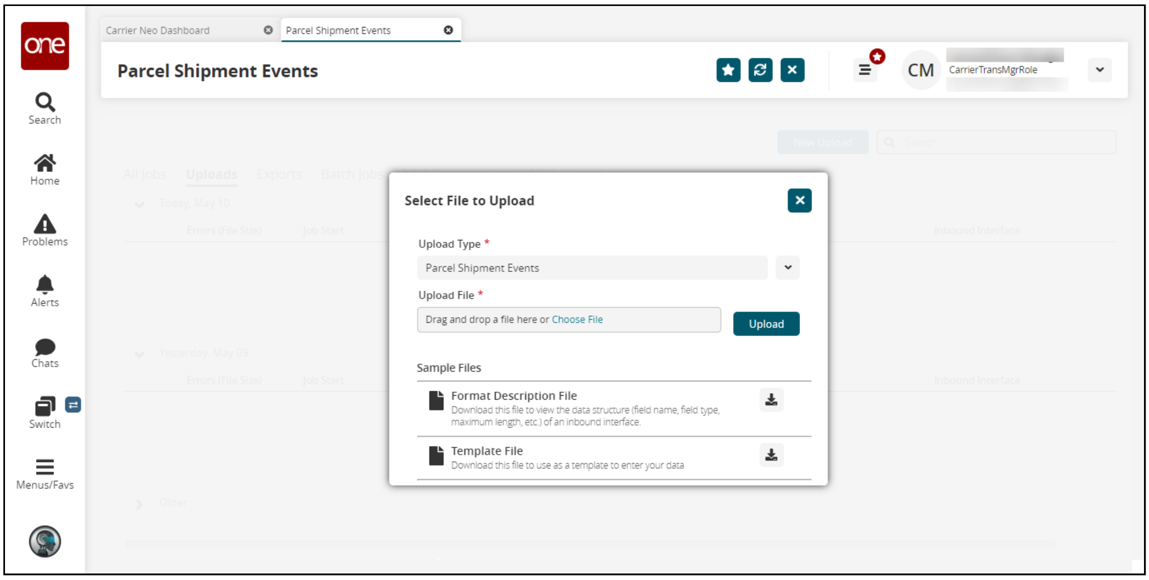
See the "Option to Add New Quote to a Rejected Quote" section in the current version of the *Release Notes* for more information.

1.2.1.2 Creating FedEx Shipment Events Through CSV Upload

Carrier Transportation Manager roles can create shipment events for FedEx shipments through CSV upload. Shipment events can be created from tracking response data (JSON), must have a state later than the Confirmed state, cannot be in the Received state, and must have a valid PRO number. Carrier Transportation Manager roles can upload CSV files through the Parcel Shipment Events screen.

Complete the following steps to upload FedEx shipment events:

1. Log in to the ONE system as a Carrier Transportation Manager role.
2. Click **Menu/Favs > Tools > Upload > Parcel Shipment Events**.
   The Parcel Shipment Events screen appears with the Select File to Upload popup displaying.



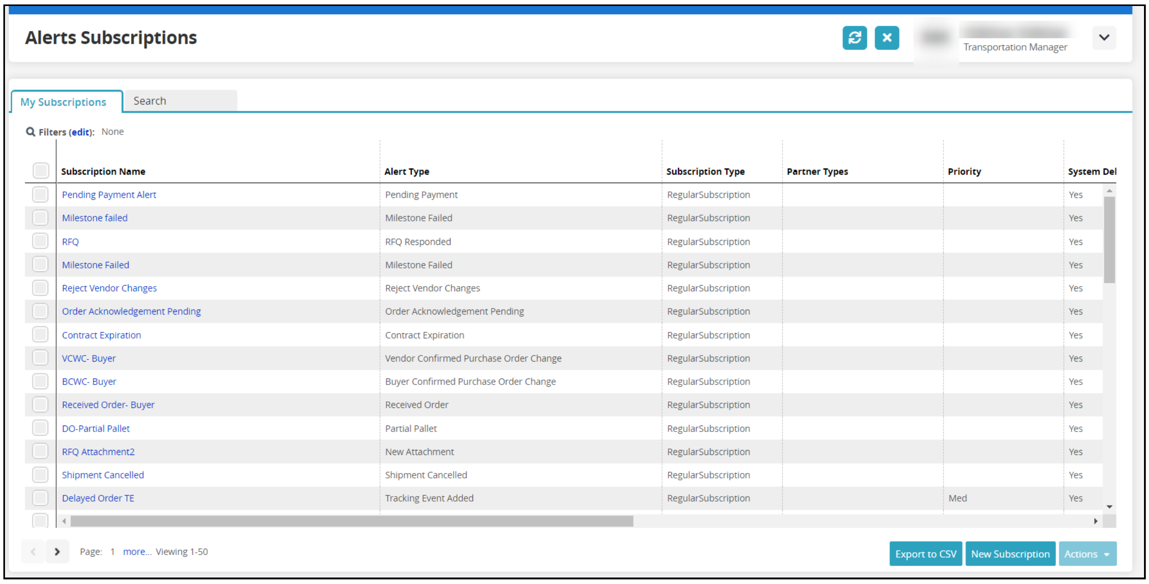
3. Click the download icon for the **Format Description File** or the **Template File** for help.
4. In the ***Upload Type** field, click the dropdown icon to select the upload type.
   The Upload Type is Parcel Shipment Events by default.
5. In the ***Upload File** field, click the **Choose File** link.
6. Select the file from your computer.
7. Click the **Upload** button.
   The file is uploaded.

See the "TD-5958 Release Note: Enhancement to process FedEx TE from GLG through FedEx csv" section in the current version of the *Release Notes* for more information.

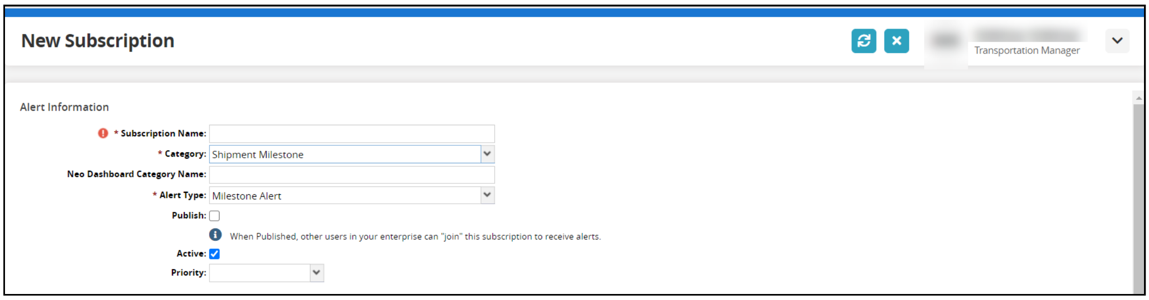
1.2.1.3 Creating Shipment Milestone Alerts

Complete the following steps to create shipment milestone alerts:

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



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



4. In the ***Subscription Name** field, enter a name for the new alert subscription.
5. In the ***Category** field, select **Shipment Milestone** from the dropdown list.
6. In the ***Alert Type** field, select **Milestone Alert, Milestone Completed, Milestone Failed,** or **Milestone Missed**.
   The remaining fields and filters vary depending on the Alert Type chosen. For more information on the available fields and filters, see the "Creating and Customizing Alert Subscriptions" in the current release of *Online Help*.
7. Complete all fields as necessary for the Shipment Milestone alert subscription. Fields with an asterisk (*) are required.
8. Click the **Create Subscription** button.
   The screen refreshes with the new alert subscription name at the top of the screen and a green success message.

See the "Added Buyer Organization Filter Field to Shipment Milestone Alerts" section in the current version of the *Release Notes* for more information.

1.2.1.4 Initiating Driver Chats from the RTTE Map

Transportation Manager roles can quickly initiate chats with drivers from the Real-Time Transportation Execution (RTTE) map by clicking the Chat icon that appears on movement information popups in the RTTE Map UI. By default, the Chat icon does not appear and requires a one-time configuration. When a chat with a driver is initialized for the first time, a new group chat is created and an invitation is sent to the driver user; if a chat with the driver user already exists, the existing chat is opened.

In general, driver chats are configured by:

- Linking a driver skill to the site
- Linking a driver to the driver skill
- Linking a resource template to the driver skill
- Assigning the driver skill to a movement

Complete the following steps to configure driver chats for the first time:

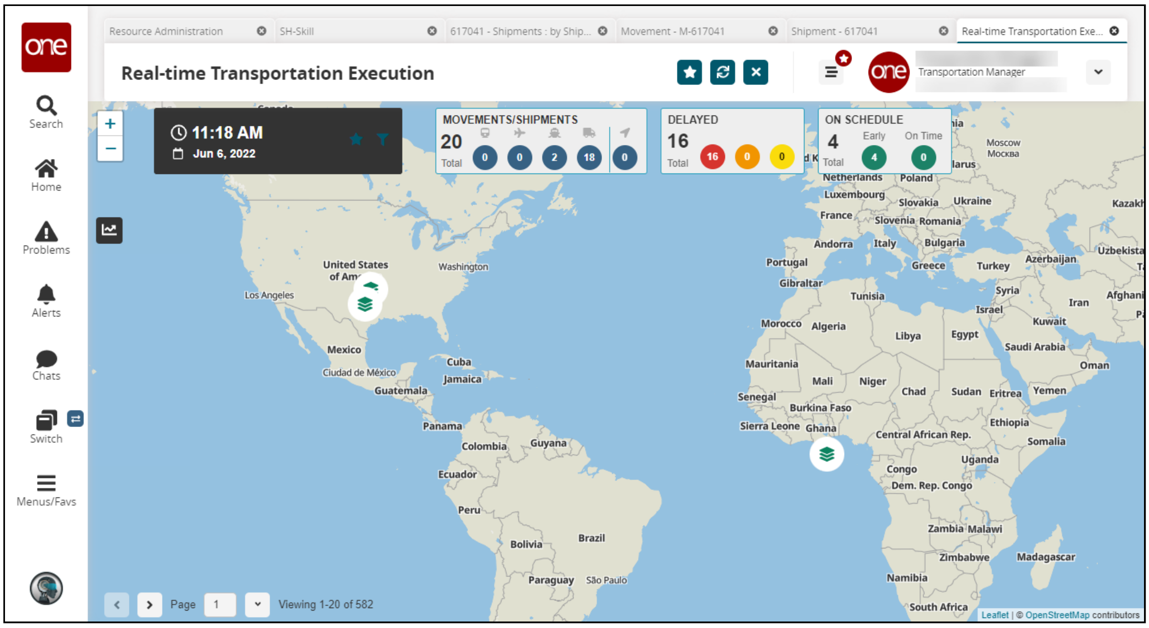
1. Log in to the ONE system.
2. Select **Menu/Favs > Fleet Mgmt > Resource Administration**.
   The Resource Administration screen appears.
3. Create a skill with the **Skill Type** of **Driver**. If one already exists, you may skip this step. For more information, see the Skills subsection of the "Site Resource Administration" section of the current version of the *Online Help*.
4. From the Resource Administration screen, with skills selected in the left pane, click a **Name** link and enter specify a **Driver Skill** and **User** for the driver. For more information, see the Skills subsection of the "Site Resource Administration" section of the current version of the *Online Help*.
5. From the Resource Administration screen, select Resource Templates in the left pane and create a resource template with the following values in the Resource Requirements table.

Field	Value
Requirement Name	Enter "Skill".
Fleet Resource Type	Select "Skill" from the dropdown menu and select "Driver" using the picker tool.
Required	Select the checkbox, indicating "Yes".
Dead Head Managed	Select the checkbox, indicating "Yes".

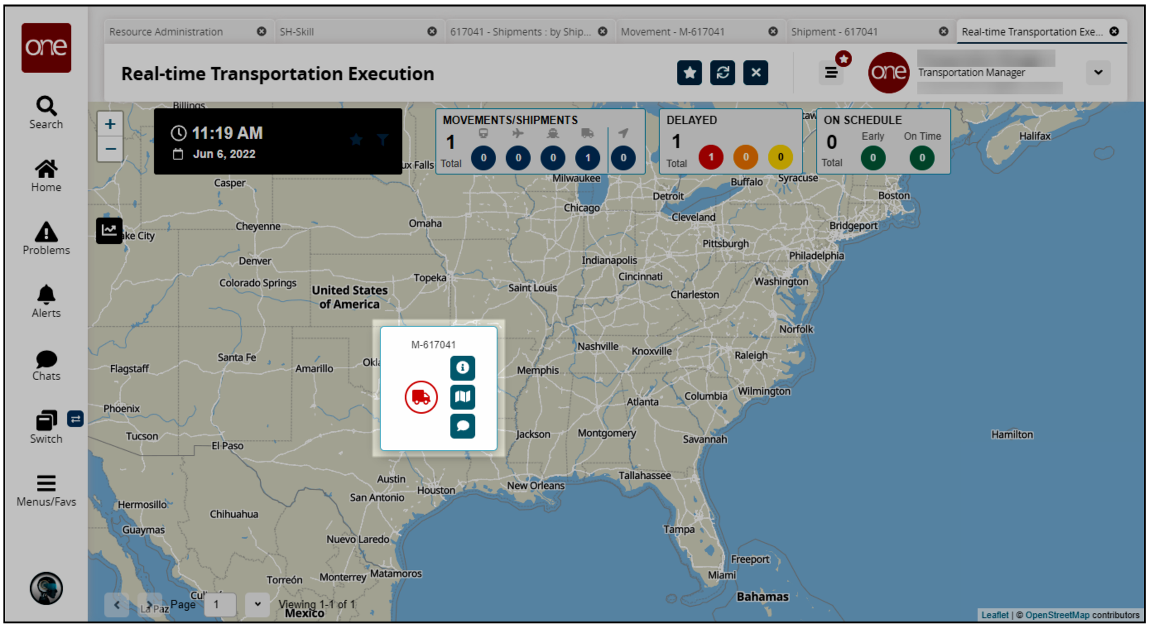
   For more information, see the Creating Templates subsection of the "Organizational Resource Administration" section of the current version of the *Online Help*.
6. Create a new shipment and on the corresponding movement, select the Resource Template created earlier in the workflow, and select the Resource as the driver skill created earlier in the workflow. For more information, see the "Using the Resources Tab for Movements" section of the current version of the *Online Help*.
7. Ensure the shipment is ready for pickup by performing any required state changes.

Complete the following steps to chat with the driver:

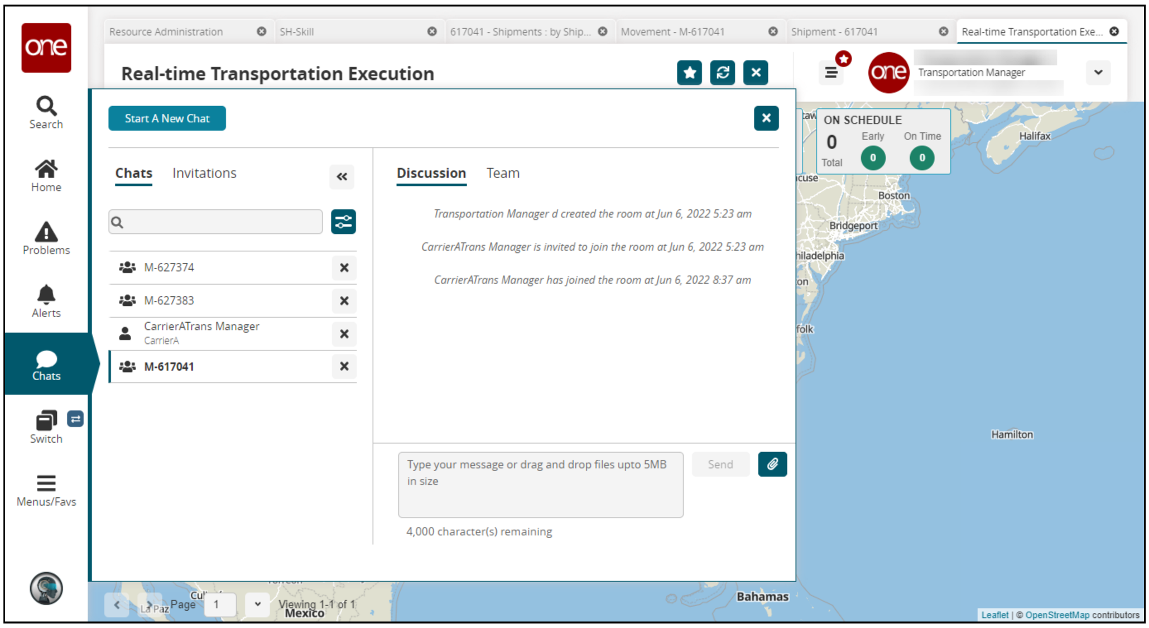
1. Click **Menu/Favs > Transportation > Real-Time Transportation Execution**.
   The RTTE Map screen appears.



2. Find and click on your shipment.
   A popup appears.



3. Click the chat icon.
   A chat with the driver appears.



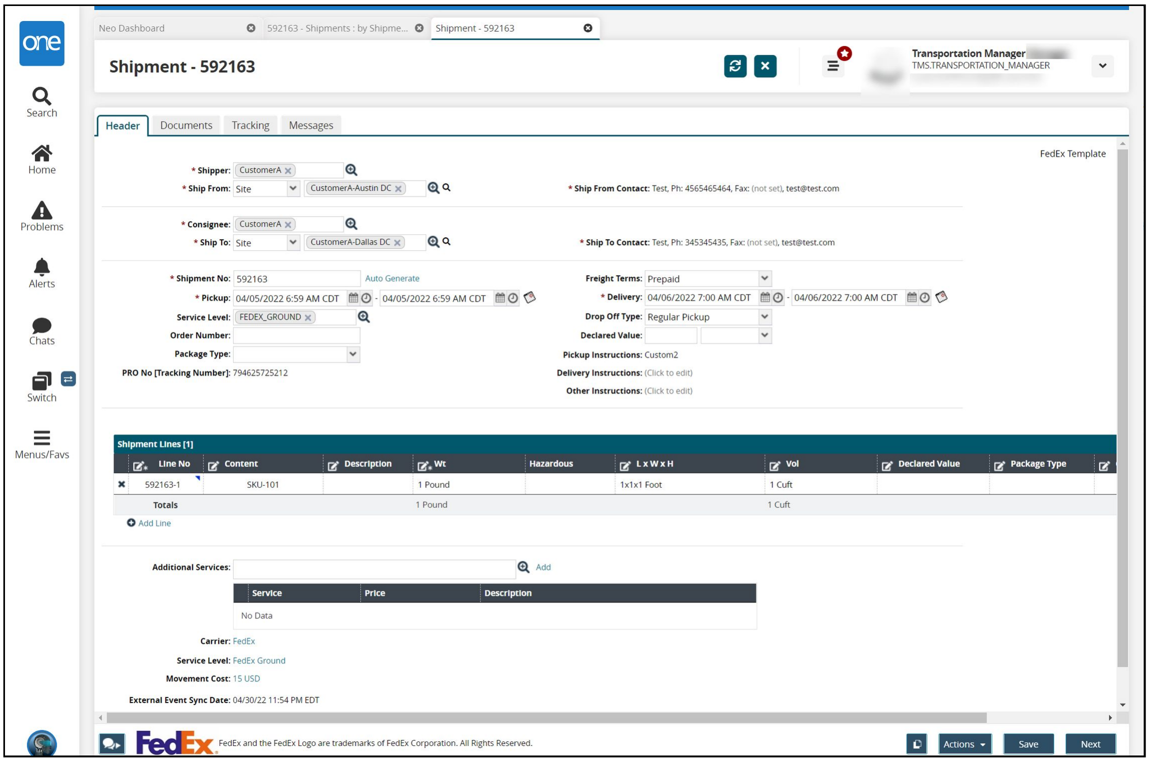
See the "Provide ability to initiate chat with drivers from the RTTE map" section in the current version of the *Release Notes* for more information.

1.2.1.5 Tracking Requests and Responses for Parcel Shipments on the Messages Tab

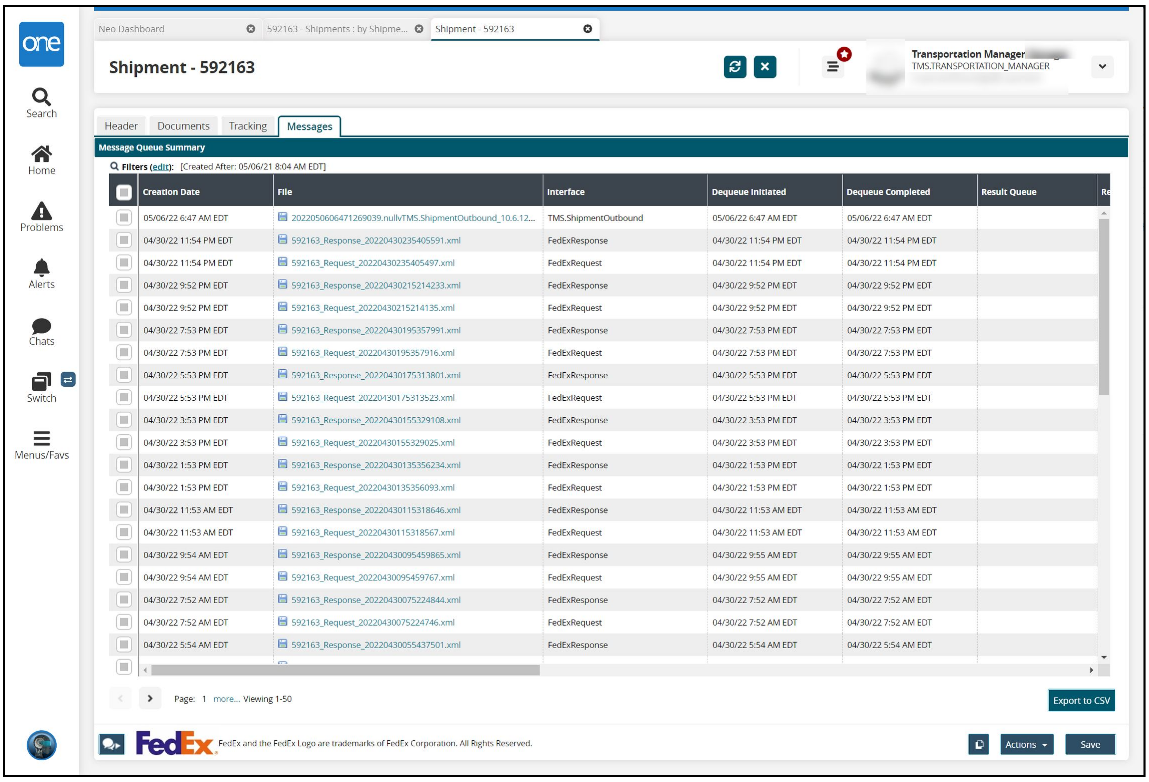
Users can track requests and responses for parcel shipments (FedEx, DHL, and UPS shipments) in the Messages tab on parcel shipment detail pages.

Complete the following steps to view the requests and responses for a parcel shipment:

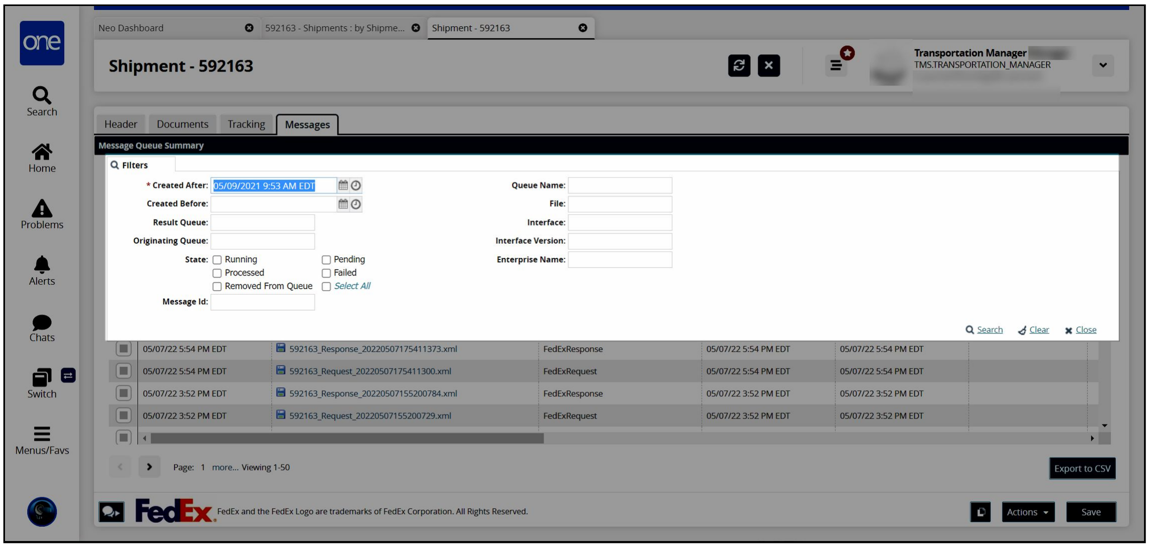
1. Log in to the ONE system.
2. Navigate to the desired parcel shipment. See the "Searching Shipments" and "Global Search" sections in the current release of *Online Help* for information on finding a shipment.
   The shipment detail screen appears. A sample FedEx parcel shipment is shown below.



3. Click the **Messages** tab.
   The Message Queue Summary displays a list of the requests and responses for the shipment.



4. Click the **Filters (edit)** link to display the filter fields.



5. Complete the following fields to limit the responses and requests that are shown. Fields with an asterisk (*) are required.

Field	Description
*Created After	Click the calendar and clock icons to select the beginning date of the requests and responses you want to view.
Created Before	Click the calendar and clock icons to select the end date of the requests and responses you want to view.
Result Queue	Enter the result queue.
Originating Queue	Enter the originating queue.
State	Click the checkboxes for the states of the requests and responses you want to view.
Message ID	Enter the message ID number for a request or response.
Queue Name	Enter the queue name.
File	Enter the file name for a request or response.
Interface	Enter the interface for the requests and responses you want to view.
Interface Version	Enter the interface version.
Enterprise	Enter the enterprise name for the requests and responses you want to view and select from the results that appear below the field.

6. Click **Export to CSV** to export the list to a CSV file.

> Though the Actions button, Copy button, and Save button appear to be active on this screen, they are not applicable on the Messages tab.

7. In the **File** column, click a link to preview the request or response in a popup window.

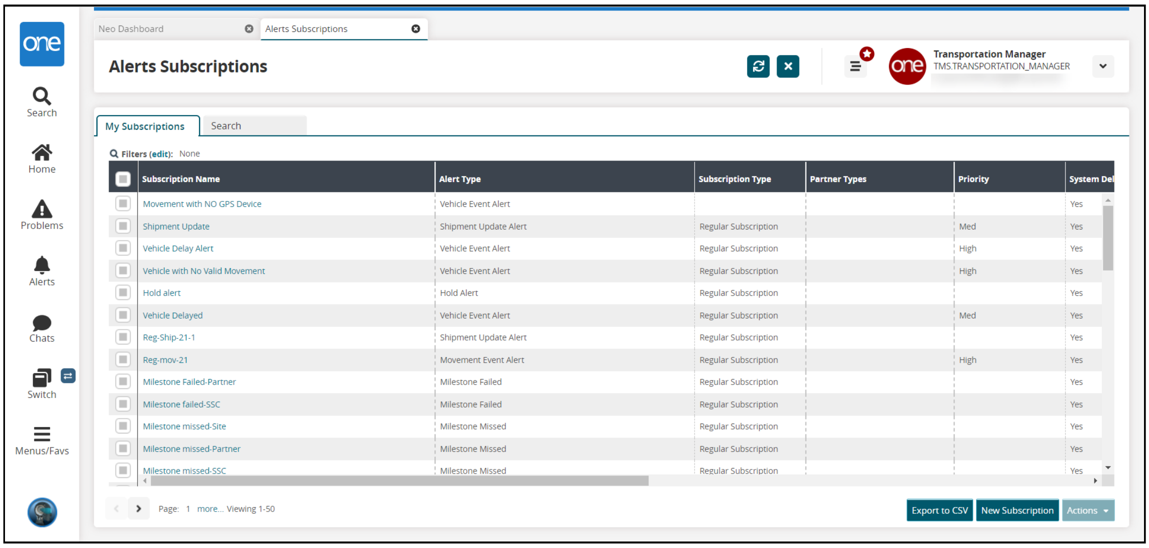
See the "Track Requests and Responses for Parcel Shipments on the Messages Tab" section in the current version of the *Release Notes* for more information.

1.2.2 Global Trade

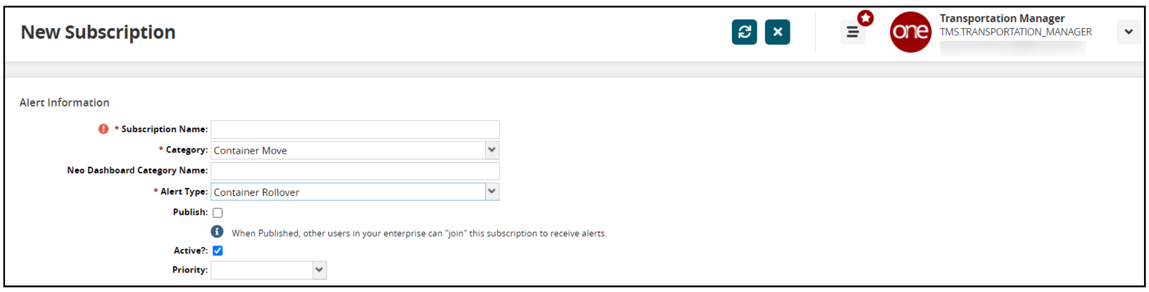
1.2.2.1 Creating Container Rollover Alerts

Complete the following steps to create container rollover alerts:

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



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



4. In the ***Subscription Name** field, enter a name for the new alert subscription.
5. In the ***Category** field, select **Container Move** from the dropdown list.
6. In the ***Alert Type** field, select **Container Rollover**.
7. Complete all fields as necessary for the Container Rollover alert subscription. Fields with an asterisk (*) are required. For complete information on the available fields and filters, see the "Creating and Customizing Alert Subscriptions" in the current release of *Online Help*.
8. Click the **Create Subscription** button.
   The screen refreshes with the new alert subscription name at the top of the screen and a green success message.

See the "Container Rollover Process for Global Transshipment Operations" section in the current version of the *Release Notes* for more information.

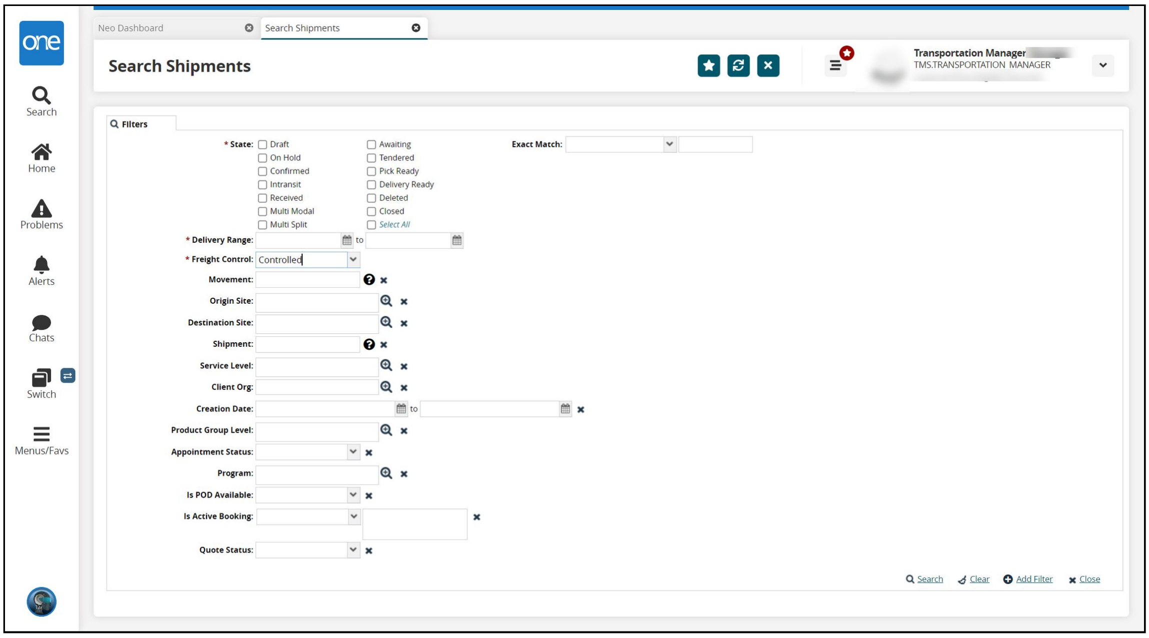
1.2.2.2 Viewing Shipments Based on Booking Status

Users can filter and view shipments based on their booking status from the following screens:

- Search Shipments screen(see page 16)
- Shipment State reports(see page 18)
- Multi Modal reports(see page 18)

Complete the following steps to filter for shipments based on booking status from the Search Shipments screen:

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



3. Complete the fields as desired. Fields with an asterisk (*) are required. For information on the fields, see the "Searching Shipments" section in the current release of *Online Help*.
4. In the **Is Active Booking** dropdown field, select Yes or No.

> If the Is Active Booking filter field is not displayed, click the **+Add Filter** link to add the filter field.

5. In the **Is Active Booking** text field, begin typing the booking status desired and select from the results that appear below the field. The following booking statuses are available:
    - New
    - Confirmed
    - Rejected
    - Pending SI Submission
    - Pending Shipper Confirmation
    - BL Issued
    - Split BL Issued
    - Awaiting Response
    - Canceled
    - Amended
    - Pending Carrier Confirmation
    - SI Confirmed
    - Requested Split
    - Surrender BL
    - Delivery Order Issued
    - BL Revoked
6. Click the **Search** link.
   Shipments with the desired booking status are displayed.

Complete the following steps to filter for shipments based on booking status from a Shipment State report:

1. Log in to the ONE system.
2. Click **Menu/Favs > Transportation > then select one of the Shipment State reports**. For this example, we used Confirmed. For more information, see the "Working with Shipment State Reports" in the current release of *Online Help*.
   The selected shipment state report appears.
3. Click the **Filters (edit)** link.
   The filter fields display.
4. Fill in the filter fields as desired. For more information, see the "Working with Shipment State Reports" in the current release of *Online Help.*

   > If the Is Active Booking filter field is not displayed, click the **+Add Filter** link to add the filter field.

5. In the **Is Active Booking** dropdown field, select Yes or No.
6. In the **Is Active Booking** text field, begin typing the booking status desired and select from the results that appear below the field. The following booking statuses are available:
   - New
   - Confirmed
   - Rejected
   - Pending SI Submission
   - Pending Shipper Confirmation
   - BL Issued
   - Split BL Issued
   - Awaiting Response
   - Canceled
   - Amended
   - Pending Carrier Confirmation
   - SI Confirmed
   - Requested Split
   - Surrender BL
   - Delivery Order Issued
   - BL Revoked
7. Click the **Search** link.
   Shipments with the desired booking status are displayed.

Complete the following steps to filter for shipments based on booking status from a Multi-Modal report:

1. Log in to the ONE system.
2. Click **Menu/Favs > Transportation > Multi-Modal**.
   The Multi-Modal report appears.
3. Click the **Filters (edit)** link.
   The filter fields display.
4. Fill in the filter fields as desired.

   If the Is Active Booking filter field is not displayed, click the **+Add Filter** link to add the filter field.

5. In the **Is Active Booking** dropdown field, select Yes or No.
6. In the **Is Active Booking** text field, begin typing the booking status desired and select from the results that appear below the field. The following booking statuses are available:
   - New
   - Confirmed
   - Rejected
   - Pending SI Submission
   - Pending Shipper Confirmation
   - BL Issued
   - Split BL Issued
   - Awaiting Response
   - Canceled
   - Amended
   - Pending Carrier Confirmation
   - SI Confirmed
   - Requested Split
   - Surrender BL
   - Delivery Order Issued
   - BL Revoked
7. Click the **Search** link.
   Shipments with the desired booking status are displayed.

See the "New Booking Filter for Searching Shipments, Shipment State Reports, and Multimodal Reports" section in the current version of the *Release Notes* for more information.

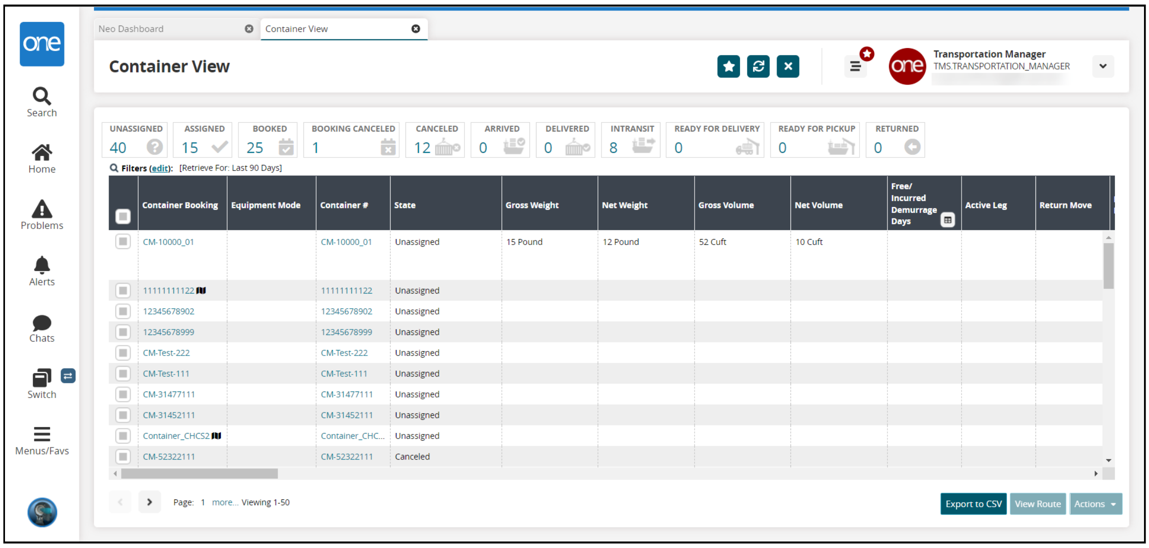
1.2.2.3 Working with Container Rollovers

Container rollovers are initiated from the Container View screen or from the Bookings report.

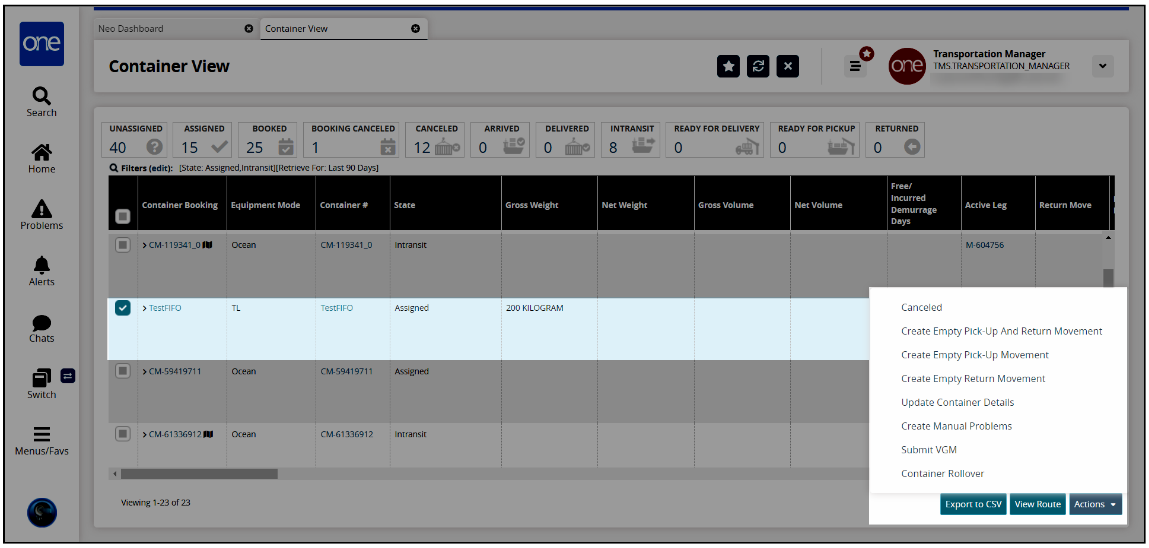
Complete the following steps to process a container rollover from the Container View screen:

1. Log in to the ONE system.

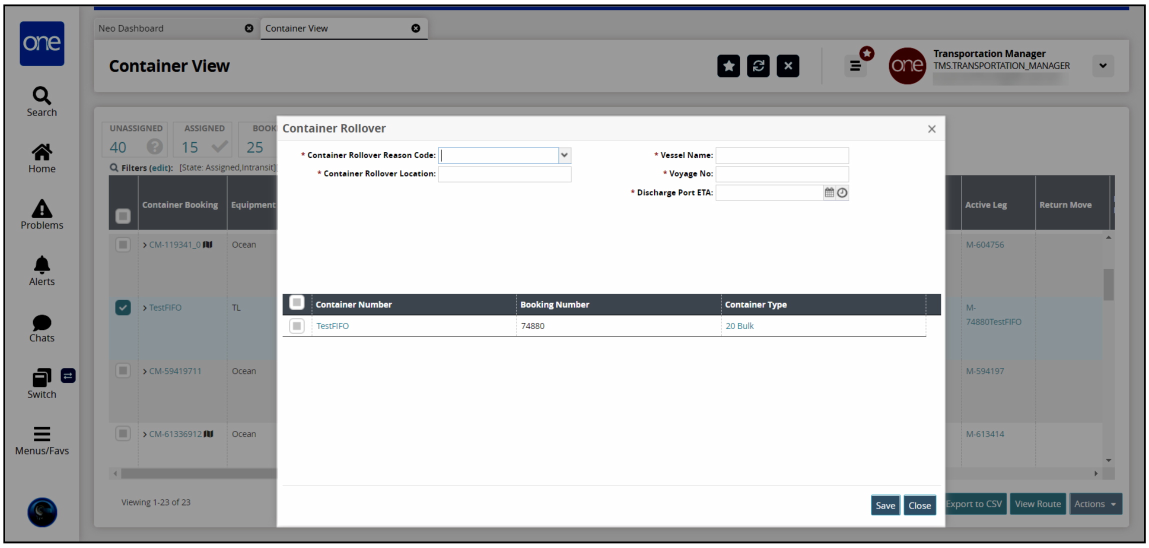
2. Click **Menu/Favs > Transportation > Container View.**
   The Container View screen appears.



3. Click the **Filters (edit)** link to search for the desired container. Note that the Container Rollover action is only available for containers in the Intransit or Assigned states.
4. Click the checkbox to select the desired container, then click the **Actions** button. The Actions menu appears.



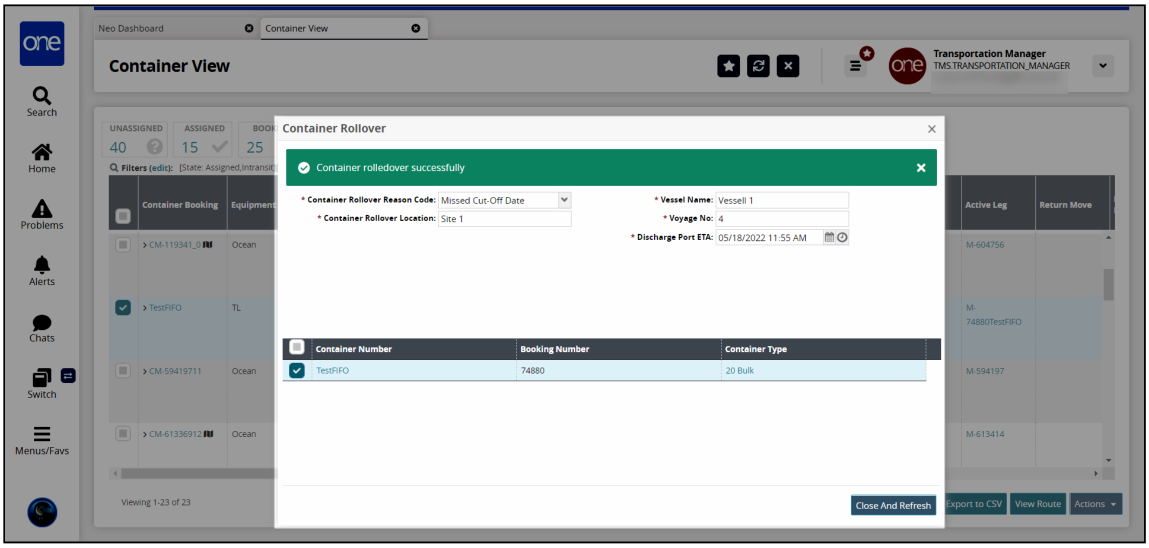
5. Click **Container Rollover**.
   The Container Rollover popup window appears.



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

Field	Description
*Container Rollover Reason Code	Select a reason for the container rollover from the dropdown list.
*Container Rollover Location	Enter the location where the rollover occurred.
*Vessel Name	Enter the vessel name.
*Voyage No	Enter the voyage number.
*Discharge Port ETA	Click the calendar and clock icons to select the discharge port ETA.

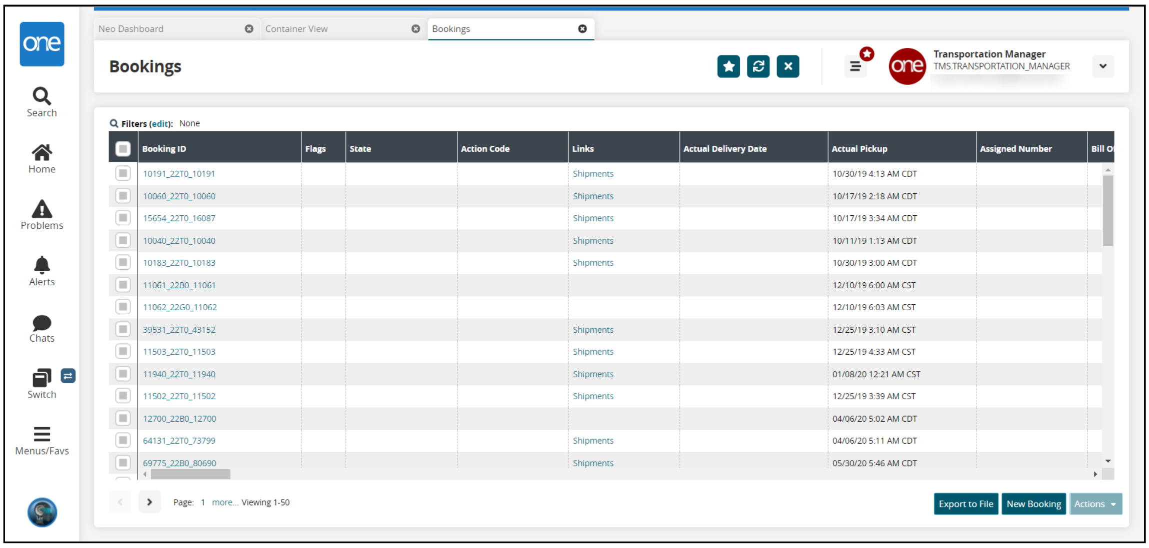
7. In the **Container Number** column, click the checkbox for the container you want to roll over.
8. Click the **Save** button.
   A success message appears.



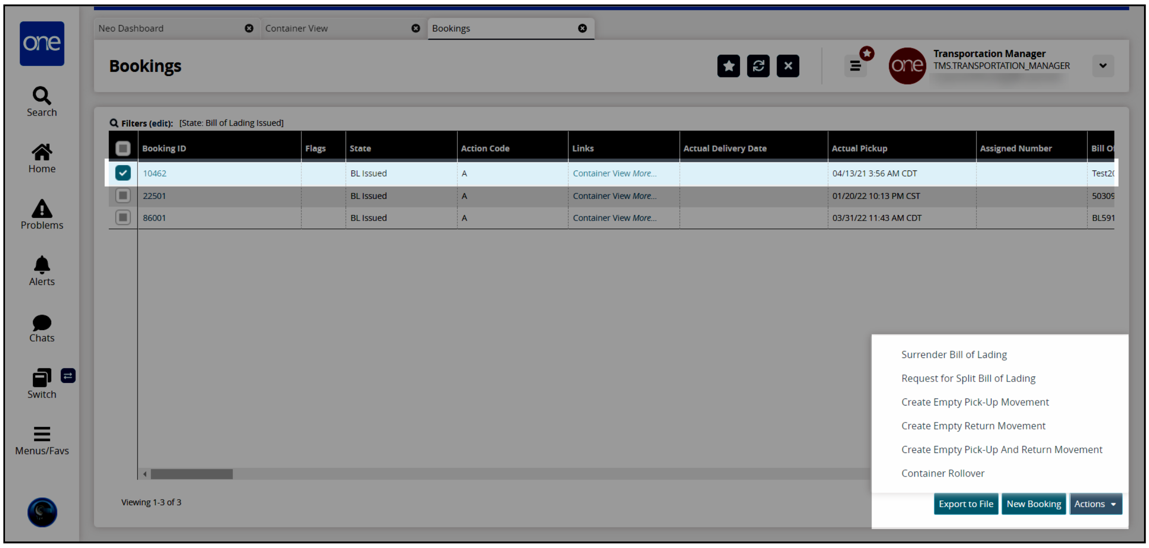
9. Click the **Close and Refresh** button.
   The Container details are updated, and the container rollover processes.

Complete the following steps to process a container rollover from the Bookings report:

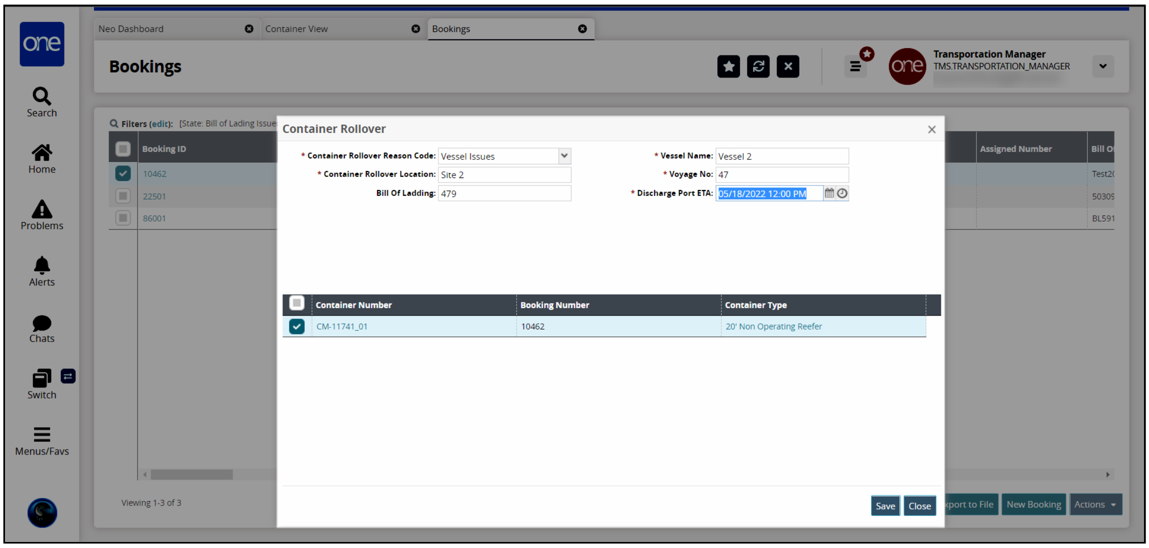
1. Log in to the ONE system.
2. Click **Menu/Favs > Transportation > Bookings.**
   The Bookings report appears.



3. Click the **Filters (edit)** link to search for the desired booking. Note that the Container Rollover action is only available for bookings in the Bill of Lading (BL) Issued state.
4. Click the checkbox for the desired booking and click the **Actions** button.
   The Actions menu appears.



5. Click **Container Rollover.**
   The Container Rollover popup window displays.

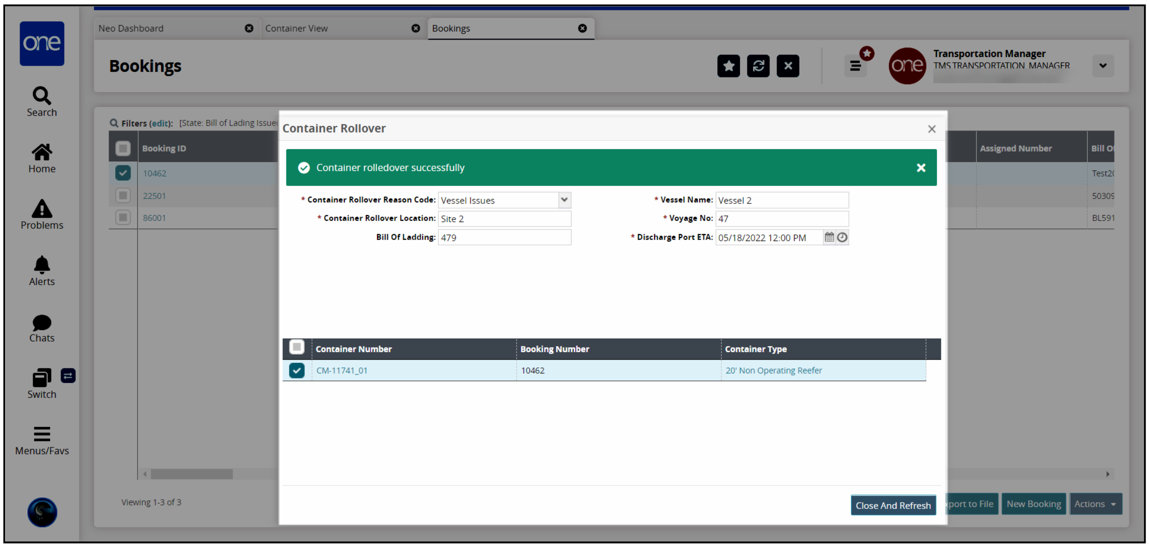


6. Complete the following fields. Fields with an asterisk (*) are required.

Field	Description
*Container Rollover Reason Code	Select a reason for the container rollover from the dropdown list.
*Container Rollover Location	Enter the location where the rollover occurred.
Bill of Lading	Enter the bill of lading number.
*Vessel Name	Enter the vessel name.
*Voyage No	Enter the voyage number.

Field	Description
*Discharge Port ETA	Click the calendar and clock icons to select the discharge port ETA.

7. In the **Container Number** column, click the checkbox for the container you want to roll over.
8. Click the **Save** button.
   A success message appears.



9. Click the **Close and Refresh** button.
   The Booking updates, and the container rollover is processed.

See the "Container Rollover Process for Global Transshipment Operations" section in the current version of the *Release Notes* for more information.

1.2.3 Scheduling

1.2.3.1 Appointment Scheduling in the NEO Workbench UI

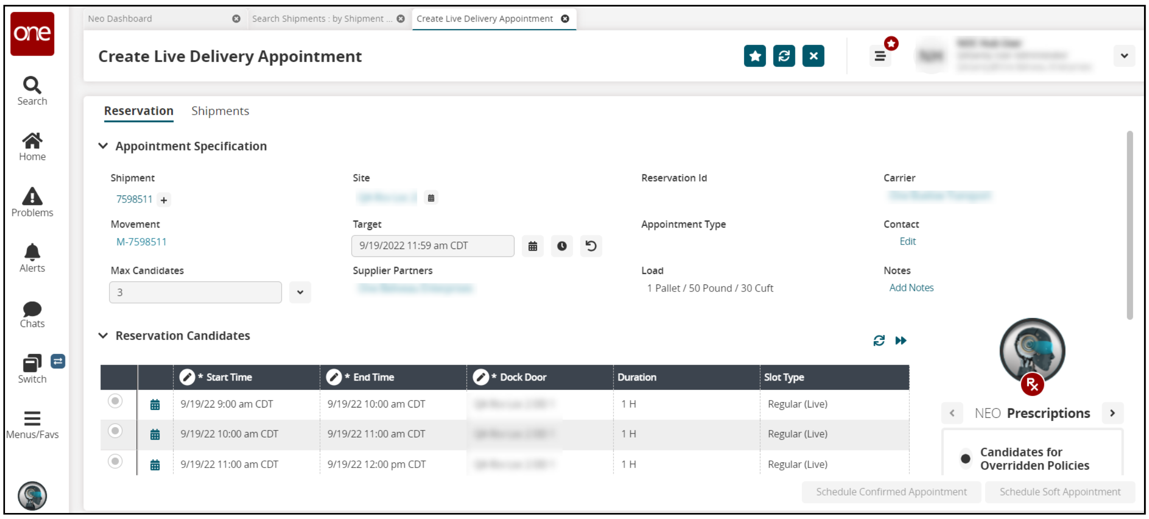
The NEO Workbench UI uses a scalable, responsive framework that works on web browsers, tablets, and mobile devices. In addition to other transportation functions, the workbench provides inline NEO prescriptions for reservation candidates for appointment scheduling.

- Viewing Appointments in the NEO Workbench(see page 25)
- Reservation Candidates Section(see page 29)
- Reservation Capacity Section(see page 31)
- NEO Prescriptions(see page 31)
- Selecting an Appointment Schedule(see page 32)

Viewing Appointments in the NEO Workbench

Complete the following steps to view appointment scheduling in the NEO Workbench UI:

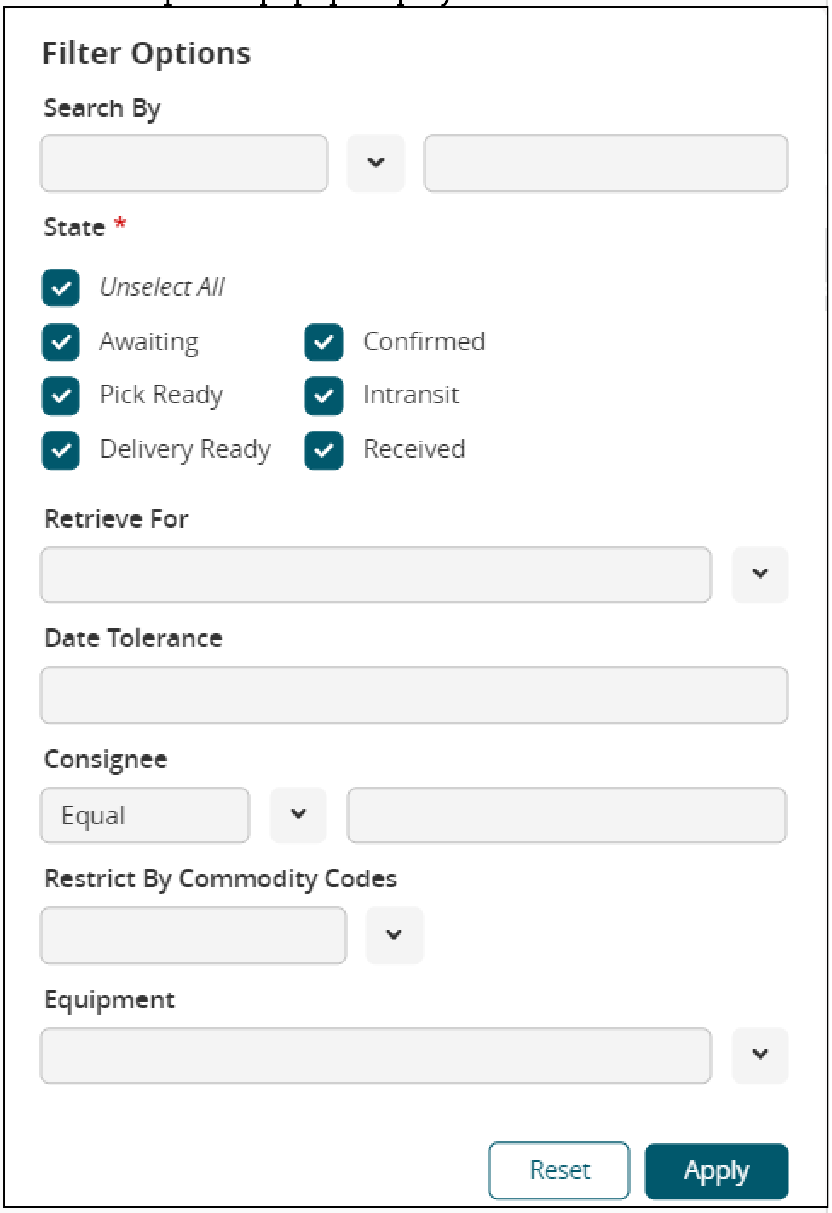
1. Log in to the ONE system.
2. Search for an open shipment using the global search function in the left navigation panel or click **Menu/Favs > Transportation > Search Shipments**.
   The Search Shipments screen displays.
3. Click an appointment link for either pickup or delivery; the shipment must be in one of the open states with a pickup or delivery link in the respective columns. Users have the option to select the following types of appointment reservations for pickups and deliveries:
   - Live - appointment for a pickup or delivery where the equipment type (a truck, for example) is loaded or unloaded with the driver in attendance and waiting
   - Drop - appointment for a pickup or delivery where the driver can pick up or deliver the shipment without staying
   - Combined - combined appointment requests show options for both live and drop appointments
4. In this example, we clicked on the link for a live pickup. The new NEO workbench for appointment scheduling displays the Reservation tab as the default.



5. Complete the following fields in the Appointment Specification section to set requirements for your desired appointment. Fields with an asterisk (*) are required.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Shipment</td><td>This field auto-populates with a live link for the shipment that opens the shipment's details screen. Users can also add shipments to this appointment.

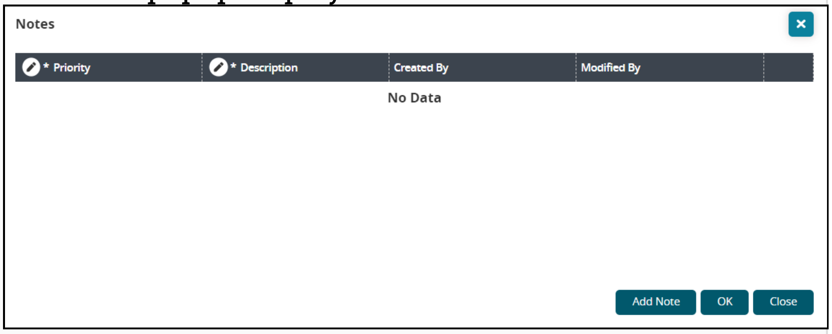
A. To add more shipments to this appointment, click the plus icon and then the Select Shipments button in the Shipment field.
The Filter Options popup displays.



B. Complete the following fields to filter for your desired shipment(s). Fields with an asterisk (*) are required.</td></tr>
</table>

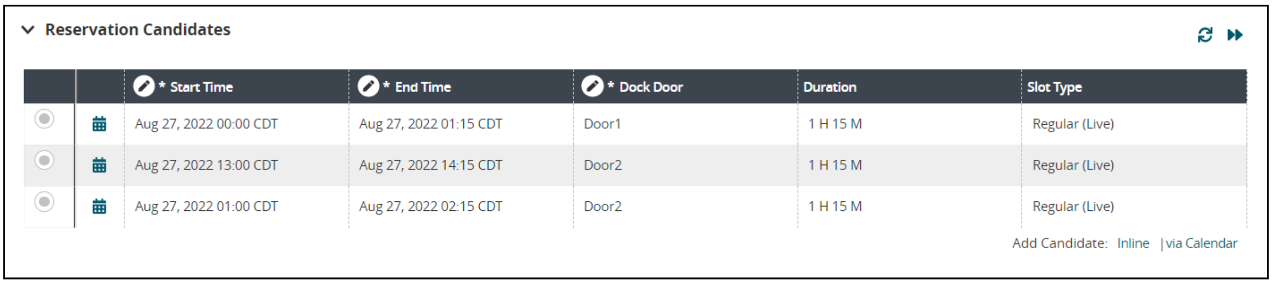
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Search By</td><td>Select the criteria to search by from the dropdown list, and fill in specific details in the second field. Please note that different fields may display when a different search criterion is selected from the list.</td></tr>
<tr><td>State *</td><td>Check the box(es) for the state of the shipments.</td></tr>
<tr><td>Retrieve For</td><td>Select the time frame for the search from the dropdown list.</td></tr>
<tr><td>Date Tolerance</td><td>Enter a date tolerance for the allowed limit before and after the target date.</td></tr>
<tr><td>Consignee</td><td>Select Equal or Not Equal from the dropdown list, and enter the consignee.</td></tr>
<tr><td>Restrict by Commodity Codes</td><td>Select Yes or No to restrict the shipment search by commodity codes.</td></tr>
<tr><td>Equipment</td><td>Select the equipment type from the dropdown list.</td></tr>
</table>
C. Click the Apply button.
The filtered shipments display in the Select Shipments popup.
D. Check the selection box for your desired shipment(s). A filter button is available on the popup for further specific shipment results.
The Add button is now active.
E. Click the Add button.
The shipment is now added to the Shipments field.
</td></tr>
<tr><td>Movement</td><td>This field auto-populates with a live link to the movement details screen.</td></tr>
<tr><td>Max Candidates</td><td>Select the maximum number of available candidates to display in the Reservation Candidates table. See below.</td></tr>
</table>

Field	Description
Site	This field auto-populates with a live link to the site details screen. Click the calendar icon to view a read-only calendar of the site's dock door availability. The candidate's calendar timeline displays. This helps if you get a red warning bar explaining problems with showing candidates who can accommodate the site's dock door availability windows.
Target	Use any of the following icons to set the target date for the pickup or delivery. ◦ Calendar - select a date ◦ Clock - select a time ◦ Undo - reset any changes back to the last displayed date
Supplier Partners	This field auto-populates based on the shipment information. Click the link to view the supplier partner details screen.
Reservation ID	This field populates when the appointment is created.
Appointment Type	This field auto-populates once the appointment has been set.
Load	This field displays the load information for the shipment.
Carrier	Click the link to view carrier partner details.
Contact	This field auto-populates if the information already exists. Complete the following instructions to add or edit a contact. A. Click the Edit link. The Phone and Contact popup displays. B. Enter a Phone number. C. Enter a Contact name. D. Click the OK button.

Field	Description
Notes	A. Click the Add Notes link. The Notes popup displays.  B. Click the Add Note button. A row displays the Created By and Modified By fields filled in. C. Click the Priority cell. Fields with an asterisk (*) are required. D. Select a priority level from the dropdown list. E. Click the Apply button. The priority displays. F. Click the *Description cell. G. Enter a description. H. Click the Apply button. The description displays. I. Click the OK button.

Reservation Candidates Section

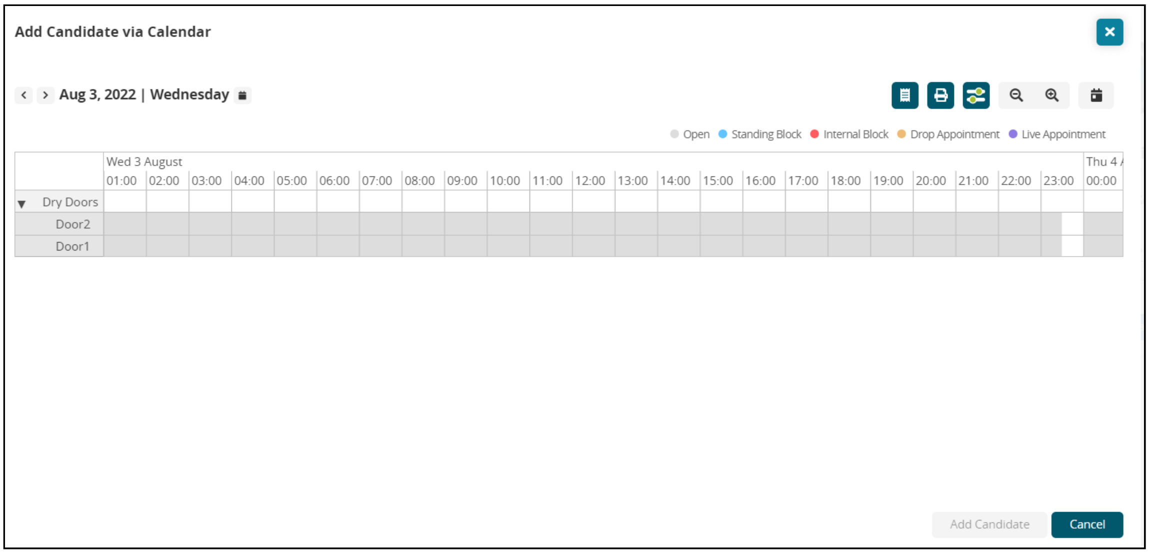
The Reservation Candidates section displays candidates who have appointments available based on the criteria set above.



Complete the following steps to view possible appointment candidates:

1. Click the **Get Candidates** icon ( ) to refresh the table.

2. Click the **Get Next Candidates** icon ( ) to show more possible appointment candidates.
3. Select one of the available appointment candidates from the **Reservation Candidates** table. Please note that the existing candidate information is not editable.
   Scheduling buttons activate.
4. If you wish to add another candidate directly to the table, click the **Inline** link.
   A new row displays in the Reservation Candidates table. Fields with an asterisk (*) are required, and fields with a pencil icon are editable.
5. Click the cell under ***Start Time**.
   The Start Time popup displays.
6. Use the calendar and clock icons to select the start time for the appointment.
7. Click the **Apply** button.
8. Click the cell under ***End Time**.
   The End Time popup displays.
9. Use the calendar and clock icons to select the end time for the appointment.
10. Click the **Apply** button.
    The Duration and Slot Type fields auto-populate.
11. Click the ***Dock Door** cell.
    The Dock Door popup displays.
12. Select an available dock door from the dropdown list.
13. Click the **Apply** button.
14. If you wish to add another candidate by viewing a calendar of available appointments, click the **via Calendar** link.
    The Add Candidate via Calendar popup displays the available doors and the open times (shown in gray) for appointments.



15. Users can perform the following tasks in the popup:
    - Click the **Summaries** button to open the Summaries page displaying dock door information.
    - Click the **Print** button to download a PDF to your computer for printing.
    - Click the **Filters** button to open a Filter Options popup to narrow your search.

- Click the **Zoom Out** and **Zoom In** icons to see different timeline views (hours, days, etc.).
- Click the **Reset Zoom** (calendar) icon to reset the zoom to the original view.

16. Click a gray/available block on the calendar, and click the **Add Candidate** button. The appointment candidate is added to the Reservation Candidate table.

Reservation Capacity Section

The Reservation Capacity section is read-only and displays existing capacities for a site. The operational hours plus capacity types (Appointment and Each as shown below) display values for appointments: Maximum, Used, Remaining, and Standing Block Unscheduled. An additional text field, also read-only, for Reason Unable to Schedule On Target Date provides additional information.

Reservation Capacity

Operation Hours: Aug 27, 2022 00:00 EDT to Aug 27, 2022 13:00 EDT

Capacity Type	Maximum	Used	Remaining	Standing Block Unscheduled
APPOINTMENT	52	0	52	0
EACH		0		0

Reason Unable to Schedule on Target Date

No applicable operating hours exist for any applicable doors. Work hours and/or work shifts are either undefined or conflicting for the following dates: Aug 11, 2022

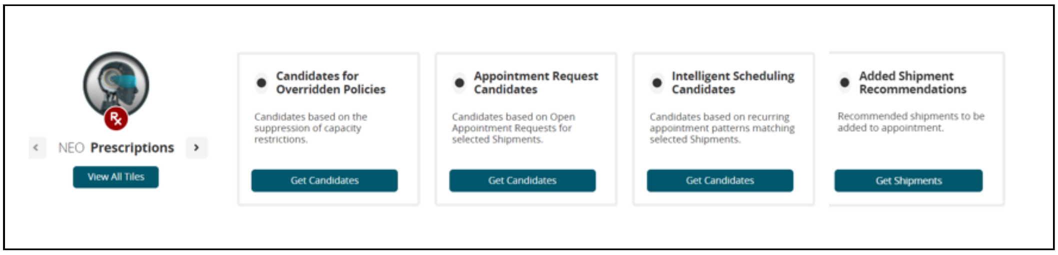
NEO Prescriptions

The NEO Prescriptions provide users with more candidates/shipments based on requirements for candidates.

Complete the following steps to use NEO for additional candidates/shipments:

1. Use the left and right arrows to view the available NEO Prescriptions options. Not every NEO prescription will display for every shipment reservation.
    - Candidates for Overridden Policies: allows users to override certain scheduling policies and search for more candidates as a what-if analysis. The NEO 3.6 release only supports a capacity policy override.
    - Appointment Request Candidates: offers appointment candidates based on open appointment requests on the shipment.
    - Intelligent Scheduling Candidates: analyzes the selected candidates based on appointment requests and scheduling and then recommends candidates based on past behavior. If this policy is enabled by customers, then default candidates include "smart" candidates. If the policy is not enabled, such candidates are presented as part of the prescription invocation.
    - Added Shipment Recommendations: offers candidate shipments that can be picked or delivered as part of the same appointment. Selected shipments are added on the Shipments tab for scheduling.

> Please note that the prescriptions icons will either display along the right side of the screen or below the Reservation Capacity table based on the user's screen resolution.



2. Click the **Get Candidates/Get Shipments** button for the desired prescription.
   Any available candidates or shipments display on a popup.
3. Click the plus (+) sign.
   New candidates are added to the Reservation Candidates table. New shipments are added to the Shipments tab.
4. Click the radio button to select the candidate/shipment.
   The Schedule Appointment button becomes active.
5. Click the **Schedule Appointment** button.
   A green success message displays.

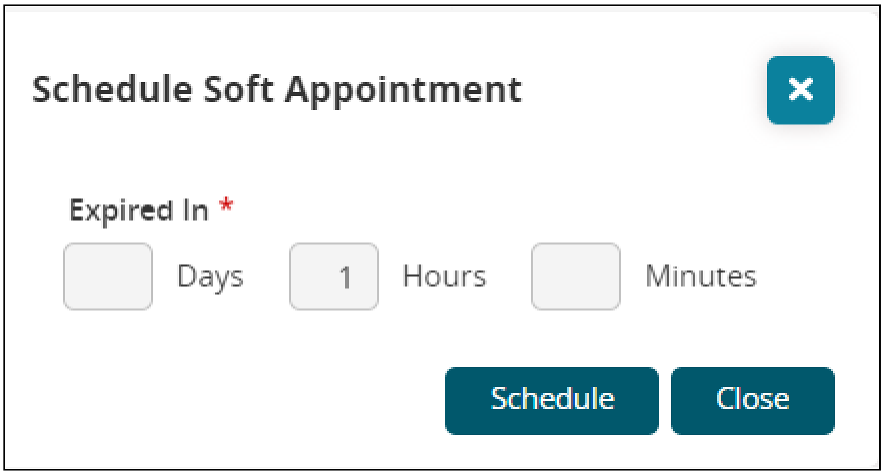
Selecting an Appointment Schedule

Complete the following steps to select an appointment if the flag/policy for enabling soft appointments has not been set for this site:

1. Click the radio button to select an appointment in the Reservation Candidates section.
   The Schedule Appointment button becomes active.
2. Click the **Schedule Appointment** button.
   A green success message displays.

Complete the following steps to select an appointment if the flag/policy for enabling soft appointments has been set for this site:

1. Click the radio button to select an appointment in the Reservation Candidates section.
   The Schedule Confirmed Appointment and the Schedule Soft Appointment buttons are now active.
2. To set a confirmed appointment, click the **Schedule Confirmed Appointment** button.
   A green success message displays.
3. To set a soft appointment, click the **Schedule Soft Appointment** button.
   The Schedule Soft Appointment popup displays.



4. In the **Expired In** * field, enter numerical values for **Days**, **Hours**, and/or **Minutes** to set the timeframe that allows the candidate to consider and approve the appointment request.
5. Click the **Schedule** button.
   A green success message displays.

Rescheduling and Canceling an Appointment

Users can reschedule or cancel appointments using the same process. In the example below, we outline the steps to reschedule an appointment, but the steps for canceling are the same.

Complete the following steps to reschedule or cancel an appointment:

1. From the relevant appointment screen, click the **Reschedule Appointment** button.
   The Reason for Rescheduling popup displays.
2. Select the **Reason Code** * from the dropdown list.
3. Enter further information in the **Description** field.
4. Click the **Reschedule Appointment** button.
   A green success message
5. Click the **Save** button.
   A green success message displays.

Actions for Appointments

Users have the following actions available for scheduled appointments:

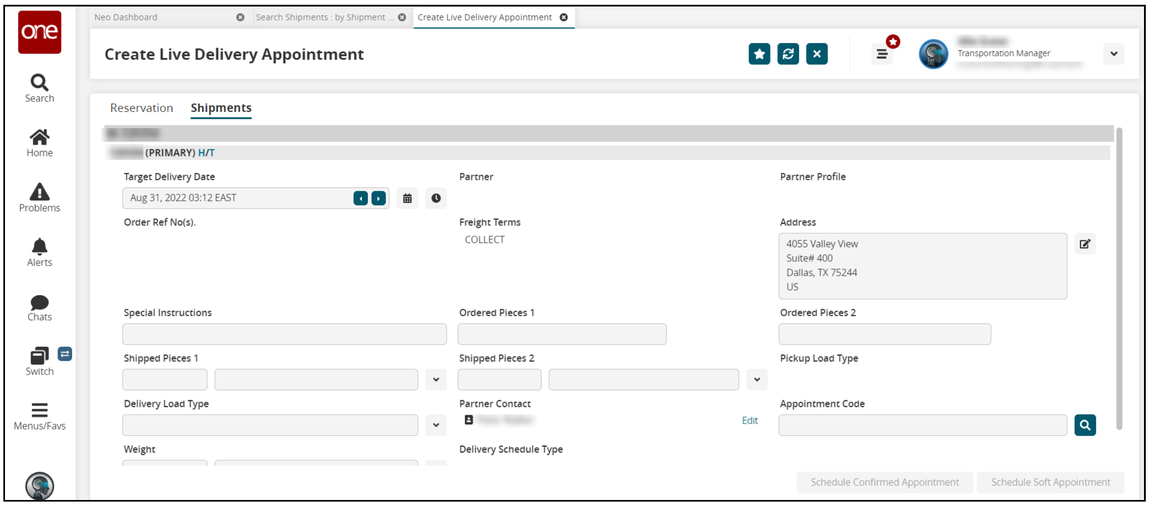
- Print - downloads a pdf to your computer
- Email - displays an email template with the appointment information. Enter email addresses in the **Recipient** * field. The **Subject** * and **Message** * fields contain auto-populated appointment data but are editable.
- Arrived - displays a green success message and indicates that a new event has been created.
- Departed - displays a green success message and indicates that a new event has been created.

- In Progress - displays a green success message and indicates that the status has been changed.

Viewing Shipments

Complete the following steps to view shipments from the workbench UI:

1. Click the **Shipments** tab.
   The shipment details display. Each shipment associated with this reservation has its own section as described in the following steps.



2. Click the trash can icon in the section header bar.
   The shipment is deleted from the reservation.
3. Click the **H** in the section header bar.
   The shipment's history displays in a new tab.
4. Click the **T** in the section header bar.
   The shipment's tracking displays in a new tab.
5. Enter values for the fields described in the table below. Fields with an asterisk (*) are required.

Field	Description
Target Delivery Date	Select the target delivery date using the arrows to move forward and backward by one day, or use the calendar and clock tools.
Order Ref No(s)	This field auto-populates order reference numbers associated with the shipment.
Special Instructions	Enter any special instructions.

Field	Description
Shipped Pieces 1	Enter a numerical value for the shipped pieces and select a unit of measure from the dropdown list.
Delivery Load Type	Select a delivery load type from the dropdown list.
Weight	Enter a numerical value for the weight and select a unit of measure from the dropdown list.
Partner	This field auto-populates if it is provided in the shipment details.
Freight Terms	This field auto-populates if it is provided in the shipment details.
Ordered Pieces 1	Enter a numerical value for the ordered pieces.
Shipped Pieces 2	Enter a numerical value for the shipped pieces and select a unit of measure from the dropdown list.
Partner Contact	This field auto-populates. Click the Edit link to enter contact information for Phone and Contact (name).
Delivery Schedule Type	This field auto-populates based.
Partner Profile	This field auto-populates if it is provided in the shipment details.

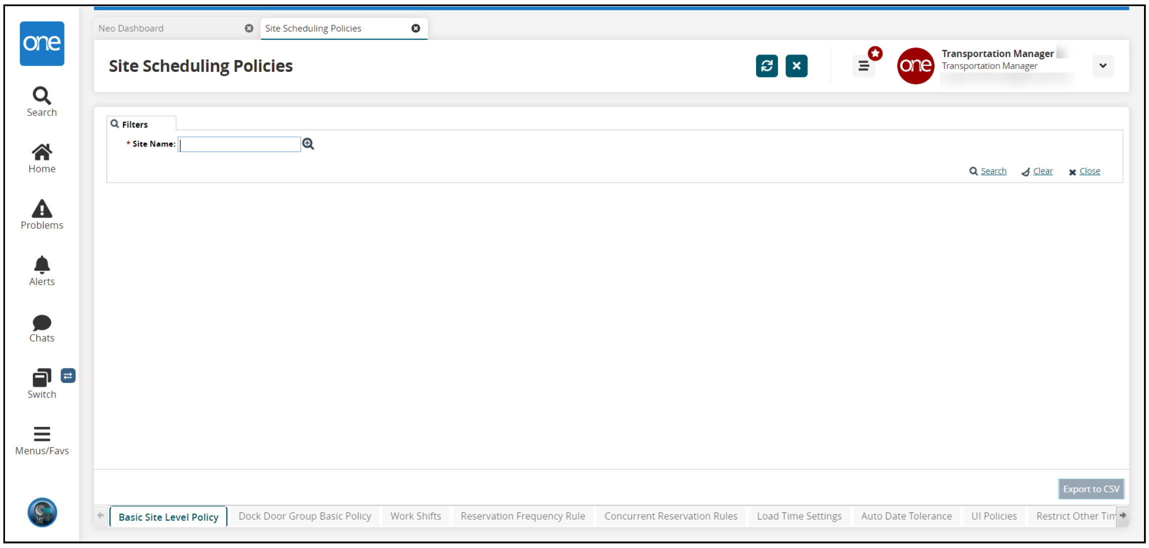
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Address</td><td>This field auto-populates. Click the edit icon to enter the fields described below. Fields with an asterisk (*) are required, and they will change based on the country code selected.
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Country*</td><td>Select the country abbreviation from the dropdown list.</td></tr>
<tr><td>Line 1*</td><td>Enter address information.</td></tr>
<tr><td>Line 2</td><td>Enter additional address information if necessary.</td></tr>
<tr><td>Line 3</td><td>Enter additional address information if necessary.</td></tr>
<tr><td>City*</td><td>Enter the city.</td></tr>
<tr><td>State*</td><td>Select the state from the dropdown list.</td></tr>
<tr><td>Zip*</td><td>Enter the ZIP code.</td></tr>
</table>
</td></tr>
<tr><td>Ordered Pieces 2</td><td>Enter a numerical value for the ordered pieces.</td></tr>
<tr><td>Pickup Load Type</td><td>This field auto-populates.</td></tr>
<tr><td>Appointment Code</td><td>Enter or select the appointment code using the picker tool.</td></tr>
</table>

See the "Support for Appointment Scheduling NEO Workbench UI" section in the current version of the *Release Notes* for more information.

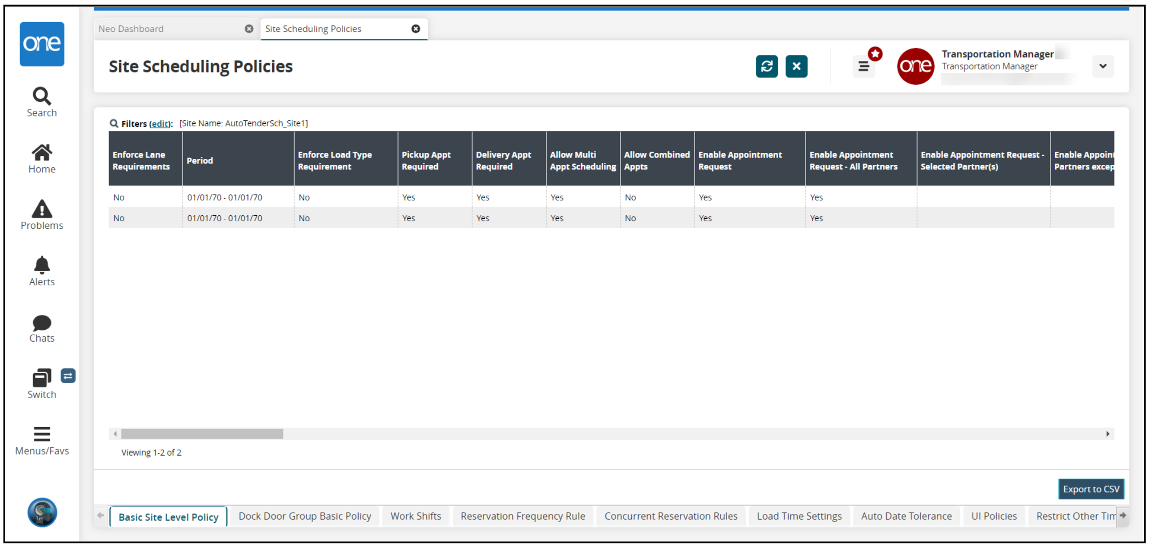
1.2.3.2 Viewing the Available Variable Capacity Settings on the Site Scheduling Policies Report

Complete the following steps to view the available variable capacity settings on the Site Scheduling Policies report:

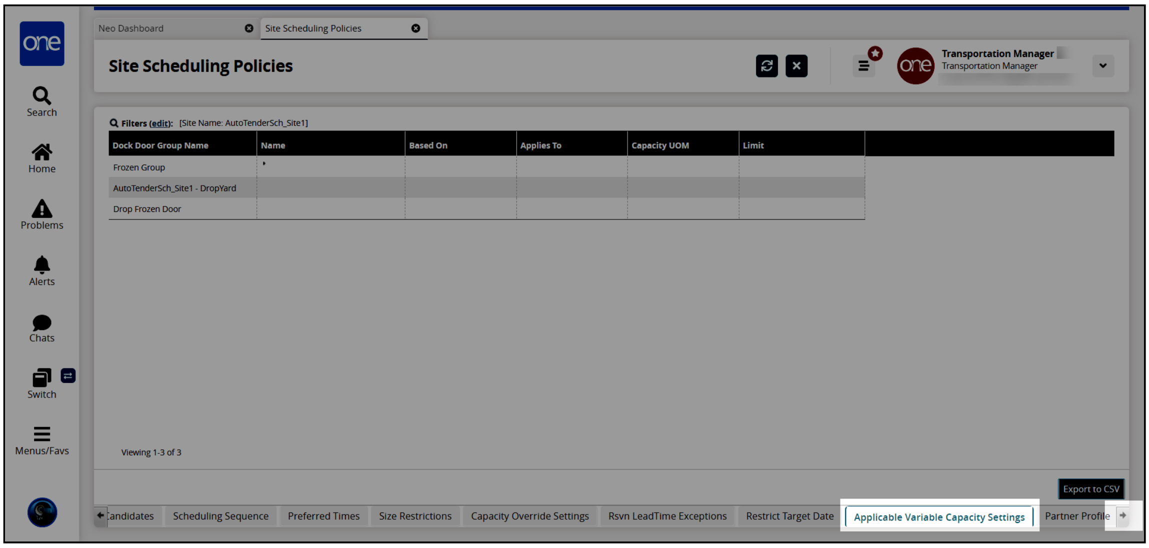
1. Log in to the ONE system.
2. Click **Menu/Favs > Reports > Site Scheduling Policies**.
   The Site Scheduling Policies screen appears.



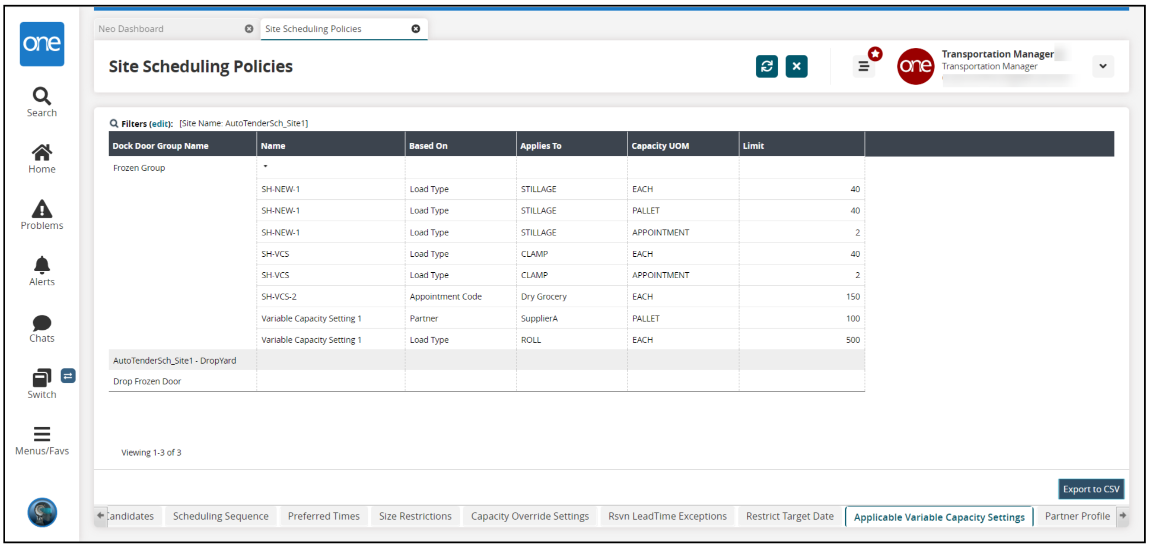
3. In the *Site Name field, begin typing the site name and choose from the results below the field, or use the picker tool to select the site.
4. Click the **Search** link.
   The Site Scheduling Policies report for the selected site appears with the Basic Site Level Policy tab displayed at the bottom of the screen.



5. Use the arrow to scroll to the right and select the **Applicable Variable Capacity Settings** tab.
   The Available Variable Capacity Settings display.



6. In the **Name** column, click the triangle to expand the applicable variable capacity settings for each dock door group. Note that not all dock door groups have variable capacity settings.



7. Click the **Export to CSV** button to download the report to a CSV file.

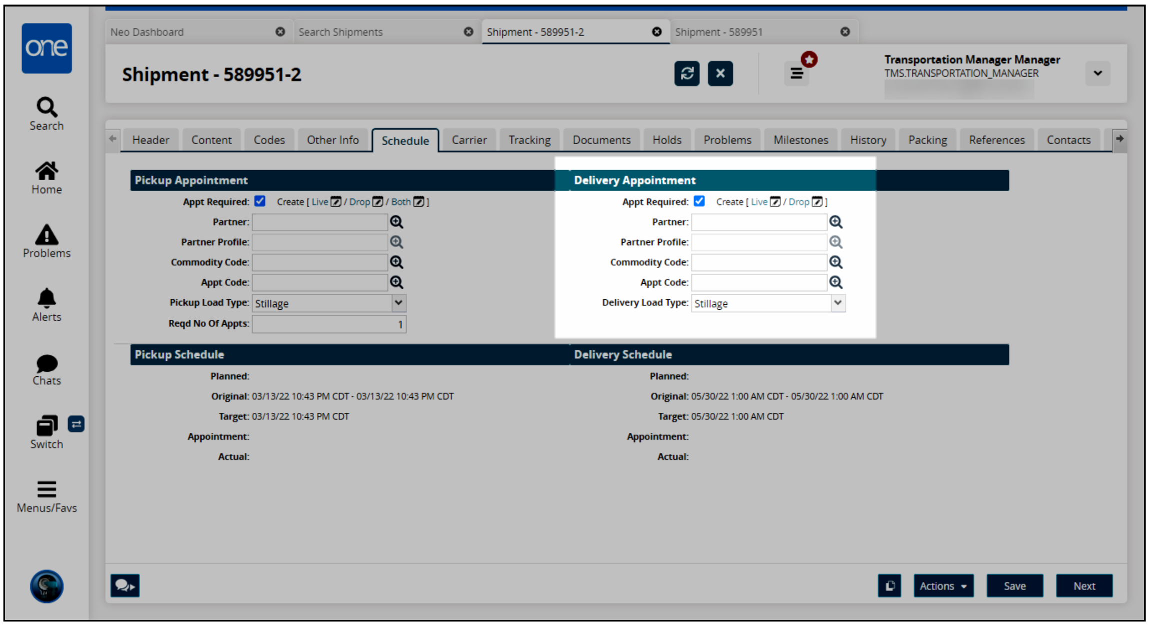
See the "Added Available Variable Capacity Settings to the Site Scheduling Policies Report" section in the current version of the *Release Notes* for more information.

1.2.3.3 Working with Multiple Violations When Scheduling Live Delivery Appointments

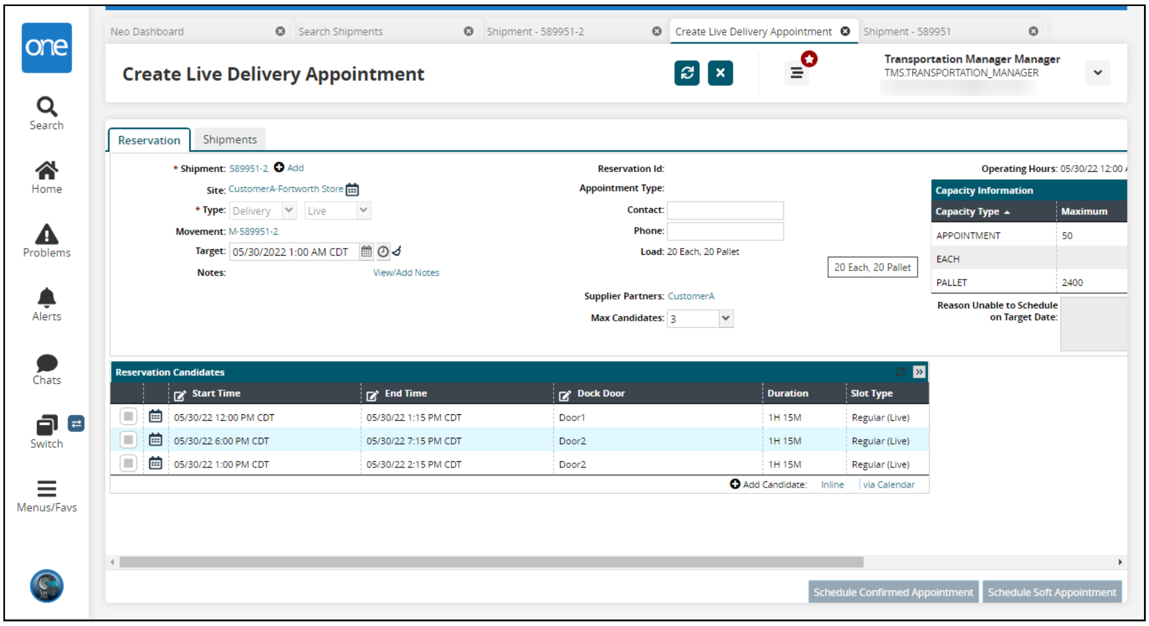
When users manually schedule live delivery appointments for shipments, the system displays warnings for all violations of applicable variable capacity settings across all units of measure and policy variations (partner, partner profile, load type, and appointment code). Users are made aware of all capacity limits that would be exceeded by a scheduled shipment, allowing them to adjust expectations when appropriate. Users must choose to override each warning before an appointment can be scheduled.

Complete the following steps to schedule live delivery appointments with multiple violations:

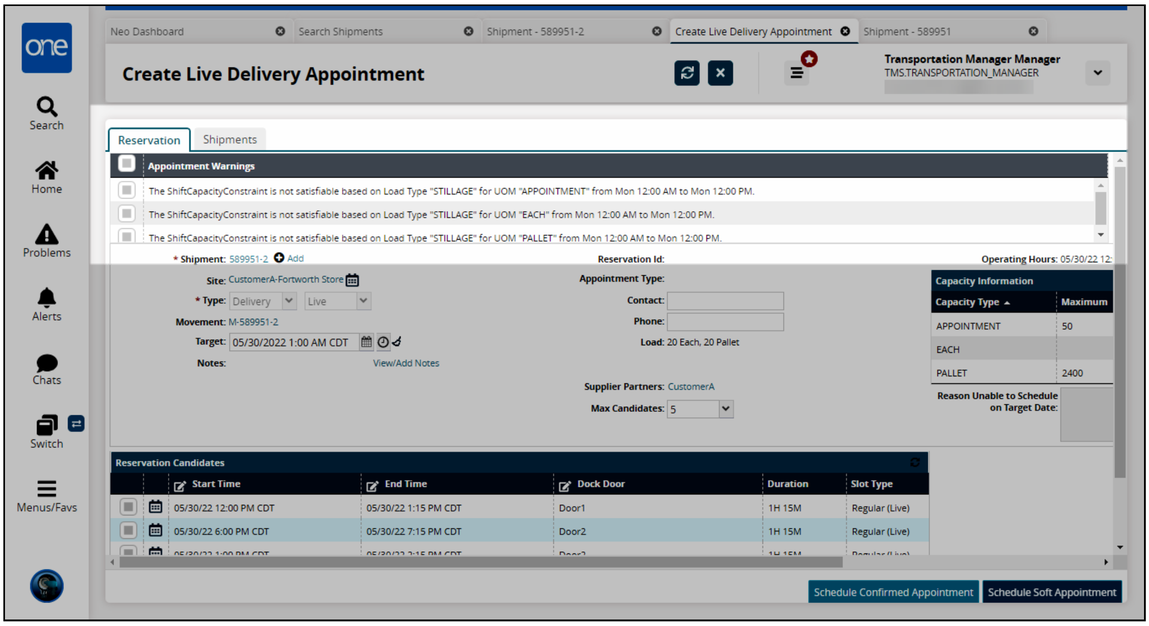
1. Log in to the ONE system as a Transportation Manager.
2. Search for the shipment for which you want to schedule a live delivery.
   The shipment details screen appears.
3. Click the **Schedule** tab.
   The Schedule tab appears.
4. Click the **Live** link in the Delivery Appointment section.



The Create Live Delivery Appointment screen appears if no appointment exists. The Reservation Candidates section lists time slots that should not interfere with the existing schedule.



5. Click the **Inline** link to add a manual reservation.
   A new row appears.
6. Select a **Start Time, End Time,** and **Dock Door**.
7. Click the checkbox for the row and click **Schedule Confirmed Appointment**.
   If the manual appointment overlaps with existing appointments, multiple violations appear.



At this point, the user can override the warning or create a new reservation candidate.

See the "Support for Multiple Capacity Violations When Scheduling Shipment Appointments" section in the current version of the *Release Notes* for more information.

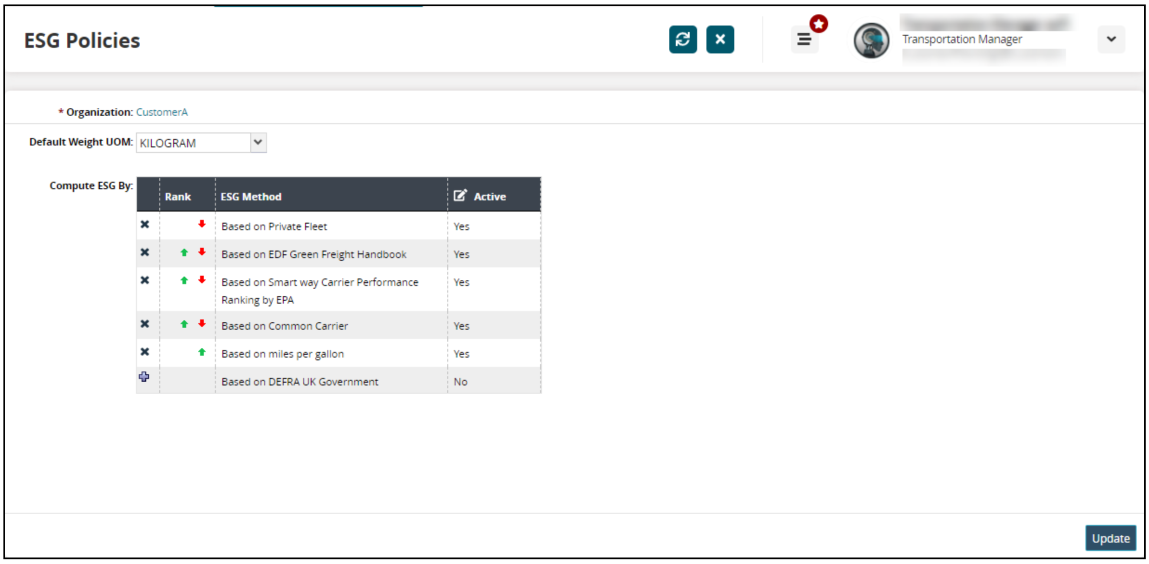
1.2.4 Visibility

1.2.4.1 Configuring the Environmental Social Governance Policy

You can configure the Environmental Social Governance (ESG) policy to configure methods to calculate carbon emissions.

Complete the following steps to configure the Environmental Social Governance policy:

1. Log in to the ONE system.
2. Click **Menus/Favs > Transportation > Policies > ESG Policies**.
   The ESG Policies screen appears. The *Organization field is auto-populated by default.



3. Click the ***Organization** name link to view the organization's details.
4. In the **Default Weight UOM** dropdown menu, select a unit of measurement.
5. In the **Compute ESG By** table:
   A. Click the **Add** ( ) icon to include an ESG method to the carbon emission computation options.
   B. Click the **Remove** ( ) icon to remove an ESG method from the carbon emission computation options.
   C. In the **Rank** column, click up and down arrows ( ) to reorder the order of computation methods.
6. Click **Update** to save the changes.

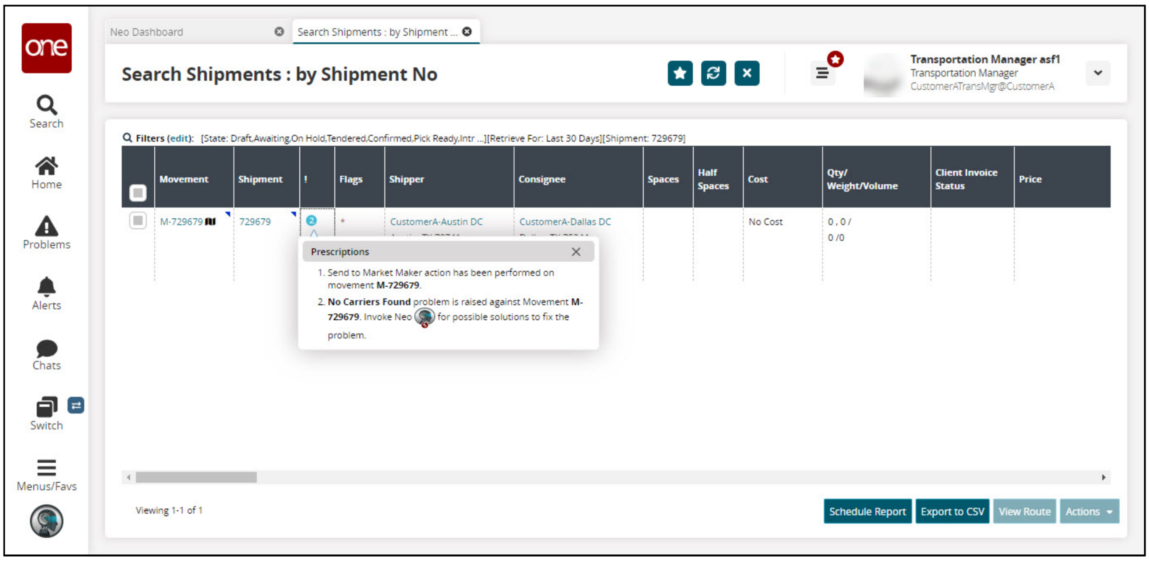
See the "Introduced an ESG Policy and Ranking Strategy to Compute the Carbon Emission by Preference" section in the current version of the *Release Notes* for more information.

1.2.4.2 Viewing the Sent to Market Maker Action Notification in the Movement Shipment Report

We introduced an additional system-generated notification under the warning (!) column to capture the movement details once the shipper user performs the Send to Market Maker action.

Complete the following steps to search the details of the movement with the Sent to Market Maker notification:

1. Log in to the ONE system.
2. Search for a shipment using the global search on the left navigation panel, or click **Menu/Favs > Transportation > Search Shipments** and use the filters to specify a shipment.
   The search results appear. In the warning (**!**) column, a system-generated recommendation number displays. This icon may be red or blue based on the warnings for the shipment.



3. Click the number.
   The Prescriptions popup notification provides one or both of the following new messages:
   A. The prescription denotes that the Send to Market Maker action was performed on the movement.
   B. The option to invoke NEO and view the carrier bid responses page for further information.
4. Click the **Invoke NEO** icon.
   The carrier bid response page displays.

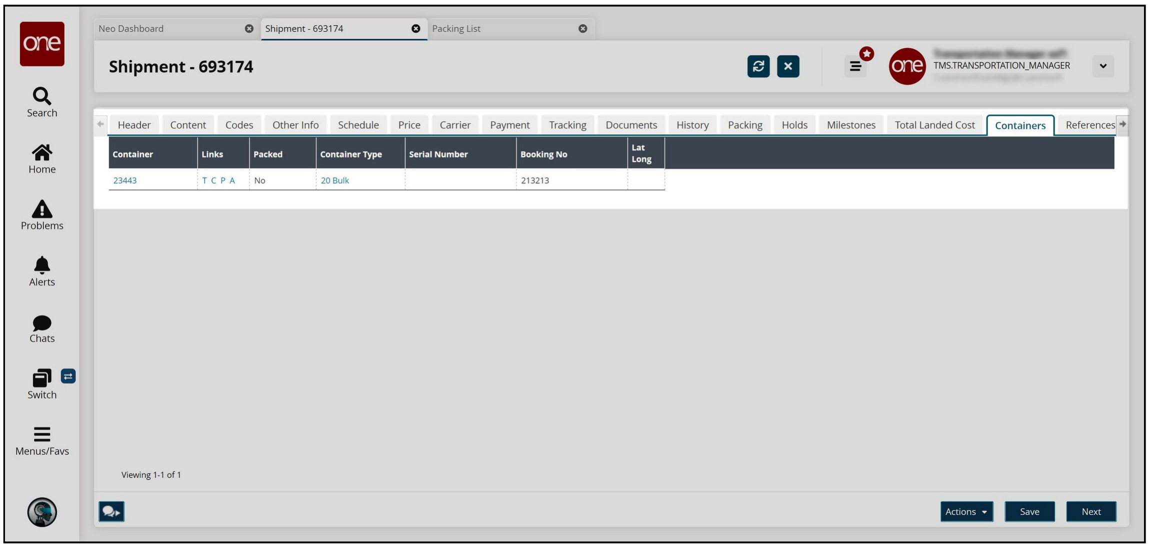
See the "Enhancement in the Movement Shipment Report to Identify the Movements Sent to Market Maker" section in the current version of the *Release Notes* for more information.

1.2.4.3 Viewing Shipment and Order Details from Packing List Screen

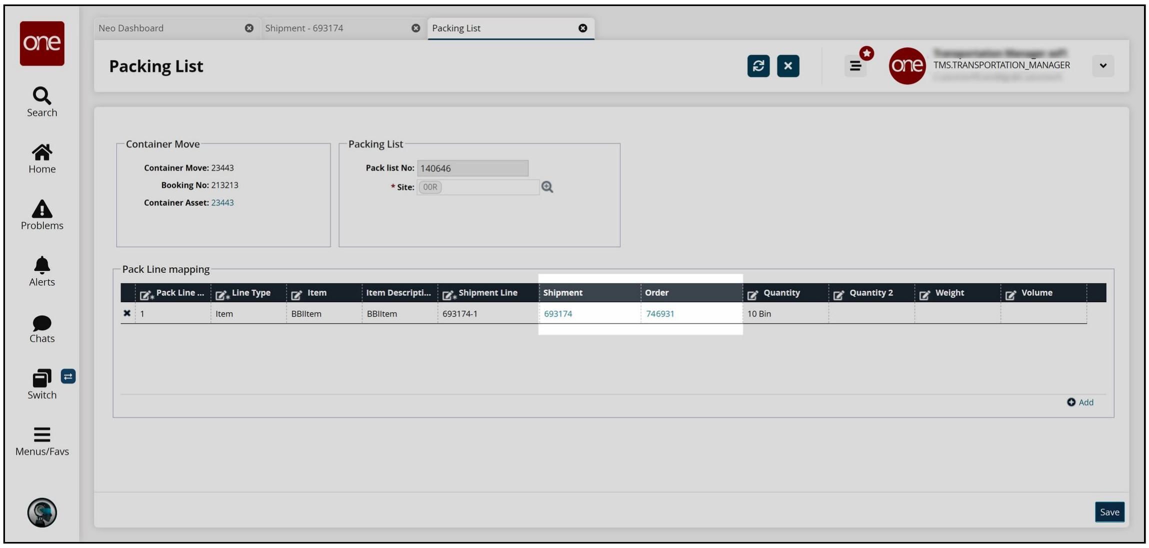
Users can now view the shipment and order details from the Packing List screen.

Complete the following steps to view shipment and order details from the Packing List screen:

1. Log in to the ONE system.
2. Search the desired shipment using the global search method.
   The search result screen appears.
3. Click the shipment number link to view shipment details.
   The shipment details screen appears.
4. Click the **Containers** tab.
5. Under the **Links** column, click **P**.
   The Packing List screen appears.



6. Click the shipment number link under the **Shipment** column to view the shipment details.
   The shipment details screen appears.
7. Similarly, click the order number link under the **Order** column to view the order details.
   The order details screen appears.



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

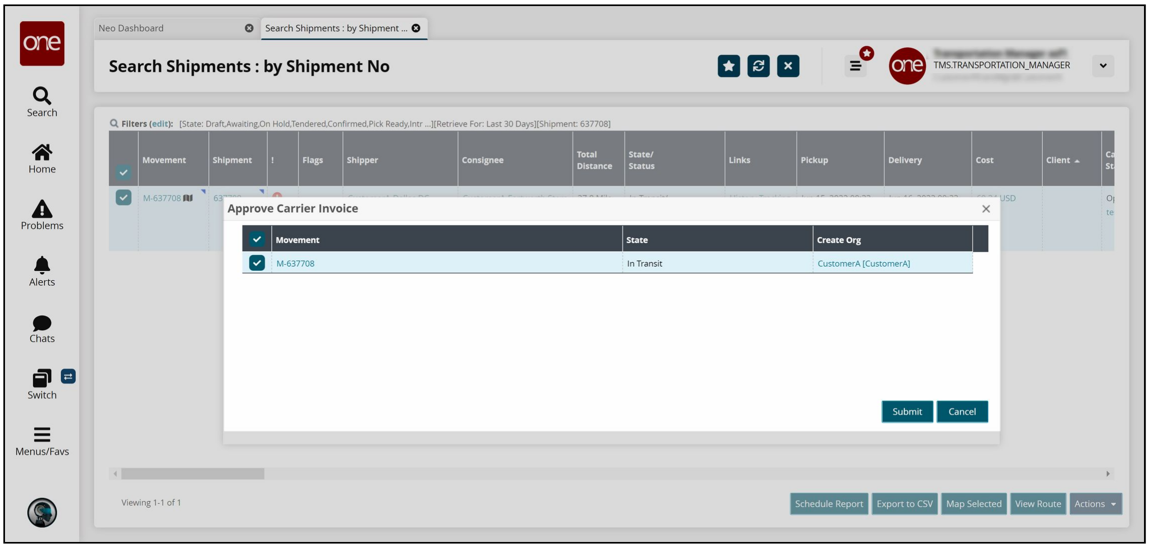
1.2.5 Financials

1.2.5.1 Approving Client and Carrier Invoices From Search Shipments Screen

Users can now approve client or carrier invoices in bulk from the Search Shipments screen.

Complete the following steps to approve the carrier invoices:

1. Log in to the ONE system.
2. Search the desired shipment(s) using the Global Search option.
   The search result screen appears.
3. Select the desired record, and click **Actions > Approve Carrier Invoice**.
   The Approve Client Invoice dialog box appears.



4. Select the desired movement and click **Submit**.
   A green success message appears in the popup window.
5. Click the **Close and Refresh** button.
   The shipment information is updated.

See the "Approve Client and Carrier Invoice from Search Shipment Screen" section in the current version of the *Release Notes* for more information.

1.3 Manufacturing

1.3.1 Demand Translation

1.3.1.1 Search Production Demand Forecast Detail Report

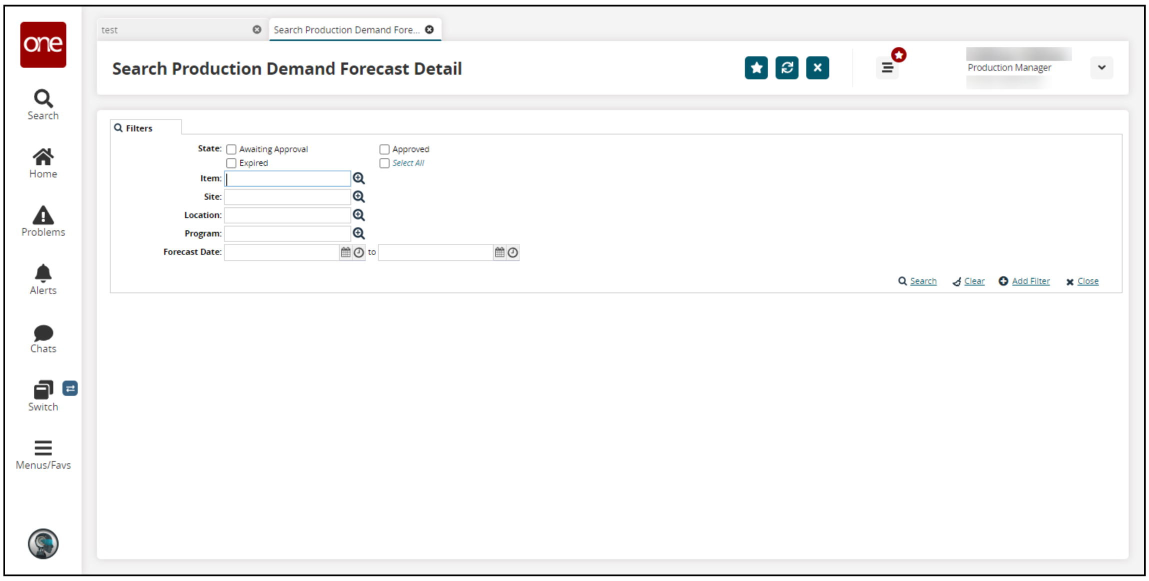
The Search Production Demand Forecast Detail report is available for Production Manager roles and displays production demand forecasts that are linked with work order forecasts. Only production demand forecasts with linked work order forecasts are displayed; if there are no linked work order forecasts, then no data is displayed.

Using this report and the Constrained Demand Translation engine, users can see how different raw materials and finished goods items affect the total production demand forecast. For example, if a user has a common raw material between two finished goods items and runs the CDT engine with the new parameter set to true, the engine generates production demand forecasts as an aggregated demand from both finished goods items. The user can then use the new Search Production Demand Forecast Detail report to view the percentage split of how each FG contributes to the total demand forecast.

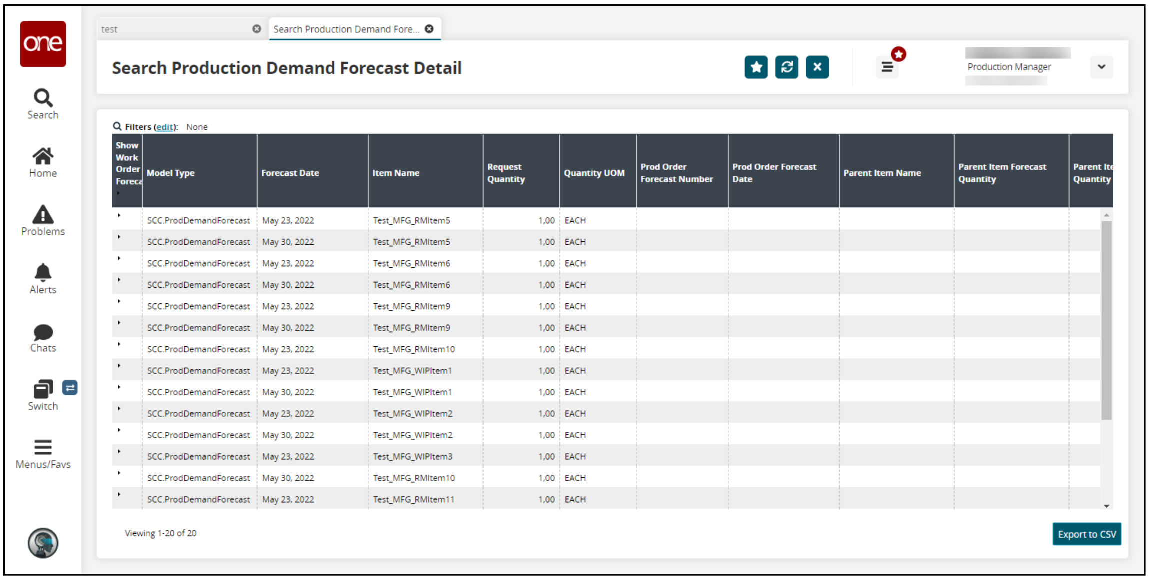
Complete the following steps to use the Production Demand Forecast Detail report:

1. Log in to the ONE system.

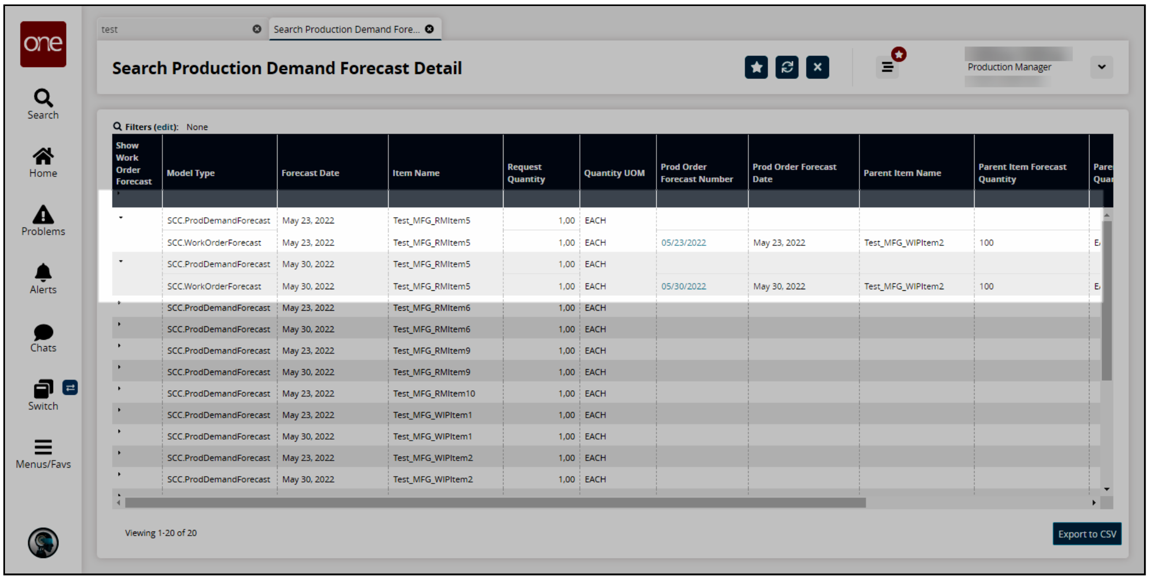
2. Click **Menu/Favs > Reports > Search Production Demand Forecast Detail**.
   The Search Production Demand Forecast Detail screen appears with the filters visible.



3. Select the desired filters and click the **Search** link.
   The search results appear.



4. Click a triangle in the **Show Work Order Forecast** column to view work order forecast details.
   Additional rows appear.



5. Clicking a link in the **Prod Order Forecast Number** column opens a details page about the selected production order forecast.
6. Click the **Export to CSV** button to export the report to a CSV file.

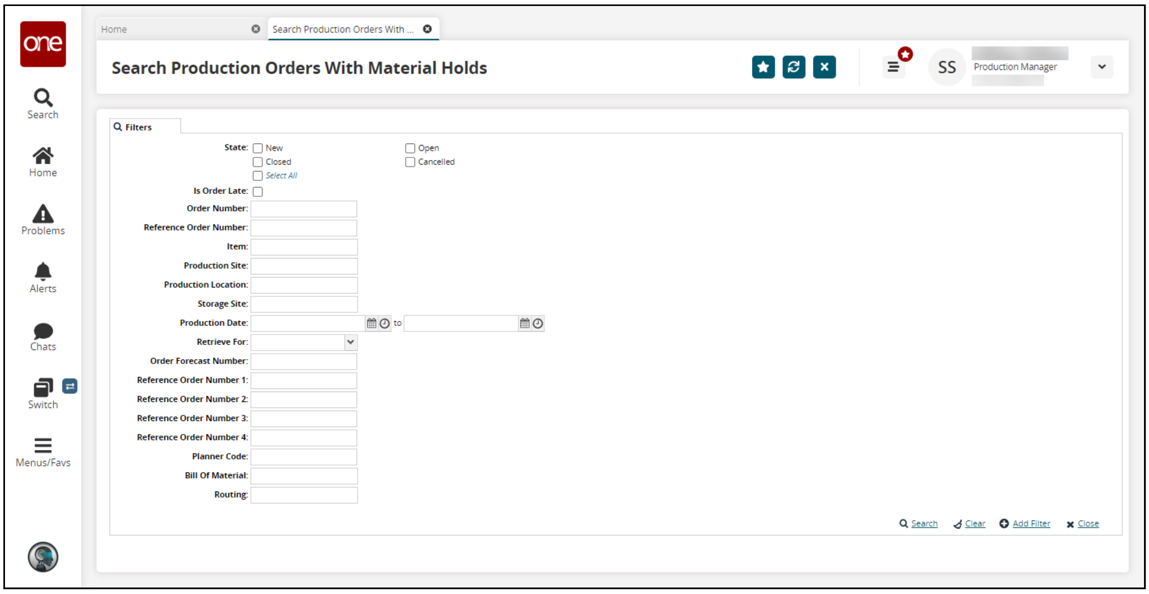
See the "Link Production Order Forecast to work order forecast of component" section in the current version of the *Release Notes* for more information.

1.3.1.2 Search Production Orders with Material Holds Report

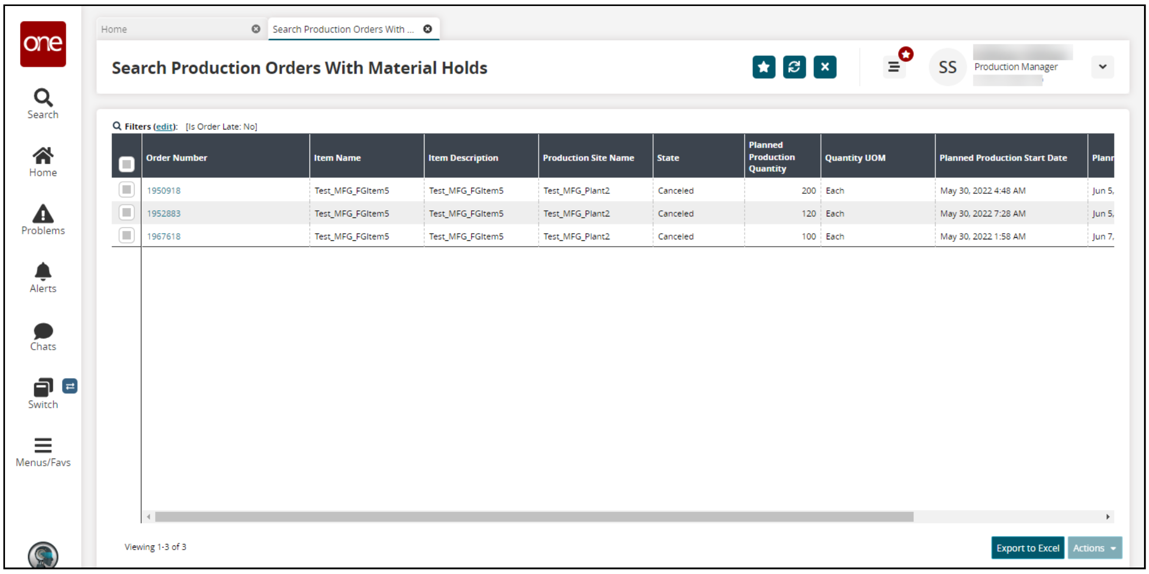
The Search Production Orders with Material Holds report allows users to search and view all production orders with material-related holds.

Complete the following steps to view the Search Production Orders with Material Holds report:

1. Log in to the ONE system.
2. Click **Menu/Favs > Production Planning > Production Order > Search Production Orders with Material Holds.**
   The Search Production Orders with Material Holds screen appears with the filters displayed.



3. Select your desired filters and click the **Search** link.
   The search results appear.



4. Check the box next to an order to select it, and click the **Actions** button.
   Options display based on the state of the order. See the table below.

State	Actions	Instructions
New	◦ Approve - The Approve popup displays. ◦ Cancel - The Cancel popup displays. ◦ Close - The Close popup displays. ◦ Update - The Update popup displays.	◦ Edit fields with the pencil icon as desired and click the Submit button. ◦ Click the Submit button. ◦ Edit fields with the pencil icon as desired and click the Submit button. ◦ Edit fields with the pencil icon as desired and click the Submit button.
Open	◦ Cancel - The Cancel popup displays. ◦ Close - The Close popup displays. ◦ Create Assemble Work Order - The Create Assemble Work Order popup displays. ◦ Create Production Work Order - The Create Production Work Order popup displays. ◦ Update Actuals - The Close popup displays.	◦ Click the Submit button. ◦ Edit fields with the pencil icon as desired and click the Submit button. ◦ Edit fields with the pencil icon as desired and click the Submit button. ◦ Edit fields with the pencil icon as desired and click the Submit button. ◦ Edit fields with the pencil icon as desired and click the Submit button.
Closed	Reopen - The Reopen popup displays	◦ Edit fields with the pencil icon as desired and click the Submit button.
Canceled	No actions are available for canceled items.	NA

5. Click an **Order Number** link to view order detail pages.
6. Click the **Export to Excel** button to export the current report to an Excel file.

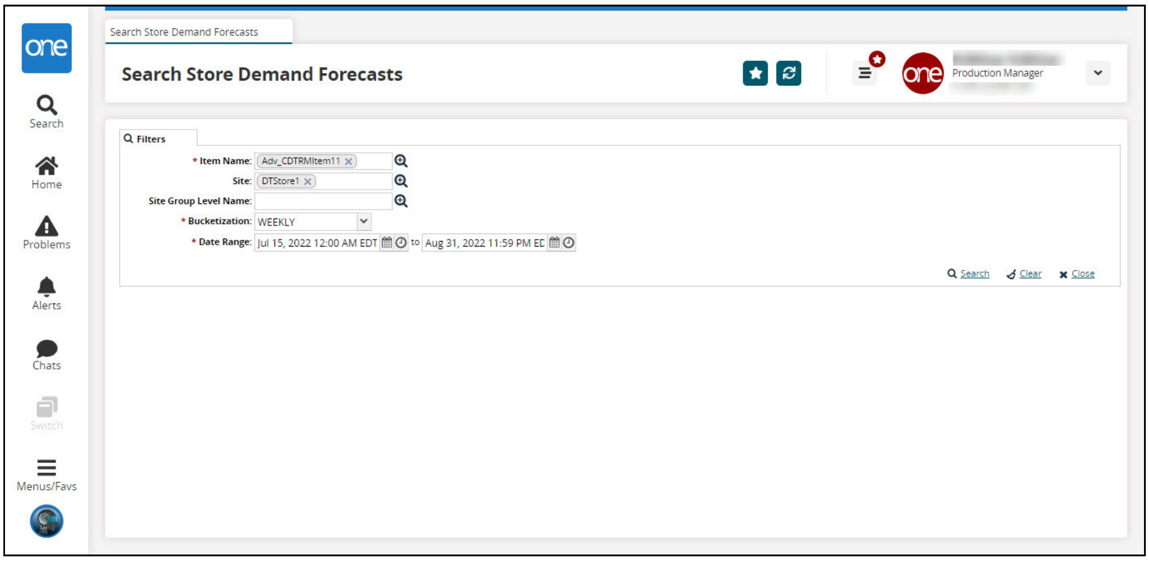
See the "Clear to Build report for Production Order" section in the current version of the *Release Notes* for more information.

1.3.1.3 Search Store Demand Forecasts Report

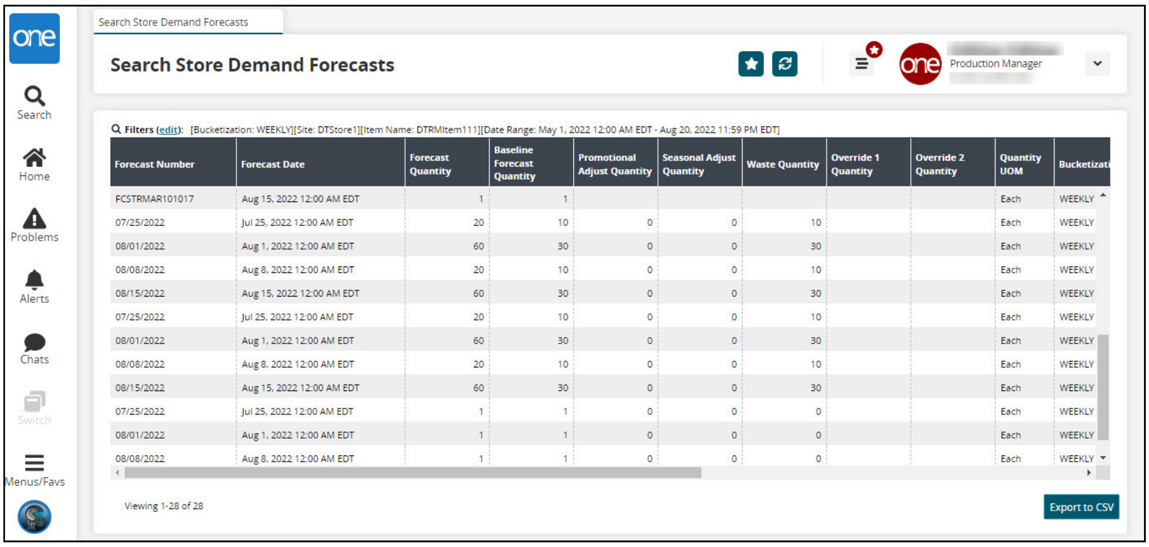
The Search Store Demand Forecasts report is available for Production Manager roles and displays the store demand forecasts that include an additional Waste Quantity column to display the waste component details. This report ensures that users have clarity and visibility of waste quantity for the site item for a specific forecast date.

Complete the following steps to view the Search Store Demand Forecasts report:

1. Log in to the ONE system.
2. Click **Menu/Favs** > **Reports** > **Search Store Demand Forecasts**.
   The Search Store Demand Forecasts report screen appears with the filters visible.



3. Select the desired filters and click the **Search** link. Fields with an asterisk (*) are required.
   The search results appear.



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

> The waste quantity is segregated from the Total Store Demand Forecast and displayed in the Waste Quantity column.

See the "Added Search Store Demand Forecasts Report" section in the current version of the *Release Notes* for more information.

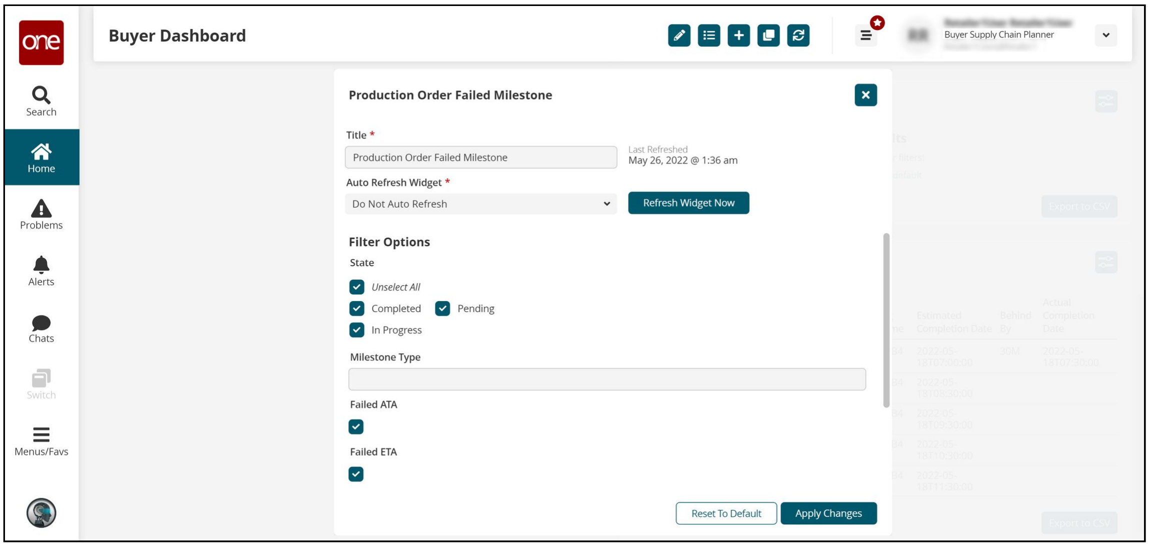
1.3.2 Production Management

1.3.2.1 Configuring Production Order Failed Milestone Widget

The Production Order Failed Milestone widget displays a list of the production orders with failed milestones.

Complete the following steps to configure the Production Order Failed Milestone widget:

1. Log in to the ONE system as a Buyer Supply Chain Planner.
2. Add the Production Order Failed Milestone widget to the dashboard using the Adding Widgets procedure.
3. Click the **FilterOptions** ( ) icon.
   The Production Order Failed Milestone filter pop-up window appears.
4. In the **Title*** field, enter the title of the widget.
5. For the **Auto Refresh Widget***, select the desired value from the drop-down list.
6. From the **Filter Options** section select the desired states to filter.
7. Enter or select a value for the **Milestone Type** field.
8. Select the filter options for Actual Time of Arrival and Estimated Time of Arrival as desired. The available options are **Failed ATA** and **Failed ETA**.
9. Click **Apply Changes**.



The widget displays the filtered data.

See the "Failed Milestone Visibility to Customers" section in the current version of the *Release Notes* for more information.

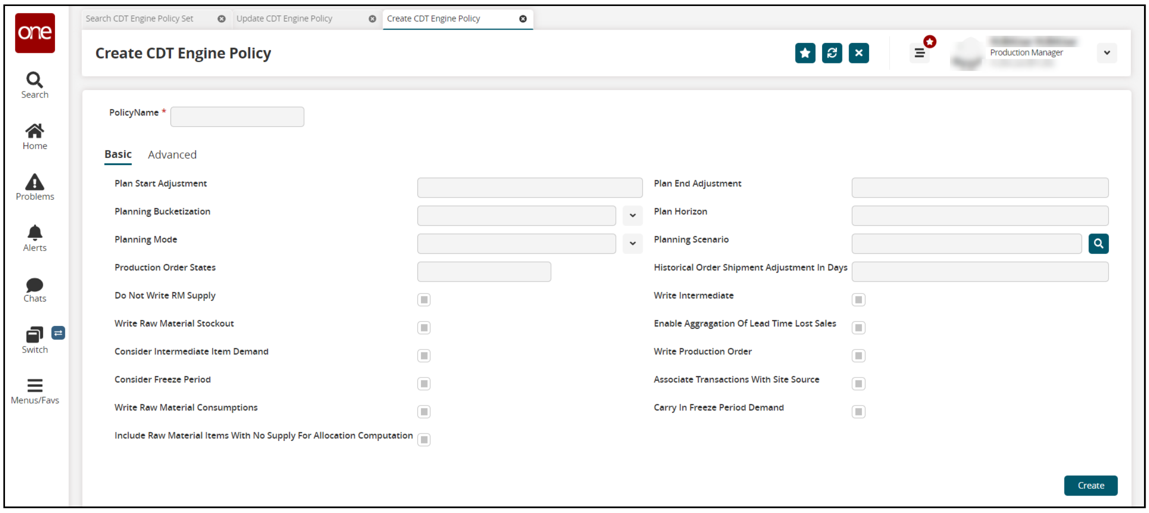
1.3.2.2 Creating CDT Engine Policies

Users can configure basic engine parameters via policies set for the Constrained Demand Translation (CDT) Engine.

> When the CDT Engine runs, any policy set overrides default engine parameters or the Intelligent Execution Management (IXM) Engine configuration.

Complete the following steps to create a new CDT engine policy:

1. Log in to the ONE system with the Production Manager role.
2. Click **Menu/Favs > Manufacturing Policies > Create CDT Engine Policy**.
   The Create CDT Engine Policy screen displays the Basic tab by default.



3. Enter values for the following fields. Fields with an asterisk (*) are required.

Field	Description
*Policy Name	Enter a unique name for the new policy.
Plan Start Adjustment	Enter the plan start adjustment value.
Planning Bucketization	Select a time bucket from the dropdown list.
Planning Mode	Select a planning mode from the dropdown list.
Production Order States	Enter the production order states as a filter for the engine run.
Do Not Write RM Supply	Check the box if you do not want to write raw material (RM) supply in the engine run.
Write Raw Material Stockout	Check the box if you wish to write raw material stockouts during the engine run.
Consider Intermediate Item Demand	Check the box if you wish the run to include intermediate item demands.
Consider Freeze Period	Check the box if you wish the run to include any freeze period.

Field	Description
Write Raw Material Consumptions	Check the box if you wish the run to write any raw materials consumed.
Include Raw Material Items With No Supply For Allocation Consumption	Check the box if you wish you include any raw materials that have no supply for allocation consumption in the engine run.
Plan End Adjustment	Enter a numerical value for the end adjustment of this plan.
Plan Horizon	Enter a numerical value for the plan's horizon.
Planning Scenario	Use the picker tool to search and select a planning scenario.
Historical Order Shipment Adjustment In Days	Enter the number of days to consider historical order shipment adjustments.
Write Intermediate	Check the box to have the engine write transactions for items that are in progress. The default is set to true.
Enable Aggregation Of Lead Time Lost Sales	Check the box if you wish to enable the aggregation of lead time for lost sales during the run.
Write Production Order	Check the box if you wish to convert the prod order forecast generated by the engine to production orders.
Associate Transactions With Site Source	Check the box if you wish the run to associate transactions with a site source.

Field	Description
Carry In Freeze Period Demand	Check the box if you wish to carry forward to future buckets any demand that is not satisfied during the freeze period.

4. Click the **Advanced** tab to enter values for the following fields:

Field	Description
Finished Goods Item Comparator	Select a value from the dropdown list as a comparison.
Maximum Hill Size	Enter a numerical value for the maximum hill size.
Relative MIP Gap Tolerance	Enter a numerical value for the gap tolerance associated with the relative MIP.
Time Limit In Seconds	Enter a numerical value for the time limit in seconds.
Build Ahead Number of Buckets	Enter a numerical value for the number of buckets in the build ahead scenario.
Late Production Discount Rate	Enter a numerical value for the discount rate on late production.
On Time Production Discount Rate	Enter a numerical value for the discount rate for on-time production.
Component Carry In Discount Rate	Enter a numerical value for the discount rate for any carry in components.
Round Down Factor	Enter a value as a factor to round down to.
Is Just In Time	Check the box if the run includes Just In Time items.
Solver Type	Select a solver type from the dropdown list.
Absolute MIP Gap Tolerance	Enter a numerical value for the gap tolerance of absolute MIP.
Max Bound	Enter a numerical value for the maximum bound.
Promise Shortage Threshold	Enter a numerical value for the threshold of promised shortages.

Field	Description
Fair Share Discount Rate	Enter a numerical value for the fair share discount rate.
Finished Goods Carry In Discount Rate	This field is deprecated. It was previously used to configure the optimizer.
Finished Goods Carry Round Down Discount Rate	This field is deprecated. It was previously used to configure the optimizer.
Disable Fair Share	Check the box if you wish to disable fair share calculations in the engine run.
Recalculate Capacity Consumption	Check the box if you wish to have a recalculation of capacity consumption made in the engine run.

5. Click the **Create** button.

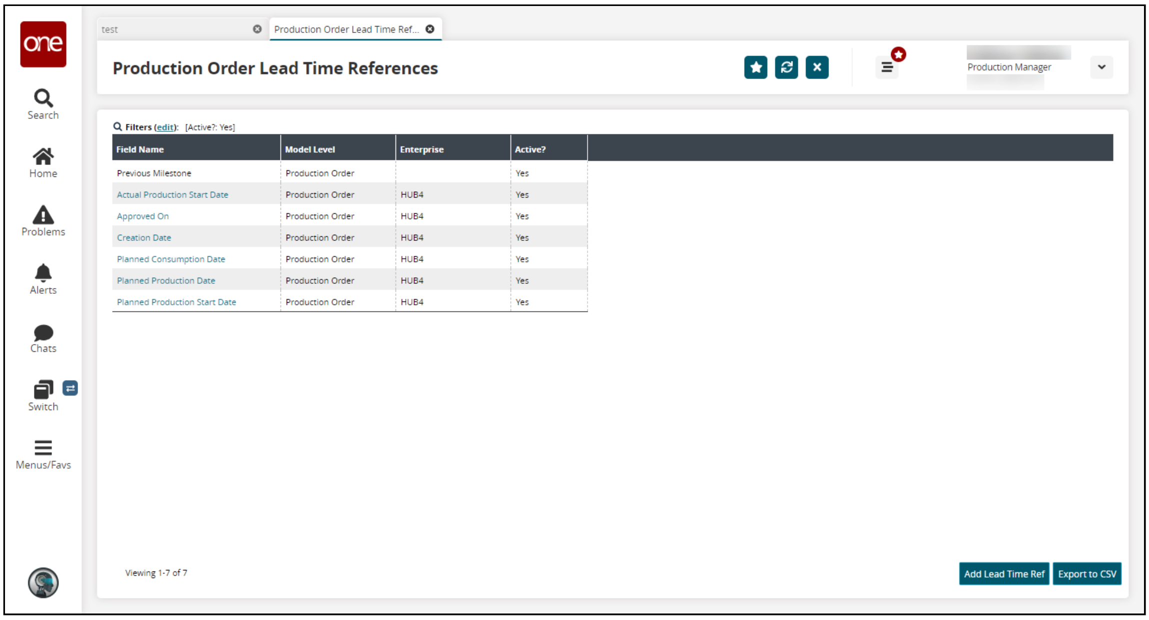
See the "Added Policy Setting for the CDT Engine" section in the current version of the *Release Notes* for more information.

1.3.2.3 Production Order Lead Time References Report

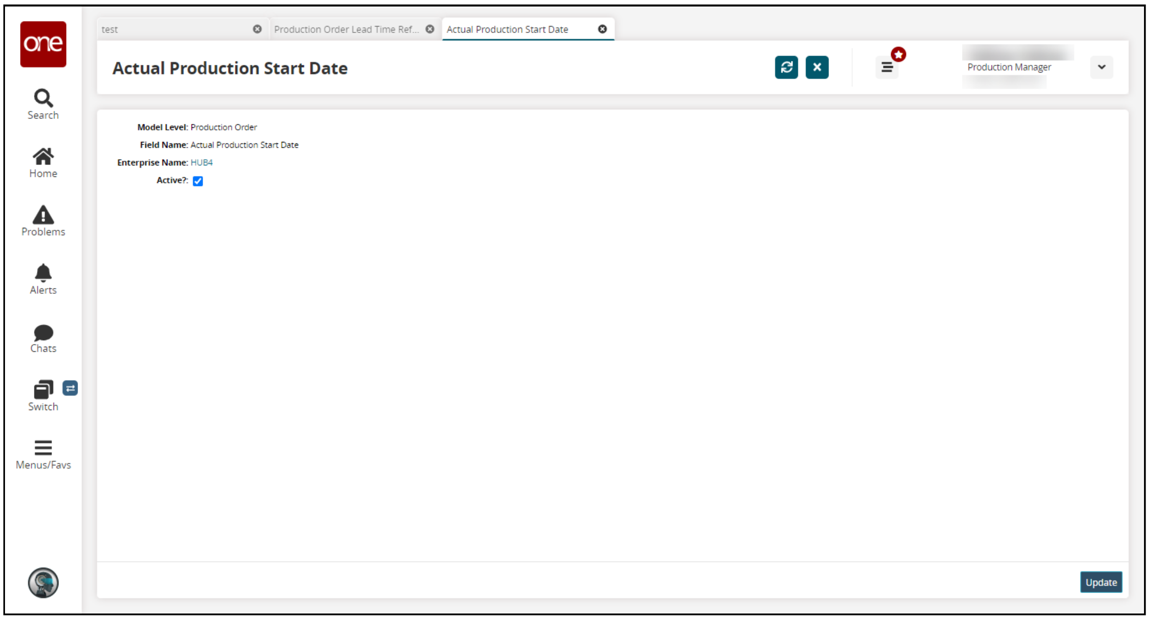
Factory Manager roles and Production Manager roles can create and update production orders related to reference lead times using the Production Order Lead Time References report. From this report, users can view existing lead time references for production orders in a table format, as well as create new lead time references

Complete the following steps to use the Production Order Lead Time References report:

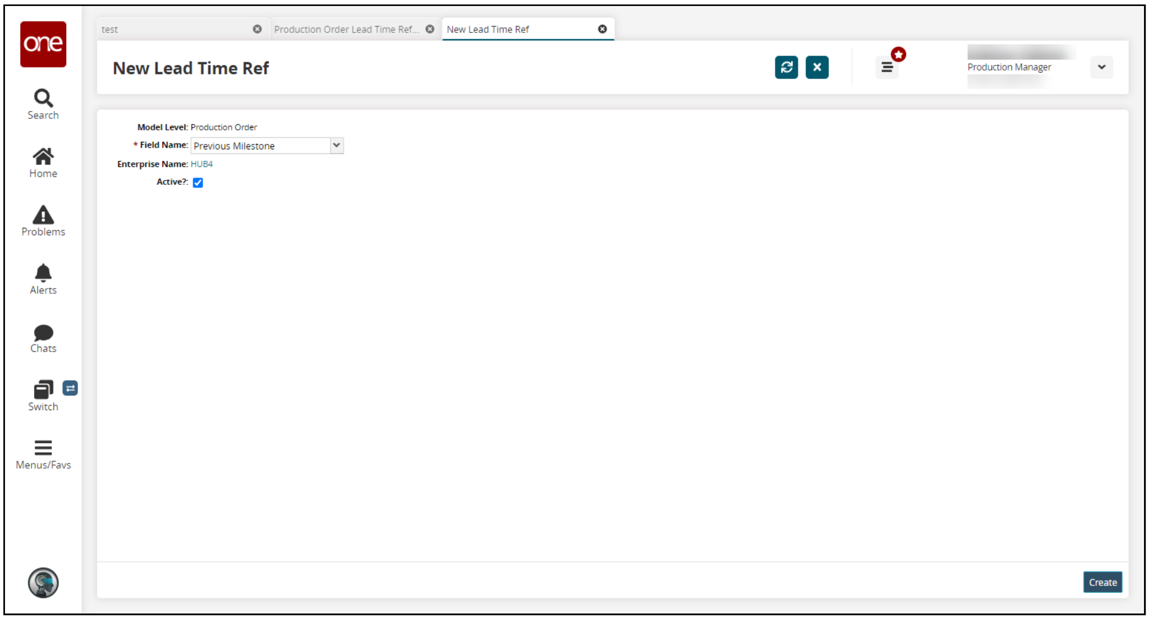
1. Log in to the ONE system.
2. Click **Menu/Favs > Production Planning > Production Order > Production Order Lead Time References**.
   The Production Order Lead Time References screen appears.



3. Click a **Field Name** link to view the details screen.
   The details screen appears.



4. Enable or disable the **Active?** field and then click **Update**.
   A green success message displays.
5. Returning to the Production Order Lead Time References screen, click the **Add Lead Time Ref** button to add new lead time references.
   The New Lead Time Ref screen appears.



6. Select a **Field Name** from the dropdown menu. Fields with an asterisk (*) are required.
7. Click the checkbox to enable or disable the **Active?** field.
8. Click the **Create** button.
   If the field name is unique, the lead time reference is created successfully. If it is not unique, an error message appears.

See the "Enhance MFG module to add lead time references via UI" section in the current version of the *Release Notes* for more information.

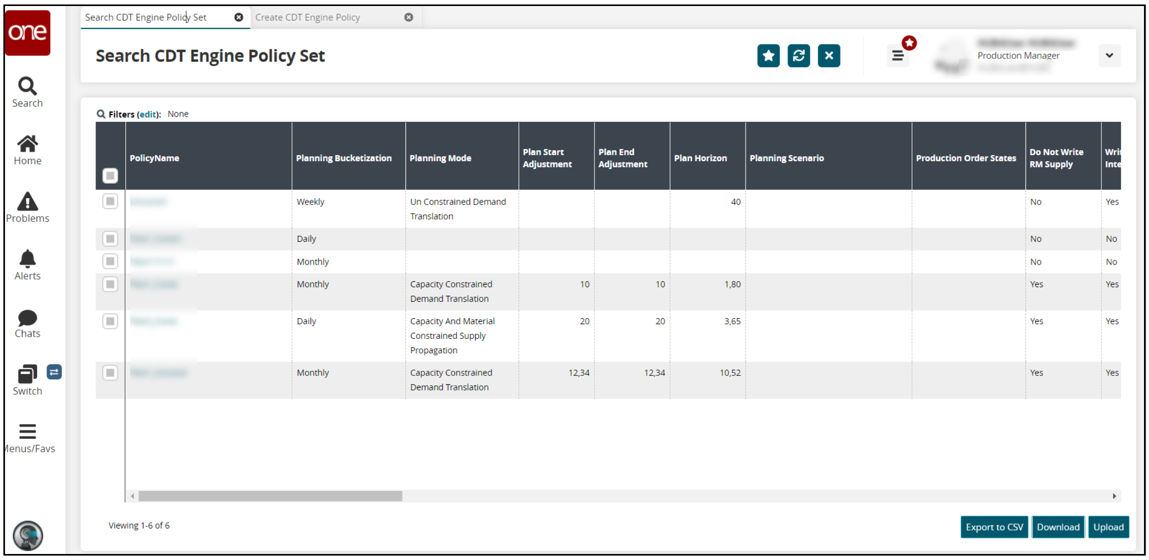
1.3.2.4 Searching CDT Engine Policies

Users can configure basic engine parameters via policies set for the Constrained Demand Translation (CDT) Engine.

> When the CDT Engine runs, any policy set overrides default engine parameters or the Intelligent Execution Management (IXM) Engine configuration.

Complete the following steps to search for CDT engine policies:

1. Log in to the ONE system with a Production Manager (manufacturing) role.
2. Click **Menu/Favs > Manufacturing Policies > Search CDT Engine Policies.**
   The Search CDT Engine Policies screen displays.



3. Click the link under **Policy Name** to open that policy's detail screen.
4. Click the **Export to CSV** button to export the existing policies to a CSV-formatted file.
5. Click the **Download** button to download the policies.
6. Click the **Upload** button to upload policies. See "Uploading Files" in the **Online Help** for more information.

   See the "Added Policy Setting for the CDT Enging" section in the current version of the *Release Notes* for more information.

1.4 NEO Platform

1.4.1 Specifying Max Attempts and Max Processing Time for Time-Based Workflows

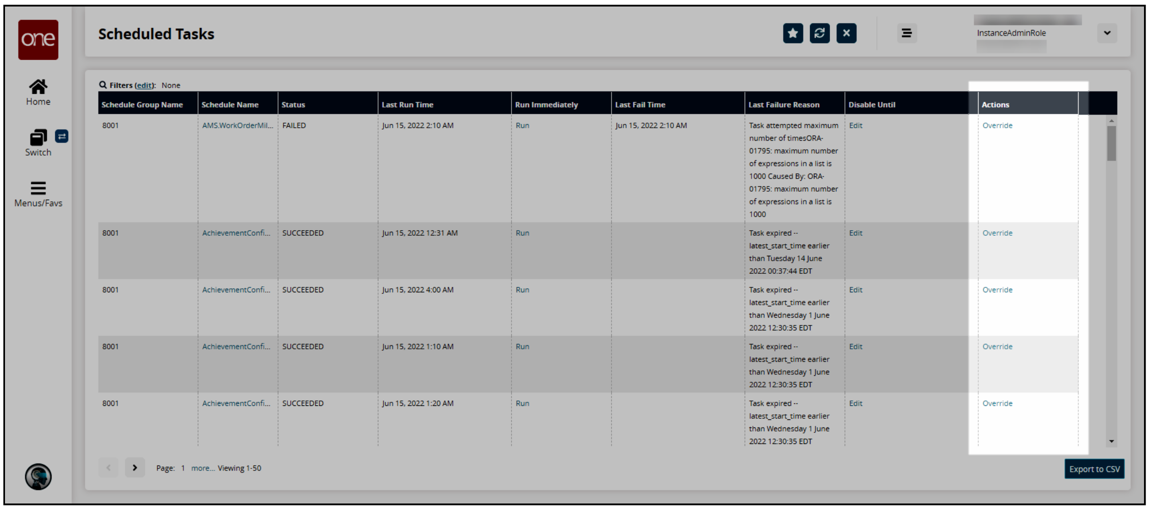
Instance Admin roles can specify the maximum number of attempts and maximum processing time when overriding a scheduled task entry; this is done through the new Max Attempt and Max Processing Time fields on the popup that appears when the Override action link is selected.

The Max Attempts field specifies how many attempts the system will make to run the scheduled tasks. The default value is either the configured value in the Module Process Template (MPT) or the default value of the MAX_ATTEMPTS column of the GRID_TASKS table. The Max Processing Time field specifies how long (in days, hours, and minutes) the system should allocate for the given scheduled tasks. The default value is either the configured value in the MPT or the value of MaxRunTimeMillis in the dvce-app-config.xml file.

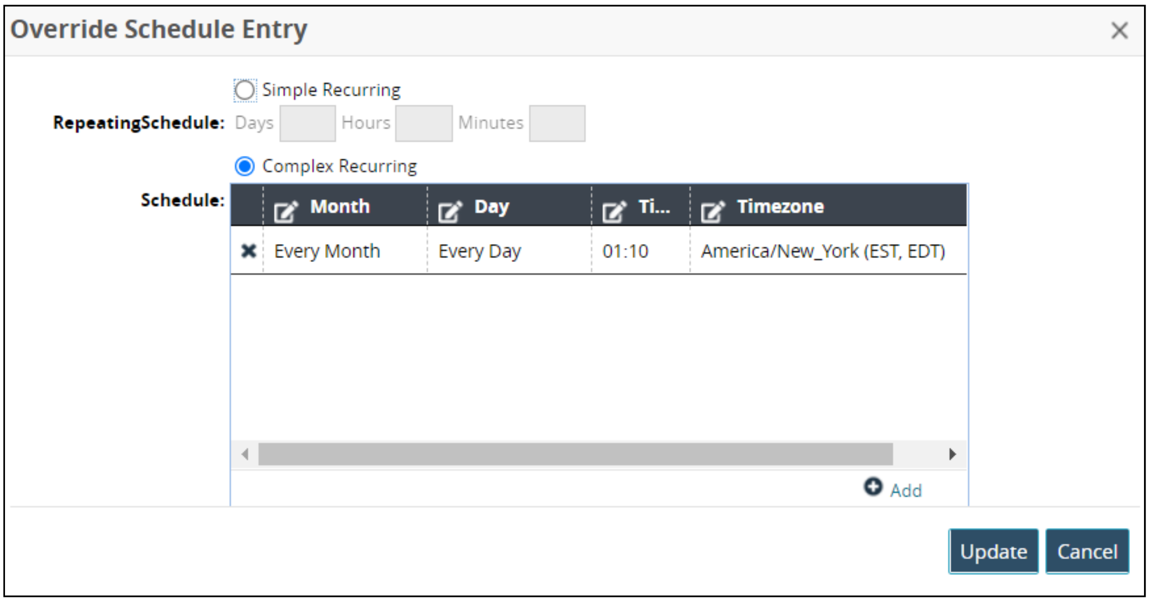
Complete the following steps to specify settings for time-based workflows:

1. Log in to the ONE system as an Instance Admin role.

2. Click **Menu/Favs > Grid > Grid Administration > Scheduled Tasks**.
   The Scheduled Tasks screen appears.
3. In the **Actions** column, click the **Override** link.



The Override Schedule Entry popup appears.



4. Complete the following fields.

Field	Description
Simple Recurring	Select this radio button to specify a simple recurring schedule.
Repeating Schedule	This field is only active if Simple Recurring is selected. Enter a number of days, hours, and minutes.

Field	Description
Complex Recurring	Select this radio button to specify a complex recurring schedule.
Schedule	This table is only active if Complex Recurring is selected. Click the Add link to add additional rows. Enter values in the Month, Day, Time, and Timezone fields.
Max Attempts	Select either Default or Custom from the dropdown menu. If Custom is selected, select a numerical option from the second dropdown menu.
Max Processing Time	Select either Default or Custom from the dropdown menu. If Custom is selected, enter the number of days, hours, and minutes.

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

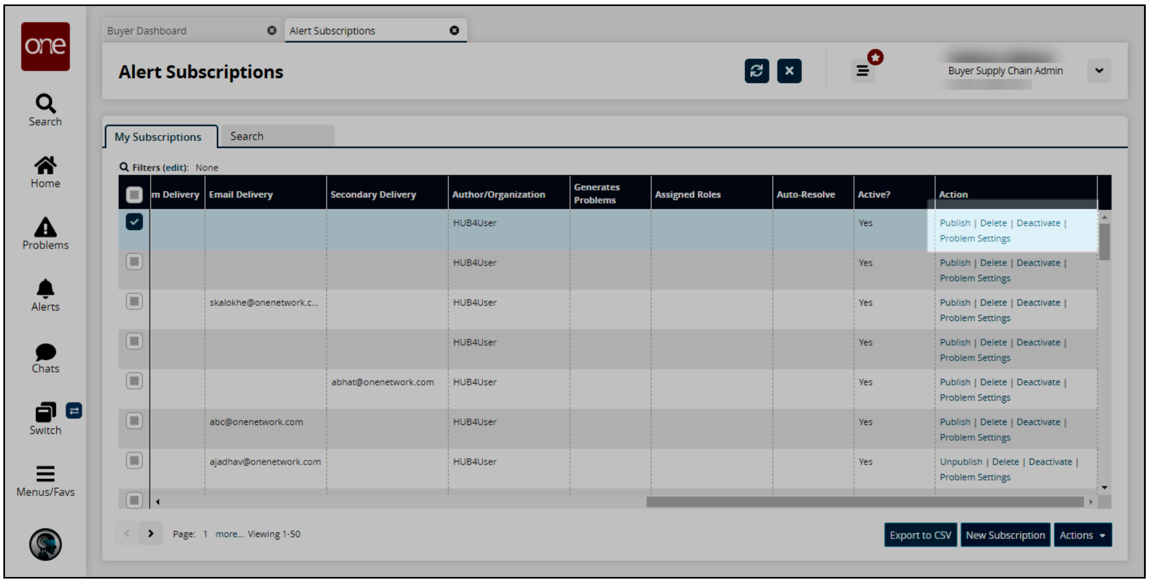
See the "Provision to update custom max attempt and max processing time for TBW through UI" section in the current version of the *Release Notes* for more information.

1.5 NEO UI

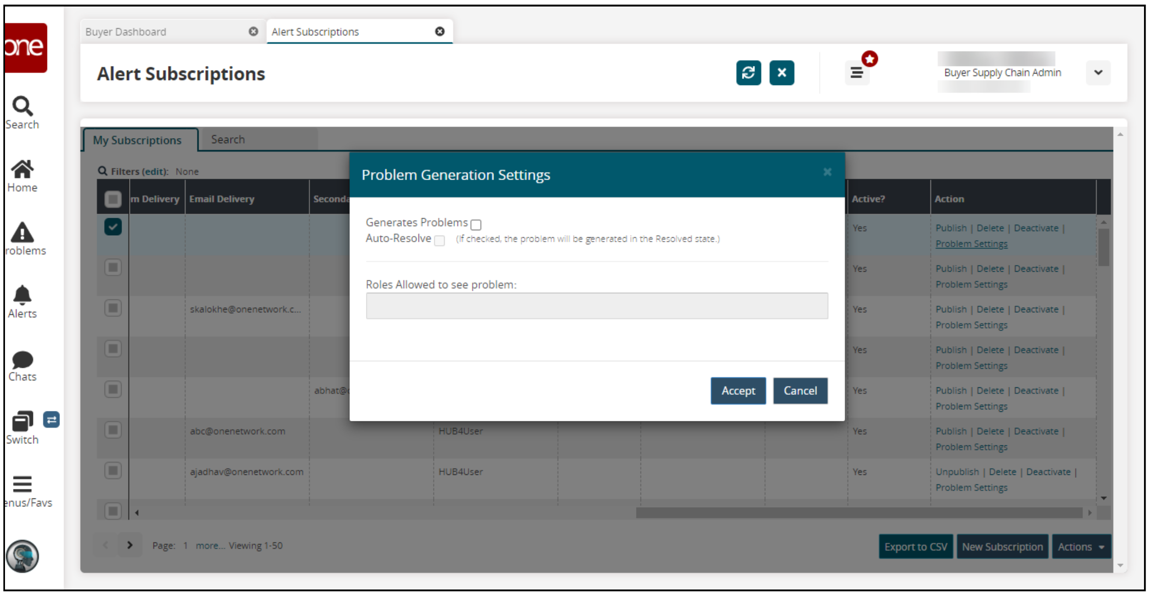
1.5.1 Auto-Resolving Problems for Existing Alert Subscriptions

Complete the following steps to quickly auto-resolve problems for existing alert subscriptions:

1. Log in to the ONE system.
2. Click **Menu/Favs > Tools > Alert Subscriptions**.
   The Alert Subscriptions screen appears.
3. Scroll to the right and click the **Problem Settings** link in the **Action** column.



The Problem Generation Settings popup window appears.



4. Select the **Generate Problems** checkbox to generate a problem every time the alert subscription is triggered.
5. Select the **Auto-Resolve** checkbox to auto-close each generated problem. This field is only active if the **Generate Problems** field is selected.
6. In the **Roles Allowed to See Problem** field, select which roles are allowed to see generated problems. This field is only active if the **Generate Problems** field is selected.

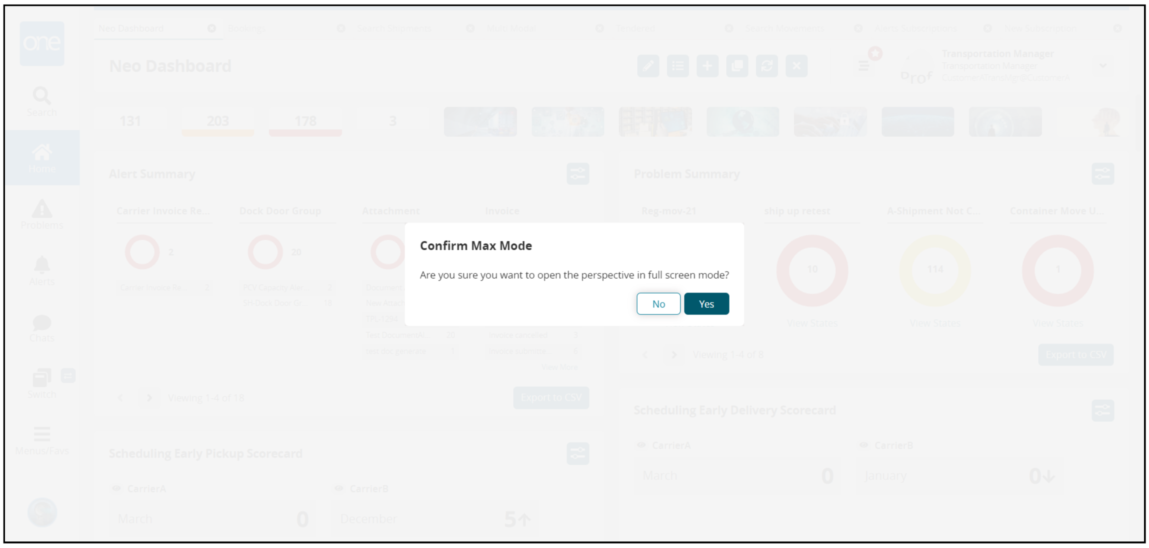
See the "Immediate problem resolution" section in the current version of the *Release Notes* for more information.

1.5.2 Using the Full-Screen Mode

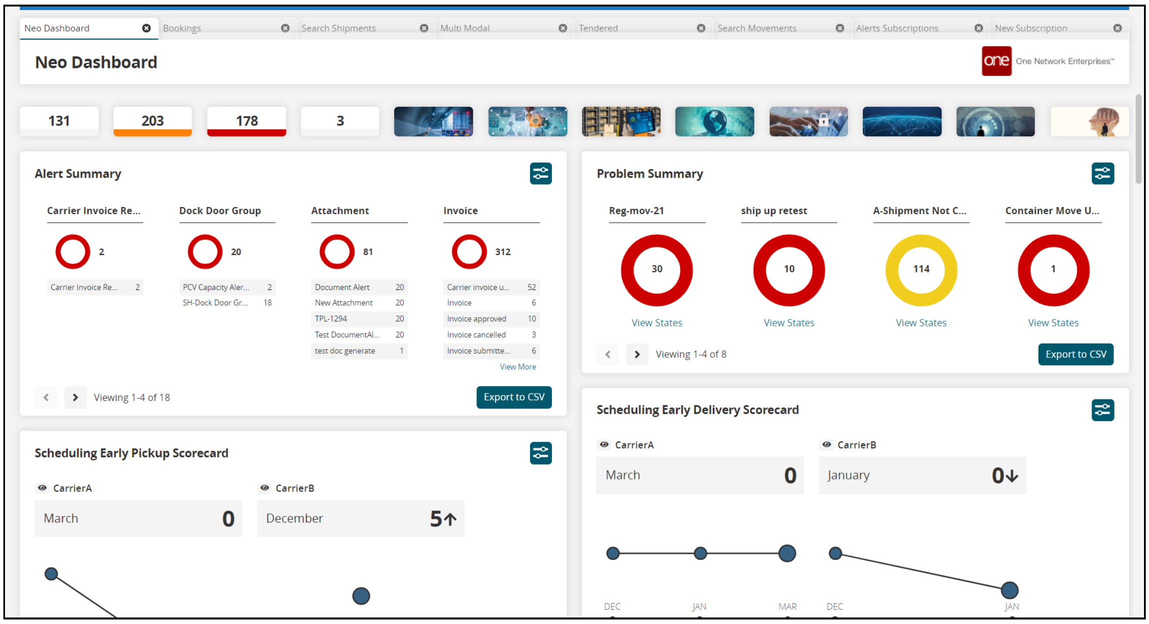
The full-screen mode hides the global sidebar and shows an updated header. This mode assists the user when projecting screens for demo purposes. Note that UI interactivity is not allowed during the full-screen mode.

Complete the following steps to use full-screen mode:

1. Log in to the ONE system.
2. Navigate to the screen you wish to display.
3. On the keyboard, press **Ctrl + Alt + m**.
   A confirmation popup displays.



4. Click **Yes**.
   The screen displays without the global sidebar and with an updated heading.



5. Press the **Esc** key to exit full-screen mode.

See the "Added a Shortcut to a Full-Screen Mode That Hides the Global Sidebar" section in the current version of the *Release Notes* for more information. Also, please see the "Viewing Keyboard Shortcuts" section in the current version of *Online Help.*

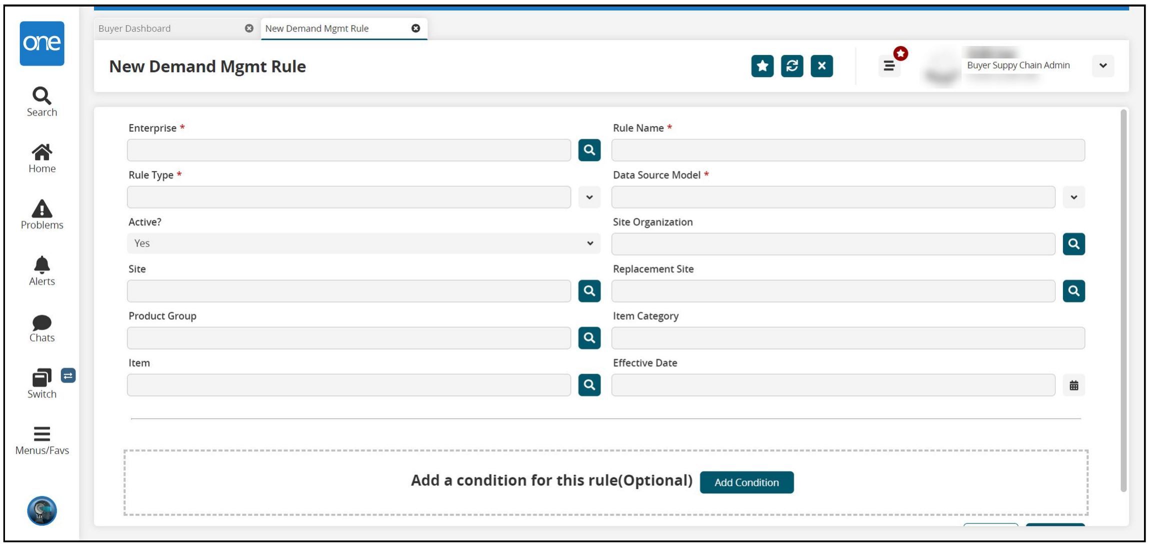
1.6 Optimization

1.6.1 Inventory Planning

1.6.1.1 Creating Demand Management Rules

Complete the following steps to create a demand management rule:

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

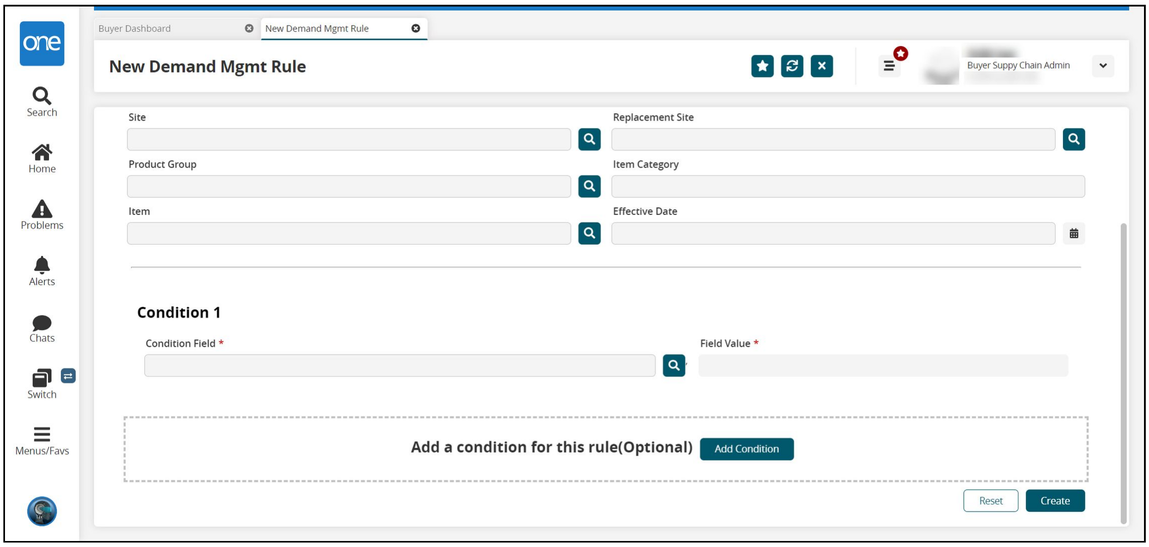


3. Complete the following fields. Fields with an asterisk (*) are required.

Field	Description
Enterprise *	Click the picker tool to select the enterprise.
Rule Name *	Enter a name for the new demand management rule.

Field	Description
Rule Type *	Select a rule type from the dropdown list. The options are Demand Exclusion and Demand Propagation.
Data Source Model *	Select a data source model from the dropdown list.
Active?	Select yes or no from the dropdown list to indicate whether the rule should be activated.
Site	Click the picker tool to select a site.
Product Group	Click the picker tool to select a product group.
Item	Click the picker tool to select an item.
Site Organization	Click the picker tool to select a site organization.
Replacement Site	Click the picker tool to select a replacement site.
Item Category	Enter an item category.
Effective Date	Click the calendar icon to select a date on which the rule should become active.

4. If desired, click the **Add Condition** button to add a condition for the new rule. A Condition 1 section appears.



5. In the **Condition Field** * field, click the picker tool to select the applicable field for the condition being added to the new rule.
6. In the **Field Value** * field, enter the value for the selected condition field. This field's format changes depending on the condition field chosen. For example, if Delivery Date is chosen for the condition field, the Field Value field displays a calendar icon for the user to select the date.
7. Click the **Add Condition** button as needed to add additional conditions to the rule.

8. Once the conditions have been added, click the **Create** button.
   A green success message appears, and the new rule is created.

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

1.6.2 Replenishment

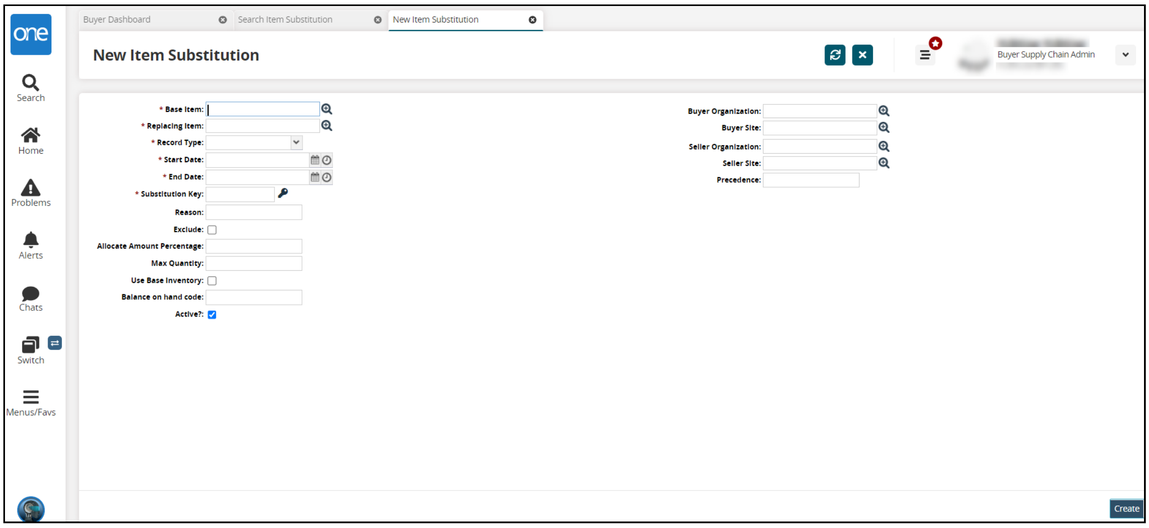
1.6.2.1 Creating Item Substitutions with the New Item Substitution Type: Substitute

In this release, ONE adds support in the Advanced Replenishment Engine for the Item Substitution Type called Substitute. Previously, ONE supported item substitution type, Phase In Phase Out, where base item A was replaced by substitute item B after a set parameter. During the engine run, both items and their various quantities were considered at the same time.

However, sometimes two items are substitutes for each other. So, when an item has an item substitution type Substitute, the engine now reads on hand, inbound, and outbound transactions (order, shipments, etc.) for substitute item B and considers item B's numbers in the pieces on hand (POH) calculation for base item A. Order Forecast generation is for the main item, but supply and demand are considered for both items. This helps users to map two items as substitutes for each other when both items are similar and where the order forecast should be generated for both items together.

Complete the following steps to create item substitutions to run order forecasts with the Advance Replenishment Engine:

1. Log in to the ONE system.
2. Click **Administration > Item > Search Item Substitution**.
   The Search Item Substitution screen displays.
3. Click the **New Item Substitution** button.
   The New Item Substitution screen displays.



4. Enter values for the fields in the table below. Fields with an asterisk (*) are required.

Field	Description
*Base Item	Use the picker tool to select the base item that items can be substituted for.
*Replacing Item	Use the picker tool to select the item that will replace the base item.
*Record Type	Select a record type from the dropdown list. In this case, select Substitution.
*Start Date	Use the calendar and clock tools to select a start date for the item substitution to occur.
*End Date	Use the calendar and clock tools to select an end date for the item substitution to occur.
*Substitution Key	Enter a substitution key or click on the key icon to user a system-generated key.
Reason	Enter text to explain the reason for this substitution.
Exclude	Check the box for an excluded item.
Allocate Amount Percentage	Enter a numerical value as a percentage for the allocation amount.
Max Quantity	Enter a numerical value for the maximum quantity.
Use Base Inventory	Check the box to use the base inventory for the substitution.

Field	Description
Balance On Hand Code	Enter the code corresponding to the balance on hand.
Active	Check the box to select an item in the Active state.
Buyer Organization	User the picker tool to select the buyer organization.
Buyer Site	User the picker tool to select the site from the buyer organization.
SellerSiteOrganization	User the picker tool to select the seller's organization.
Seller Site	User the picker tool to select the site from the seller's organization.
Precedence	Enter a numerical value for the precedence.

5. Click the **Create** button.
   A green success message displays.

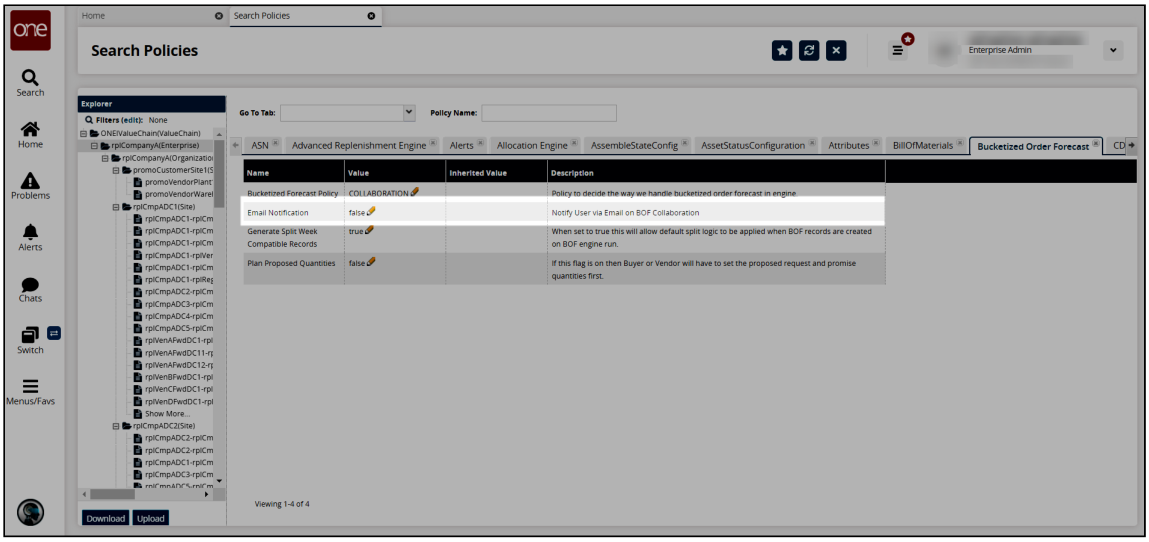
See the "Support for New Item Substitutions" section in the current version of the *Release Notes* for more information.

1.6.2.2 Enabling/Disabling BOF State Change Email Notification

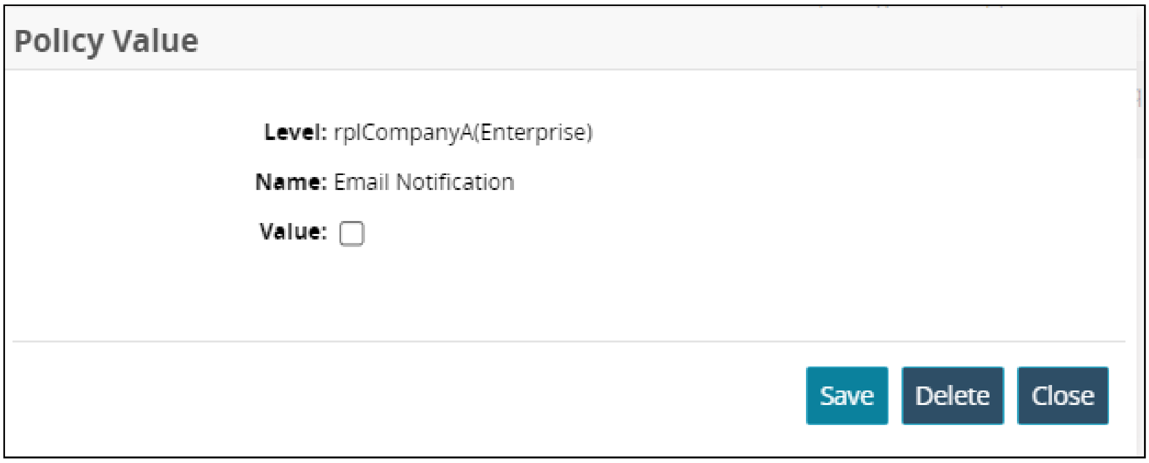
This policy allows Enterprise Admin users to turn on/off the email notifications for bucketized order forecasts (BOF) actions and state changes for buyer and vendor users. Enterprise Admin users can change the policy to enable or disable email notifications for an enterprise; however, the policy is disabled with no emails by default. Instead, users subscribe to alerts and report notifications for updates.

Complete the following steps to enable/disable BOF email notifications:

1. Log in to the ONE system as an Enterprise Admin.
2. Click **Menu/Favs > Administration > Search Policies.**
   The Search Policies screen displays.
3. Select the **Bucketized Order Forecast** tab by selecting from the **Go to Tab** dropdown, typing in the **Policy Name** field, or clicking the arrow icons to locate the tab.
   The Bucketized Order Forcast tab displays BOF policies.



4. In the **Value** column, click the cell for **Email Notification.**
   The Policy Value popup window displays.



5. Check or uncheck the **Value** checkbox.
   • **False** (unchecked) to turn off the notifications
   • **True** (checked) to turn them on
6. Click the **Save** button.
   The setting for the policy is saved.

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

1.7 Order Management

1.7.1 Databot

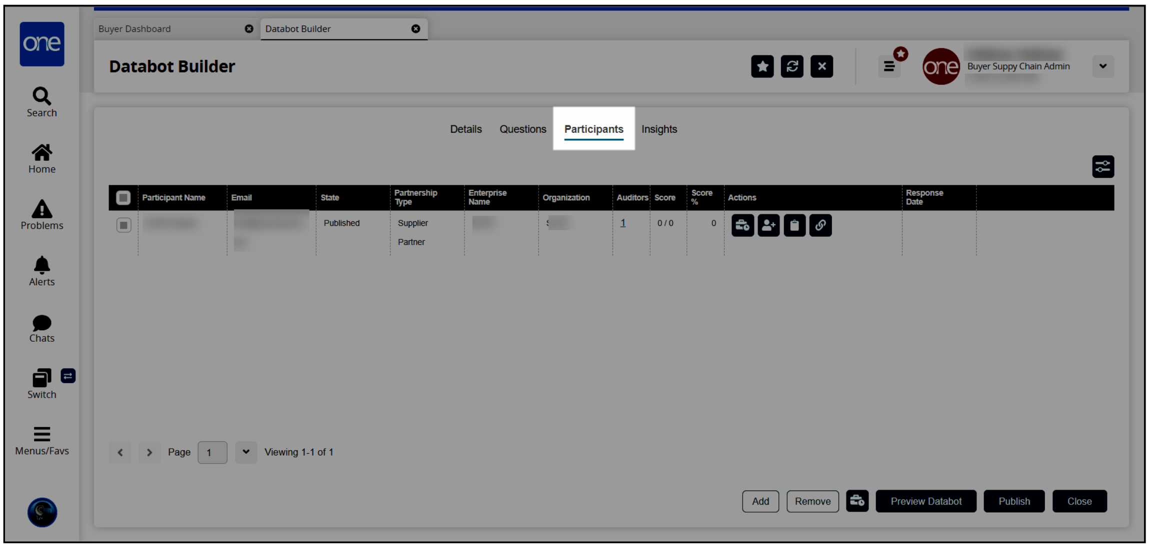
1.7.1.1 Creating a Databot with Auditors

Databot creators and participants can add auditors to a databot to audit participant responses. Each participant's response can be assigned to one or more auditors.

> **Note**
>
> This topic describes how databot creators can add auditors. Participants can add auditors by selecting a databot and clicking the **Add Auditors** action under the **Actions** column on the **My Databot** screen.

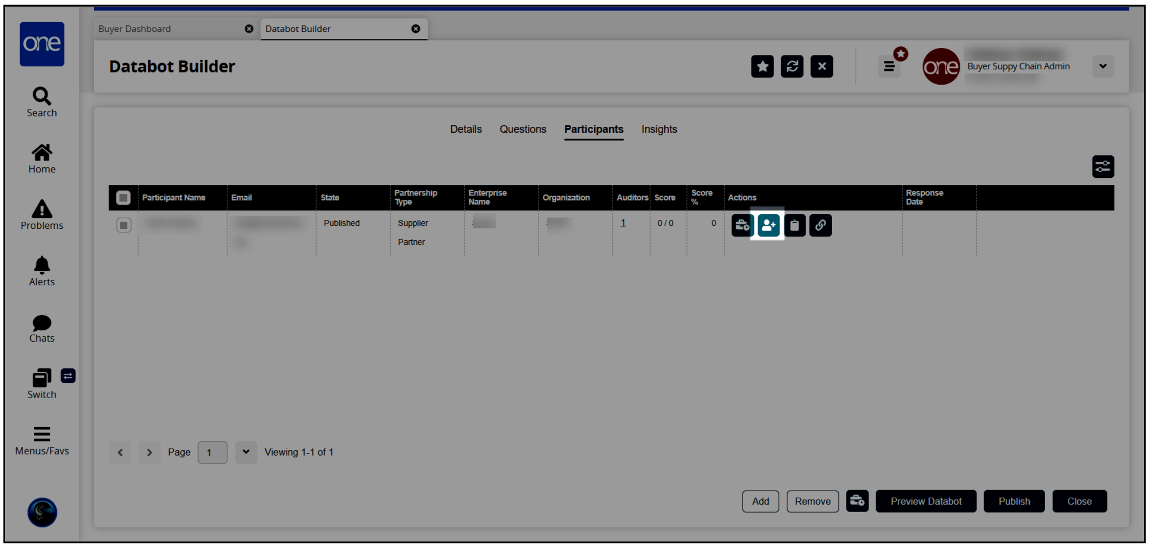
Complete the following steps to add auditors while creating a new databot:

1. Log in to the ONE system.
2. Create and publish a **With Audit** databot.
   See the "Creating a Databot Using the Databot Builder" section in the *Online Help* for more information.
3. To add auditors for a participant, click the **Participants** tab.

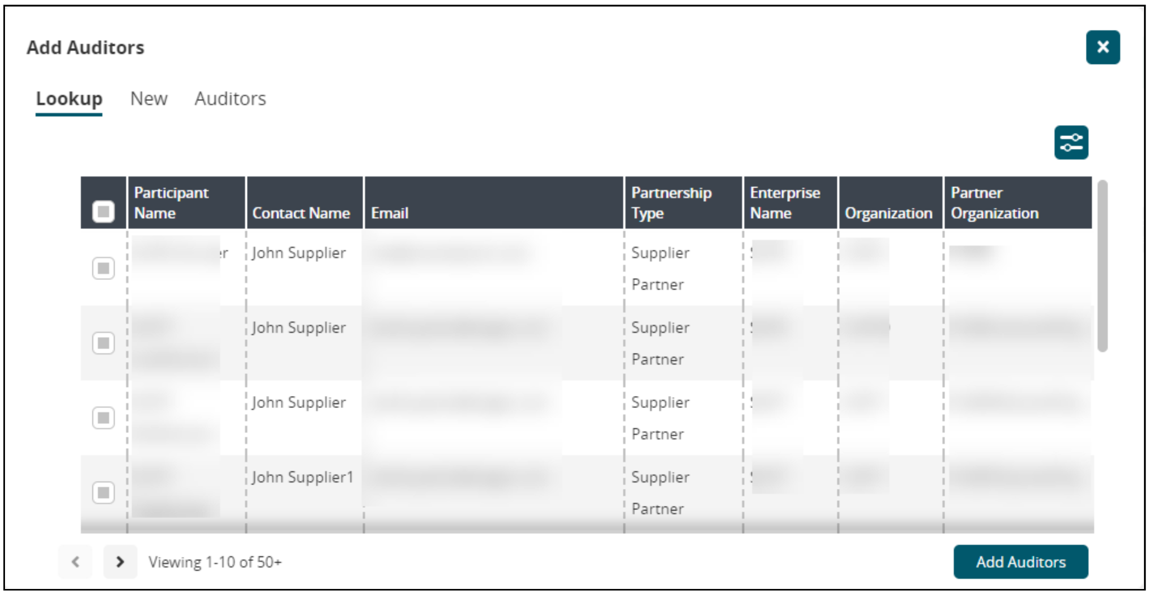


4. In the **Actions** column, click the **Add Auditors** icon.

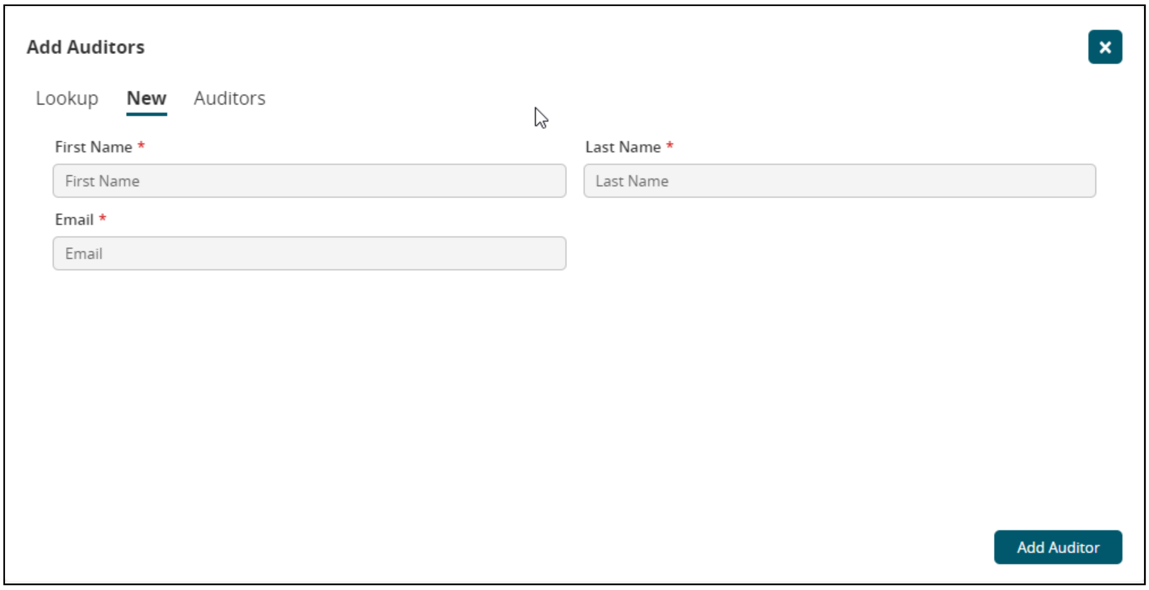
> Note that the databot must be published before the **Add Auditors** icon appears.



The Add Auditors popup screen appears.



5. Select an existing user and click **Add Auditors** to add them as an auditor for the selected participant.
6. To add a new auditor, click the **New** tab.



7. Enter the **First Name**, **Last Name**, and **Email** of the person you want to add as an auditor.
8. Click **Add Auditor** to add the auditor.
   Auditors can access the databots they have been added to as auditors on the My Databots screen.
9. Click the **Auditors** tab to view current auditors for the databot.

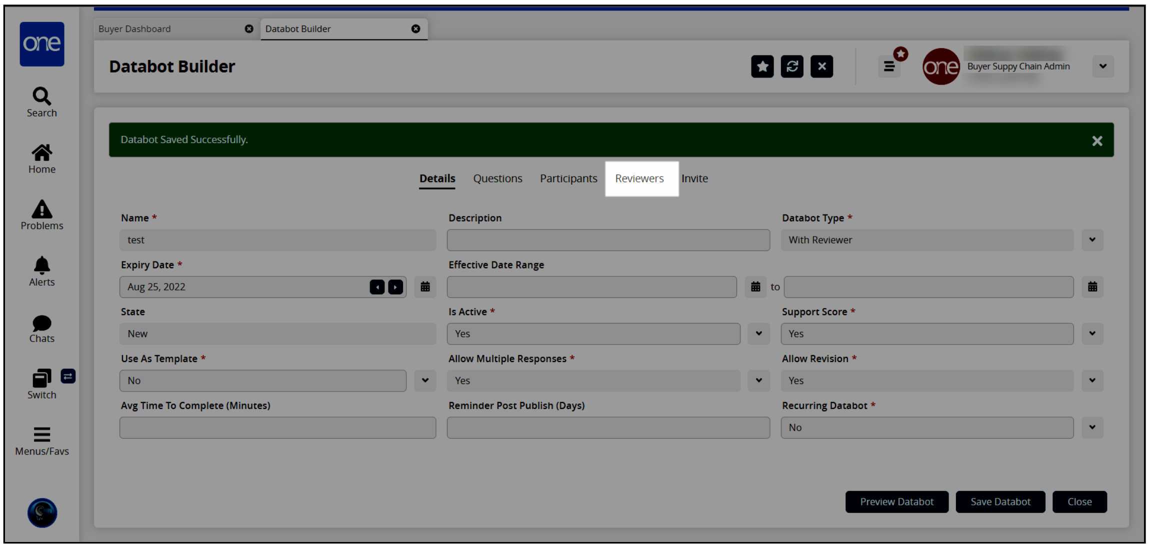
See the "New Databot Types Support New Roles" section in the current version of the *Release Notes* for more information.

1.7.1.2 Creating a Databot with Reviewers and Reviewing Participant Responses

Databot creators can add a reviewer by selecting the With Reviewer type while creating a new databot, and a new tab allows the creator to add the reviewers.

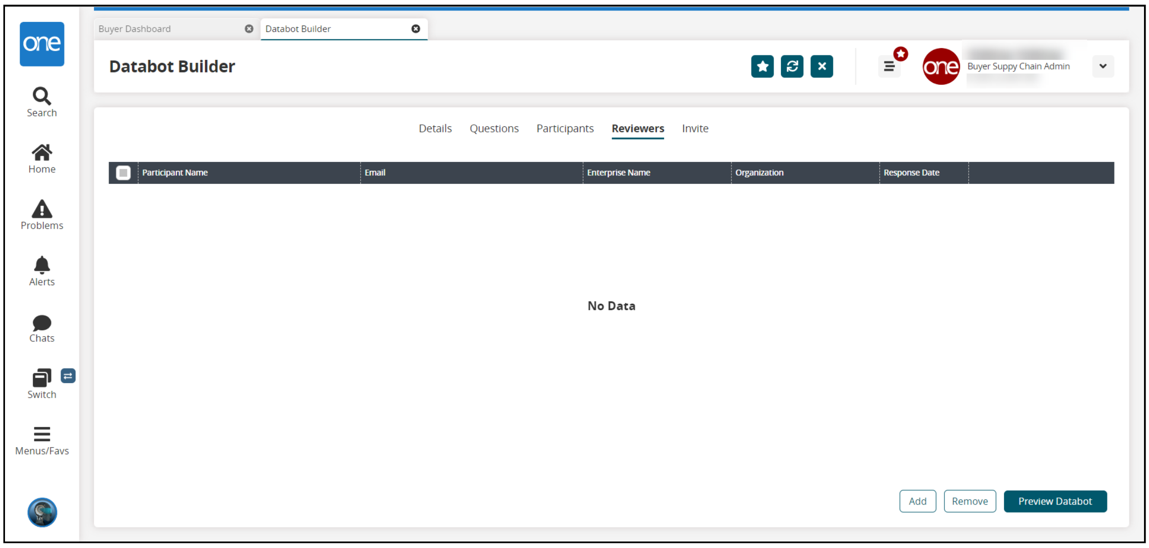
Complete the following steps to create a databot with reviewer(s):

1. Log into the ONE system.
2. Click **Menus/Favs** > **Tools** > **Databot** > **Databot Builder**.
3. Create a databot and select **With Reviewer** in the **Databot Type** field. See the "Creating a Databot Using the Databot Builder" section in the *Online Help* for information on creating a databot.
   The Databot Builder screen displays with a Reviewers tab.

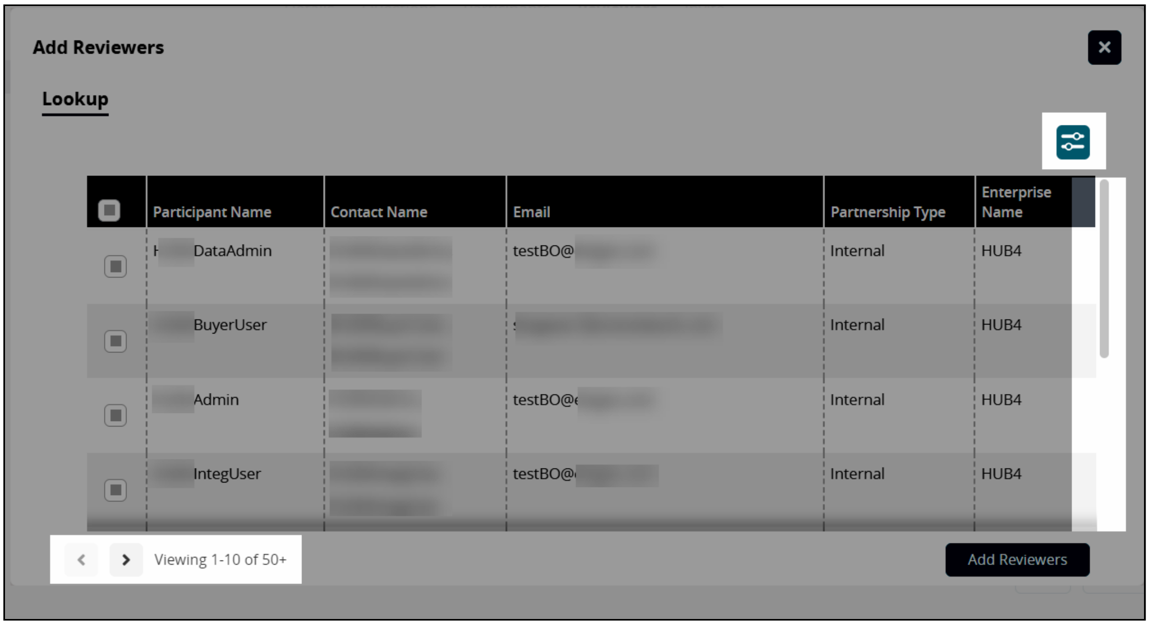


Adding Reviewers

1. Click the **Reviewers** tab.
   The Reviewers tab displays.



2. Click the **Add** button.
   The Add Reviewers popup window appears.



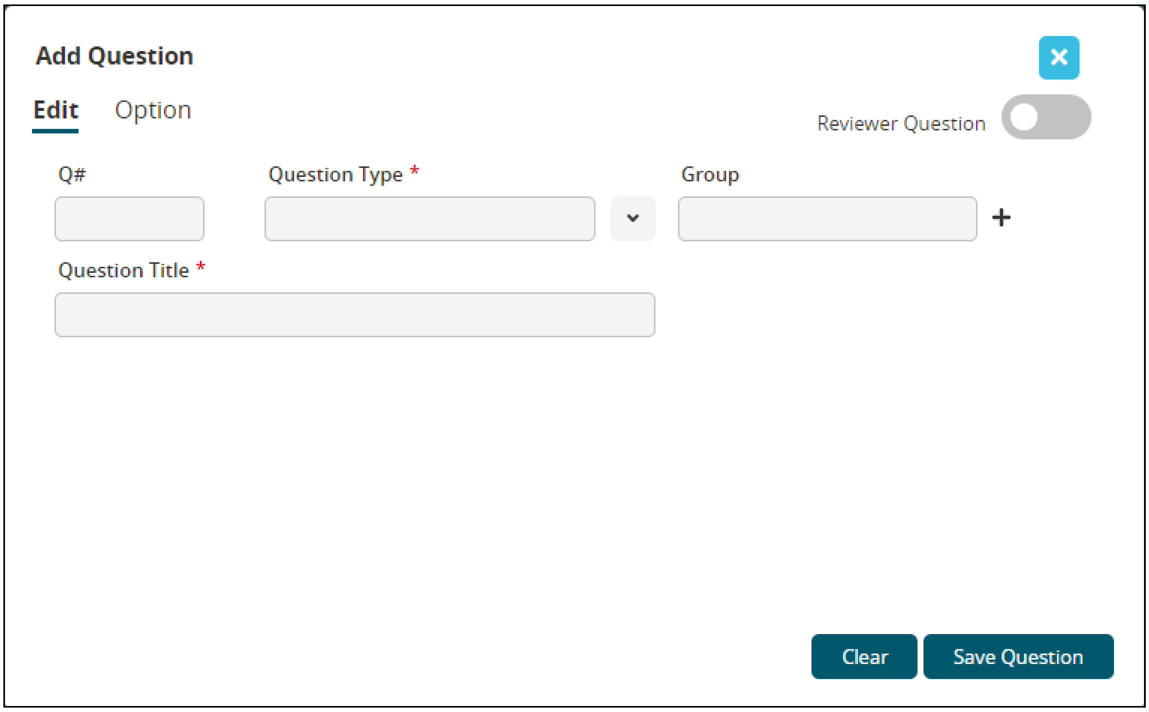
3. Use the filters icon, the pagination tools, or the scroll bar as highlighted above to locate the participants you want add as reviewers.
4. Click the checkbox for the selected participants.
5. Click the **Add Reviewers** button.
   A success message appears, and the Reviewers tab updates with the selected participants listed.
6. To remove a particpant as a remover, click the checkbox for the desired participant on the **Reviewers** tab.
7. Click the **Remove** button.
   The Reviewers tab updates.

Adding Questions for Reviewers

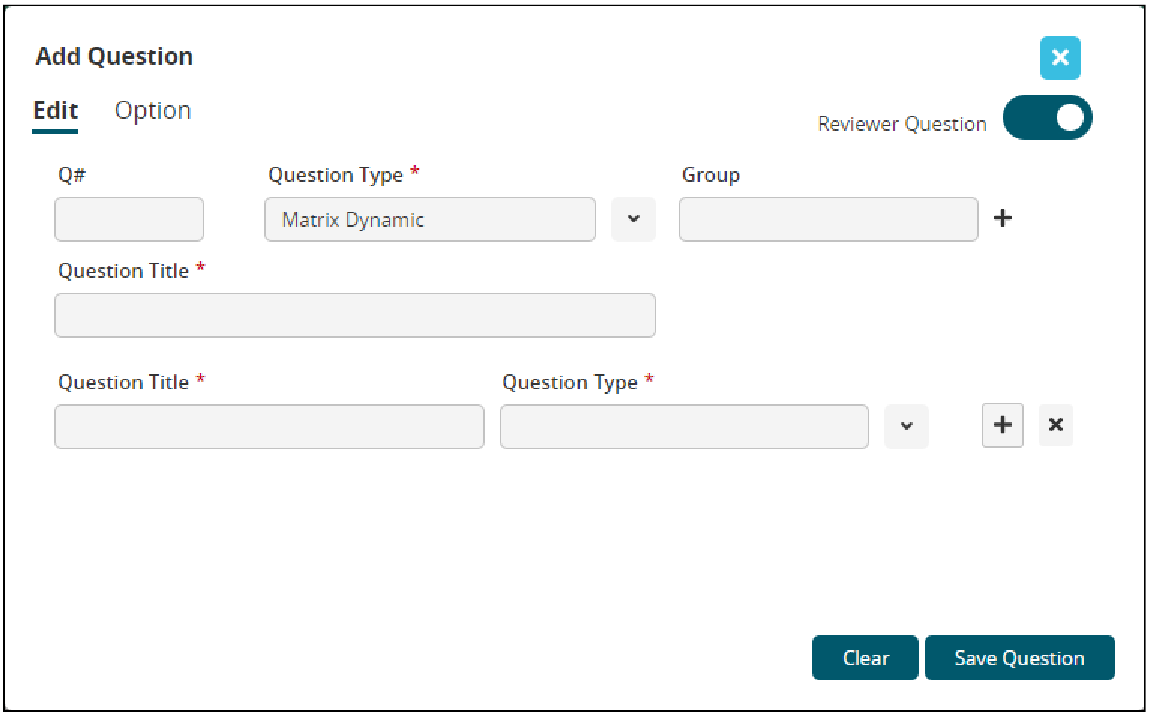
When you create a databot with reviewers, you can create questions for reviewers. These questions are visible only to the reviewers and are not considered in the databot insights.

Complete the following steps to add a question for a reviewer:

1. Click the **Questions** tab and then click **Add Question**.
   The Add Question popup screen appears:



2. To mark the question for the reviewer, toggle the **Reviewer Question** option on. The screen updates with additional fields.



Field	Description
Q#	Enter question number.

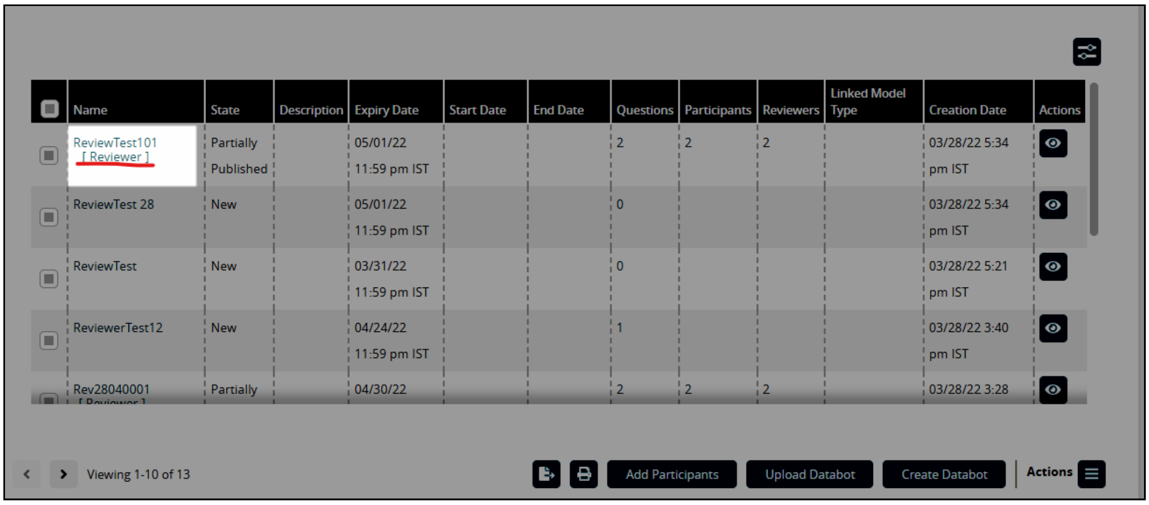
Field	Description
Question Type *	Select a question type from the dropdown list. Only the following question types can be marked as reviewer questions: ◦ Matrix Dynamic ◦ Text ◦ Comment ◦ Rating ◦ Number
Group	Click the plus sign to add a category for the question.
Question Title *	Enter the main question.
Question Title *	Enter another question (sub-question) to be viewed only by the reviewer.
Question Type *	Select a question type for the sub-question from the dropdown list.

3. Click the **Add** (+) icon to add more sub-questions.
4. Click the **x** icon to remove a sub-question.
5. Click **Save** to save the questions for reviewers.

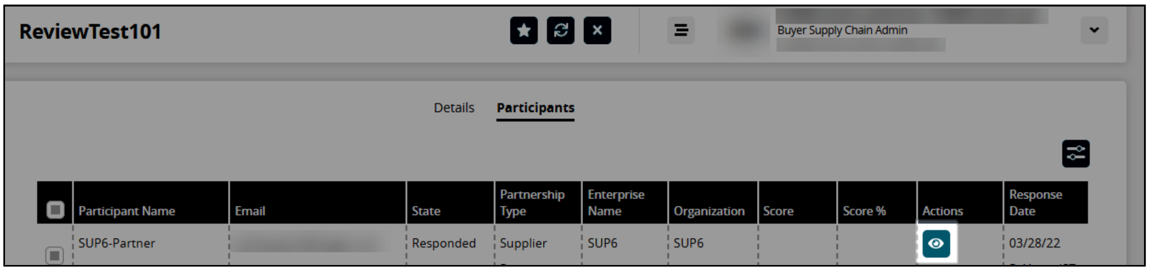
Viewing Participant Responses and Responding to Reviewer Questions

Reviewers can access the databots they have been added to as reviewers on the **Databot Explorer** screen.

1. Log in to the ONE system.
2. Click **Menu/Favs > Tools > Databots > Databot Explorer.**
   The Databot Explorer screen appears with databots to which you have been assigned as a reviewer containing a Reviewer label in the Name column.



3. In the **Name** column, click the link for the desired databot.
   The databot details display in a new tab.



4. In the **Actions** column, click the icon to review the responses for a participant and answer the reviewer questions.
5. Repeat this step for each partipant.

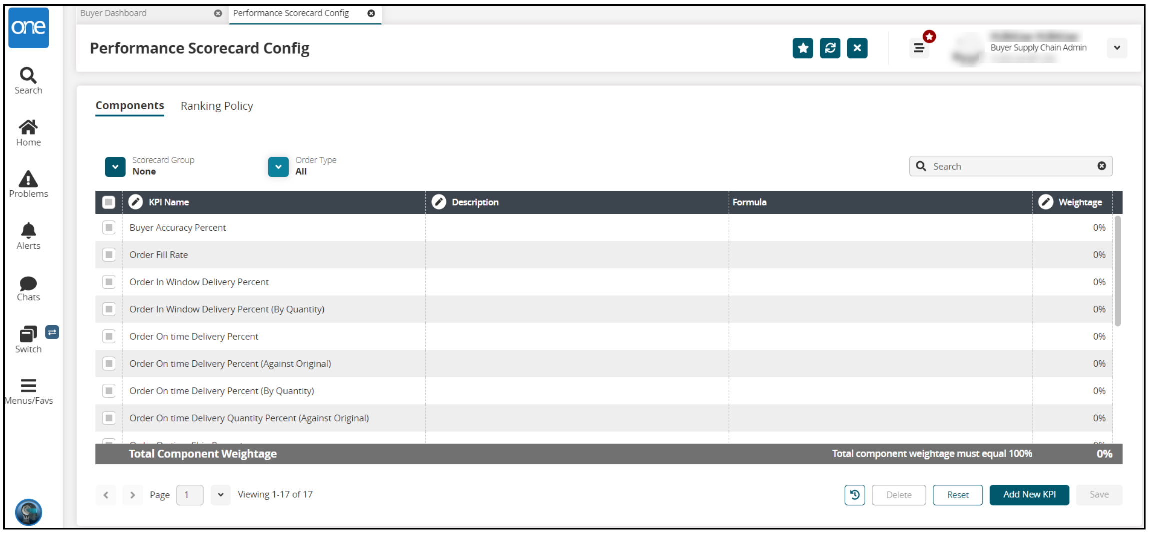
See the "New Databot Types Support New Roles" section in the current version of the *Release Notes* for more information.

1.7.2 General OMS

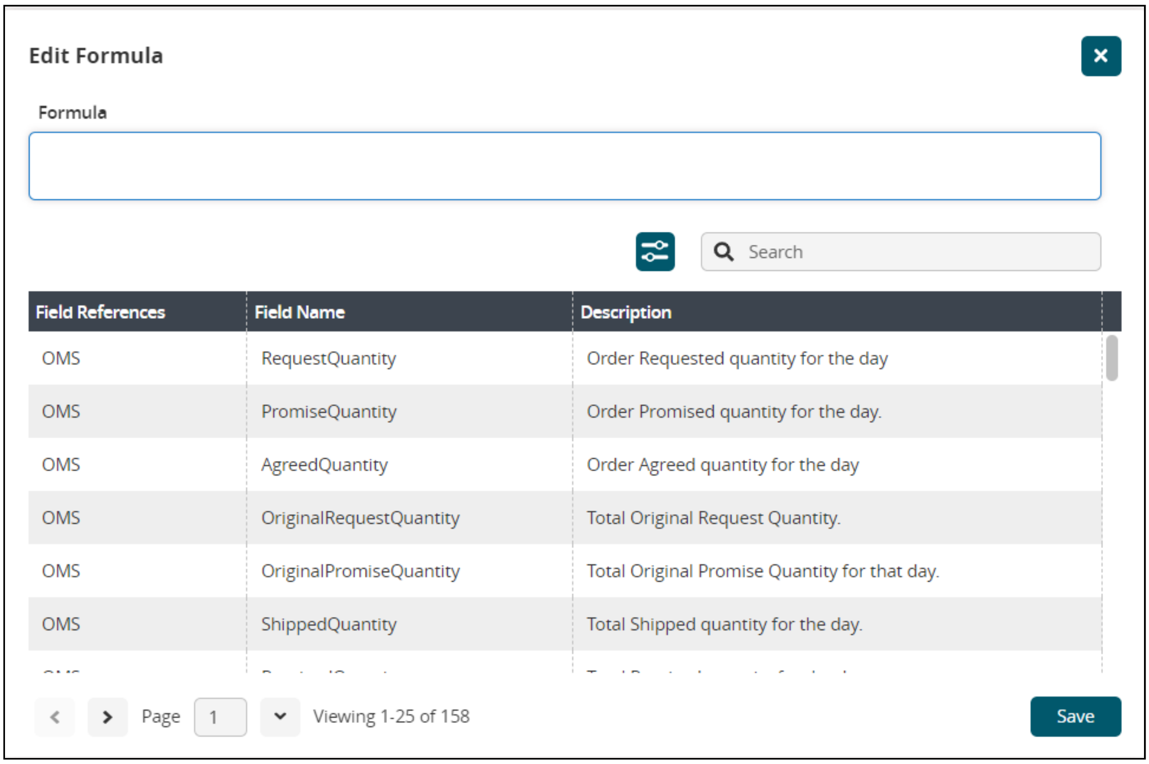
1.7.2.1 Configuring Vendor Scorecards

Complete the following steps to add a new KPI to the performance scorecard:

1. Log in to the ONE system.
2. Click **Menu/Favs** > **Reports** > **Vendor Performance** > **Performance Scorecard Config**.
   The Performance Scorecard Config screen displays the Components tab by default. The available default KPI formulas are listed. Note that these KPIs cannot be deleted or edited except for the weightage, but leaving the weightage at 0% means they won't be used in the calculation in the scorecard.



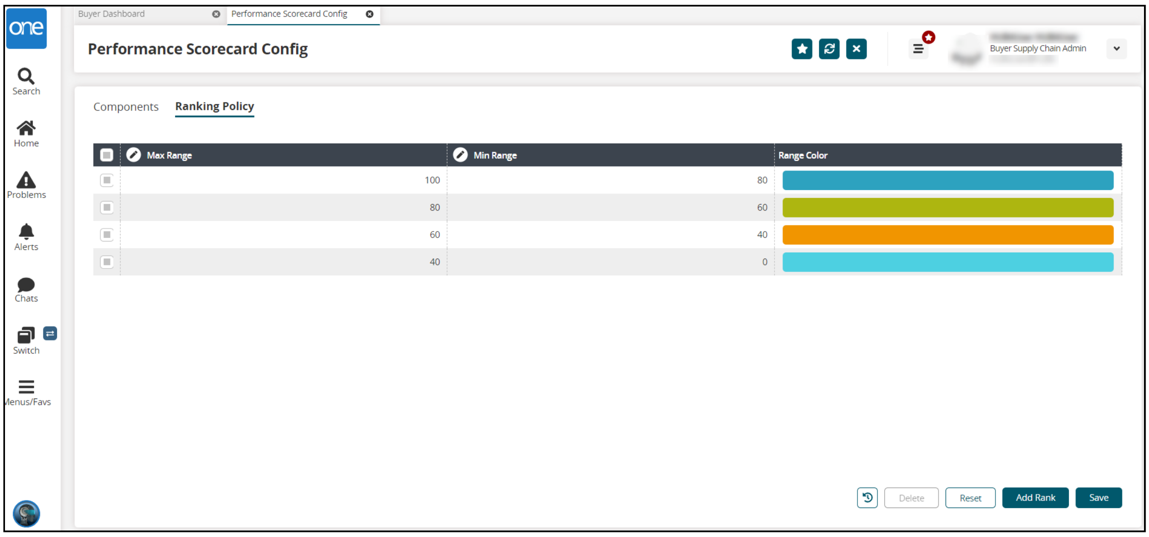
3. Click the **Add New KPI** button.
   A new row is added to the table.
4. Click the **KPI Name** cell.
   A popup displays.
5. Enter a name for the KPI and click the **Apply** button.
6. Click the **Description** cell.
   A popup displays.
7. Enter a description for the KPI and click the **Apply** button.
8. Click the pencil icon in the **Formula** cell.
   The Edit Formula popup displays. Users can filter the fields for OMS or TMS values or enter field names in the search bar.



9. Click a field to add it to the Formula box.
10. Enter mathematical expressions and fields as required to complete the formula.
11. Click the **Save** button.
    The KPI formula is added to the row.
12. Click the **Weightage** cell.
    A popup displays.
13. Enter a number value for the percentage weight that this KPI will carry and click the **Apply** button.
    The Total Component Weightage bar will change colors until all of the KPI weightage values equal 100%.
14. Enter **Weightage** values for all KPIs until the total percentage is 100.
    The Total Component Weightage bar turns green and the Save button is active.
15. Click the **Save** button.
    A green success bar displays.

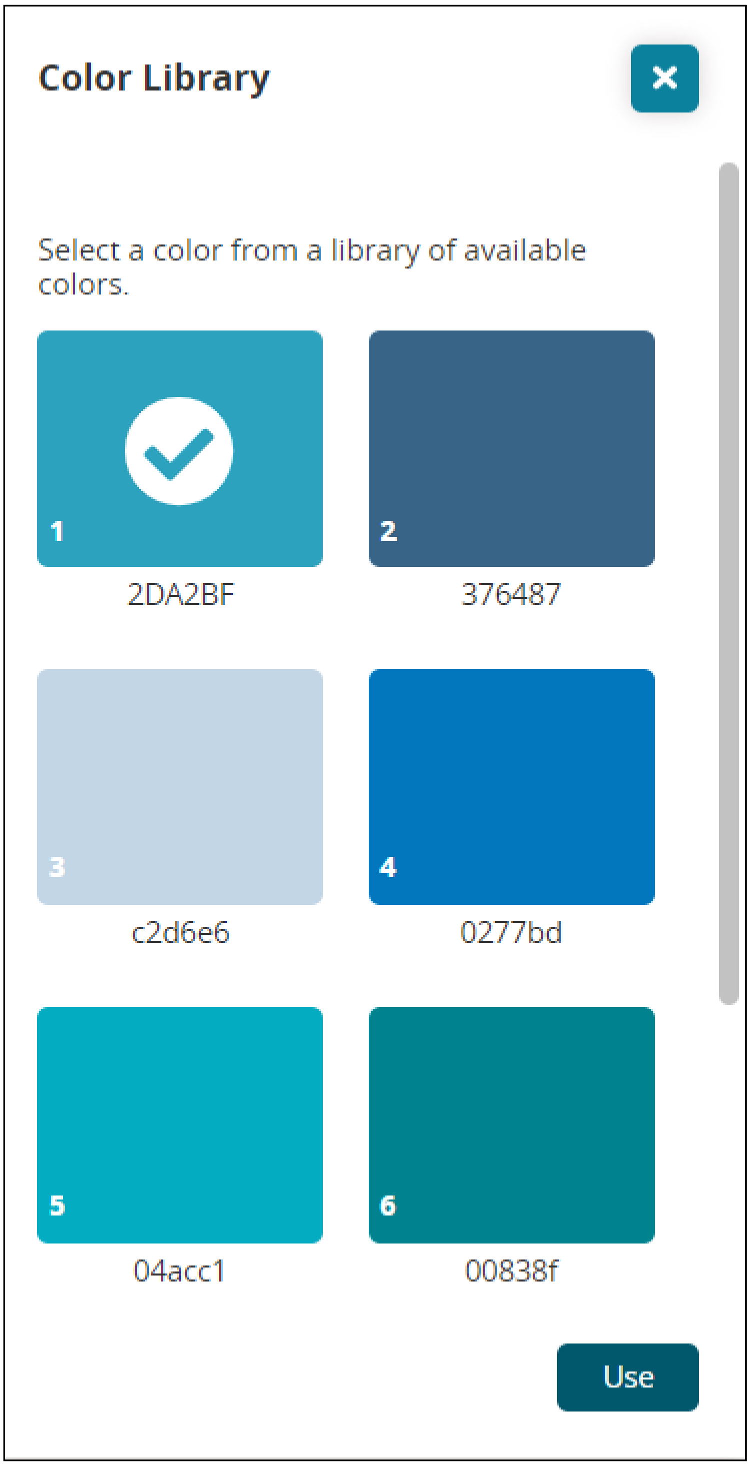
Complete the following steps to create a new ranking policy from the Performance Scorecard Configuration screen:

1. From the Performance Scorecard Configuration page, click the **Ranking Policy** tab.
   The Ranking Policy tab displays the current minimum and maximum settings as well as the colors assigned to each rank.



2. Click the **Add Rank** button.
   A new row displays in the table.
3. Click the **Max Range** cell.
   A popup window displays.
4. Enter a number value for the maximum value in the range allowed.
5. Click the **Apply** button.
6. Click the **Min Range** cell.
   A popup window displays.
7. Enter a number value for the minimum value in the range allowed. A zero (0) is allowed.
8. Click the **Apply** button.
9. To change the color of the rank, click the color.
   The Color Library slide-out displays. The current color for the rank has a

checkmark.



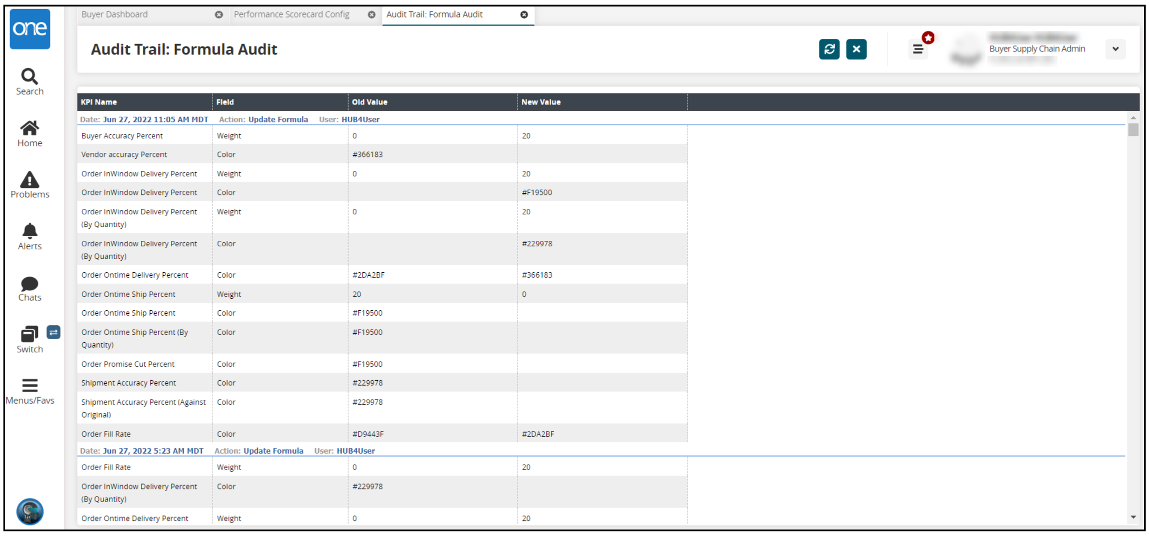
10. Click your preferred color.
11. Click the **Use** button.
    The slide-out closes and the color updates.
12. Click the **Save** button.
    A green success message displays.

Complete the following steps to filter for specific groups and order types, reset values, delete rows, and view an audit history from either tab on the Performance Scorecard Config screen:

1. To filter for a specific KPI for a group, click the arrow next to the **Scorecard Group** field.
   A popup displays.
2. Select a group from the dropdown list and click the **Confirm** button.
   The KPI formulas for that group display.
3. To filter KPI formulas by order type, click the arrow next to the **Order Type** field.
   A popup displays.
4. Select an order type from the dropdown list and click the **Confirm** button.
   The KPI formulas for that type display.
5. To reset the table to the last saved settings, click the **Reset** button.
   A confirmation popup asks if you want to reset the values of the table. Please note that the Reset button does not perform unless changes have been saved.
6. Click the **Yes** button.
7. Click the **Save** button.
   A green success message displays.
8. To delete a ranking policy row, click the checkbox to select it.
   The Delete becomes active.
9. Click the **Delete** button.
   A popup confirmation displays.
10. Click the **Yes** button.
    The row is deleted.
11. Click the **Save** button to save changes.
    A green success message displays.

> You cannot delete a default KPI. A warning message displays at the top of the screen if you select one.

12. Click the **Audit Trail** button to open a new tab that shows an audit trail of all changes made to the Performance Scorecard Config screen.



See the "Enhancements to the Vendor Scorecard Process and a New Vendor Scorecard Schedule Report" section in the current version of the *Release Notes* for more information.

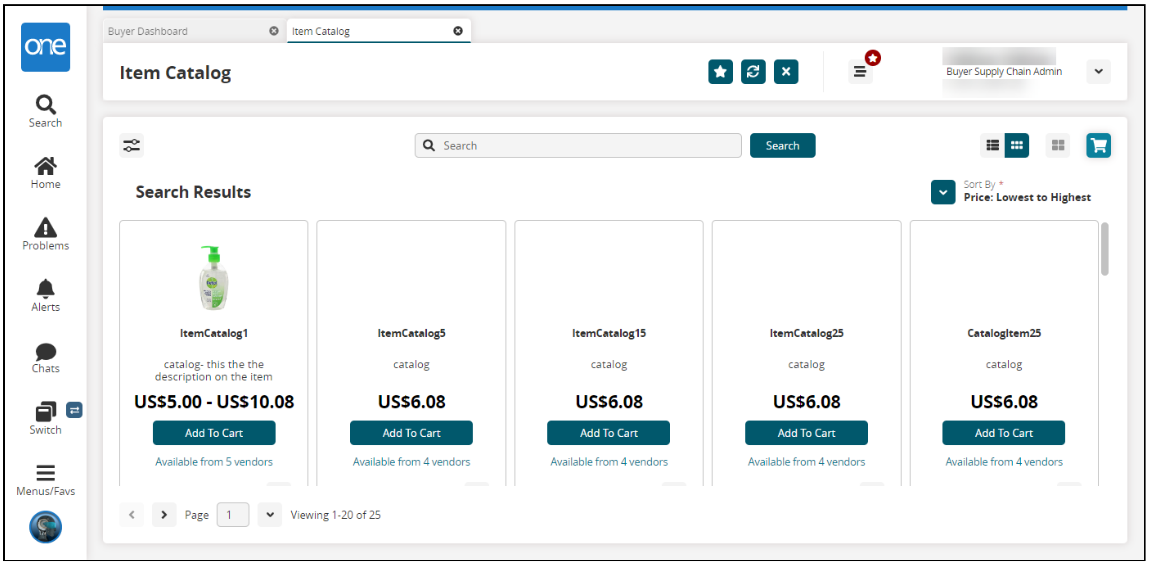
1.7.2.2 Item Catalog Report

The Item Catalog report allows Buyer Supply Chain Admin roles to search and add items from multiple vendors to a cart and then easily create a requisition order from that cart. Similar to other online merchants, a host of familiar features are now supported, including:

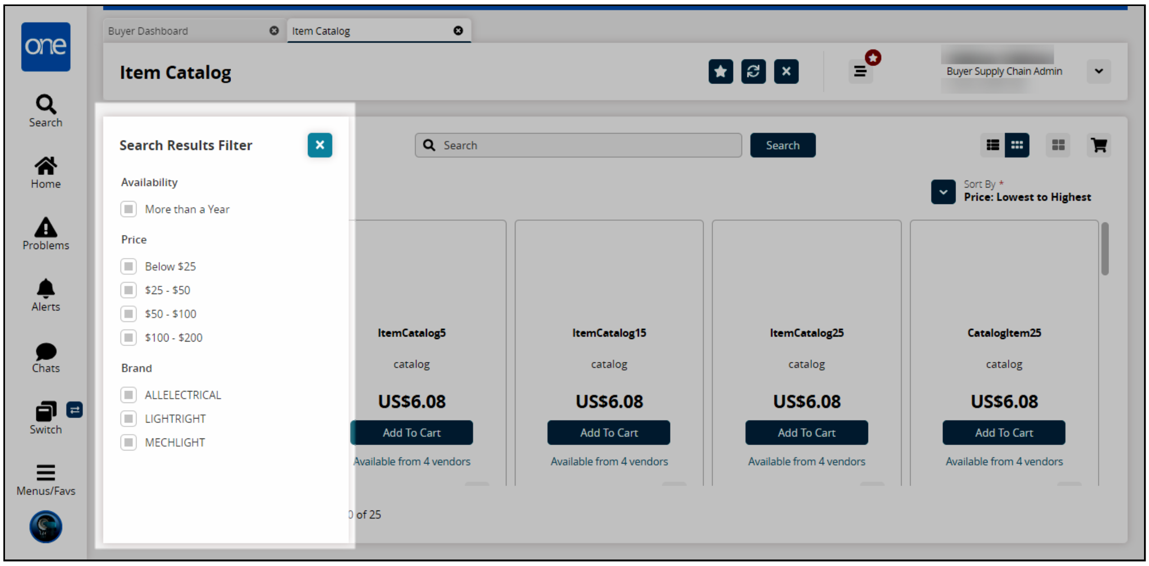
- View items with convenient thumbnails in a tile view or a list view
- Search items by name
- Filter items by item availability, price ranges, and brands
- Sort items by price, such as lowest to highest or highest to lowest
- Compare multiple items with one another
- View which vendors are selling a given item and at what price
- Open item detail pages by clicking on item names

Complete the following steps to use the Item Catalog report:

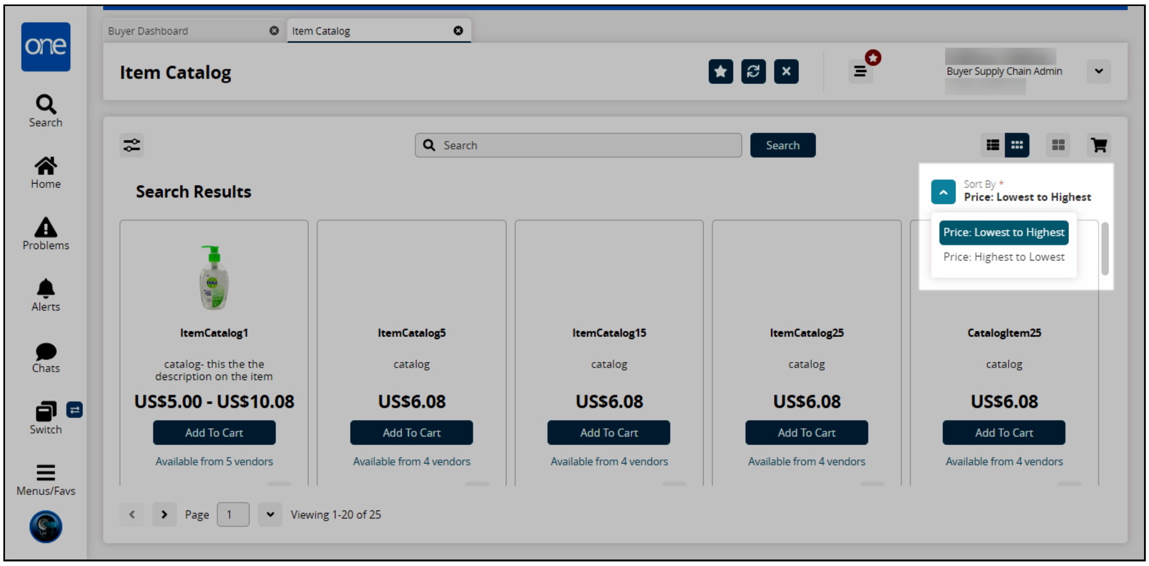
1. Log in to the ONE system.
2. Click **Menu/Favs > Administration > Item > Item Catalog**.
   The Item Catalog screen appears.
3. Enter an item name in the Search field and click **Search**. Clicking the **Search** button with no search text returns all items.
   The search results appear.



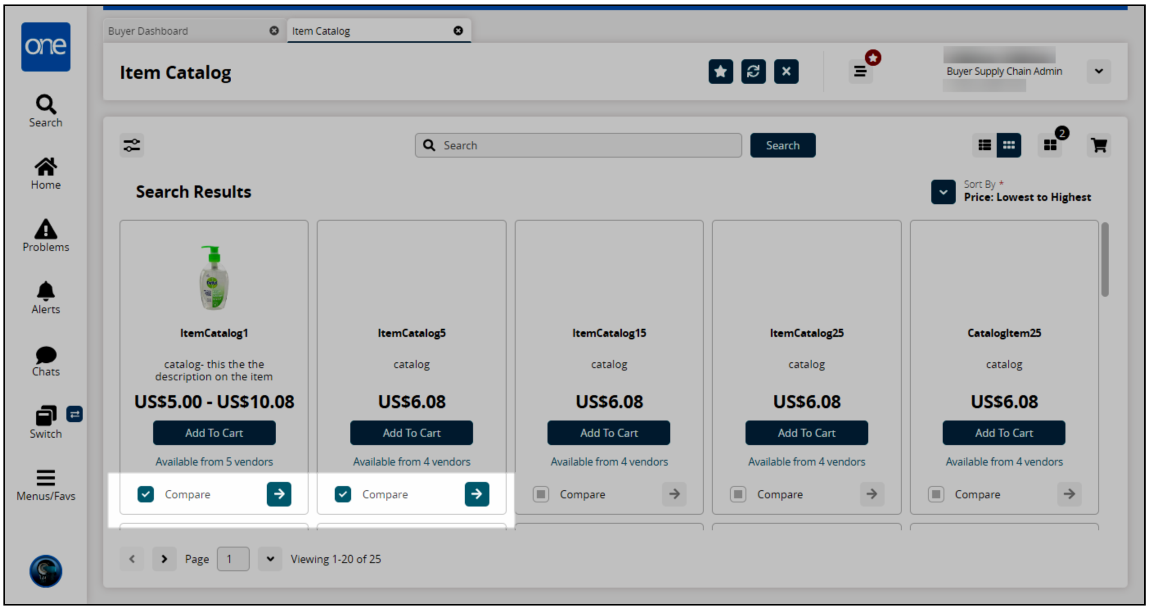
4. Click the filters icon to filter items by availability, price, and brand.



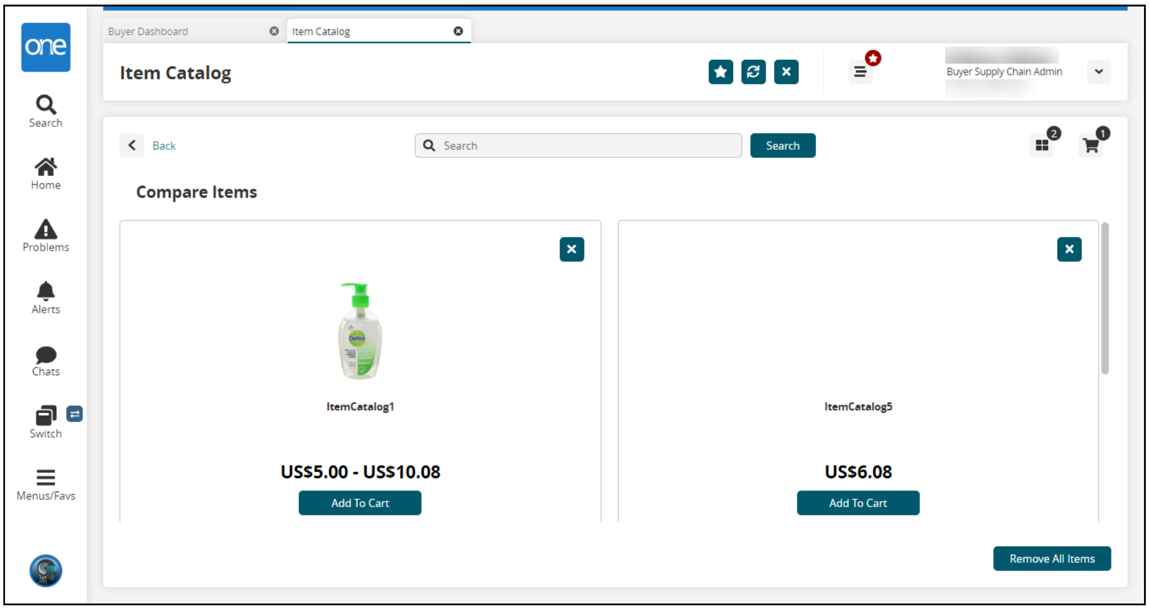
5. Click the sort arrow to sort items by price.



6. Click the view icons  to change between thumbnail view and list view.
7. Tick the **Compare** box on up to four items and then click the right arrow button.

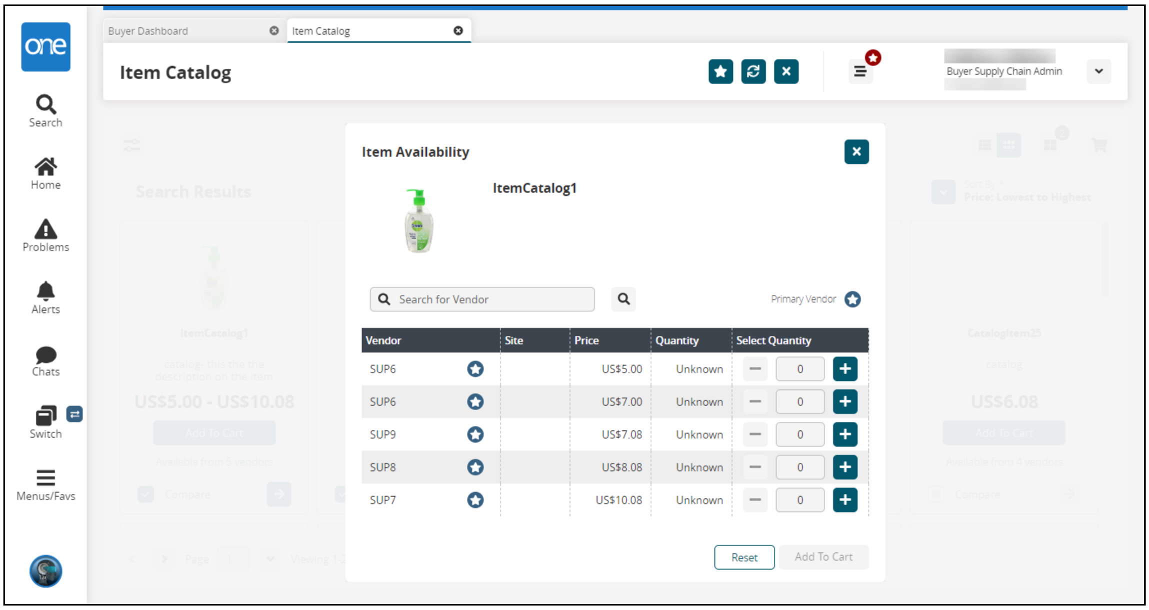


The Compare Items screen appears.

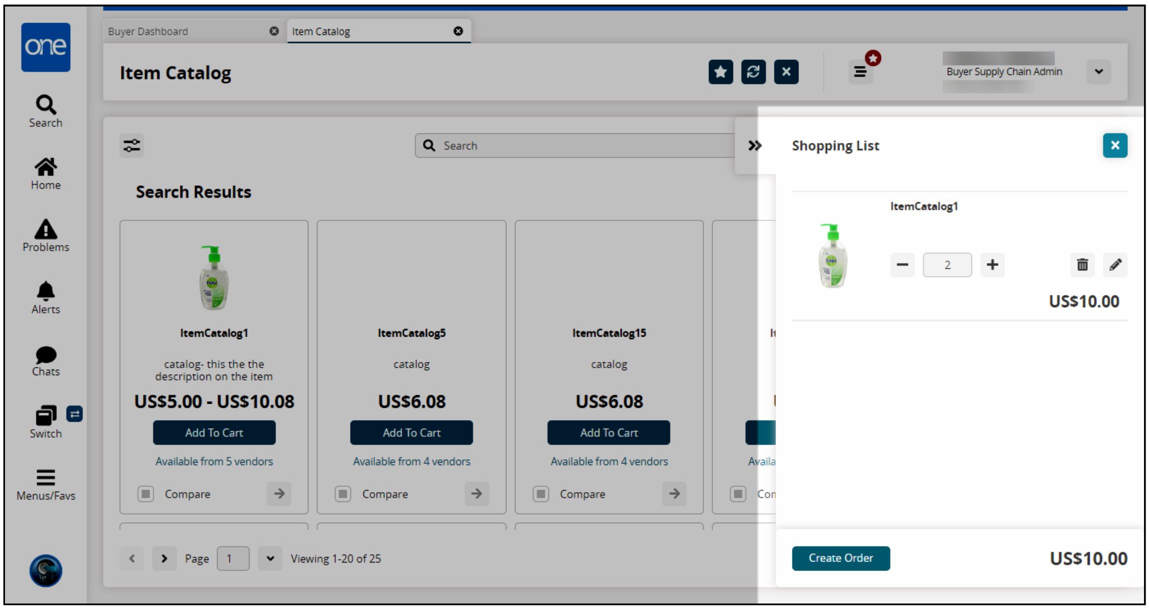


Complete the following steps to add items to your cart and create an order:

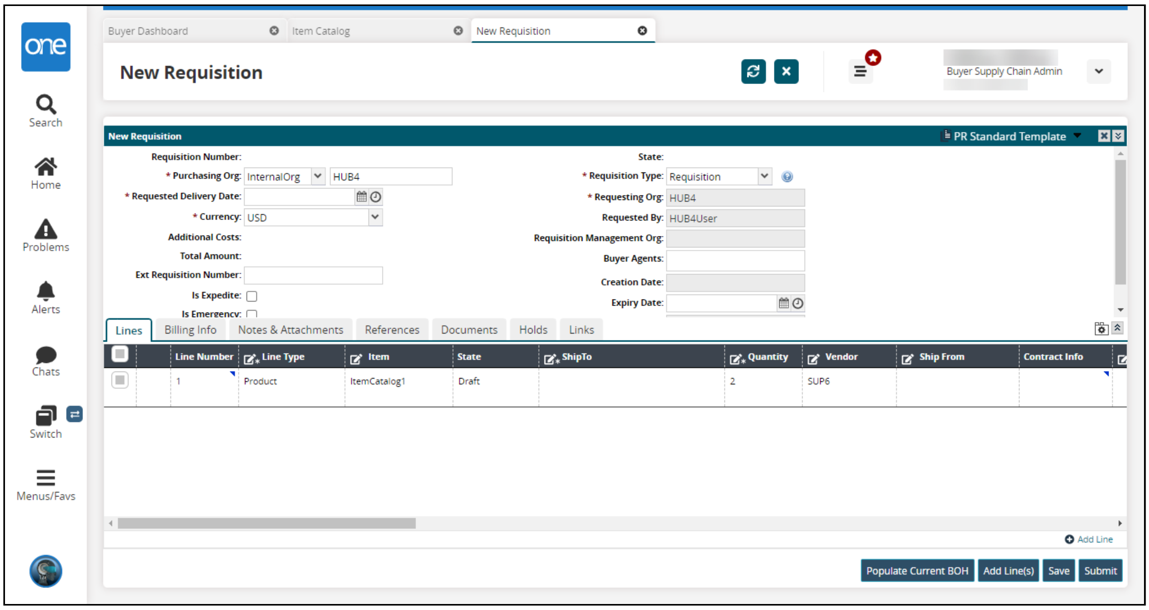
1. Click the **Add To Cart** button to add an item to your cart.
   The Item Availability popup appears.



2. Select the item quantity and from which vendor you want to purchase the item using the - and + buttons.
3. Click **Add To Cart**.
   The items are added to your cart, and the number of items shows on the cart icon at the top of the screen 
4. Click the cart icon.
   The Shopping List sidebar appears.



5. Modify your cart as desired using the - and + icons, click the delete icon to delete the item, or click the pencil icon to make further changes.
6. Click the **Create Order** button.
   A New Requisition is prepopulated.



7. Make any desired changes and click **Submit**.

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

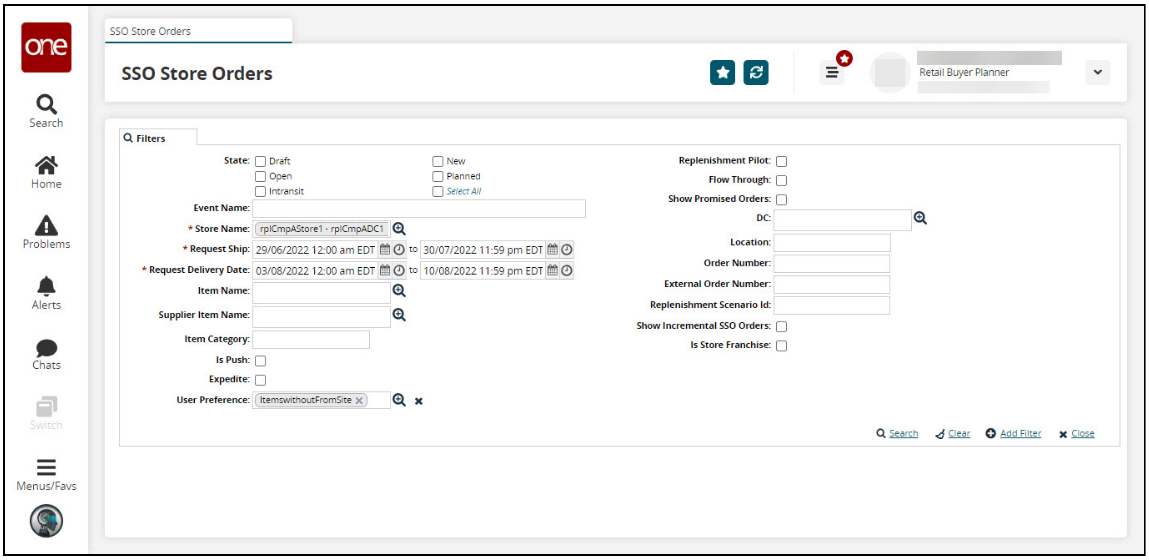
1.7.2.3 Adding the User Preference Filter on the Suggested Store Orders Report

Suggested Store Orders (SSO) present store order suggestions to users with the Buyer Planner Role. The User Preference field enables the user to choose and select item preferences.

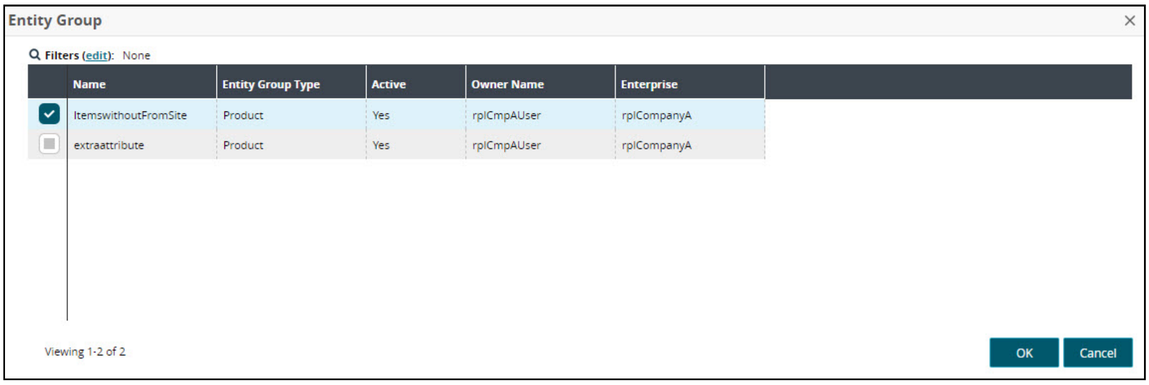
> **Note**
>
> Not all users and roles have access to the SSO Store Order report, which is accessible for a retailer user with the Retail Buyer Planner role.

Complete the following steps to select and apply the user preference filter to the SSO Store Order Report:

1. Log in to the ONE system.
2. Click **Menus/Favs > Order Mgmt > SSO Store Orders**.
   The SSO Store Orders filter header appears.
3. Click the **Add Filter** link.
   A menu of additional filter field options displays.
4. Click the checkbox for **User Preference**.
   The User Preference field displays.



5. Click the picker tool to select the respective preference items in the **User Preference** field.
   The Entity Group popup appears.



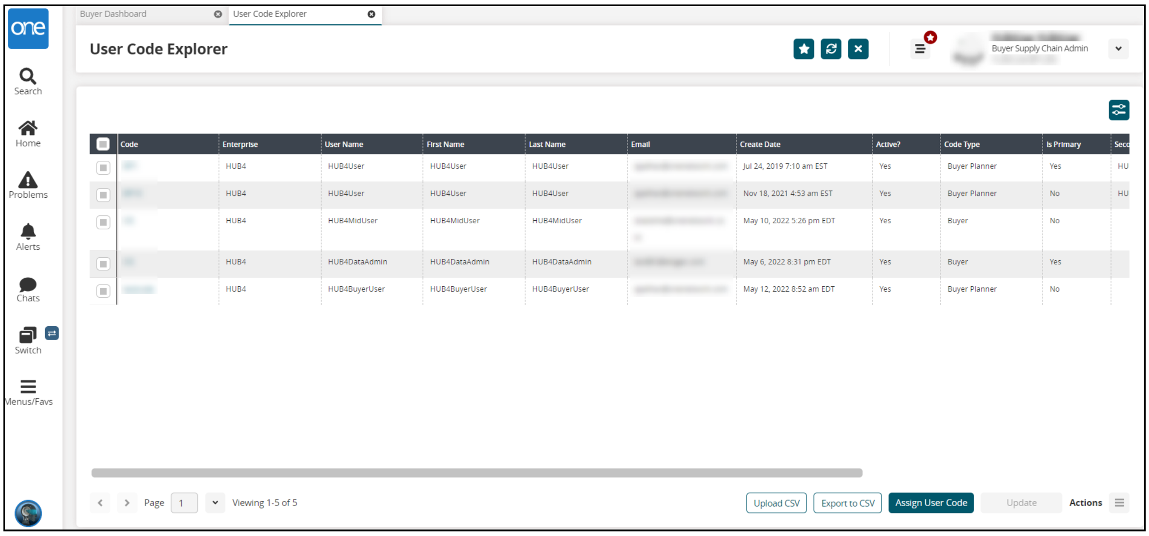
6. Select the item preference from the previously defined options.
7. Click the **OK** button.
   The User Preference field is populated with the entity group selected.

See the "OMS UI and Integration Enhancements" section in the current version of the *Release Notes* for more information.

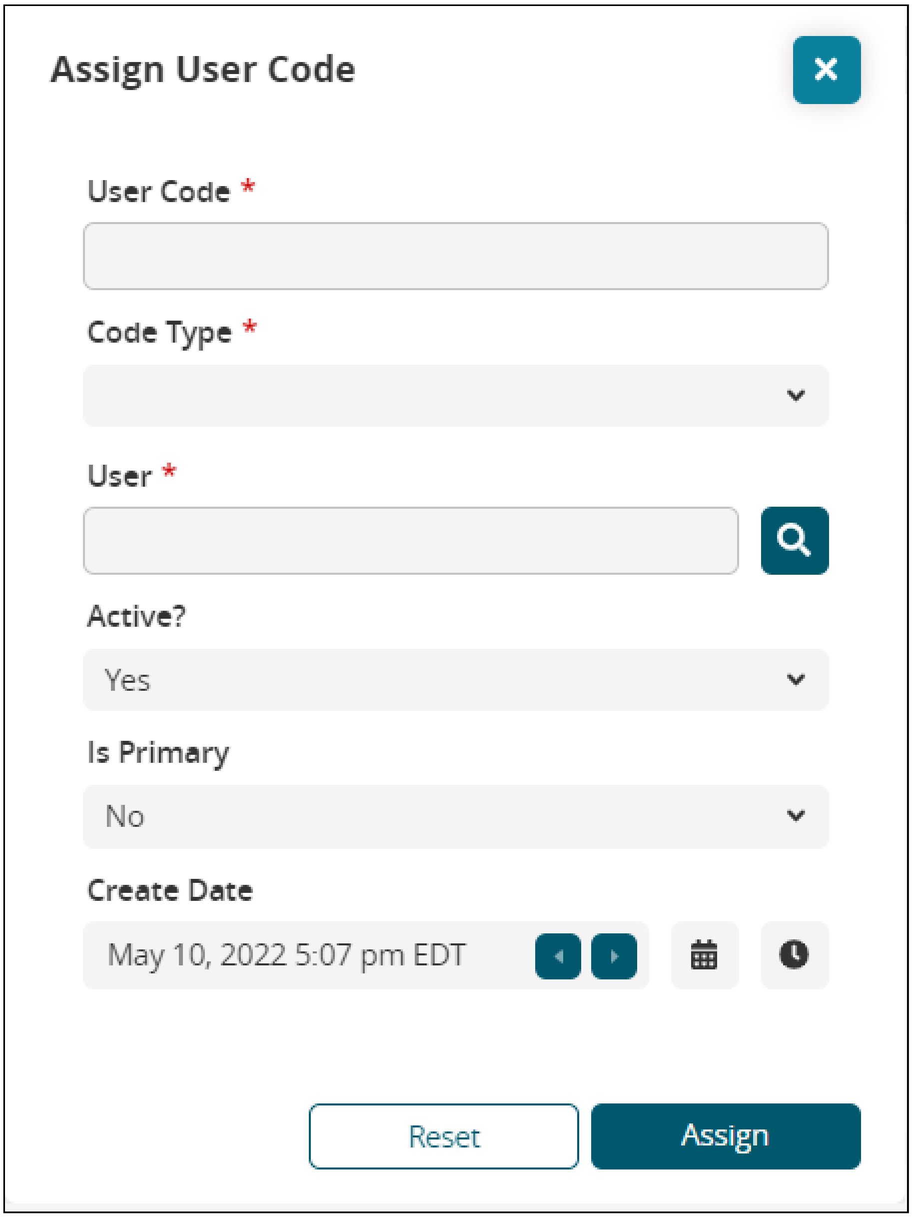
1.7.2.4 Using the User Code Explorer UI

Complete the following steps to assign a user code to a user from the User Code Explorer screen:

1. Log in to the ONE system.
2. Click **Menu/Favs > Administration > User > User Code Explorer**.
   The User Code Explorer screen displays.



3. Click the **Assign User Code** button.
   The Assign User Code popup displays.



4. Enter values for the following fields. Fields with an asterisk (*) are required.

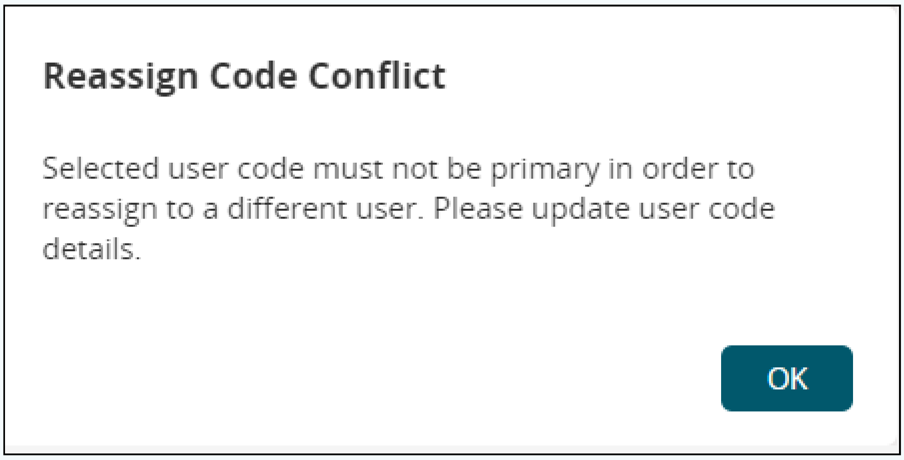
Field	Description
User Code*	Enter the user code name.
Code Type*	Select a code type from the dropdown list.
User*	Use the picker tool to select a user.
Active	Select Yes or No from the dropdown list.
Is Primary	Select Yes or No from the dropdown list. If this field is set to Yes, then a secondary user cannot be added to the code.

Field	Description
Create Date	Use the < and > buttons to select the day prior to or after the current day, or use the calendar and clock icons to select a date and time.

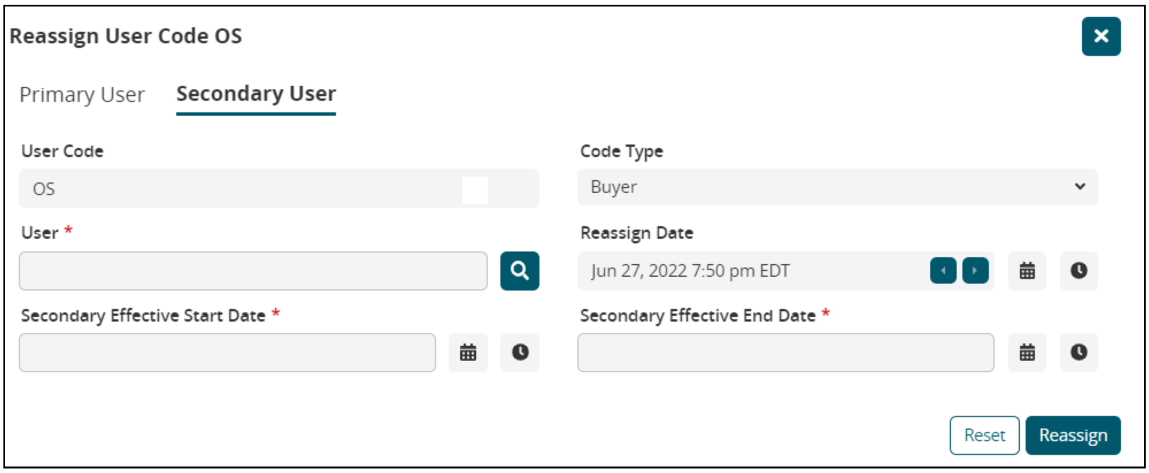
5. Click the **Reset** button to clear the values in the popup window.
6. Click the **Assign** button to assign the code to the user.
   A green success message displays, and the new code displays in the report.
7. To update the code(s), click the checkbox.
   The Update button is now active.
8. Click the **Update** button.
   The report filters all other codes to only show the selected records with editable fields noted with a pencil icon.
9. Update the fields as required.
10. Click the **Submit** button.
    The screen refreshes with the updates and a green success message.

Complete the following steps to reassign a user code to a primary and/or secondary user starting from the User Code Explorer screen:

1. In the **User Code Explorer** screen, click the checkbox next to a user code.
   The Actions menu is active.
2. Click the **Actions** button, then select **Reassign Code**.
   The Reassign Code popup window displays the Primary User tab as the default. In this case, we selected the OS code.

> Please note that if the code is set to **Is Primary**, then the following warning popup displays. Click the **OK** button to close the popup. To assign a secondary user, update the code and remove the check for the **Is Primary** field.
>
> 
>

3. Click the **Secondary User** tab.



4. Use the picker tool to select a user for the **User** * field.
5. Use the calendar and clock tools to select the beginning date and time for the **Secondary Effective Start Date** * field.
6. Use the calendar and clock tools to select the end date and time for the **Secondary Effective End Date** * field.
7. Click the **Reassign** button.
   The code records update with the secondary user name and effective dates, and a green success message displays.

Complete the following steps to upload or export CSV files or remove a code:

1. On the **User Code Explorer** screen, click the **Upload CSV** button to upload files.
   The Select File to Upload popup displays. See the "Uploading Files" section of the *Online Help* for more information.
2. Click the **Export to CSV** button to download a CSV file with the current codes to your computer.
3. To remove a code, select it by checking the box for it.
   The Actions menu is active.
4. Click the **Actions** button and select **Remove**.
   A confirmation popup displays.
5. Click the **Yes** button.
   The screen refreshes with a green success message.

See the "New User Interface for Planner Code Assignments" section in the current version of the *Release Notes* for more information.

1.7.2.5 Viewing and Configuring Customer Scorecards

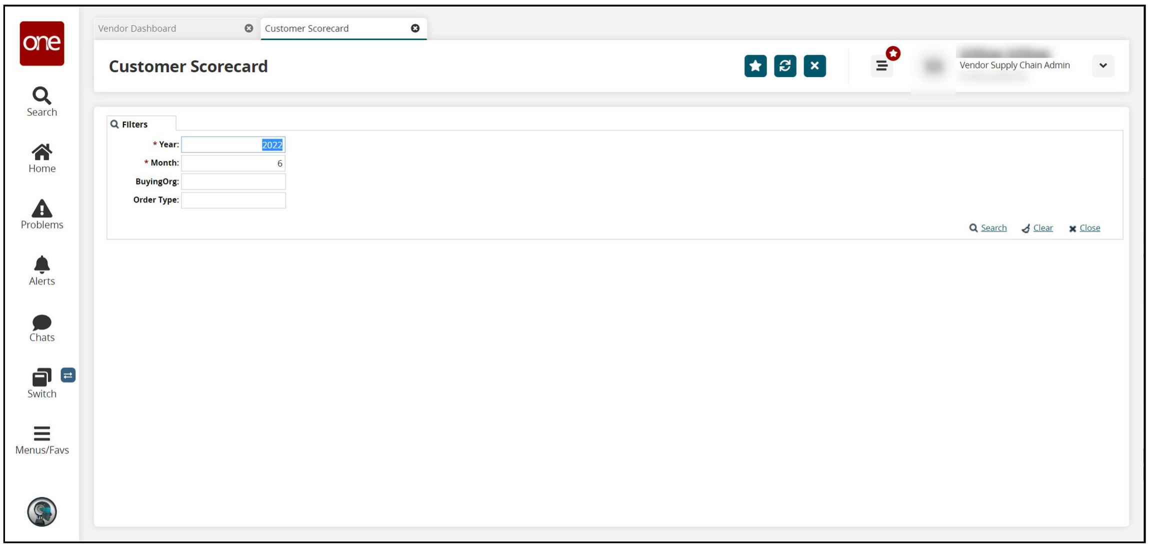
Vendors can calculate and view customer scorecards that are based on a KPI configuration set by the vendor. Vendor Supply Chain Admin users configure the metrics they want to be used to calculate customer scorecards under the Performance Scorecard Config screen.

Vendors can view a list of scorecards in the Customer Scorecard report. From the report, vendors can navigate to a Customer Scorecard Overview for each customer.

- Viewing Customer Scorecards(see page 92)
- Configuring Customer Scorecards(see page 0)

Complete the following steps to view customer scorecards:

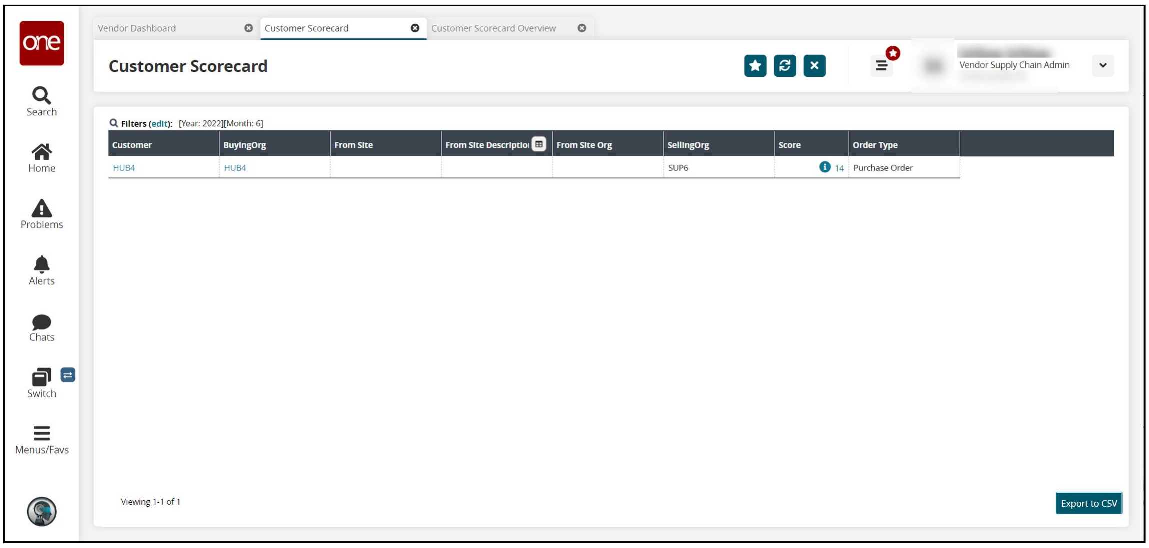
1. Log in to the ONE system as a Vendor Supply Chain Admin user.
2. Click **Menu/Favs > Reports > Vendor Performance > Customer Scorecard.**
   The Customer Scorecard screen appears with the filter fields displayed. The Year and Month field values default to the current year and month.



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

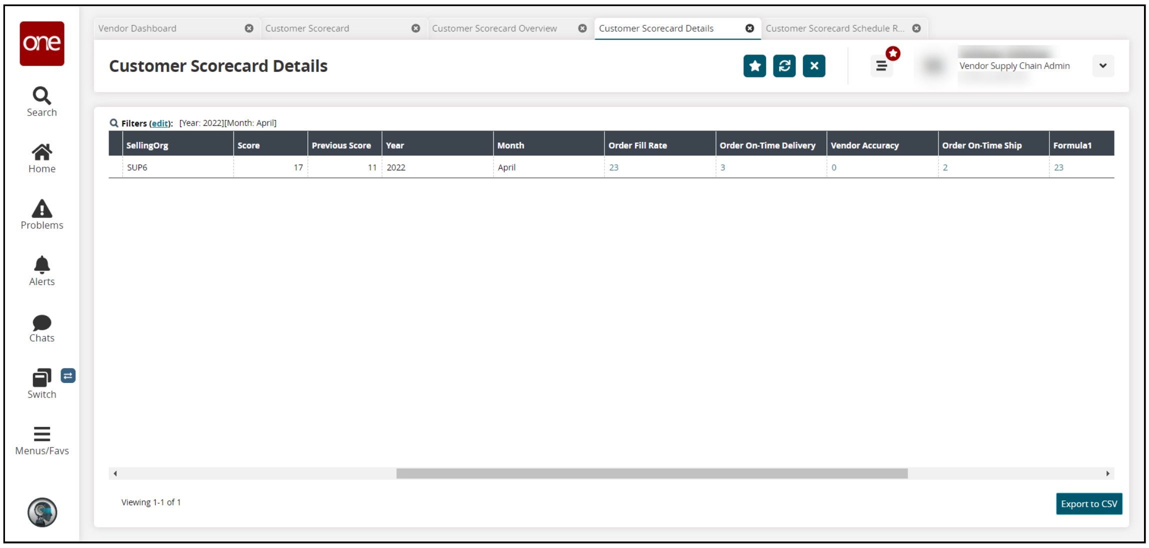
Field Name	Description
*Year	Enter the year. The customer's data for the chosen year is used to calculate the scorecard.
*Month	Enter the month. The customer's data for the selected month and year is used to calculate the scorecard.
Buying Org	Enter the buying organization.
Order Type	Enter the order type.

4. Click the **Search** link.
   The Customer Scorecard screen updates with the results from the selected criteria.

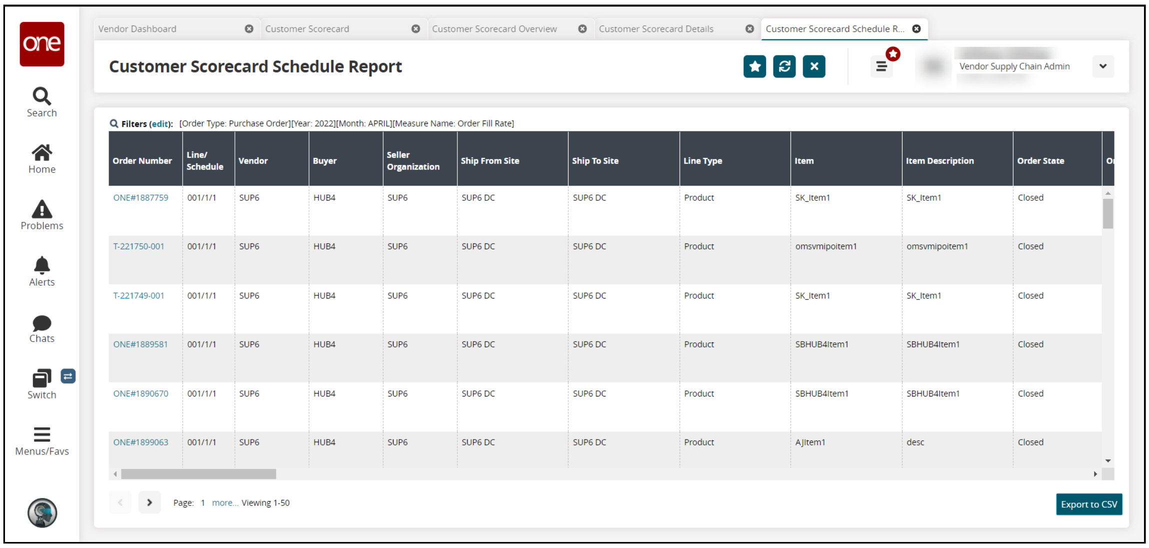


5. In the **Customer** column, click a customer link. Alternatively, click a score link in the **Score** column. (Note that the ***i*** icon in the score column denotes a corporate-level scorecard.)
   The Customer Scorecard Overview screen appears in a new tab.

6. Click any score or customer count link above 0 to view the customer scorecard details.
   The Customer Scorecard Details screen appears in a new tab.

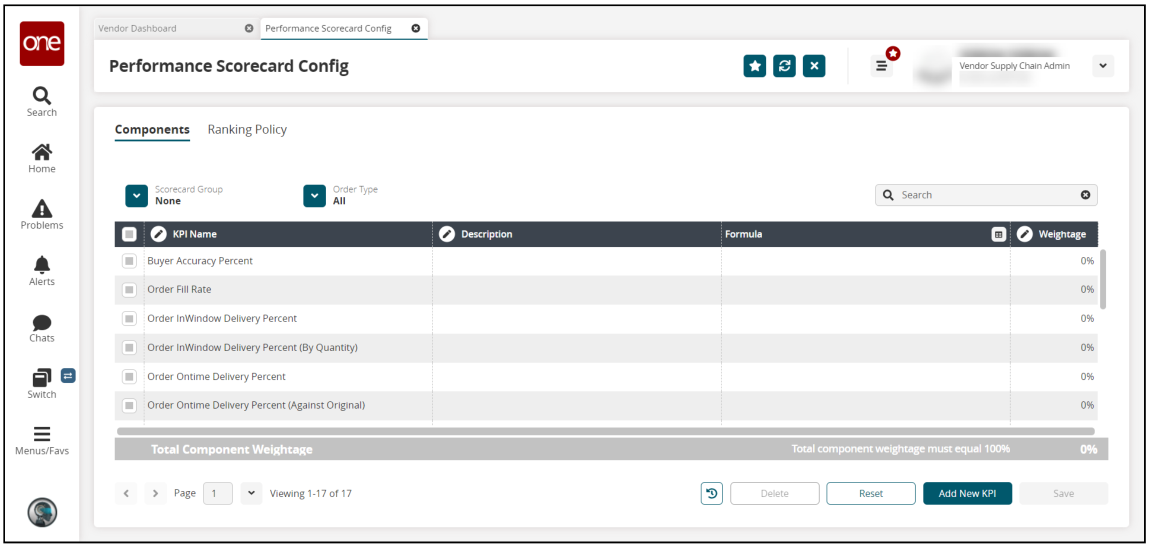


7. Click a link in any of the data measure columns with a score above 0.
   The Customer Scorecard Schedule Report displays in a new tab.



Complete the following steps to configure customer scorecards:

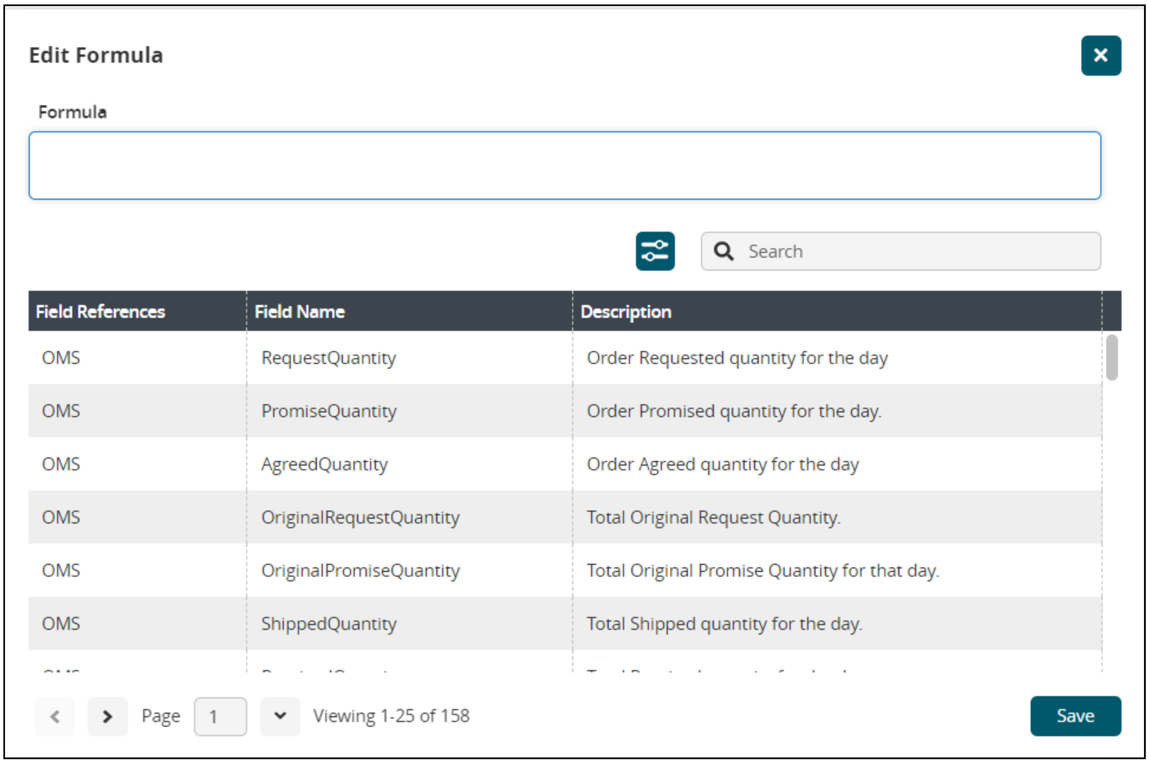
1. Log in to the ONE system as a Vendor Supply Chain Admin user.
2. Click **Menu/Favs > Reports > Vendor Performance > Performance Scorecard Config.**
   The Performance Scorecard Config screen appears with the Components tab displayed.



The available default KPI formulas are listed. Note that these KPIs cannot be deleted or edited except for the weightage, but leaving the weightage at 0% means they won't be used in the calculation in the scorecard.

Components Tab

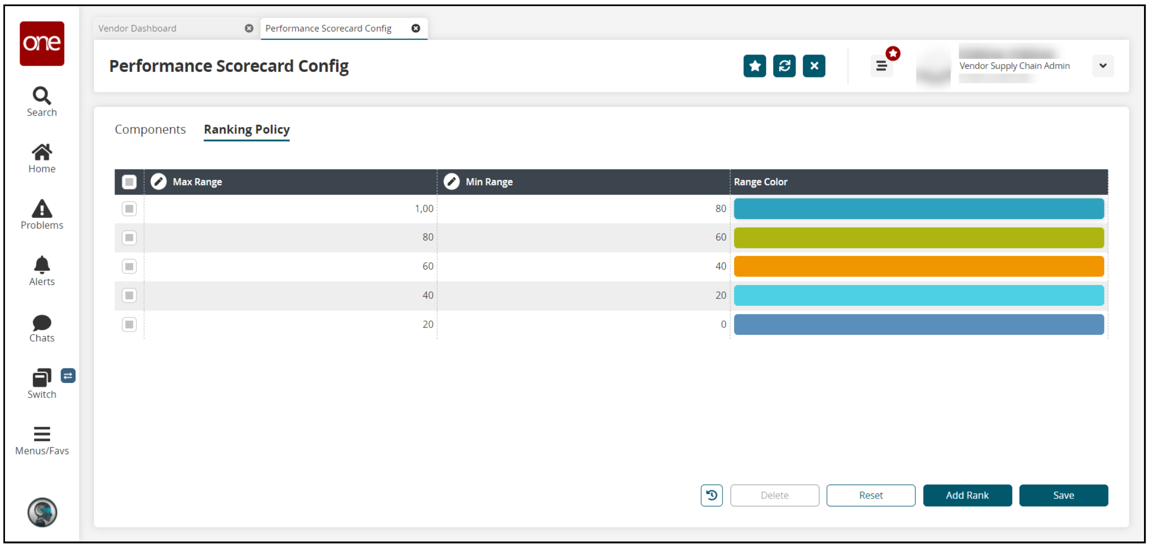
1. Click the **Add New KPI** button.
   A new row is added to the table.
2. Click the **KPI Name** cell.
   A popup displays.
3. Enter a name for the KPI and click the **Apply** button.
4. Click the **Description** cell.
   A popup displays.
5. Enter a description for the KPI and click the **Apply** button.
6. Click the pencil icon in the **Formula** cell.
   The Edit Formula popup displays. Users can filter the fields for OMS or TMS values or enter field names in the search bar. Alternatively, use the pagination tools at the bottom of the popup window.



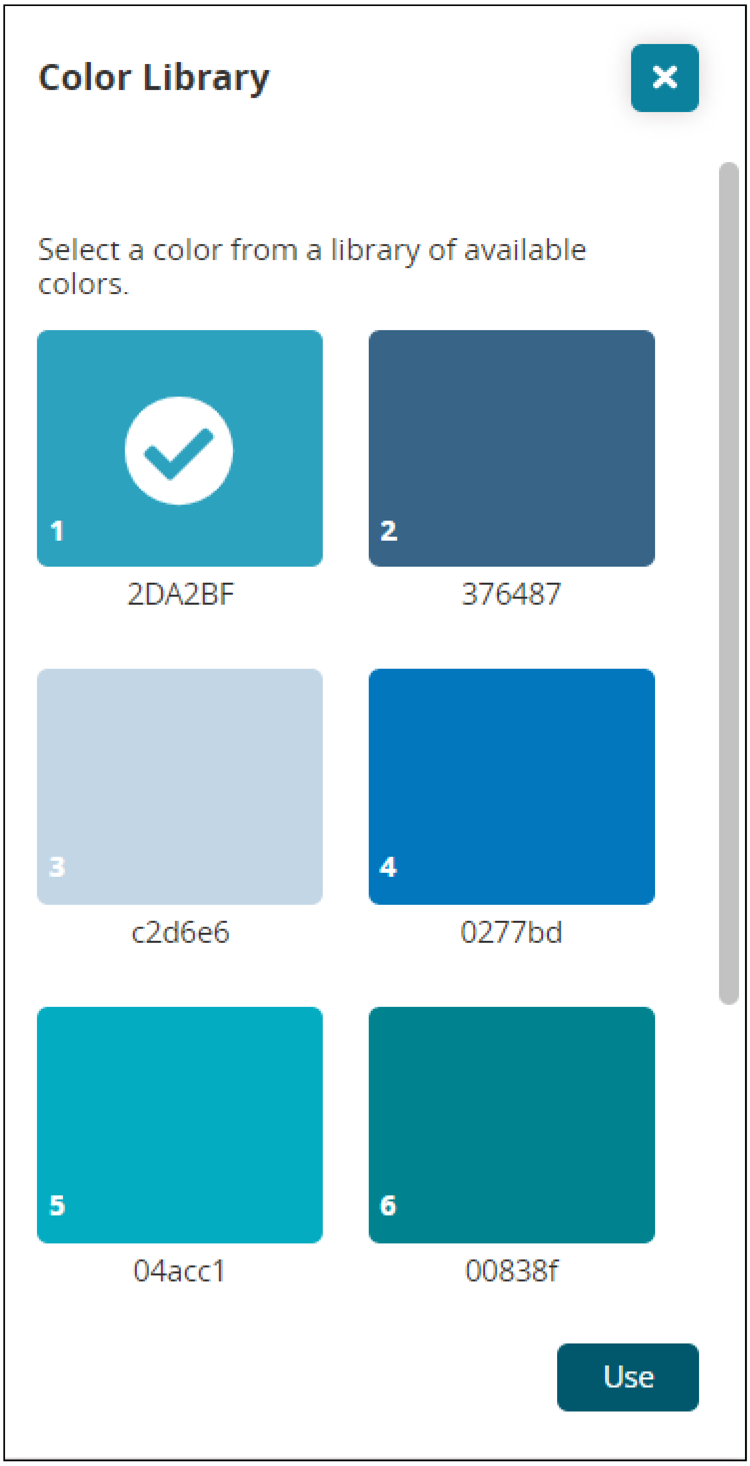
7. In the **Field Name** column, click to select the KPI you want to use in the scorecard calculation. Enter mathematical expressions and fields as required to complete the formula.
   The formula for the selected KPI appears in the Formula field.
8. Click **Save**.
   The popup window closes and the formula for the new KPI appears in the new KPI row on the Performance Scorecard Config screen.
9. Click the **Weightage** cell.
   The Weightage popup window appears.
10. Enter a number value for the percentage weight that this KPI will carry, and click the **Apply** button.
    The Total Component Weightage bar will change colors until all of the KPI weightage values equal 100%.
11. Enter **Weightage** values for all KPIs until the total percentage is 100.
    The Total Component Weightage bar turns green and the Save button is active.
12. Click the **Save** button.
    A green success bar displays.
13. To remove all added KPIs, click the **Reset** button.

Ranking Policy Tab

1. From the Performance Scorecard Config screen, click the **Ranking Policy** tab.
   The Ranking Policy tab appears.



2. Click the **Add Rank** button.
   A new row displays in the table.
3. Click the **Max Range** cell.
   A popup window displays.
4. Enter a number value for the maximum value in the range allowed.
5. Click the **Apply** button.
6. Click the **Min Range** cell.
   A popup window displays.
7. Enter a number value for the minimum value in the range allowed. A zero (0) is allowed.
8. Click the **Apply** button.
9. To change the color of the rank, click the color.
   The Color Library slide-out displays. The current color for the rank has a checkmark.



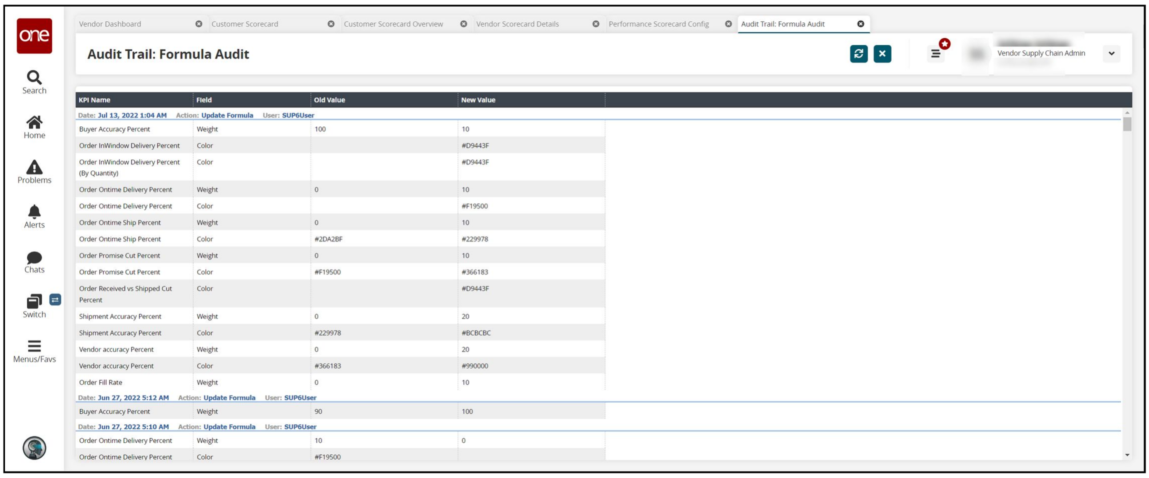
10. Click your preferred color.
11. Click the **Use** button.
    The slide-out closes and the color updates.
12. Click the **Save** button.
    A green success message displays.

Complete the following steps to filter for specific groups and order types, reset values, delete rows, and view an audit history from either tab on the Performance Scorecard Config screen:

1. To filter for a specific KPI for a group, click the arrow next to the **Scorecard Group** field.
   A popup displays.
2. Select a group from the dropdown list and click the **Confirm** button.
   The KPI formulas for that group display.
3. To filter KPI formulas by order type, click the arrow next to the **Order Type** field.
   A popup displays.
4. Select an order type from the dropdown list and click the **Confirm** button.
   The KPI formulas for that type display.
5. To reset the table to the last saved settings, click the **Reset** button.
   A confirmation popup asks if you want to reset the values of the table. Please note that the Reset button does not perform unless changes have been saved.
6. Click the **Yes** button.
7. Click the **Save** button.
   A green success message displays.
8. To delete a ranking policy row, click the checkbox to select it.
   The Delete becomes active.
9. Click the **Delete** button.
   A popup confirmation displays.
10. Click the **Yes** button.
    The row is deleted.
11. Click the **Save** button to save changes.
    A green success message displays.

> You cannot delete a default KPI. A warning message displays at the top of the screen if you select one.

12. Click the **Audit Trail** button to open a new tab that shows an audit trail of all changes made to the Performance Scorecard Config screen.



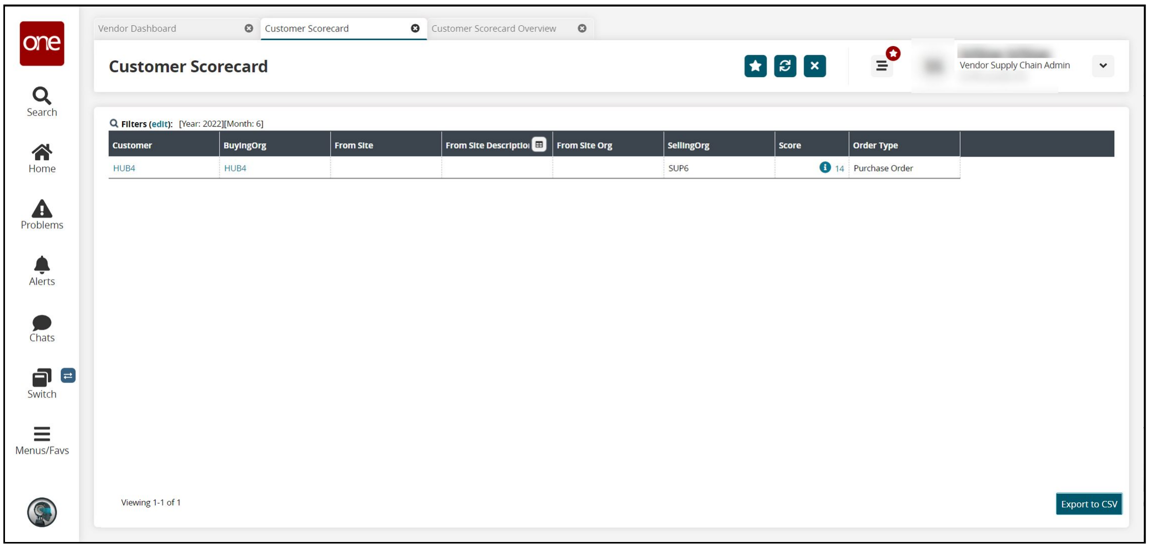
See the "Added Customer Scorecards for Vendors" section in the current version of the *Release Notes* for more information.

1.7.2.6 Viewing the Customer Scorecard Schedule Report

When a Customer Scorecard Details report is opened from the Customer Scorecard Overview page, links are available in the key performance indicator (KPI) fields that open a Customer Scorecard Schedule Report. This report enables the user to view the details of the transactions that contribute to that data measure. When a user clicks on a hyperlink in a data measure field, the Customer Scorecard Schedule Report opens with the data that contributed to the measure highlighted. This report allows users to quickly view which measures to improve in order to improve a score.

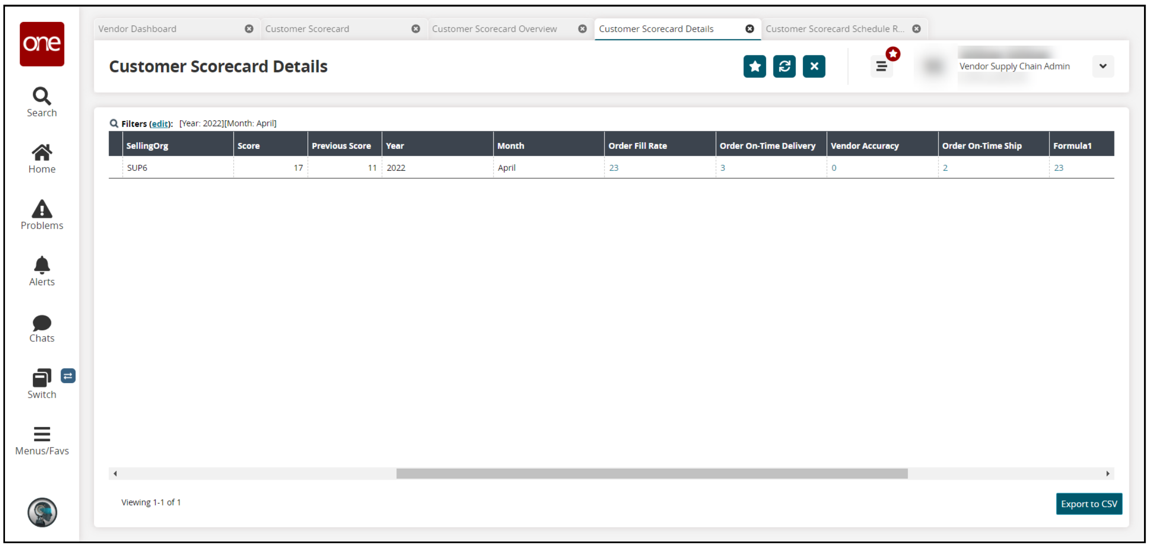
Complete the following steps to view a Customer Scorecard Schedule Report:

1. Log in to the ONE system as a Vendor Supply Chain Admin user.
2. Click **Menu/Favs > Reports > Vendor Performance > Customer Scorecard.**
3. Click the **Filters (edit)** link.
   The filter fields display.
4. Fill in the fields to locate the desired vendor scorecard(s). Fields with an asterisk (*) are required. See the "Viewing and Configuring Customer Scorecards" section in the *New Feature and Usage and Configuration Guide* for information on the fields.
5. Click the **Search** link.
   The Customer Scorecard report displays.

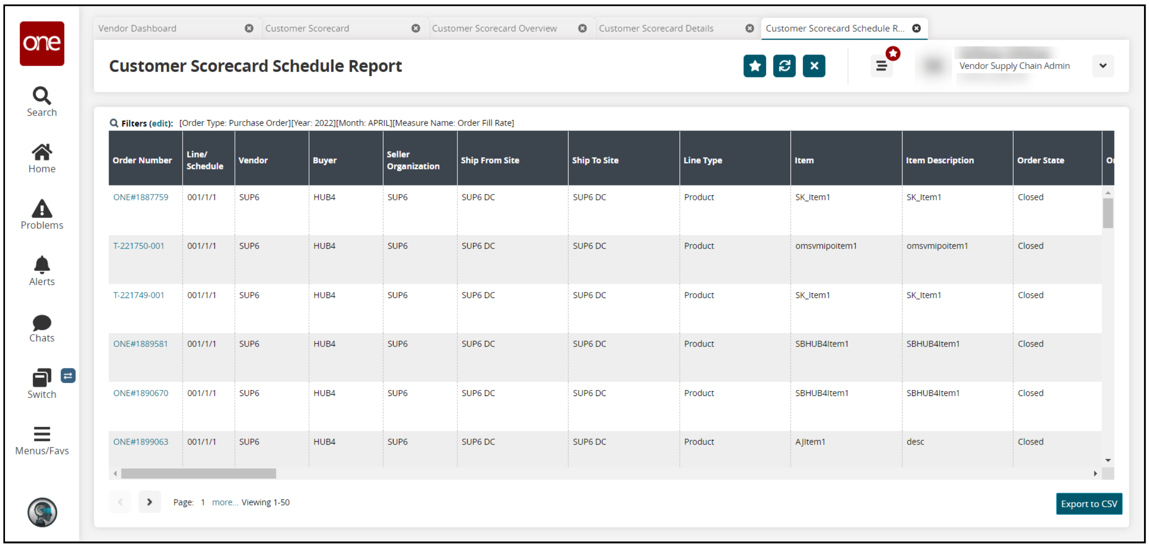


6. In the **Score** column, click the link for the desired scorecard.
   The Customer Scorecard Overview screen appears.

7. Click a score link or any customer count link above 0 to view the customer scorecard details.
The Customer Scorecard Details screen appears in a new tab with the data measures selected during customer scorecard configuration displayed in columns.



8. Click a link in any of the data measure columns with a score above 0.
The Customer Scorecard Schedule Report for that data measure appears in a new tab.



9. Click **Export to CSV** to export the report to a CSV file.

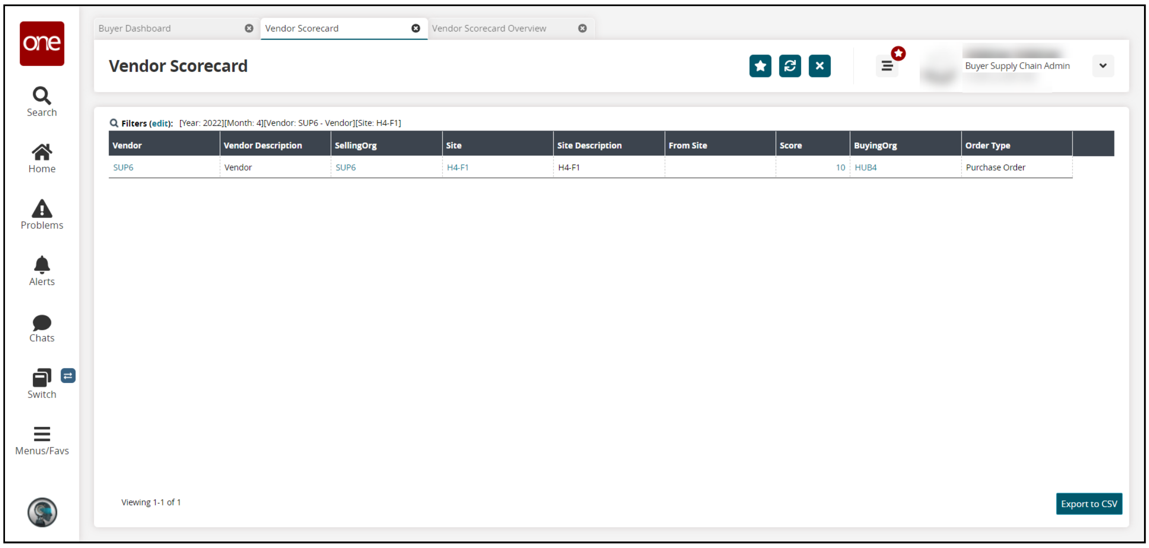
See the "Added Customer Scorecards and a New Customer Scorecard Schedule Report for Vendors" section in the current version of the *Release Notes* for more information.

1.7.2.7 Viewing the Vendor Scorecard Schedule Report

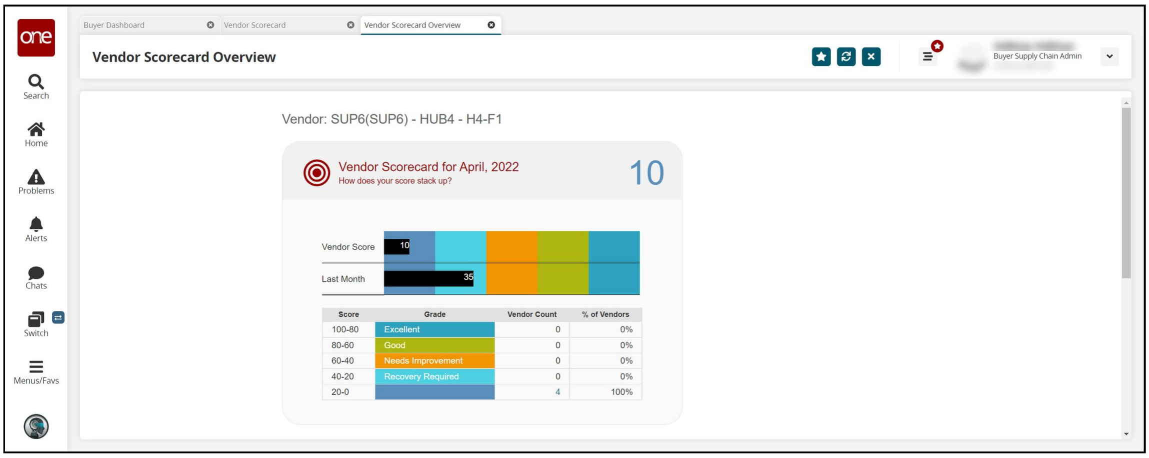
When a Vendor Scorecard Details report is opened from the Vendor Scorecard Overview page, links are available in the key performance indicator (KPI) fields that open a Vendor Scorecard Schedule Report. This report enables the user to view the details of the transactions that contribute to that data measure. When a user clicks on a hyperlink in a data measure field, the Vendor Scorecard Schedule Report opens with the data that contributed to the measure highlighted. This report allows users to quickly view which measures to improve in order to improve a score.

Complete the following steps to view a Vendor Scorecard Schedule Report:

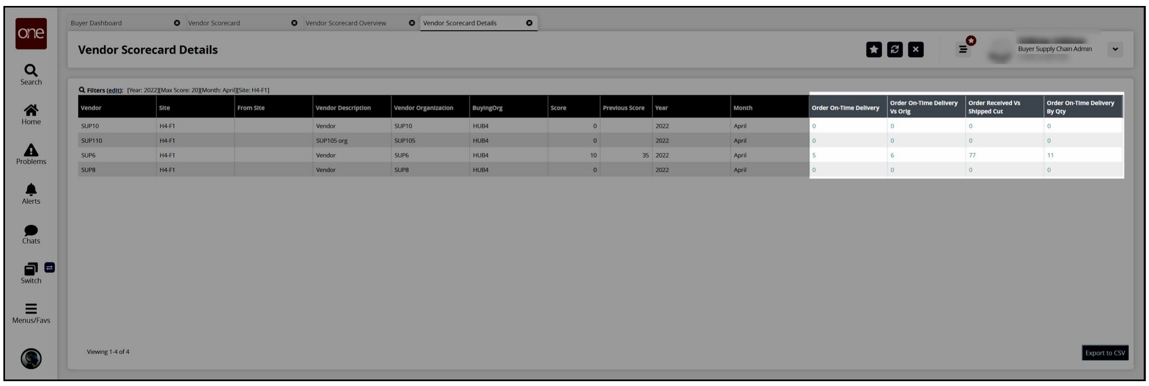
1. Log in to the ONE system.
2. Click **Menu/Favs > Reports > Vendor Performance > Vendor Scorecard.**
3. Click the **Filters (edit)** link.
   The filter fields display.
4. Fill in the fields to locate the desired vendor scorecard(s). Fields with an asterisk (*) are required. See the "Vendor Scorecarding" section of the current release of *Online Help* for information on the fields.
5. Click the **Search** link.
   The Vendor Scorecard report displays.



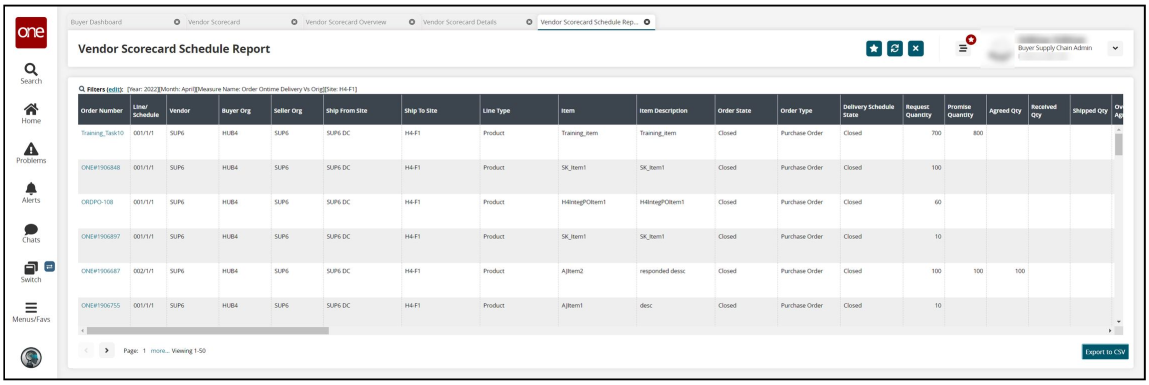
6. In the **Score** column, click the link for the desired scorecard.
   The Scorecard Overview screen appears in a new tab.



7. Click a **Vendor Score** link or a **Vendor Count** link above 0 to view the vendor scorecard details.
   The Vendor Scorecard Details screen appears in a new tab with the data measures selected during vendor scorecard configuration displayed in columns.



8. Click a link in any of the data measure columns with a score above 0.
   The Vendor Scorecard Schedule Report for that data measure appears in a new tab.



9. Click **Export to CSV** to export the report to a CSV file.

See the "Enhancements to the Vendor Scorecard Report and a New Vendor Scorecard Schedule Report" section in the current version of the *Release Notes* for more information.

1.7.3 Invoices

1.7.3.1 Using the Active on Ready for Pickup or Pickup Code for Auto-Invoice Creation

The ONE system supports the "Active on Ready for Pickup or Pickup" code and, when configured, generates invoices when the related shipment moves to the Pick Ready state. This code is only applicable for the following orders and shipment types:

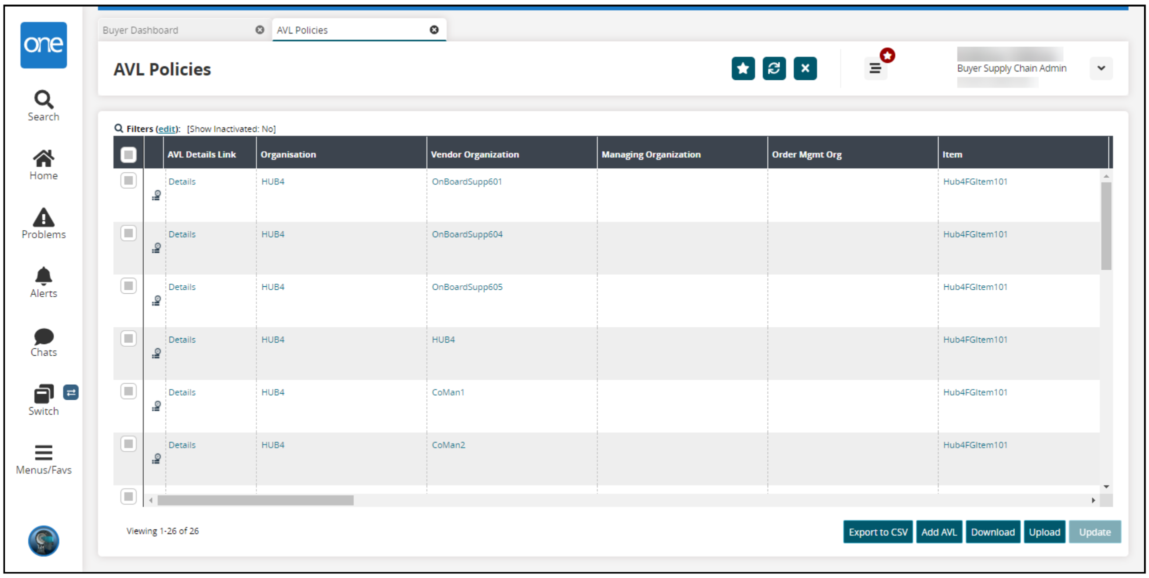
- Purchase orders (POs)
- Blanket purchase orders (BPOs)
- Deployment orders (DOs)
- Contract-based shipments

Prerequisites

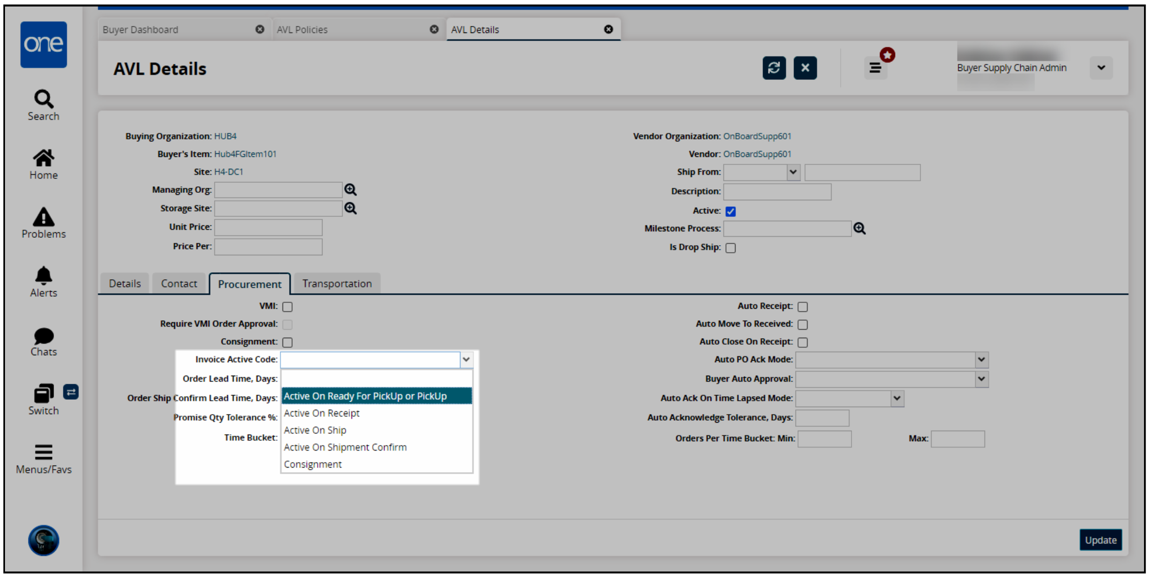
The Active on Ready for Pickup or Pickup code can only be used when the TMSServiceEnabled policy is enabled, as shipments only move to the Pick Ready state only when TMSServiceEnabled = Yes. If TMSService is disabled and the Active on Ready for Pickup or Pickup code is set, auto-invoices are not created. Please contact ONE to enable this policy.

Complete the following steps to enable the Active on Ready for Pickup or Pickup Code for automatic invoice creation:

1. Log in to the ONE system.
2. Click **Menu/Favs > Contract Mgmt > Procurement Policies > AVL Policies**.
   The AVL Policies screen appears.



3. Click an **AVL Details** link for the desired AVL policy.
   The AVL Details screen appears.
4. Click the **Procurement** tab.
5. In the **Invoice Active Code** field, select **Active On Ready For Pickup or Pickup** from the dropdown list.



6. Click **Update**.

See the "Support Invoice Active Code = "Pick Ready" for Auto-Invoicing" section in the current version of the *Release Notes* for more information.

1.7.4 Orders

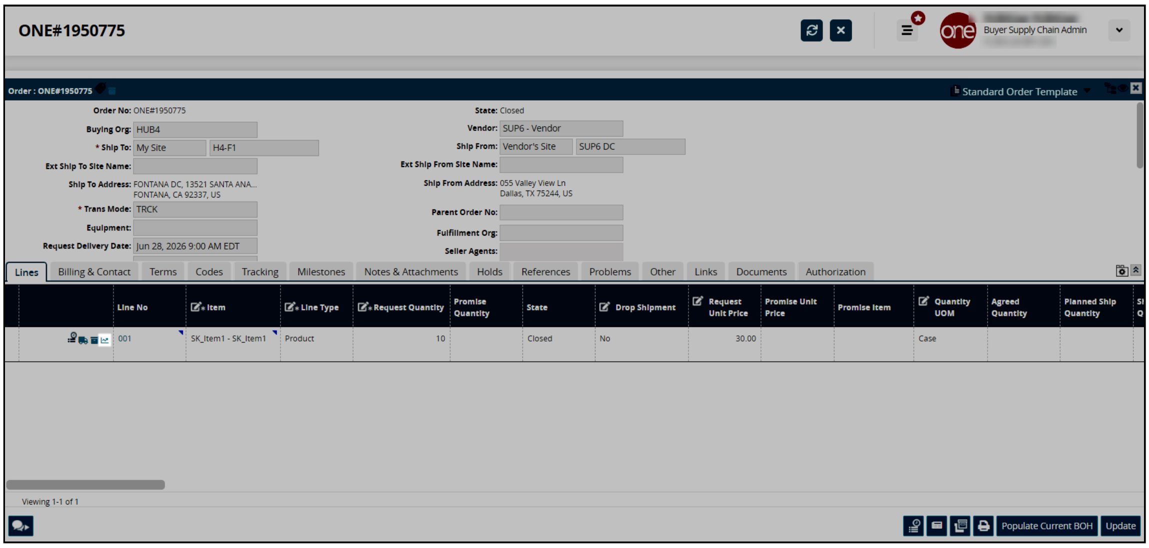
1.7.4.1 Viewing Buffer Impact During Order Collaboration

Buyer and vendor users can access a new slide-out showing the projected inventory for the relevant buffer to assess the impact of the changes made to the original order. The slide-out displays data both as a graph and a table.

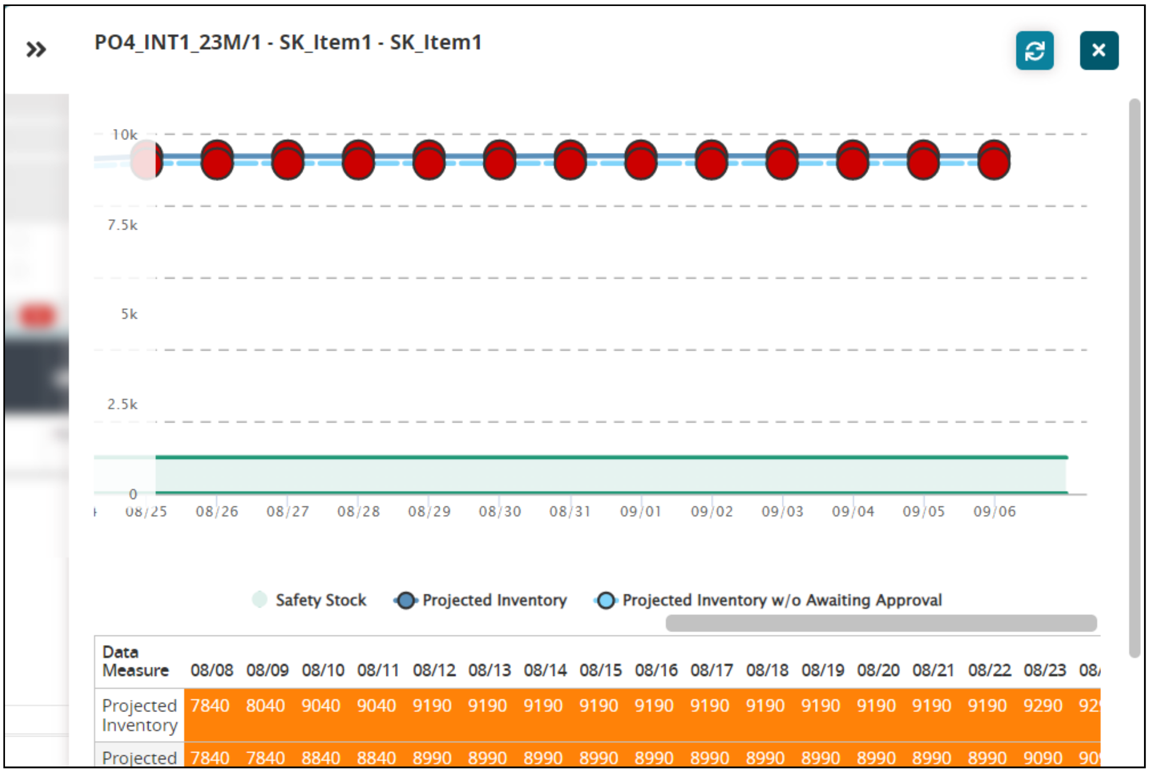
> **Note**
>
> The new slide-out is available on the Order Line (for orders created with the standard template) and the Delivery Schedule line (in the schedules template). This topic describes how to access it from an order line for orders created with the standard template.

Complete the following steps to view the projected inventory slide-out:

1. Log into the ONE system.
2. Click **Menus/Favs > Order Mgmt > Purchase Order** > **Search POs**.
3. Enter the search criteria and search for relevant purchase orders.
4. Click the order number link to view details of the desired order.



5. Click the **View PIV** icon for the desired order line.
   The projected inventory view for the relevant buffer appears as a slide-out.
   The values within the maximum and minimum limits are shown in green.



Color Codes:

- Charts: Values above the maximum threshold or below the minimum threshold are displayed in red.
- Table: Values above the maximum threshold are displayed in yellow-orange while values below min are displayed in red.
- Values within the maximum and minimum ranges are displayed in green.

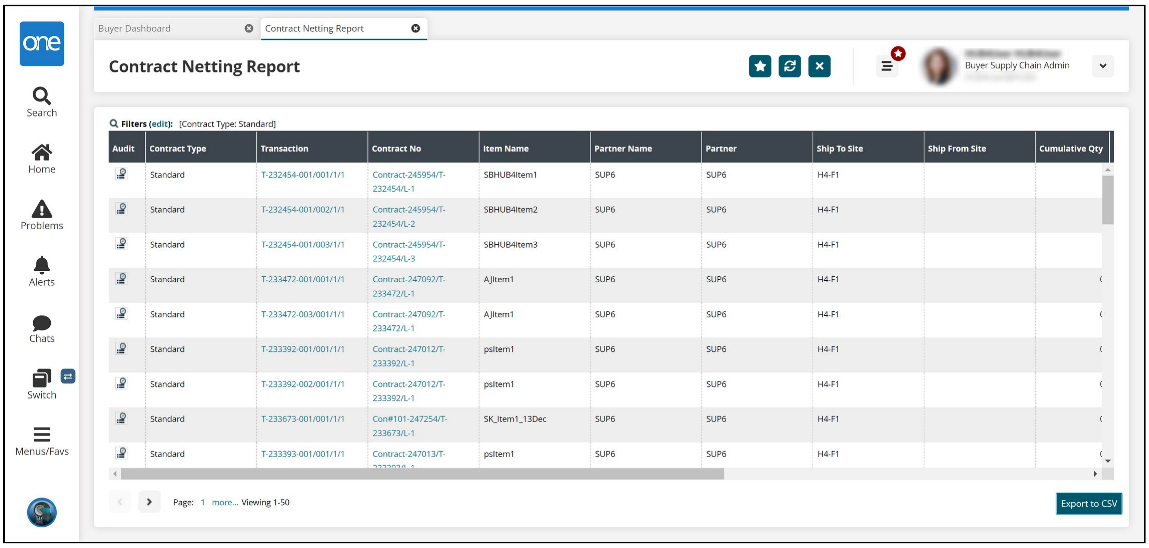
6. Click **Refresh** to refresh the PIV data.
7. Click the **X** icon to close the slide-out.

See the "Buffer Impact Assessment" section in the current version of the *Release Notes* for more information.

1.7.4.2 Viewing Contract Netting Report

Complete the following steps to view the contract netting report:

1. Log in to the ONE system.
2. Click **Menus/Favs** > **Contract Mgmt** > **Procurement Policies** > **Contract Netting Report**.
   The Contract Netting Report screen appears with a list of netting transactions.



3. Click the **Filters (edit)** link to apply desired filters.
4. Click the transaction number link under the **Transaction** column to view details.
5. Click the contract number link under the **Contract No** column to view contract details.
6. Click **Export to CSV** to export the report in the CSV file format.

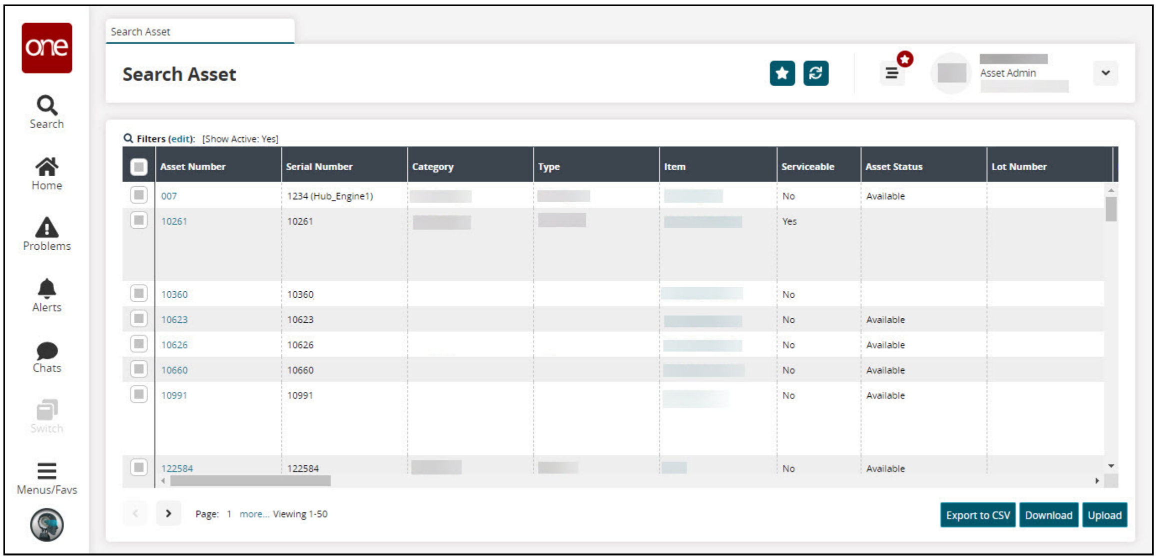
See the "Support Cumulative Quantity on Blanket Contract" section in the current version of the *Release Notes* for more information.

1.8 Adding Notes And Attachments To An Asset History Number

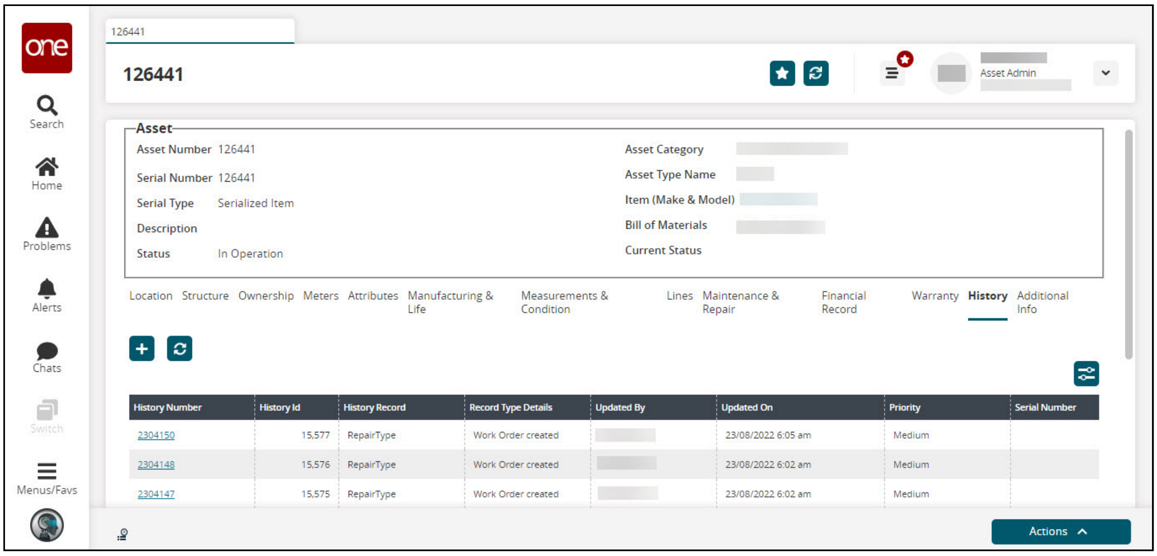
In this release, we have introduced a capability that enables admin users to add notes and attachments for an asset history record.

Complete the following steps to add notes and attachments for an asset history number:

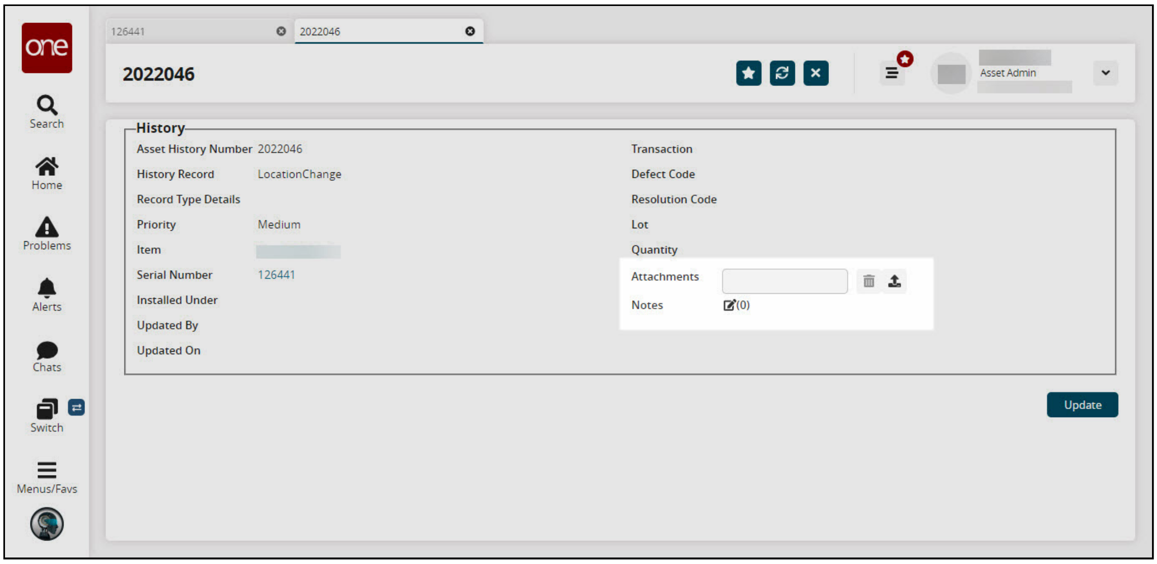
1. Log in to the ONE system.
2. Click the **Menus/Favs** > **Asset Management** > **Search Assets.**
   The Search Assets screen appears.



3. Click the **Filters (edit)** link to filter out the asset details information.
4. Click the **Asset Number** link to view asset details.
   The asset's details page appears.

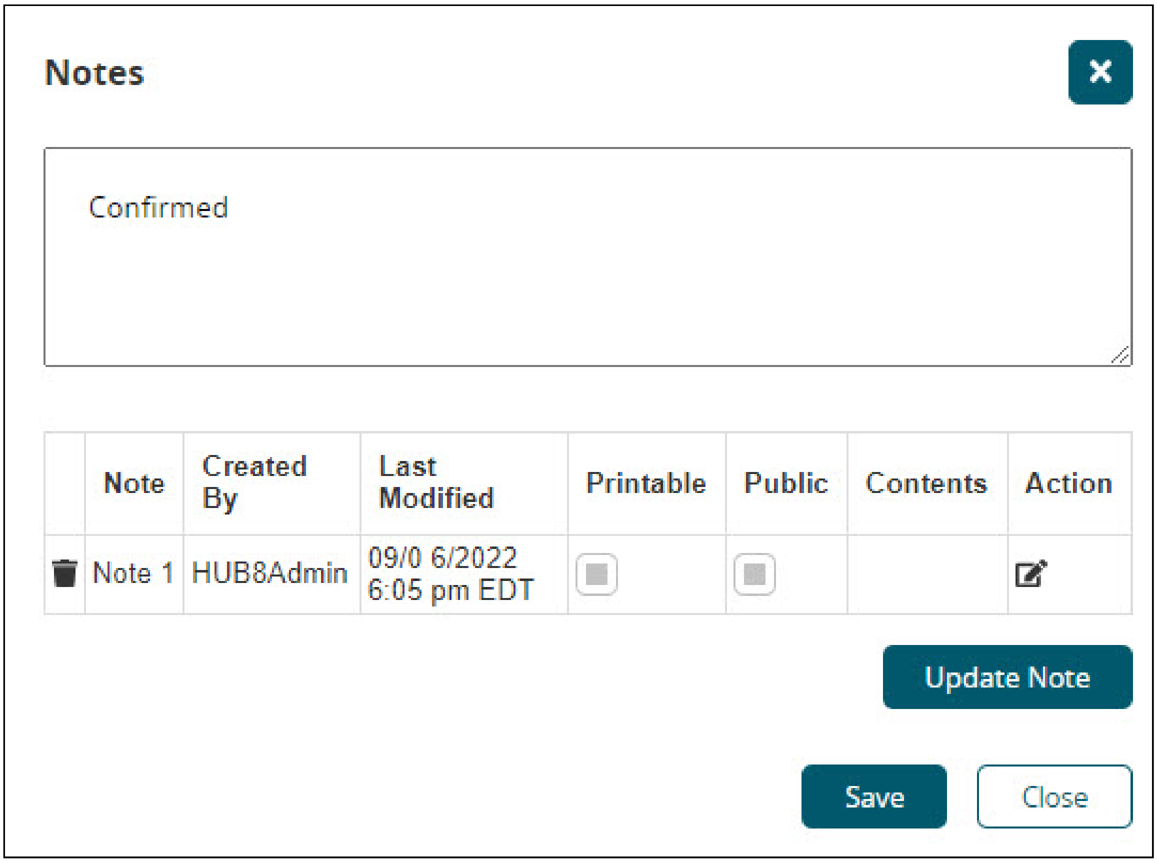


5. Click the **History** tab.
6. Click the asset's **History Number** link.
   The asset's History details screen appears. Most of the information in the History screen is auto-populated based on the asset details such as Asset History Number, History Record, Priority, Item, and Serial Number.



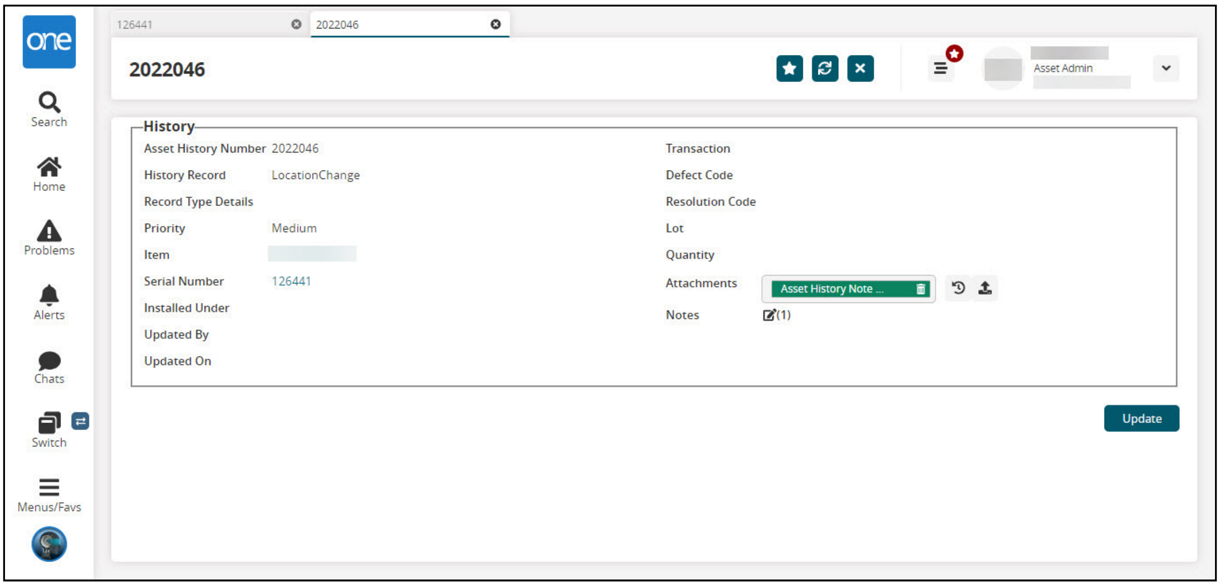
7. Next to the **Attachments** field, click the **Add File** icon to upload a file from your local machine.
8. Click the edit icon(pencil).
   The Notes pop-up appears.

9. By default, the note row is populated where the user needs to click the edit(pencil) icon.
   The Notes pane appears.



- Enter the note details as desired and then click the **Update Note** button. The added text details are displayed in the **Contents** column.
- Click **Add Note** button to add multiple note rows to the asset history record.
- Click the **Save** button to save the details. The note is appended and the respective count is displayed in brackets as shown below.

10. Click **Update** to update the asset history record details.



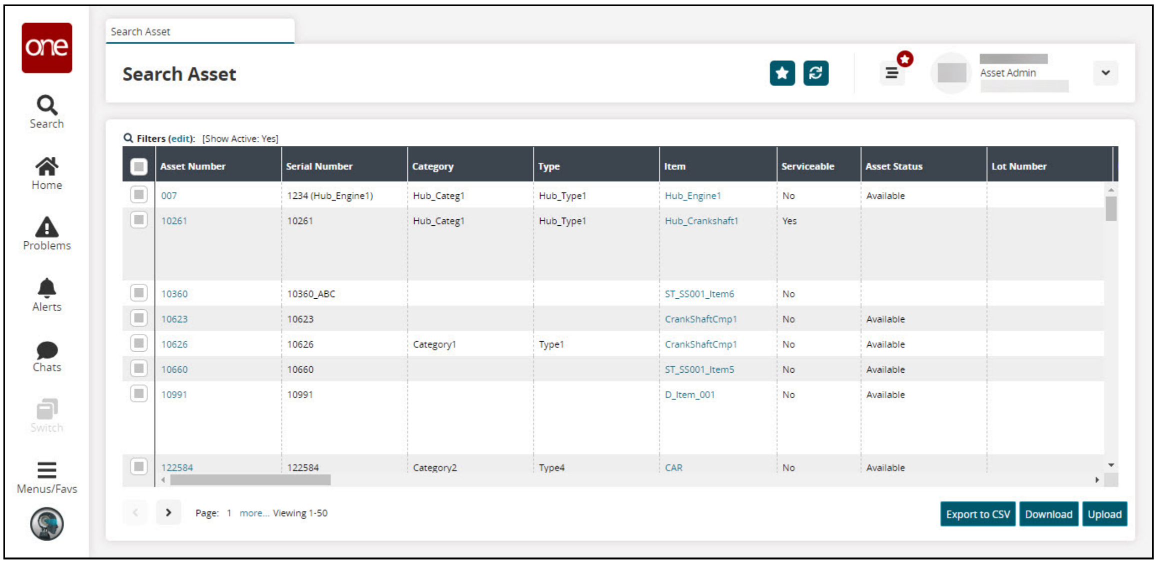
See the "Introduced History tab and UI Elements on the Asset Details page" section in the current version of the *Release Notes* for more information.

1.9 Adding History Tab To The Asset Details Page

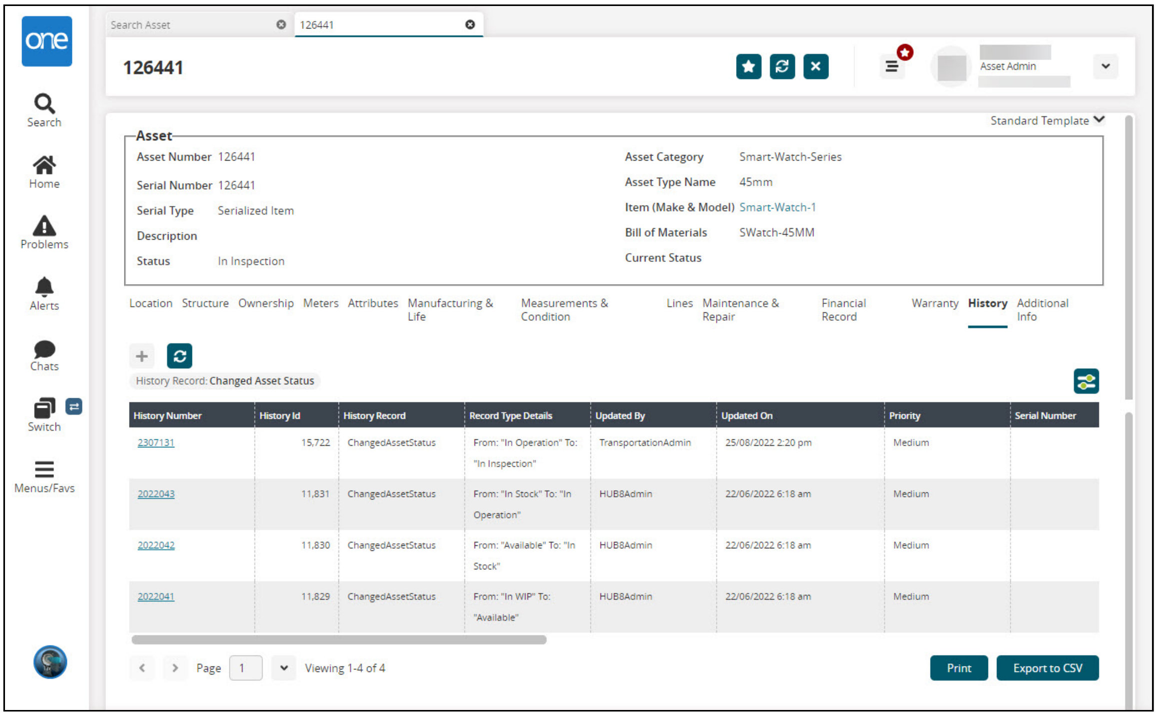
As part of this release, we have introduced a History tab on the Asset Details screen to record all the changes done on assets throughout their life cycle. We have also implemented significant UI changes to capture the tracking of asset history and associated details.

Complete the following steps to view the History tab:

1. Log in to the ONE system.
2. Click the **Menus/Favs > Asset Management > Search Assets**.
   The Search Assets screen displays.



3. Click the **Filters (edit)** link to filter the list by Serial Asset Number or Asset Number.
4. Click the **Serial Asset Number** or **Asset Number** to view asset details.
   The Asset Details page displays.



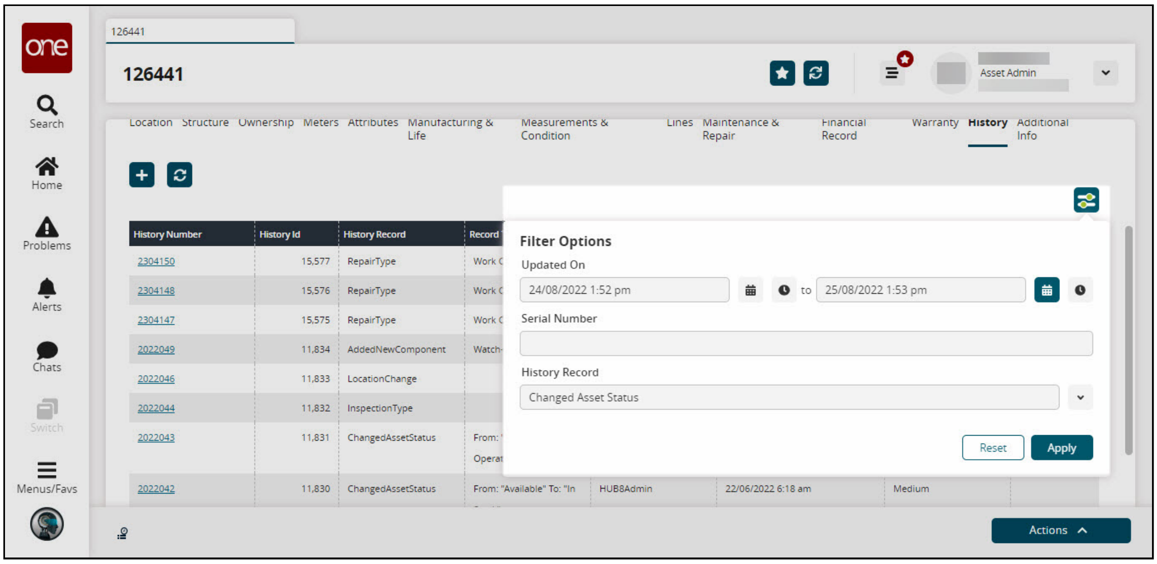
5. Go to the **History** tab.
6. The following table elicits the UI elements that are included in the History grid.

Field	Description
History Number	A chronological asset history number is generated for every update performed by the user. The admin user can also add attachments and notes to an asset history number. For more information, see the [Adding Notes and Attachments to an Asset History Number](see page 108) page.
History ID	A chronological history Id is generated for every asset history number.
History Record	The asset history record information is displayed.
Record Type Details	The asset record type details are displayed.
Updated By	The user details are displayed.
Updated On	The update date and time are displayed.
Priority	The priority is displayed. By default, the Medium option is selected.

Field	Description
Serial Number	The corresponding serial number is displayed.
Installed Under	The parent asset information is displayed under which the respective asset line is installed.
Lot Number	The lot number is displayed.
Quantity	The quantity information is displayed.
Quantity UOM	The unit of measurement is displayed.
Transaction	The unique transaction number is generated when a work order is created for that respective asset history number.
Work Order Status	The present work order status for that created work order is displayed.
Defect Code	
Resolution Code	
Attachments	The attachment file name uploaded for that asset history number is displayed.
Note Count	The notes appended are displayed in numeric format.

> **Note**
>
> The admin user can click the **Raise Issue (+)** button to raise an issue line, work order, or inspection. For more information, see the Initiating Raise Issue Action for an Asset in Operation(see page 123) page.

7. On the top-right side of the History grid, click the **FilterOptions** ( ) button. The Filter Options pop-up displays.



- Use the calendar and clock tools to populate the updated duration date/time fields.
- Select the desired value from the **History Record** field drop-down list.
- Click the **Apply** button.
- The screen updates with the filter options applied above the History grid.

8. Click the **Print** button to download the PDF on your local machine and print the details.
9. Click the **Export to CSV** button to export the report to a CSV file.

See the "Introduced History tab and UI Elements on the Asset Details page" section in the current version of the *Release Notes* for more information.

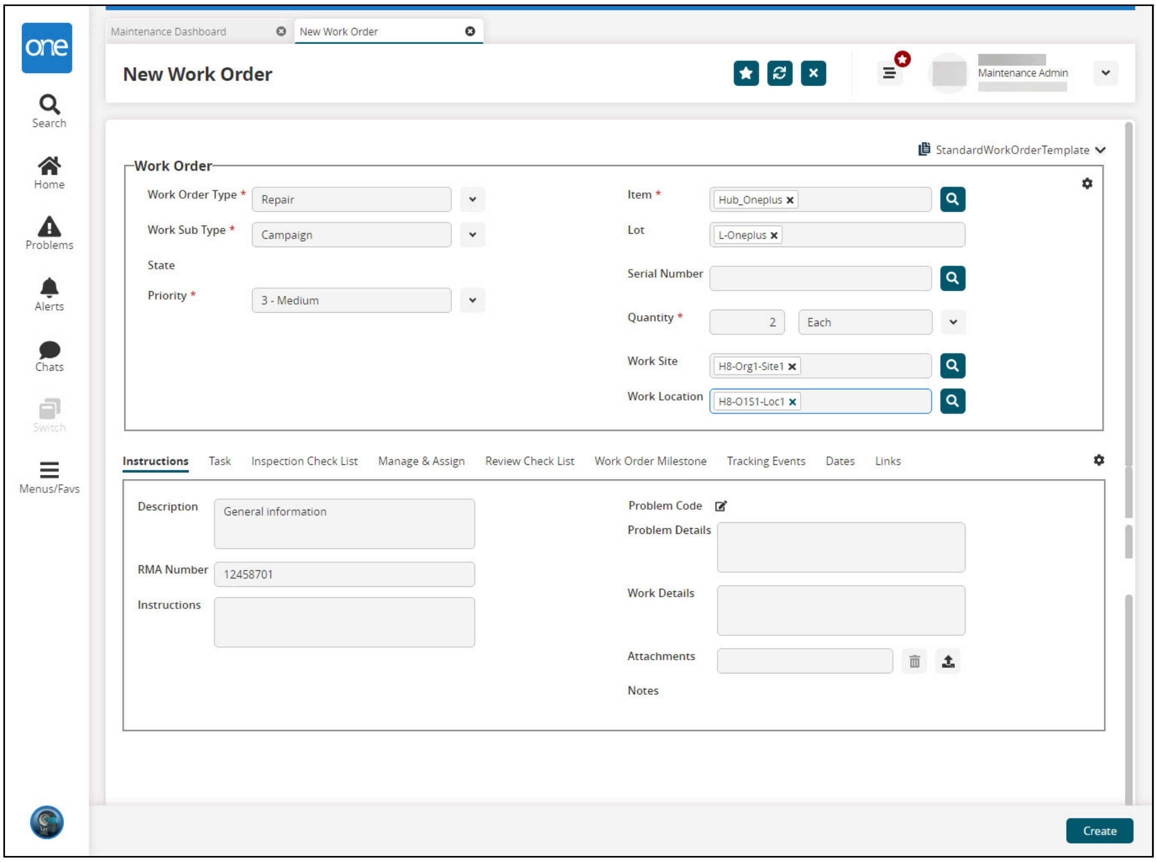
1.10 Campaign Management Work Order

This release introduces the Campaign Management capability for admin users to streamline and facilitate the repairs of the parent work order with their corresponding child work orders.

> **Prerequisite**
>
> Not all users and roles have access to this feature. It is mandatory for an Enterprise Admin role user to initiate the **Auto Explode Tasks** and **Auto Create Child Work Order** policies at the enterprise level from the Search Policies under the **Menus/Favs** menu. By initiating the policies, the task and child work order is auto-populated based on the quantity defined on the parent work order.

Complete the following steps to create a campaign management repair work order:

1. Log in to the ONE system.
2. Click **Menus/Favs** > **Work Order Management** > **New Work Order**.
   The New Work Order screen appears.

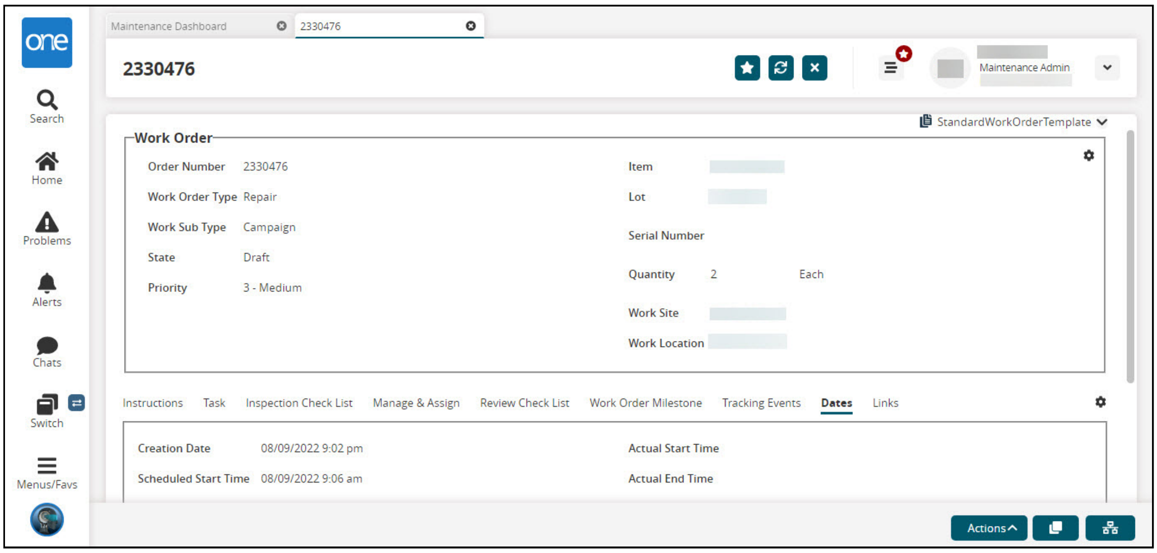


3. Fill out the following fields. Fields with an asterisk (*) are required.

Field	Description
*Work Type	In the drop-down list, select the Repair work order.
*Work Sub Type	In the drop-down list, select the Campaign subtype.
*Item	Use the picker tool to select the item name.
Lot	Enter the lot associated with the item.
*Quantity	Enter the number of items that need to be repaired.
Work Site	Use the picker tool to select the worksite at which the work order is performed.
Work Location	Use the picker tool to select the work location at which the work order is performed.
State	Displays the present state of the work order.

Field	Description
*Priority	By default, Medium priority is selected. In the drop-down list, select another priority level if desired.

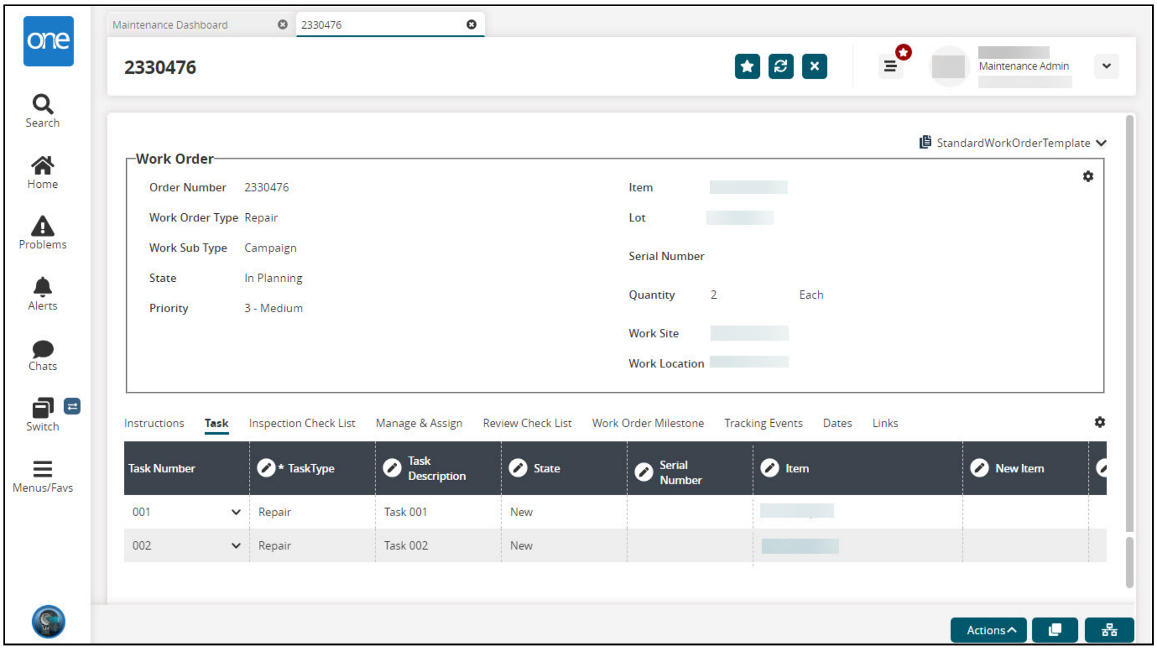
4. Click the **Create** button.
The screen refreshes with the success message. The campaign management parent work order is created in the **Draft** state.



Note

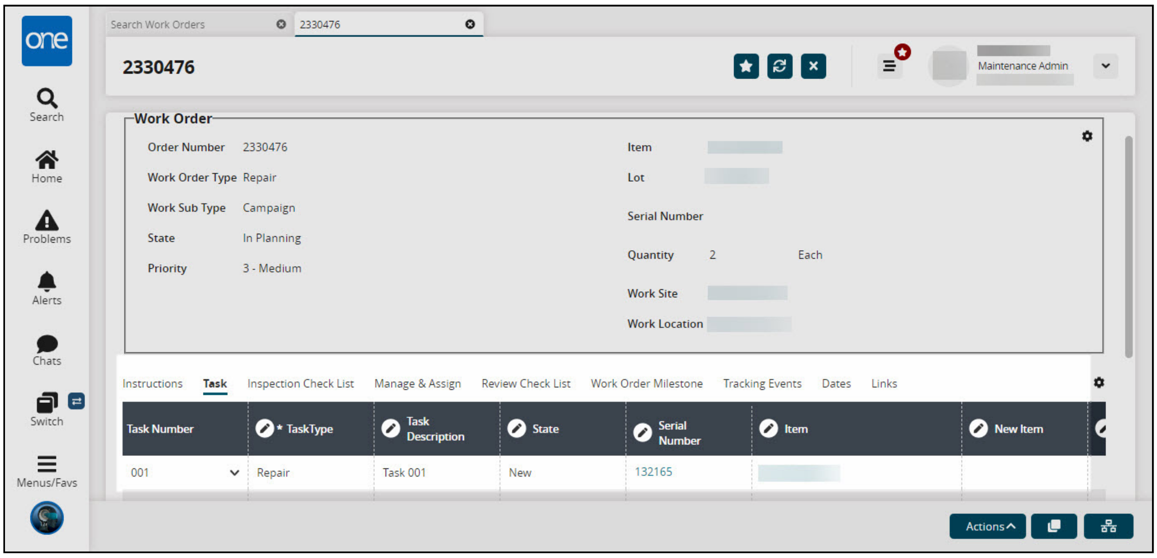
The user needs to move the parent work order from Draft, New, Assigned, Open, Awaiting Inspection, In-inspection, Completed Inspection, Accepted, In Diagnosis, Completed Diagnosis, and then In Planning state.

5. Move or ensure that the parent work order is in the In Planning state.
6. Based on the configured policy, the task is auto-populated with **New** as the task state.



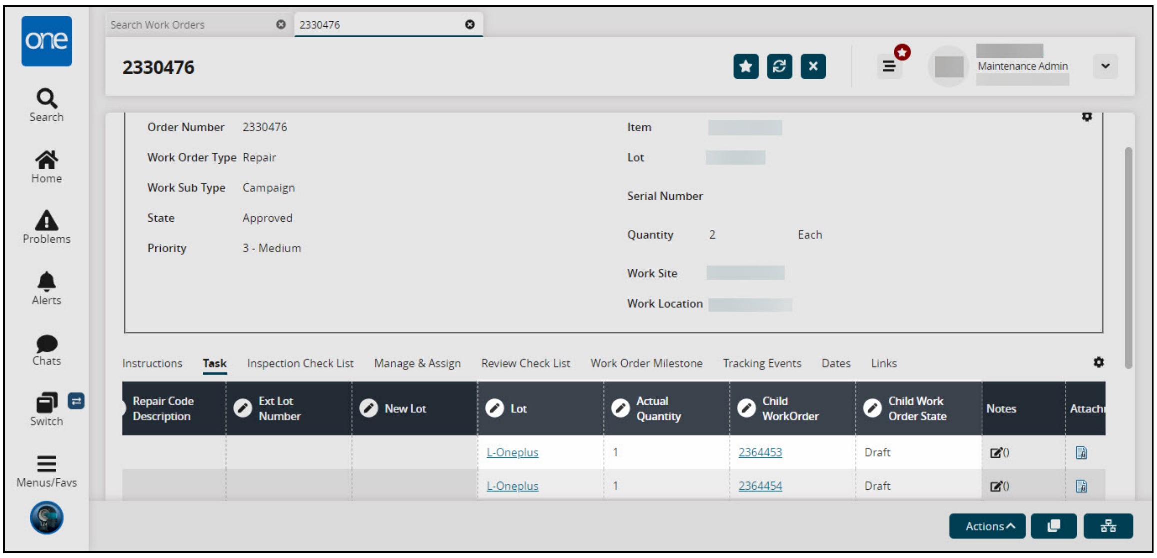
7. In the **Serial Number** column, select or enter the respective serial number for the task record.

> **Note**
>
> A serial number is selected per task and cannot be shared among two or more tasks. If a single serial number is selected for two tasks, then the system generates a warning message.



8. Click **Actions** > **Update**.
9. Click the **Submit** button.
10. Click **Actions** > **Approve**.
    A green success message appears. (The child work order is created for the campaign management parent work order and appears under the child work order

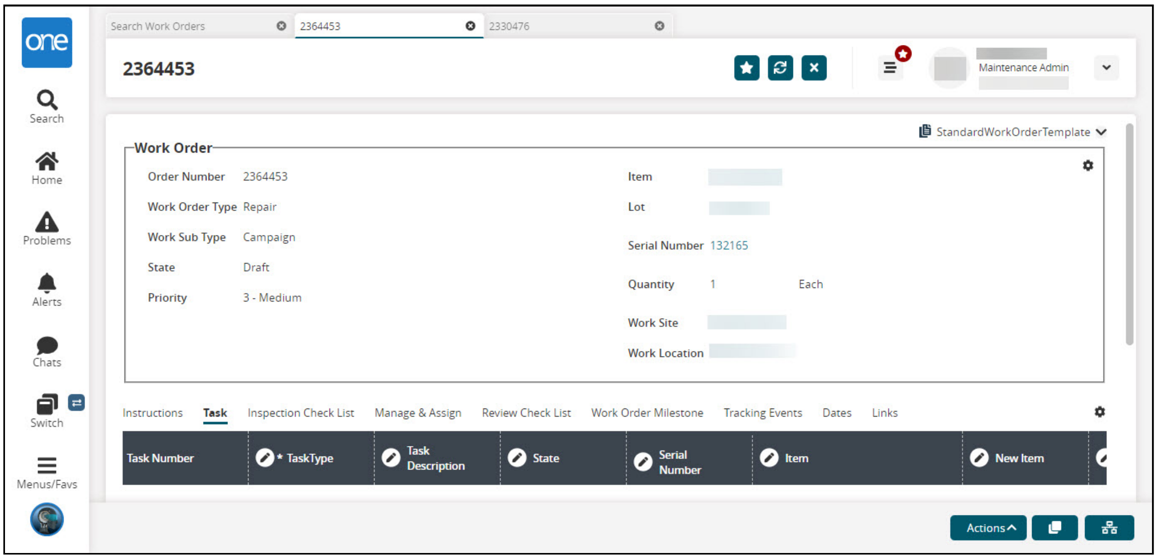
column.)



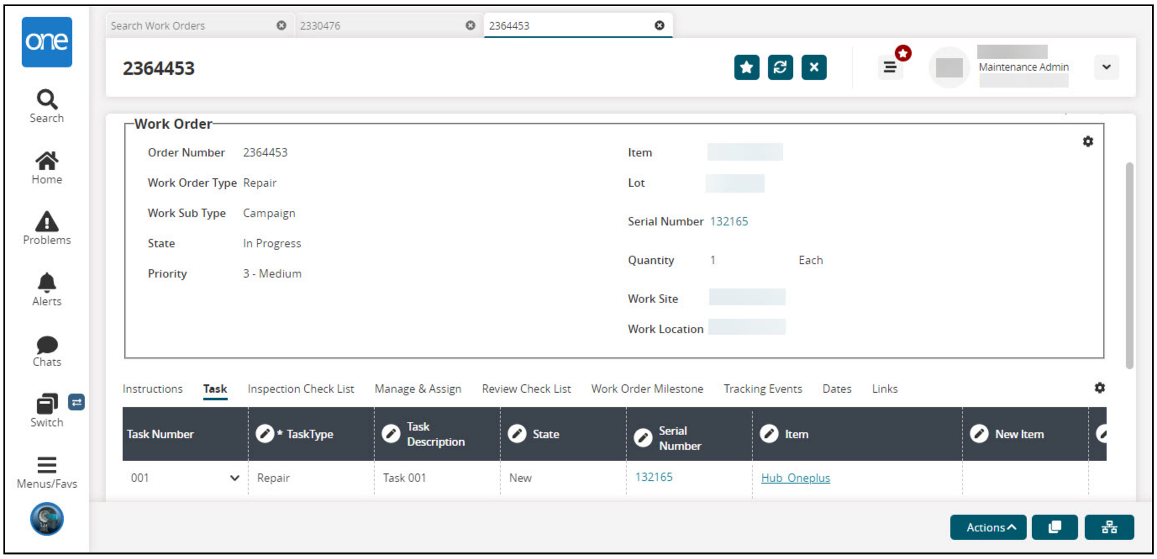
After initiating the Approve action button, the system auto-populates the child work order. The admin user must execute the child work order before executing the parent work order.

The admin user can execute the parent work order once all the respective child work orders are executed. For example, if the child's work order reflects the *Review Completed* state, then the admin user can execute the parent's work order up to the *Review Completed* state. This rule applies to all the corresponding child and parent work order states.

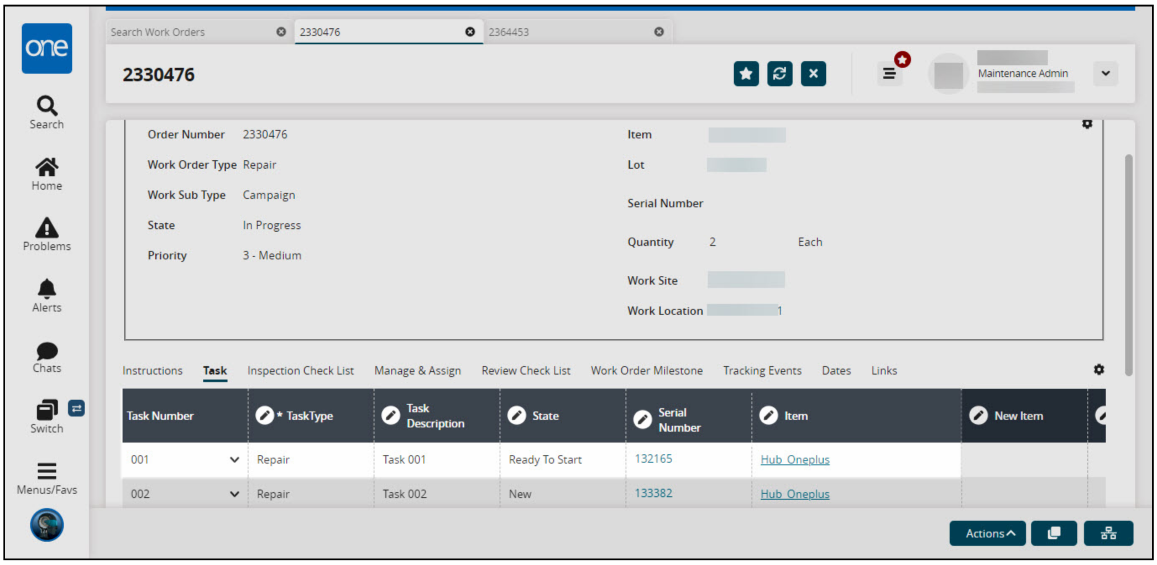
11. Click the respective **Child Work Order** number link.
    The respective child work order screen appears.



12. Execute the child's work order state from Draft, New, Assigned, Open, Awaiting Inspection, In-inspection, Completed Inspection, Accepted, In Diagnosis, Completed Diagnosis, In Planning, Completed Planning, and then In Progress state. As per the configured policy, the system auto-generates the task when the child's work order reaches the In progress state.

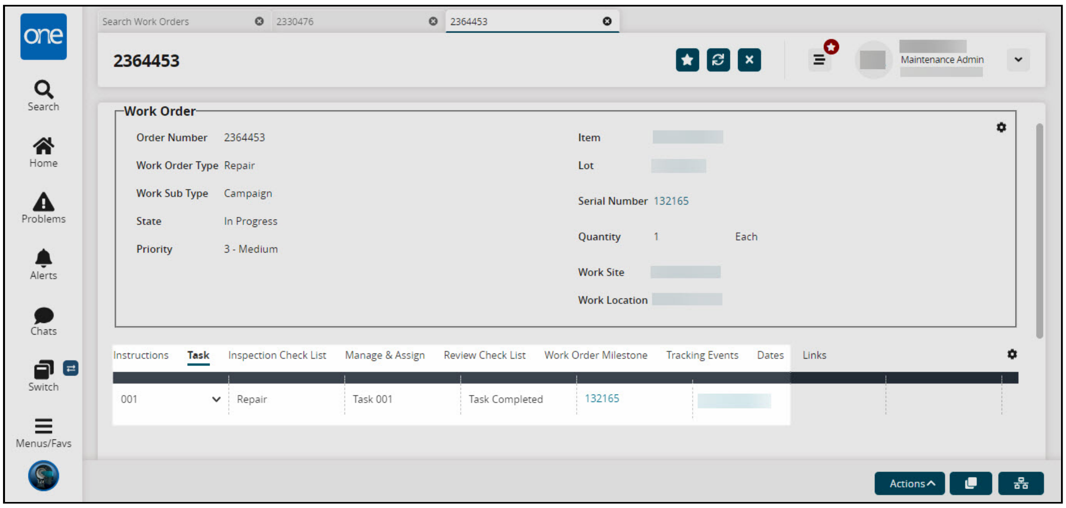


13. When the admin user initiates the Task for the child work order, then the Task record state of the Parent work order changes to the **Ready to Start** state.

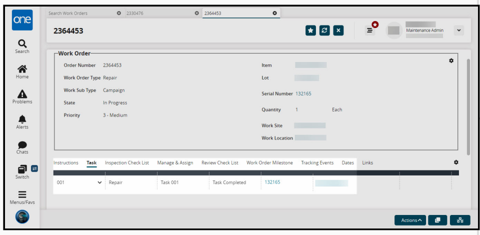
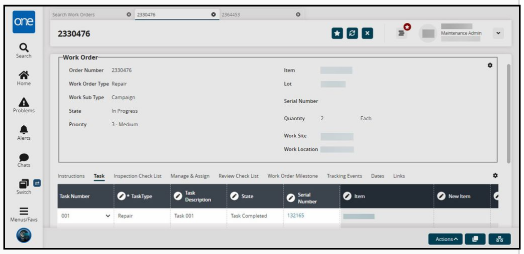
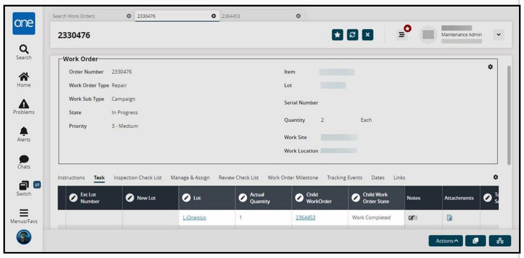


14. In the child work order, perform the task's activity by Initiating, Starting, and Completing the task. The child's work order task state reflects Task Completed. For more information, see the following sections in the current version of the online help:
    - Initiating Tasks
    - Issuing Tools and Parts

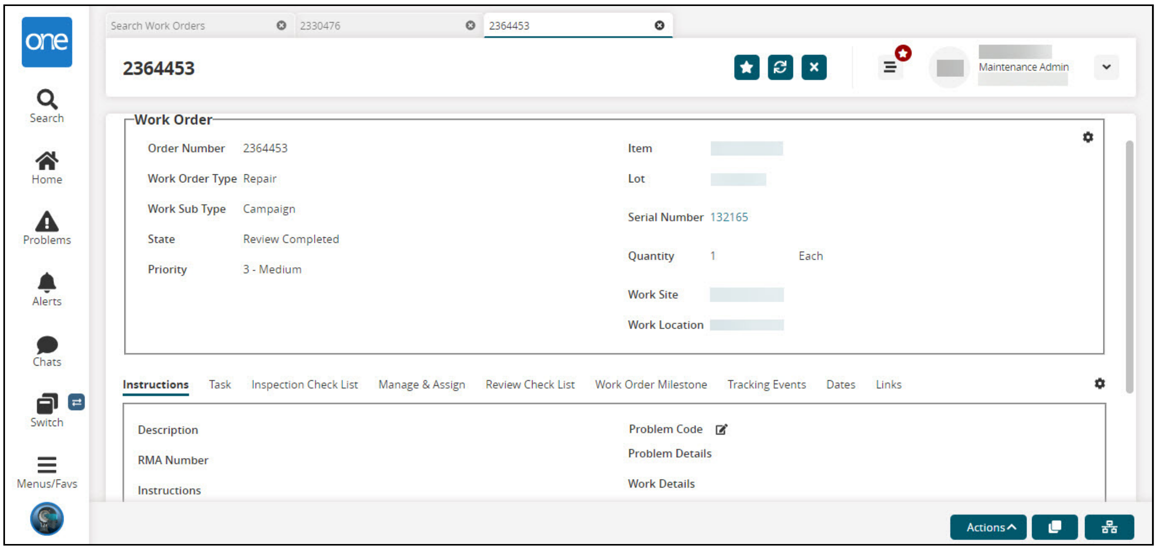
- Starting and Completing Tasks



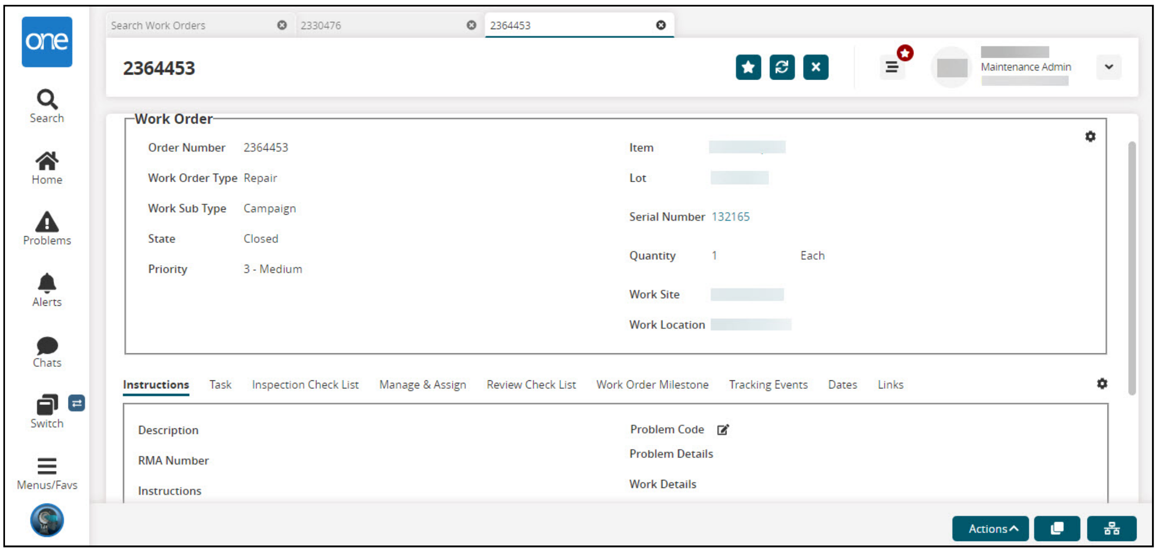
Once the child work order state is *Work Completed*, the parent work order task record state will reflect the *Task Completed* state, and the respective child work order state reflecting *Work Completed*.

Child Work Order Task view	Parent Work Order Task view
	 

15. On the child work order, click **Actions** > **Complete Work.**
16. Click the **Submit** button.
    The child work order state changes to Work Completed.
17. Click **Actions** > **Start Review**.
18. Click the **Submit** button.
    The child work order state changes to In Review.
19. Click **Actions** > **Complete Review.**
20. Click the **Submit** button.
    The child work order state changes to Review Completed.



21. Click **Actions** > **End Work.**
    The child work order state changes to Work Ended.
22. Click **Actions** > **Deliver Asset.**
    The child work order state changes to Asset Delivered.
23. Click **Actions** > **Close Work.**
24. Click the **Submit** button.
    The child work order state changes to Closed.



After executing all the child work orders, then the admin user can proceed to execute the parent work order.

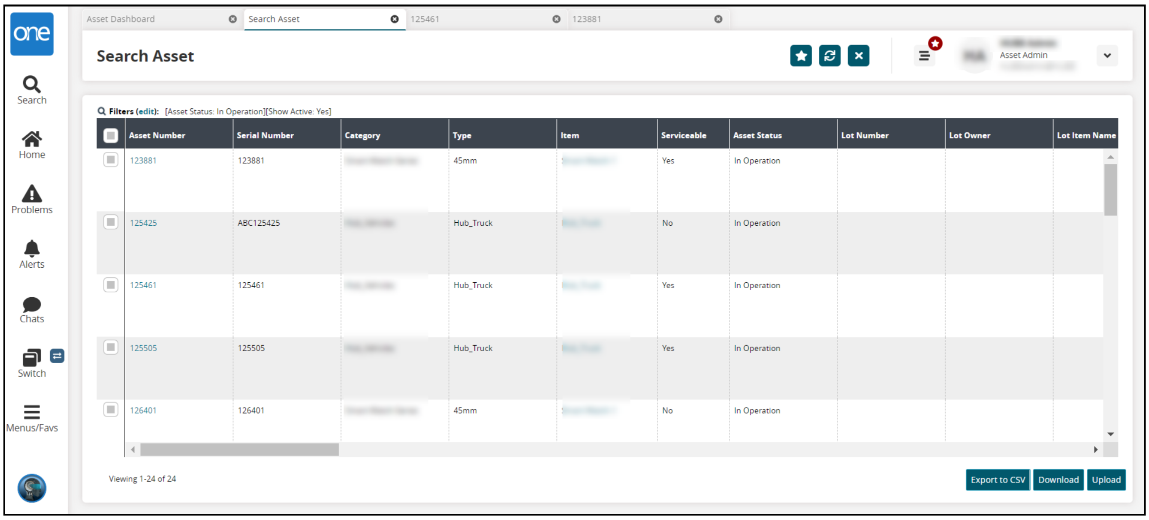
See the "Enhancements to Work Orders" section in the current version of the *Release Notes* for more information.

1.11 Raising An Issue For An Asset In Operation (Issue Line Type)

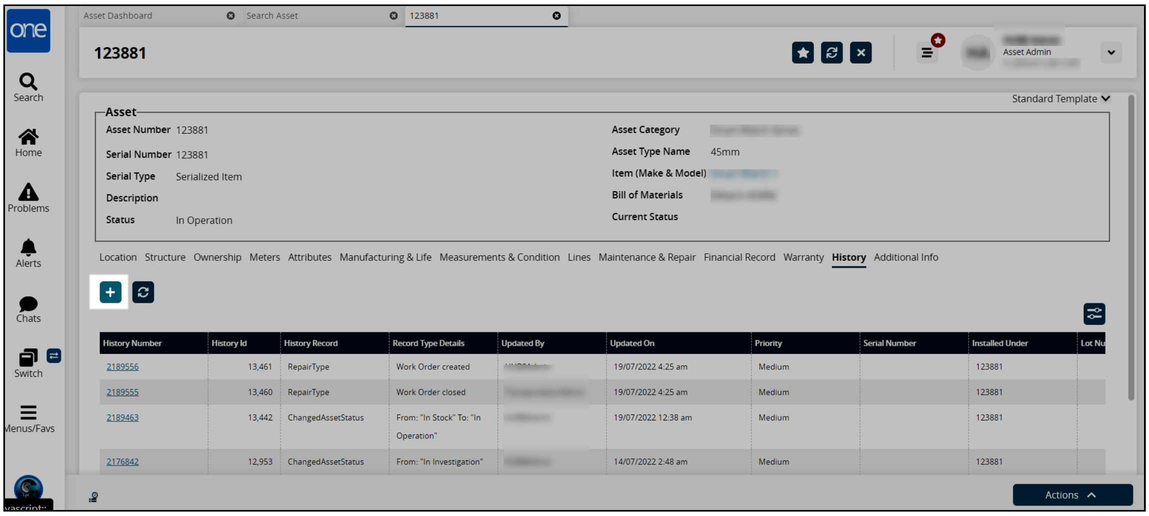
The Raise Issue action button allows users to initiate and record updates for an asset in operation. Users can only raise an issue for assets with an In Operation status, and the issue can be a work order, inspection, or an issue line.

Complete the following steps to raise an issue for an asset:

1. Log in to the ONE system.
2. Click the **Menus/Favs** > **Asset Management** > **Search Assets.**
   The Search Assets screen displays.
3. Click the **Filter (edit)** link and select **In Operation** from the **Asset Status** dropdown list.
   The assets currently in operation display.

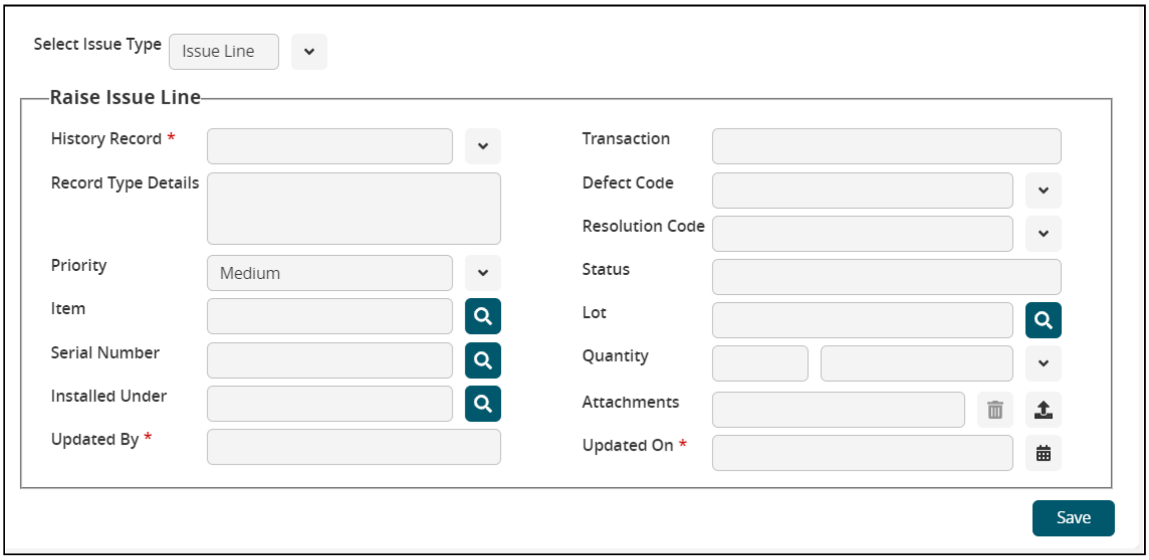


4. Click the **Asset Number** link to view asset details.
   The asset details page displays.
5. Click the **History** tab.
   The History tab displays. If an asset has the correct details, a plus sign for raising an issue is active, as shown below.



6. Click **Raise Issue** (+) button.
   A popup displays with the Issue Line option displayed as the default in the Select Issue Type field.

> **Note**
>
> The issue raised can be a Work Order, Inspection, or an Issue Line type. The popup fields will differ based on the type selected; the Issue Line type is shown below.
> Please see the "Raising an Issue for a Work Order" and the "Raising an Issue for an Inspection " sections for more information on the fields specific to those issue types.



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

Field	Description
History Record*	Select the type of record from the dropdown menu.
Record Type Details	Enter the details.
Medium Priority	Select the priority for the issue type. By default, the Medium priority is selected.
Item	Select an item using the picker tool.
Serial Number	Select a serial number using the picker tool.
Installed Under	Use the picker tool to select the singleton this issue is installed under.
Updated By*	Enter the user's name raising the issue.
Transaction	Enter the transaction details.
Defect Code	Select the defect code details from the dropdown menu.
Resolution Code	Select the resolution code details from the dropdown menu.
Status	Enter a status for the issue.
Lot	Use the picker tool to select the lot details.
Quantity	Enter a numeric value for the quantity in the first field, and select the quantity unit of measure from the dropdown menu in the second field
Attachments	Click to upload the file attachments from your local machine.
Updated On*	Click the calendar icon to select the date for the issue update.

8. Click the **Save** button.
   A green success message displays, and the issue is listed in the historical issue table.

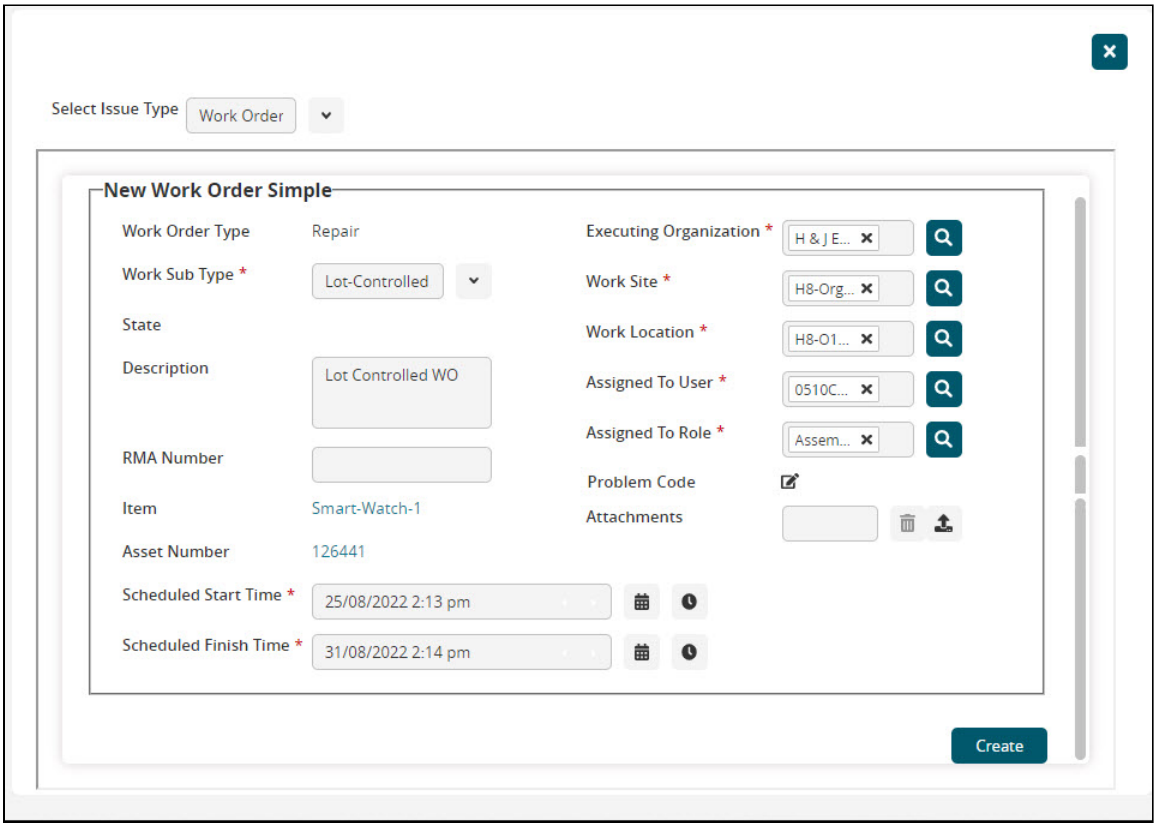
See the "Introduced History tab and UI Elements on the Asset Details page" section in the current version of the *Release Notes* for more information.

1.11.1 Raising an Issue for a New Work Order

Users can raise an issue to create a work order. General instructions can be found in the "Initiating a Raise Issue Action for an Asset In Operation" section through step 6.

Complete the following steps to raise an issue for creating a simple work order:

1. From the **Raise Issue** popup in the **Select Issue Type** field, select the **Work Order** type from the dropdown menu.
   The popup updates with the fields displayed in the following screenshot.



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

Field	Description
Work Order Type	The work order option is auto-populated.
Work Sub Type*	Select the desired work order sub-type from the menu.
Description	Enter the desired description.

Field	Description
RMA Number	Enter the Return Material Authorization (RMA) number.
Item	The item is auto-populated.
Asset Number	The asset number is auto-populated.
Scheduled Start Time*	Click the calendar icon to select the scheduled start date and time.
Scheduled Finish Time*	Click the calendar icon to select the scheduled end date and time.
Executing Organization*	Select the executing organization using the picker tool.
Work Site*	The work site is auto-populated.
Work Location*	The work location is auto-populated.
Assigned To User*	Use the picker tool to select the respective user.
Assigned To Role*	Use the picker tool to select the user role.
Problem Code	Click the problem code icon to enter appropriate problem code values.
Attachments	Click the attachments icon to upload a file attachment.

3. Click the **Save** button.
   A green success message displays.

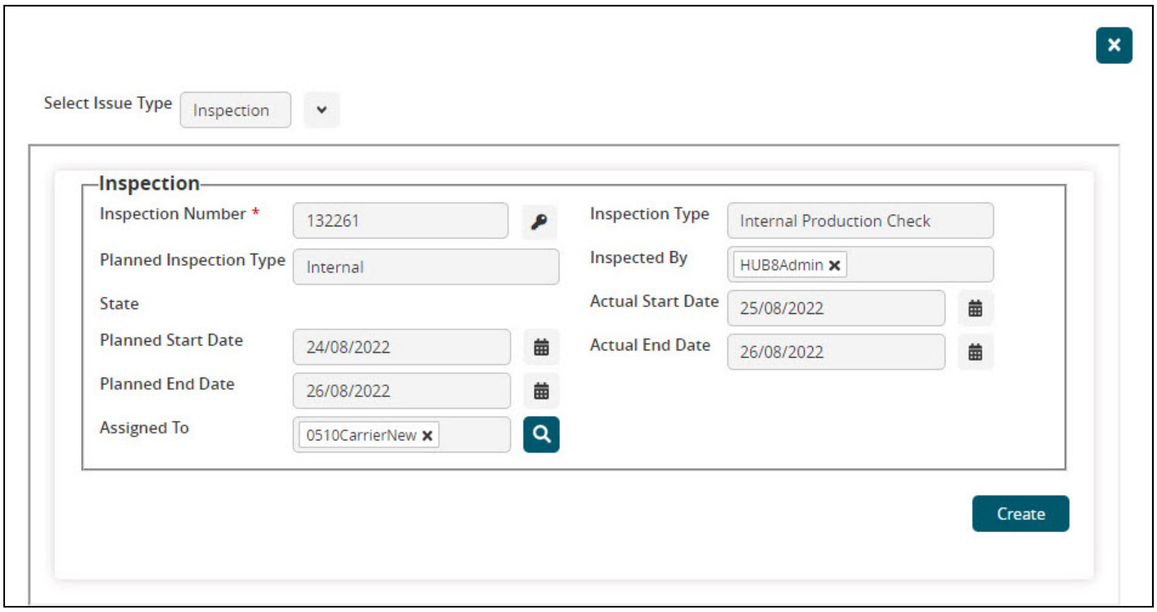
1.11.2 Raising an Issue for an Inspection

Users can raise an issue to create an inspection. General instructions can be found in the "Initiating a Raise Issue Action for an Asset In Operation" section through step 6.

Complete the following steps to raise an issue for creating a simple work order:

1. From the **Raise Issue** popup in the **Select Issue Type** field, select the **Inspection** type from the dropdown menu.

The popup dates with the fields shown in the following screenshot.



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

Field	Description
Inspection Number*	Click the key icon to generate a unique system-generated inspection number.
Planned Inspection Type	Enter the desired information in the field.
Planned Start Date	Click the calendar icon to select the planned inspection start date.
Planned End Date	Click the calendar icon to select the planned inspection end date.
Assigned To	Use the picker tool to assign the details to the respective user.
Inspection Type	Enter the inspection type information.
Inspected By	Enter the appropriate information.
Actual Start Date	Click the calendar icon to select the actual inspection start date.

Field	Description
Actual End Date	Click the calendar icon to select the actual inspection end date.

3. Click the **Save** button.
   A green success message displays.

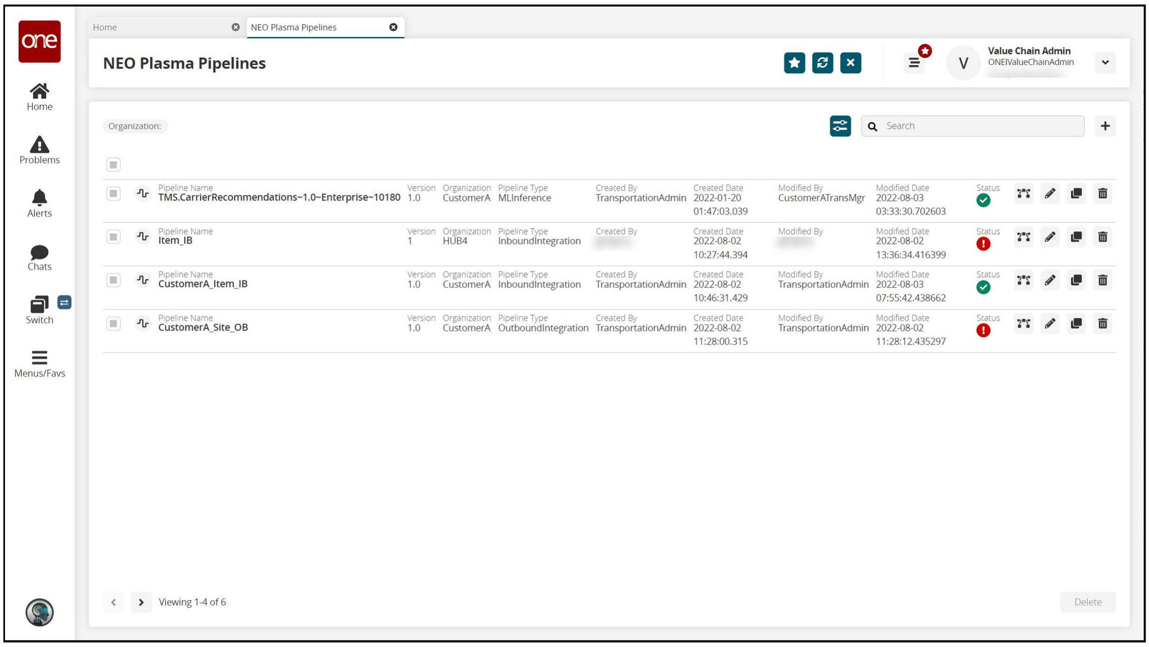
1.12 Integration

1.12.1 Working with the NEO Plasma Pipelines Screen

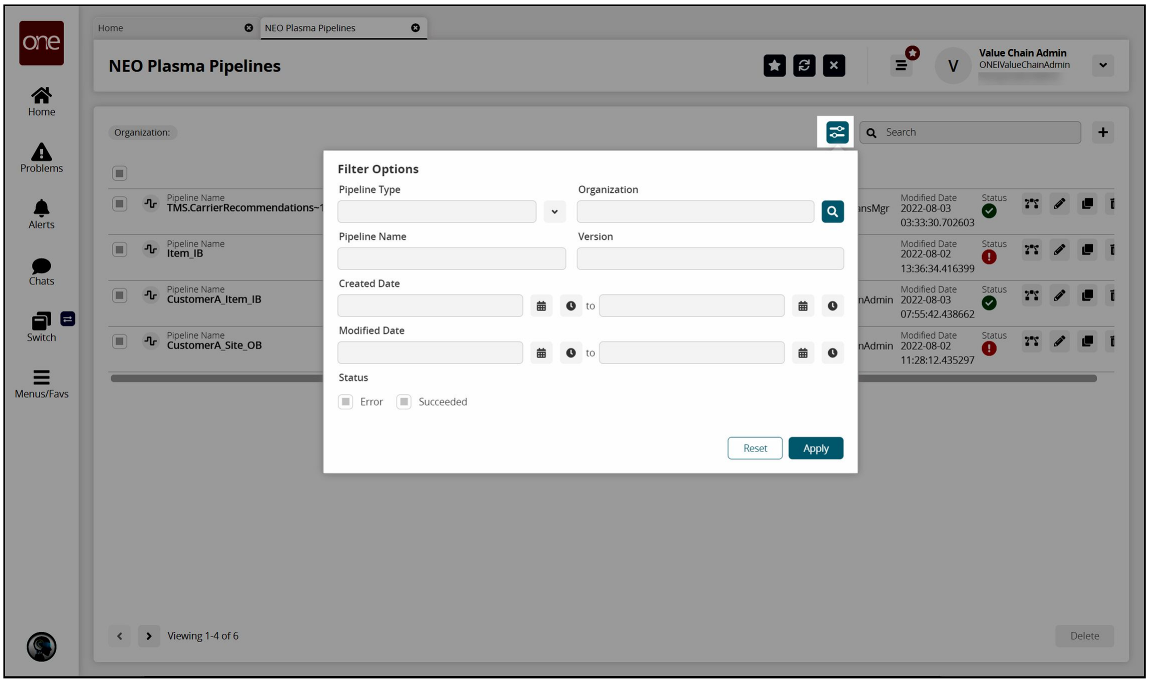
Users can view, copy, and delete integration and machine learning pipelines from the NEO Plasma Pipelines screen. In addition, users can create integration pipelines from this screen. Note that a machine learning pipeline can only be created from the ML Plug Points screen. See the "Bring Your Own Intelligence" section in *Online Help* for more information.

Complete the following steps to view the NEO Plasma Pipelines screen:

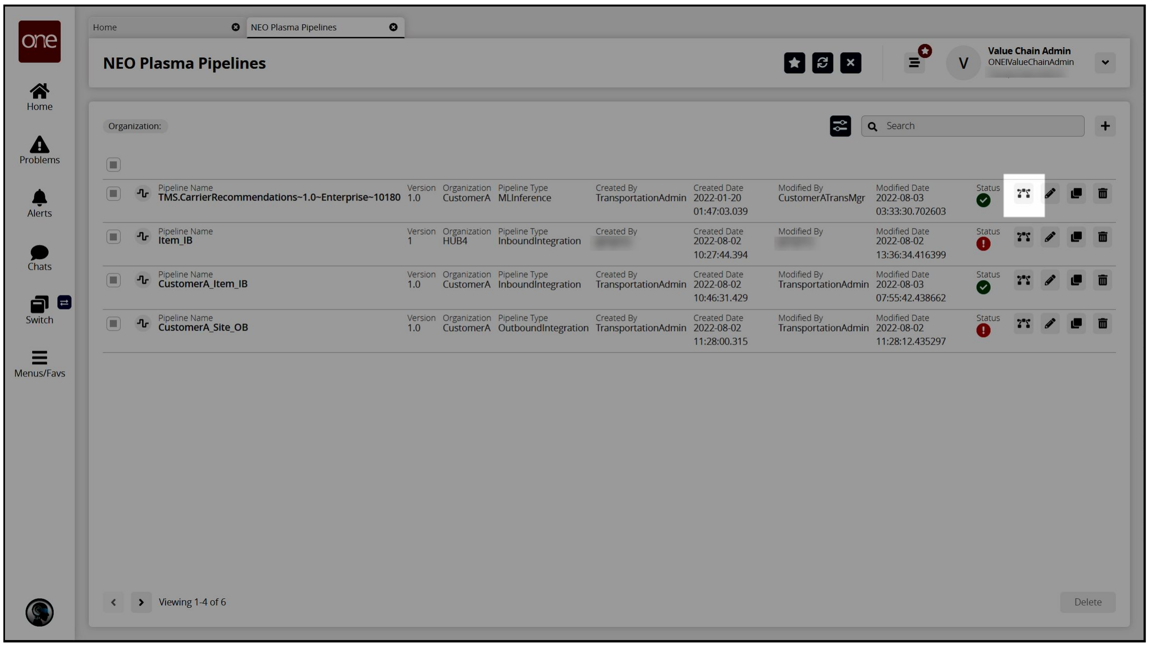
1. Log in to the ONE system.
2. Click **Menu/Favs > Tools > Integration > NEO Plasma Pipelines**.
   The NEO Plasma Pipelines Screen appears with a list of existing pipelines. The Pipeline Type column displays whether the pipeline is an integration pipeline (Inbound Integration or Outbound Integration) or a machine learning pipeline (ML Inference).



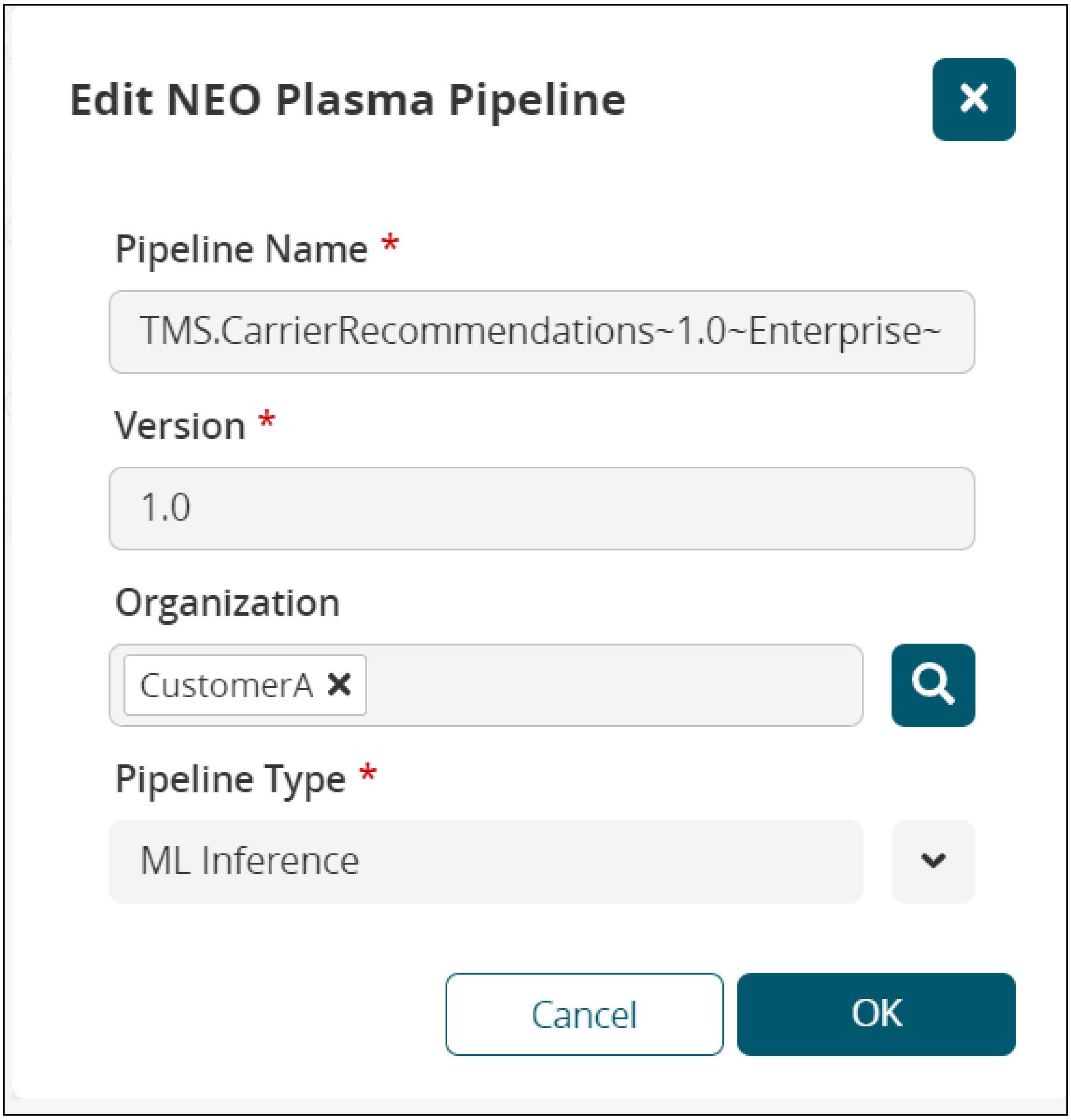
3. Click the filter icon to search for a specific pipeline(s).
   The Filter Options popup window displays.



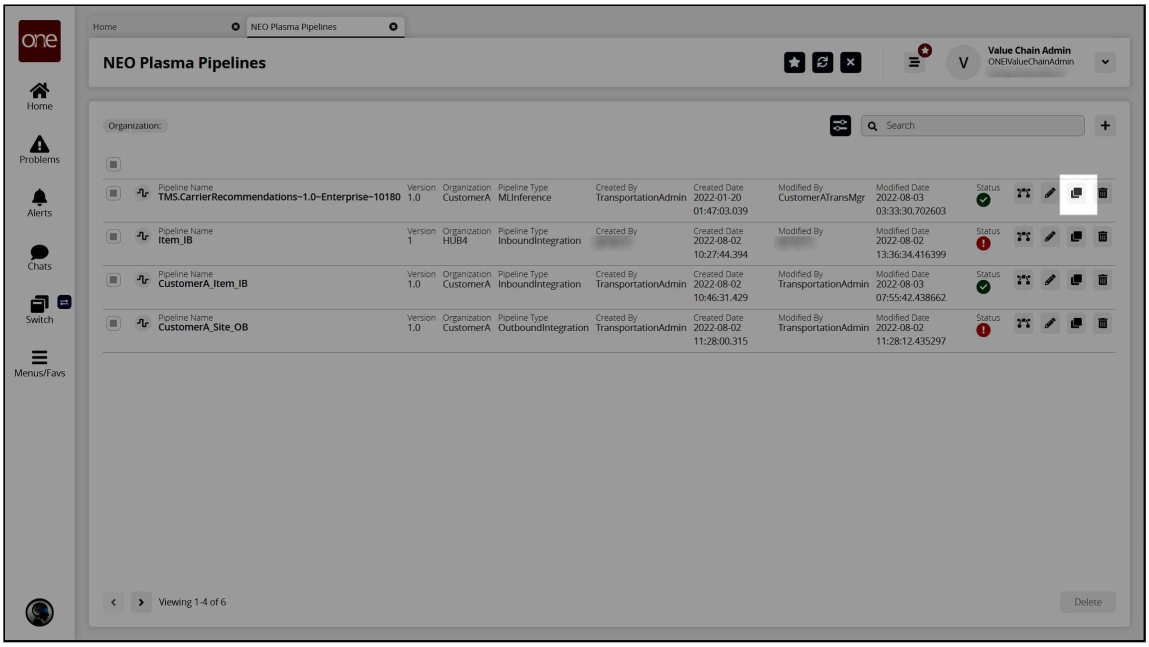
4. Enter the search criteria as desired.
5. Click **Apply**.
   The pipelines with the specified criteria display.
6. Click the pipeline icon to view a pipeline.



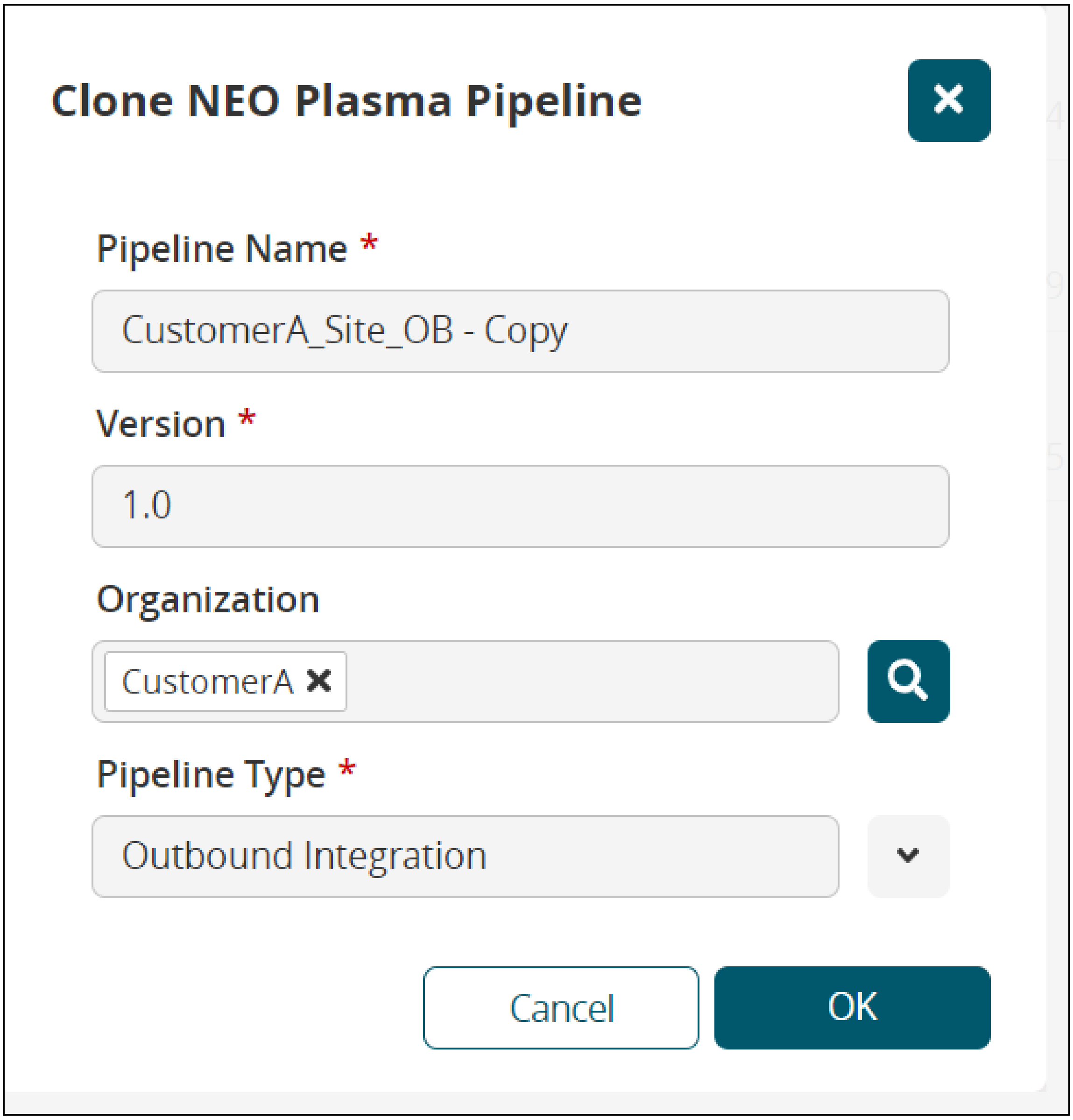
   The pipeline opens in a new tab.
7. Click the pencil icon to edit the pipeline information.
   The Edit NEO Plasma Pipeline popup window appears.



8. Edit the information as desired.
9. Click **OK.**
   The NEO Plasma Pipelines screen returns.
10. Click the copy icon to copy a pipeline.



The Clone NEO Plasma Pipeline popup window appears.



11. Edit the information for the copied pipeline as desired.
12. Click **OK**.
    A success message displays.
13. Click **OK**.
    The NEO Plasma Pipelines screen appears.
14. Click the checkbox beside a pipeline and click the **Delete** button to delete the pipeline. Alternatively, click the trash icon for the pipeline.
15. Click the **+ (plus)** icon in the top right to create a new integration pipeline. See the "Creating an Inbound Integration Pipeline" and "Creating an Outbound Integration Pipeline" sections for more information. Note that a machine learning pipeline can only be created from the ML Plug Points screen. See the "Bring Your Own Intelligence" section in *Online Help* for more information.

See the "Added Integration Pipeline Framework and NEO Plasma Pipelines Screen" section in the current version of the *Release Notes* for more information.

1.12.2 Working with Inbound Integration Pipelines

An integration pipeline is a linear sequence of specialized nodes that process and validate inbound and outbound data files, transforming the data into an existing integration framework. The user creates a new pipeline, defines a pipeline inbound or outbound interface and a message queue, then executes the pipeline. The user can also select and execute an existing pipeline and view a pipeline execution history.

Users can view the existing integration and machine learning pipelines from the NEO Plasma Pipelines (see page 129)screen. New inbound and outbound integration pipelines can be created from this screen. (Machine learning pipelines can be viewed on this screen, but they are created from the ML Plug Points screen. See the "Bring Your Own Intelligence" section in *Online Help* for more information.)

The basic workflow to create an inbound integration pipeline:

1. Create an integration pipeline.(see page 134)
2. Create a pipeline interface.(see page 152)
3. Create a message queue.(see page 154)
4. Execute the pipeline.(see page 156)
5. View the pipeline execution history.(see page 158)

Prerequisites for following along with the example shown in each section of this documentation:

1. Identify the Value Chain ID (VC ID) for your dataset.
2. Identify the Enterprise and Organization you would like to use. You can either create a HUB4 Enterprise and HUB4 Organization to mimic the sample data and code provided, or use your own and change references to HUB4 within our sample data and code.

See the "Added Integration Pipeline Framework and NEO Plasma Pipelines Screen" section in the current version of the *Release Notes* for more information.

1.12.2.1 Creating an Inbound Integration Pipeline

The basic workflow to create an inbound integration pipeline:

1. Create an integration pipeline.
2. Create a pipeline interface.
3. Create a message queue.
4. Execute the pipeline.
5. View the pipeline execution history.

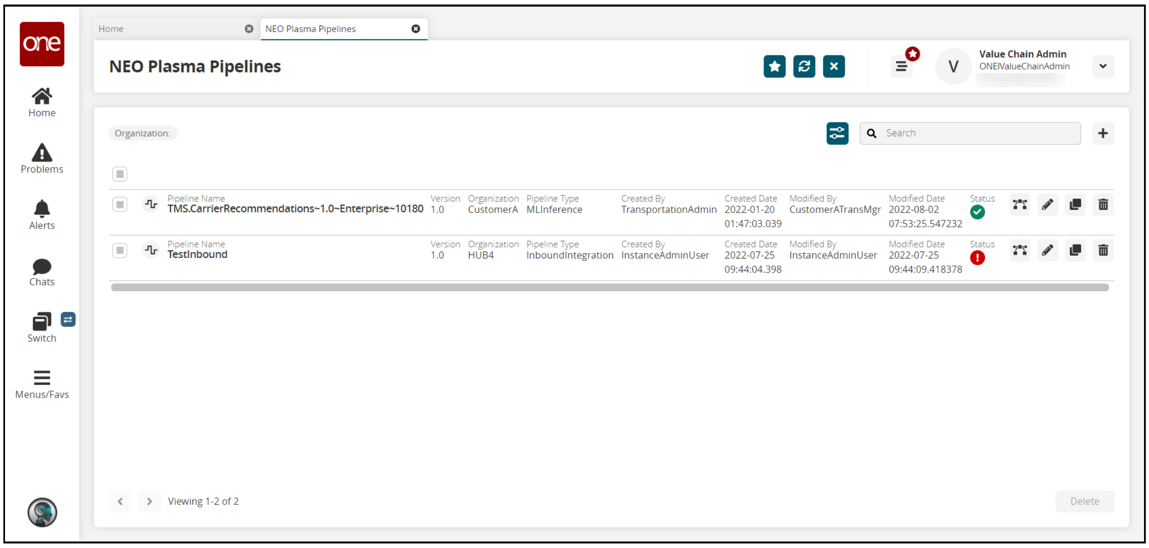
This page provides the instructions for the first step in this workflow. See the subsequent sections for information on each step. This example covers inbound integration from a JSON file. Users can also use the pipeline to integrate data from CSV and XML files.

Prerequisites for following along with the example shown in each section of this documentation:

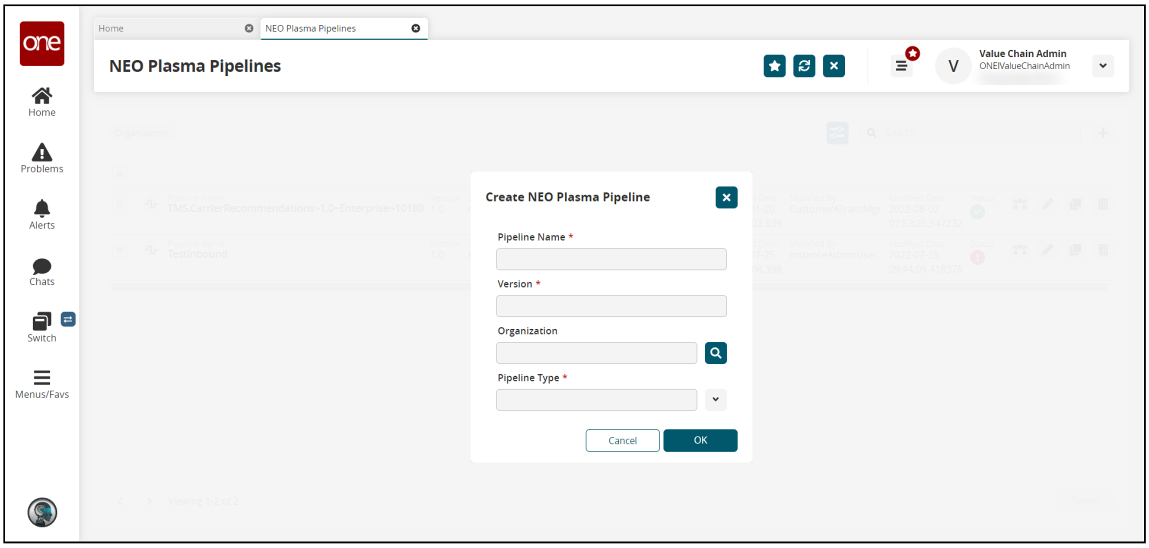
1. Identify the Value Chain ID (VC ID) for your dataset.
2. Identify the Enterprise and Organization you would like to use. You can either create a HUB4 Enterprise and HUB4 Organization to mimic the sample data and code provided, or use your own and change references to HUB4 within our sample data and code.

Complete the following steps to create a new integration pipeline:

1. Log in to the ONE system.
2. Click **Menu/Favs > Tools > Integration > NEO Plasma Pipelines.**
   The NEO Plasma Pipelines screen appears.



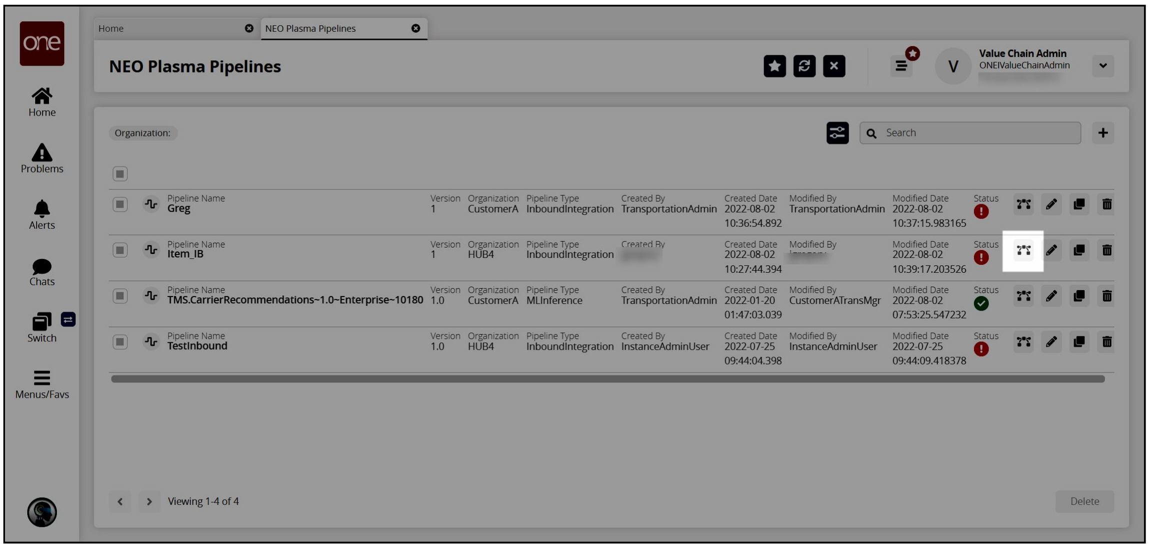
3. Click the **+ (plus)** icon in the top right corner.
   The Create NEO Plasma Pipeline popup window appears.



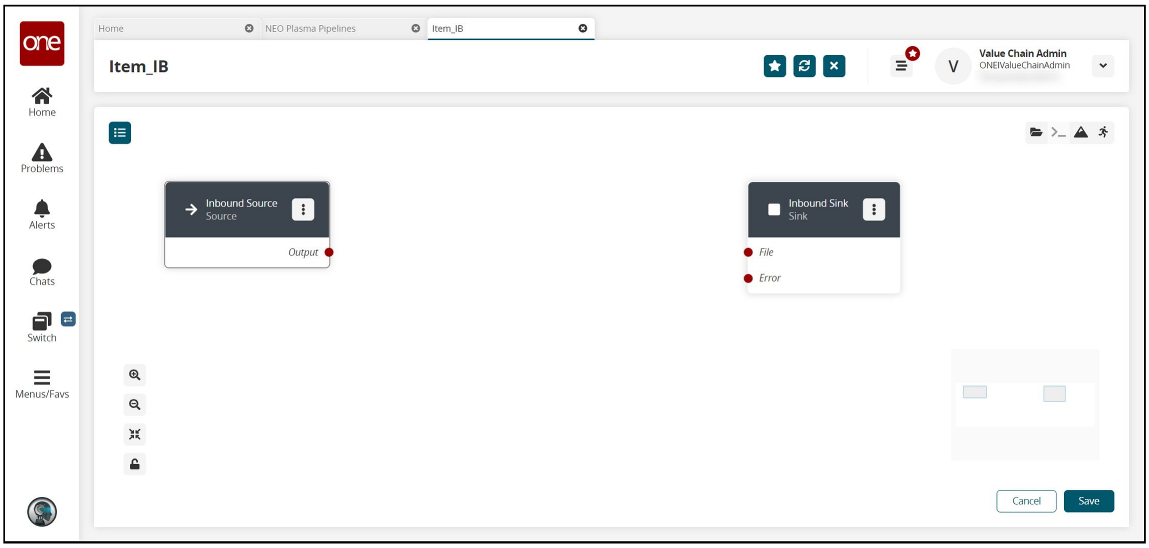
4. Complete the fields described in the table below. Fields with an asterisk (*) are required.

Field	Description
Pipeline Name*	Enter a name for the new pipeline.
Version*	Enter a version number for the new pipeline.
Organization	Use the picker tool to select the organization.
Pipeline Type*	Select the pipeline type from the dropdown menu. The options are Inbound Integration and Outbound Integration. For this example, select Inbound Integration.

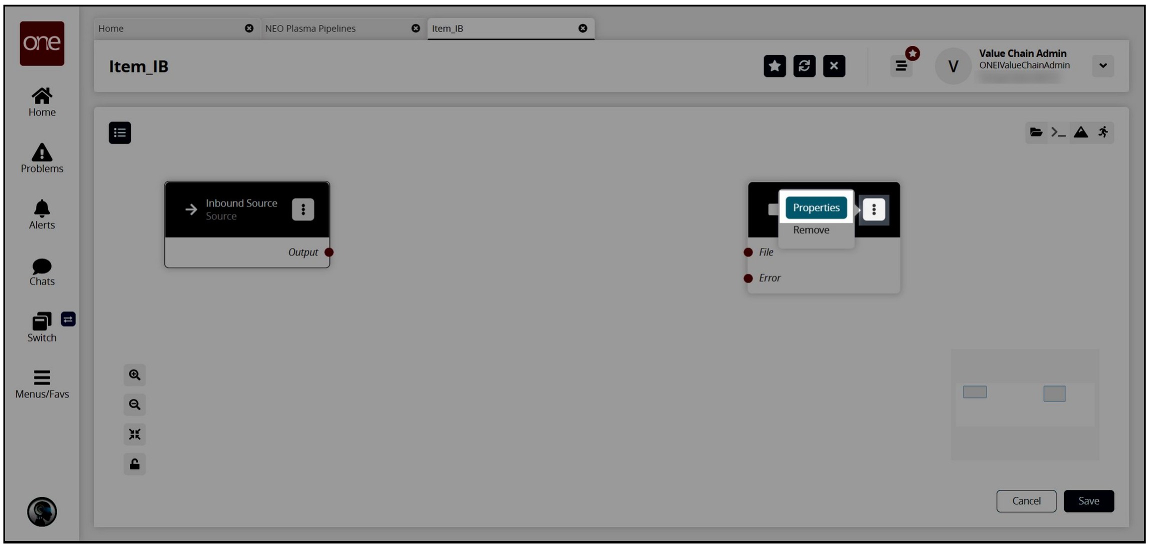
5. Click **OK**.
   The new pipeline appears on the NEO Plasma Pipelines screen.
6. Click the pipeline icon (highlighted below) to view the new pipeline.



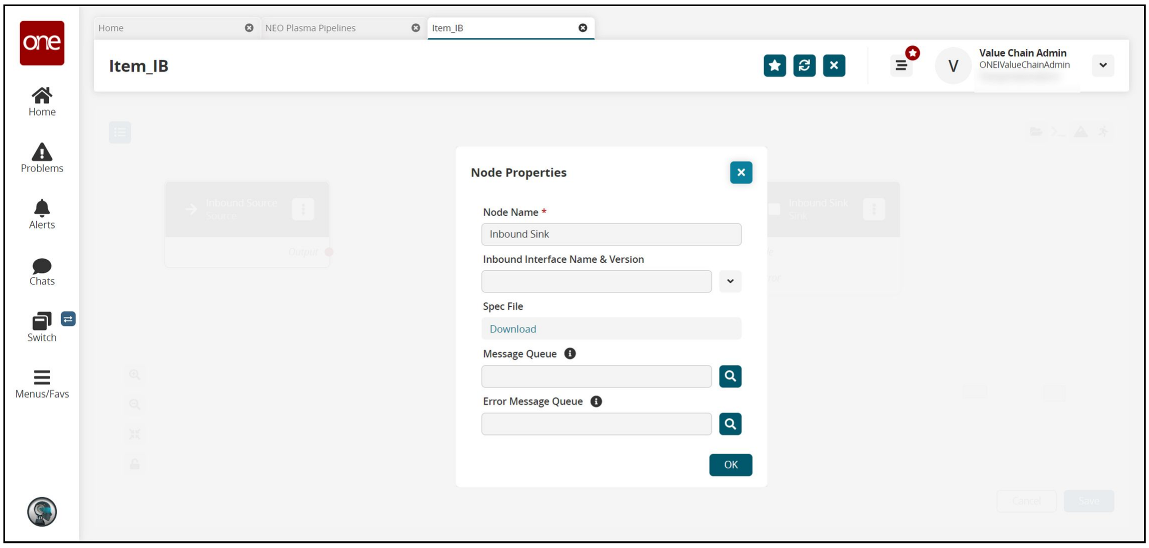
The new pipeline appears with Inbound Source and Inbound Sink nodes displayed.



7. On the Inbound Sink node, click the icon with three vertical dots and click **Properties**.



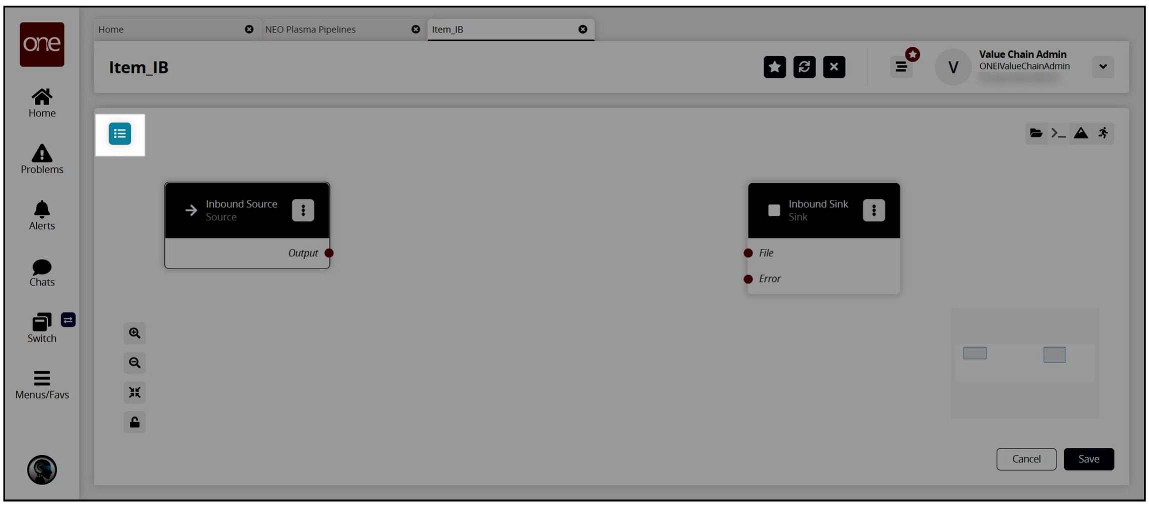
The Node Properties popup window displays.



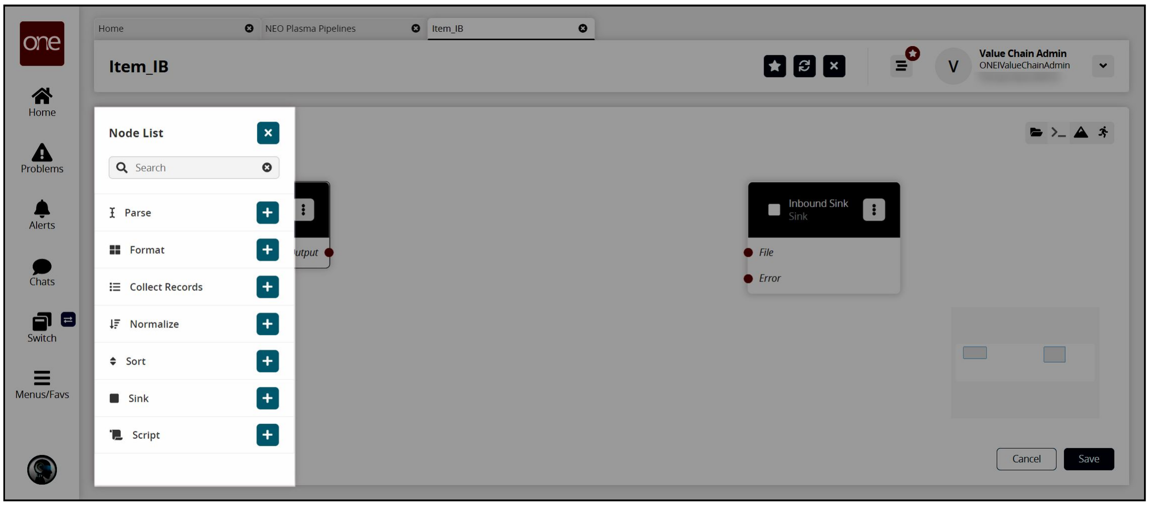
8. Complete the fields described in the table below. Fields with an asterisk (*) are required.

Field	Description
Node Name*	This field auto-populates for the Inbound Sink node.
Inbound Interface Name & Version	Select the interface from the dropdown menu.
Spec File	Click the Download link to download a spec file. A spec file is a CSV file with sample data.
Message Queue	Use the picker tool to select a message queue.
Error Message Queue	Use the picker tool to select an error message queue.

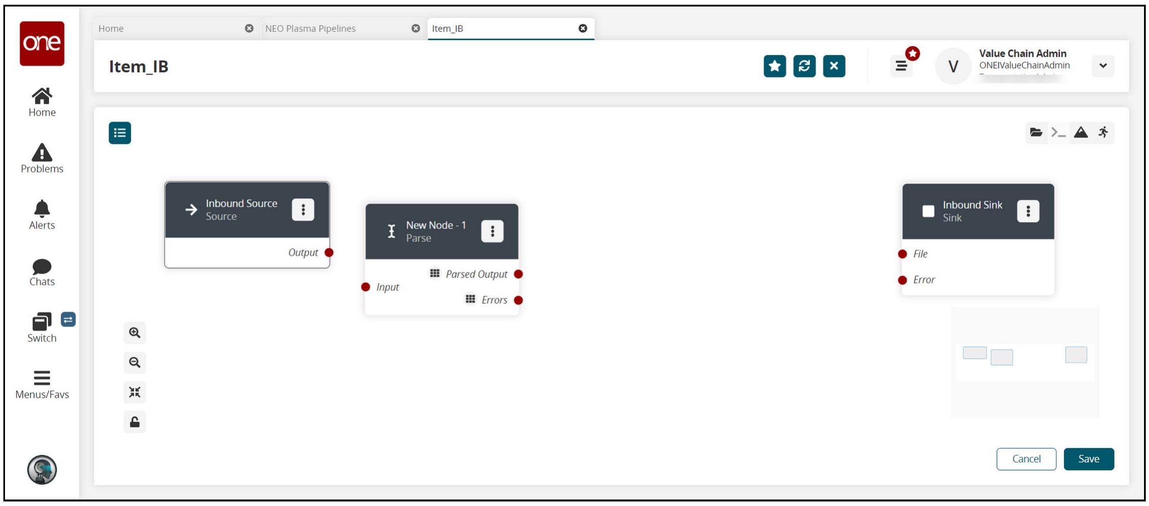
9. Click **OK**.
   The pipeline screen appears.
10. Click the **Node List** icon in the top left corner.



The Node List slideout appears.

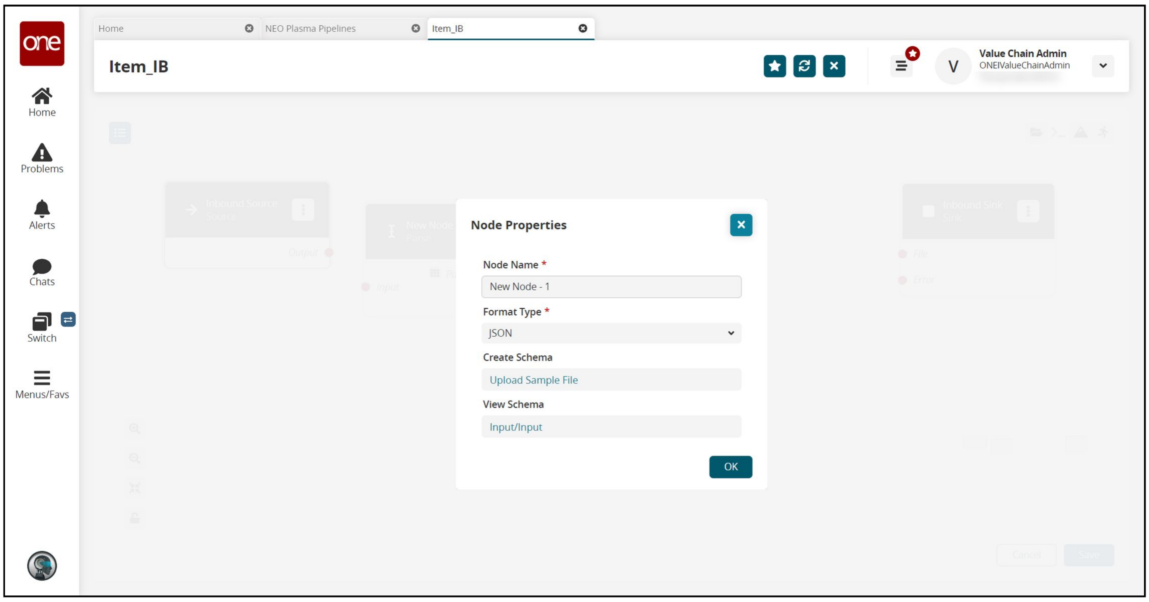


11. Click the **+ (plus)** icon for the type of node you want to add. For this example, we selected a parse node. The parse node parses the inbound file data into records. The parse node appears in the pipeline.



12. On the new node, click the icon with three vertical dots and click **Properties**. The Node Properties popup window appears.

> Click to download JSON sample file to use in this example. You will upload this sample file in the next step. Alternatively, use the data in the "Sample JSON File(see page 160)" section of this guide to create your own JSON file to upload in the next step.



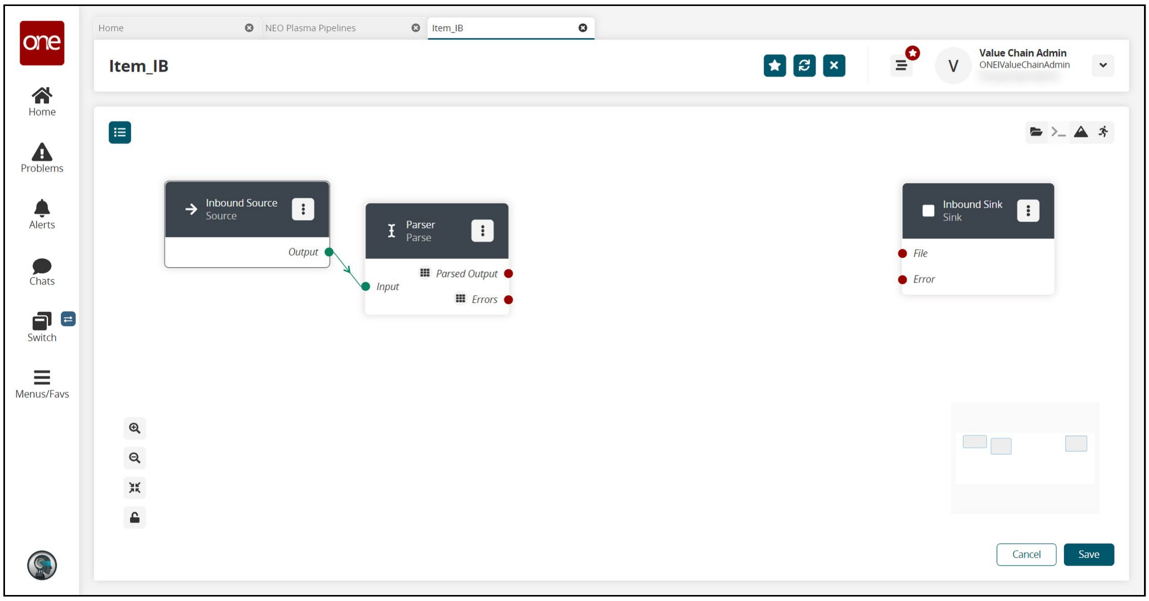
13. Complete the fields described in the table below. Fields with an asterisk (*) are required.

Field	Description
Node Name*	Enter a name for the node.
Format Type*	Select a format type for the inbound file from the dropdown list. Options are JSON, CSV, and XML. The remaining fields vary according to the format chosen. For this example, we selected JSON.

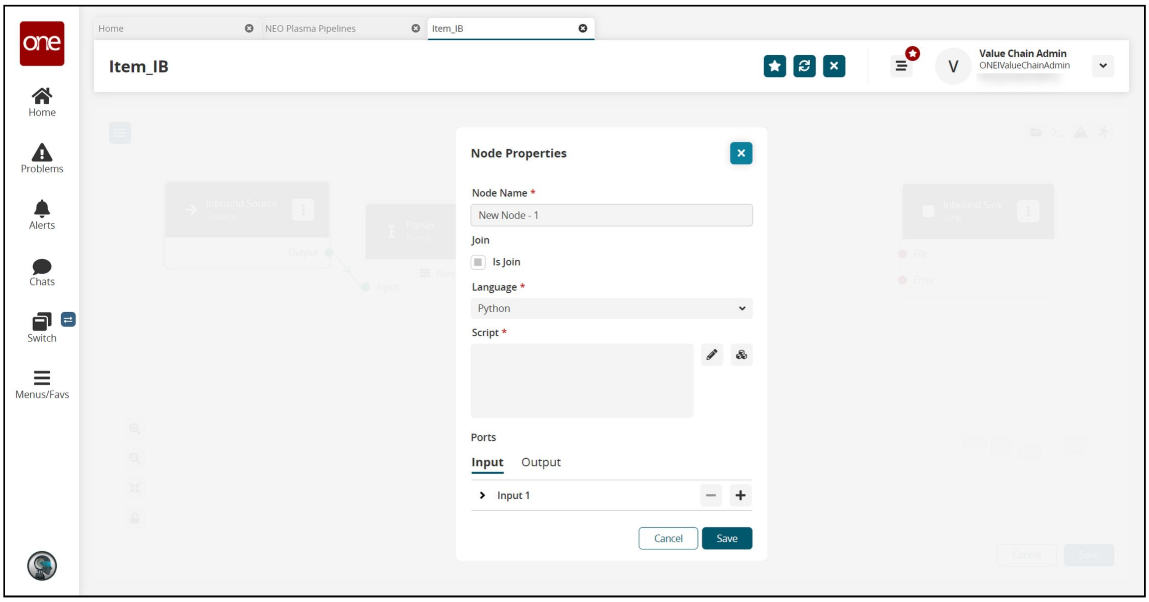
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Create Schema</td><td>a. Click the Upload Sample File link.
The Create Schema popup appears.

b. Complete the following fields. Fields with an asterisk are required.
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Namespace*</td><td>Enter a unique category to organize schema name fields.</td></tr>
<tr><td>Schema*</td><td>Enter a unique name with which to associate the dataset.</td></tr>
<tr><td>Sample File*</td><td>Click the upload icon to upload a sample file for the parse node. For this example, you can use the same JSON file downloaded in the previous step, or create a JSON file using the data in the "Sample JSON file(see page 160)" section.</td></tr>
<tr><td>JSON Root*</td><td>Select the JSON root you want the parser to use.</td></tr>
</table>
c. Click OK.
The Node Properties updates.</td></tr>
<tr><td>View Schema</td><td>This field auto-populates with a link once the sample file is uploaded in the Create Schema field. Click the link to view or edit the record schemas.</td></tr>
</table>

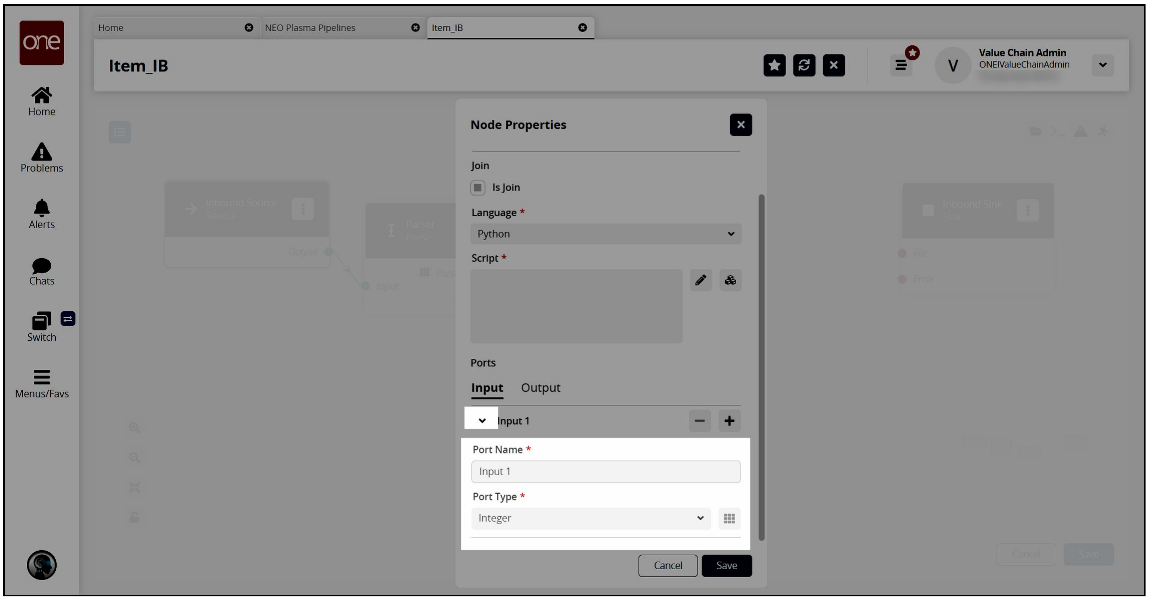
14. Click **OK.**
    The pipeline screen updates.
15. On the **Inbound Source** node, click the red dot next to **Output** and drag the cursor to connect to the **Input** on the **Parse** node.
    The connection turns green. The parse node can now parse the data from the inbound source into records.



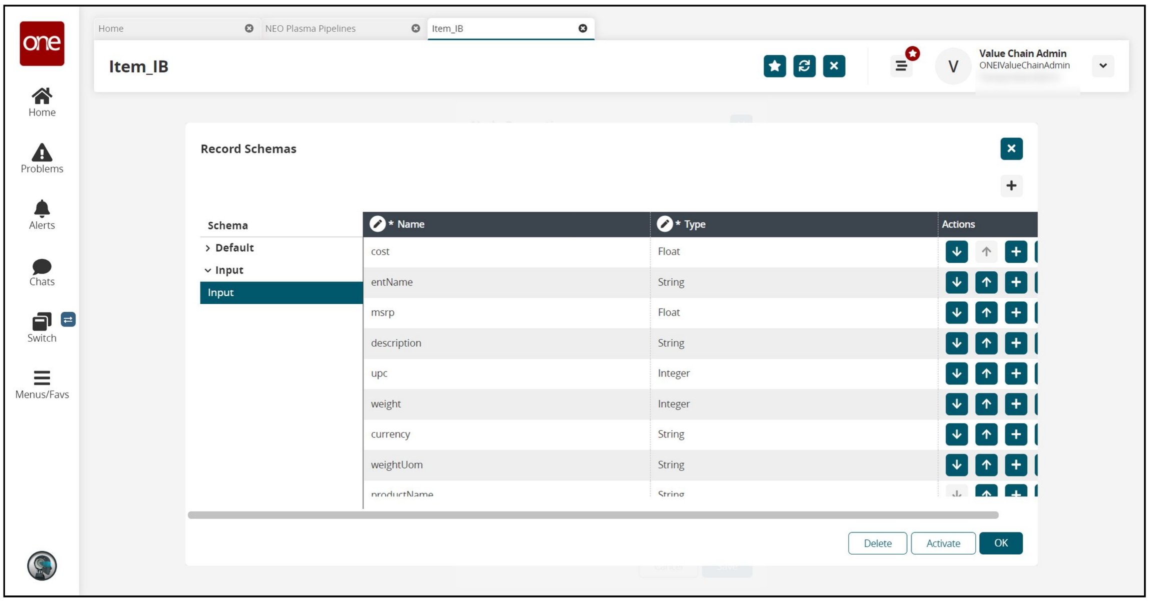
16. Click the node list icon in the top left corner again.
    The Node List slideout reappears.
17. Click the **+ (plus)** icon next to Script.
    A script node is added to the pipeline.
18. On the new script node, click the icon with three vertical dots and click **Properties**.
    The Node Properties popup window appears.



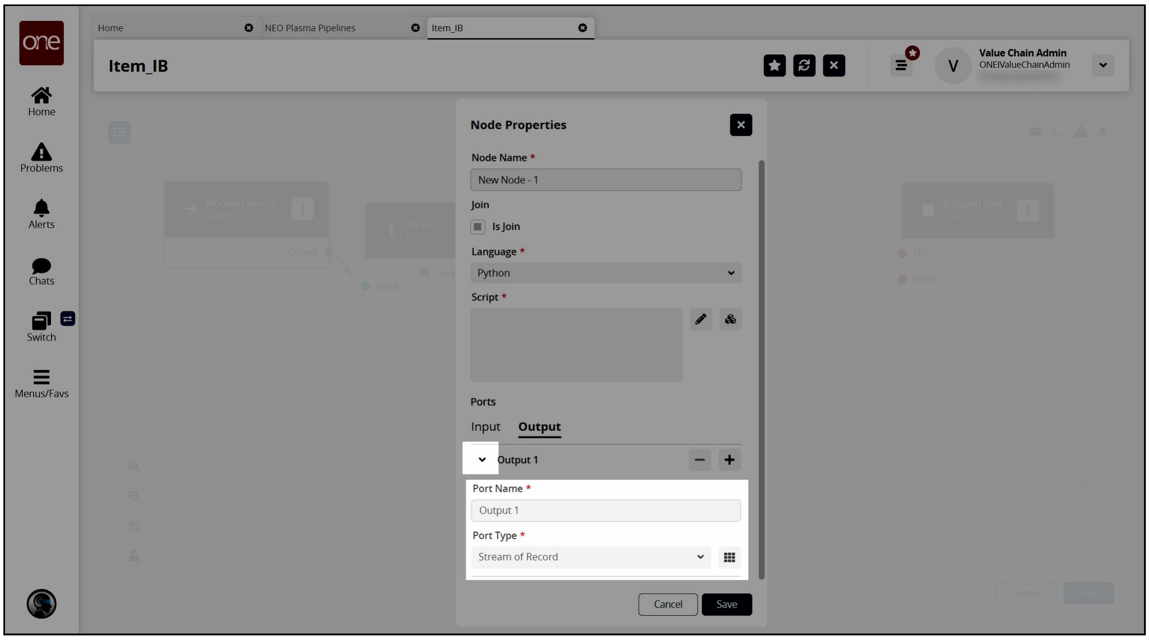
19. On the **Input** tab in the **Ports** section, click the arrow to display the port fields.



20. In the **Port Type*** field, select **Stream of Record** from the dropdown list.
    The icon beside the dropdown list becomes active.
21. Click the icon beside the **Port Type*** dropdown list.
    The Record Schemas popup window displays.
22. Click the arrow beside Input.
    The list of schemas displays.
23. Select the schema.
    The schema displays in the pane to the right, and the Activate button becomes active.



24. Click the **Activate** button.
25. Click **OK.**
    The Node Properties popup window appears again.
26. In the **Ports** section, click the **Output** tab.
27. Click the arrow to the left of the output to display the **Port Name*** and **Port Type*** fields.

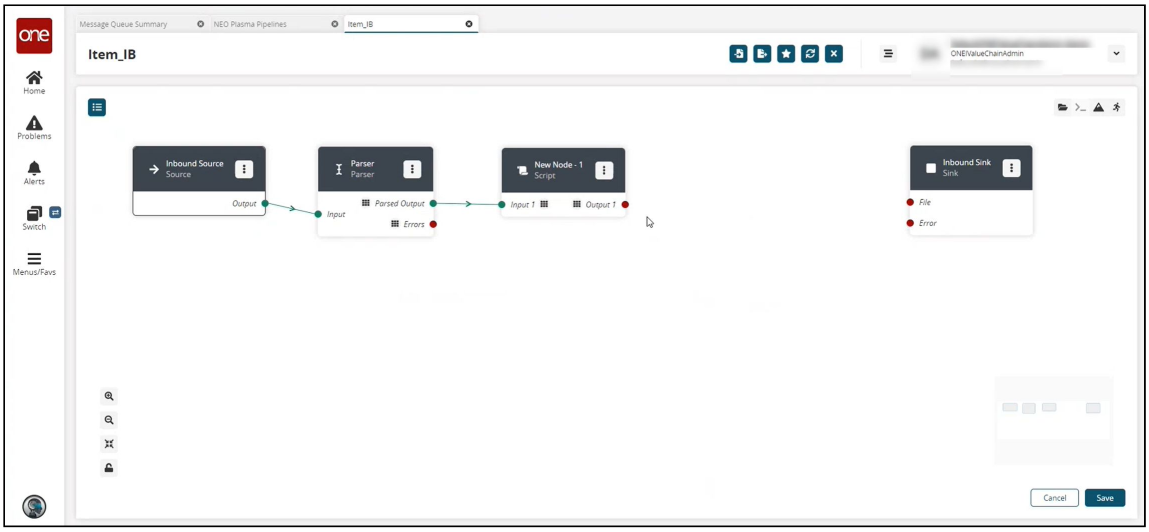


28. In the **Port Type*** field, select **Stream of Record** from the dropdown list.
29. Click the icon to the right of the **Port Type*** dropdown list.
    The Record Schemas popup window displays.
30. In the **Schema** pane on the left, click the arrow beside **Default**.
    The Output record schemas display in the pane.
31. Click the interface selected on the Inbound Sink node previously.
    The schema displays in the pain to the right, and the **Activate** button becomes active.
32. Click the **Activate** button.
33. Click **OK**.
    The Node Properties popup window reappears.
34. In the **Script*** field on the **Node Properties** popup window, click the pencil icon.
    The Edit Script popup window appears.
35. Enter the script code for the node. A sample script code is shown below.

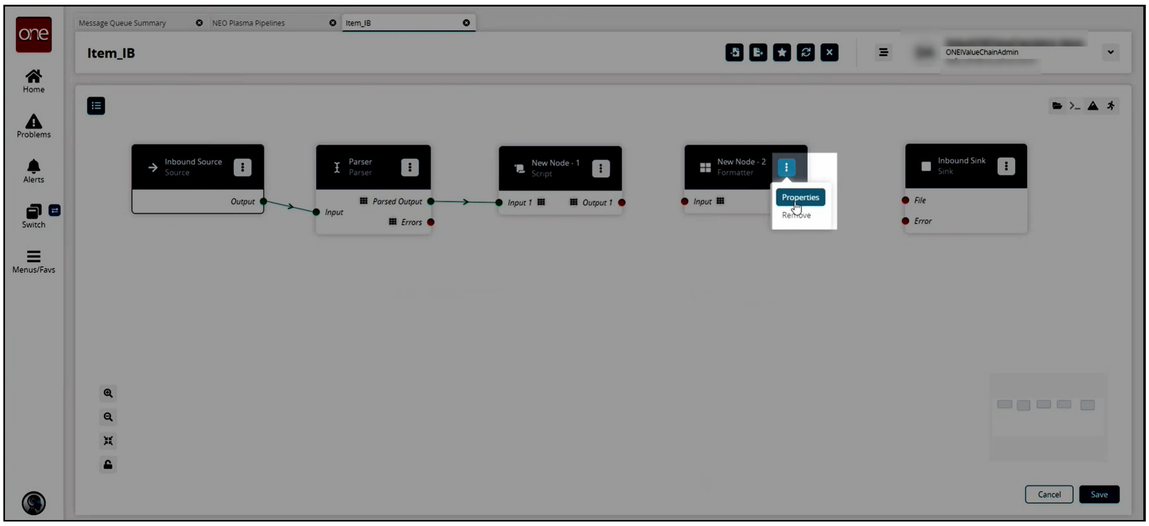
```
def executeNode(inputs):
  iterable_inputs = {}
  outputs = {}

  # Input ports

  iterable_inputs["Input 1"] = inputs["Input 1"]
  # Type = stream.record
  # cost, msrp, description, upc, weight, currency, weightUom, productName

  # Add node logic here
  for record in iterable_inputs["Input 1"]:
    yield {
      "Output 1": {
        "ItemName": record["productName"],
        "Description": record["description"],
        "ManagingEntName": record["entName"],
```

```
            "ManufacturerPrice": record["msrp"],
            "Price": record["msrp"],
            "Currency": record["currency"],
            "CaseUPC": record["upc"],
            "PackageUPC": record["upc"],
            "Weight": record["weight"],
            "WeightUOM": record["weightUom"],
            "Active": True
          }
        }

  # Activate and set outputs (omit a port to prevent execution of nodes
that depend on that port)

  # Type = stream.record
  # ManagingEntName, ManagingOrgName, ItemName, PartnerName, Description,
CaseUPC, PackageUPC, UniversalItemName,
  # GlobalTradeItemNumber, StandardCost, PurchaseCost, TotalLandedCost,
Price, ManufacturerPrice, Currency, Length,
  # Width, Height, LinearUOM, Weight, WeightUOM, UnitsPerCase,
CasesPerPallet, UnitsPerPallet, CaseLength, CaseWidth,
  # CaseHeight, CaseLinearUOM, CaseWeight, CaseWeightUOM, PalletLength,
PalletWidth, PalletHeight, PalletLinearUOM,
  # PalletWeight, PalletWeightUOM, UnitsPerLayer, LayersPerPallet,
ItemType, ItemClass, ItemCategory, CommodityCode,
  # Style, Color, Size, StockingUOM, OrderingUOM,
OrderingToStockingConversionFactor, ManufacturerPartner,
  # ManufacturerEnterpriseName, ManufacturingItemName, ActivationDate,
DeactivationDate, Active, InitialDuration,
  # InitialDurationUOM, GrowthDuration, GrowthDurationUOM,
MaturityDuration, MaturityDurationUOM, DeadlineDuration,
  # DeadlineDurationUOM, ShelfLife, ShelfLifeUOM, LikeItemName,
IsLotControlled, IsSerialControlled, IsNeverOutItem,
  # Stackable, PlannerCode, ReplenishmentType, DrawingNumber, Notes,
ModelSupplyChain, Hazardous,
  # HazmatNumberHazmatNumber, HazmatNumberCategory, ProperShippingNameName,
HazardClassName, HazmatContactName,
  # HazmatContactPhone, HazmatPackagingGroup, FreightClass, HTSCode,
OrderMgmtOrgEnterpriseName, OrderMgmtOrgName,
  # CycleCountingFrequency, Spaces, ExtManufacturerItemName,
ReversePartnerEntName, ReversePartnerOrgName

  return outputs
```

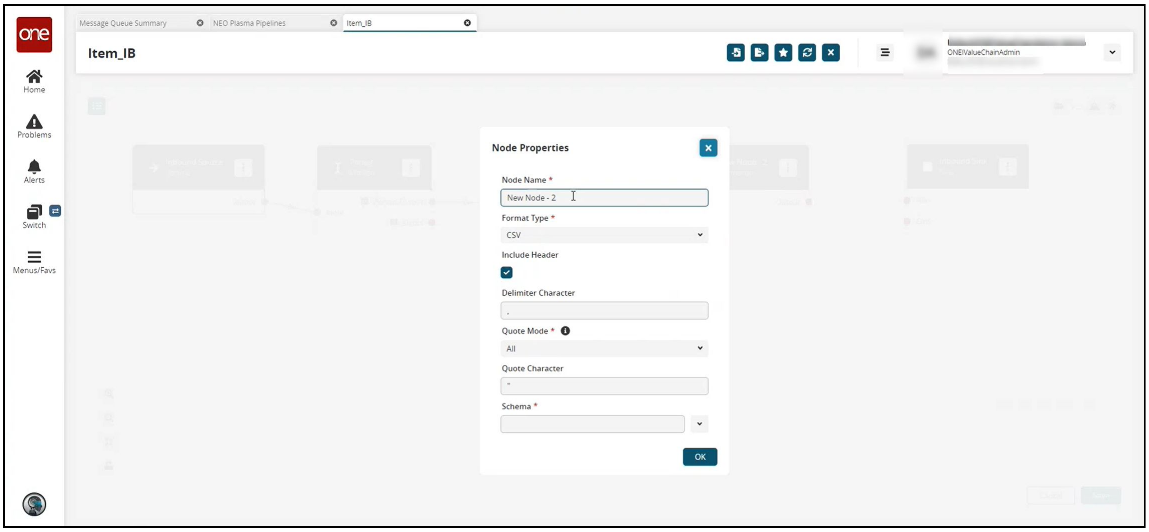
36. Click **Save**.
    The Node Properties popup window appears.
37. Click **Save**.
    The pipeline screen reappears.
38. On the **Parse** node, click the red dot next to **Parsed Output** and drag the cursor to connect to **Input 1** on the script node.
    The connection turns green. The stream of records from the parser has now been converted to the correct format.



39. Click the node list icon in the top left corner again.
    The Node List slideout reappears.
40. Click the **+ (plus)** icon next to **Format**.
    A format node is added to the pipeline.
41. On the new **Format** node, click the icon with three vertical dots and click **Properties**.



The Node Properties popup window appears.

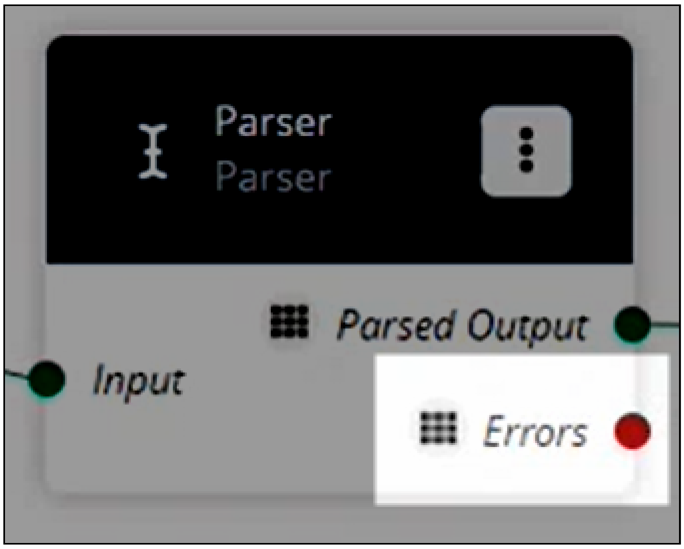


42. Complete the fields described in the table below. Fields with an asterisk (*) are required.

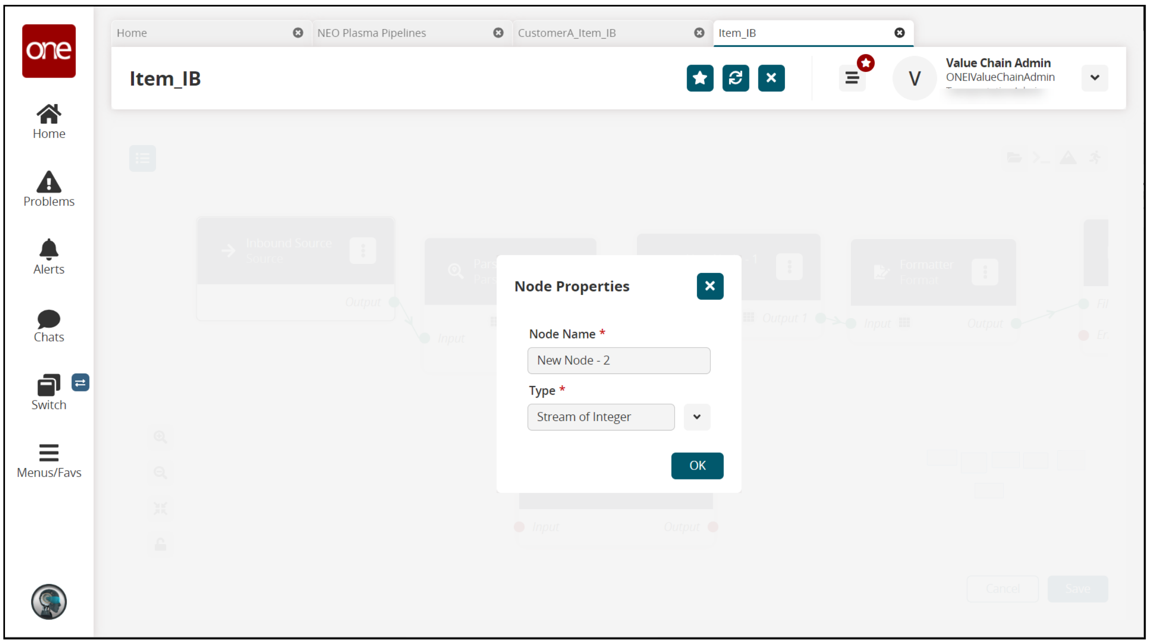
Field	Description
Node Name*	Enter a name for the node.
Format Type*	Select the desired format type from the dropdown list. For this example, we used CSV. Note that the remaining fields vary based on the format type selected.
Include Header	Click the checkbox to include the header when formatting the data.
Delimiter Character	Enter a delimiter character or leave the default
Quote Mode*	Select a quote mode from the dropdown list.
Quote Character	Enter a quote character or level the default
Schema*	Select the output schema from the dropdown list.

43. Click **OK**.
    The pipeline screen reappears.
44. On the **Format** node, click the red dot next to **Output** and drag the cursor to connect to **File** on the **Inbound Sink** node.
45. Repeat this process to add additional nodes as desired. The following node types are available:

    A. Parse
    B. Format
    C. Collect Records
    D. Normalize
    E. Sort
    F. Script
46. If a pipeline node has an Errors output label, as shown in the image below, error handling should be set up.

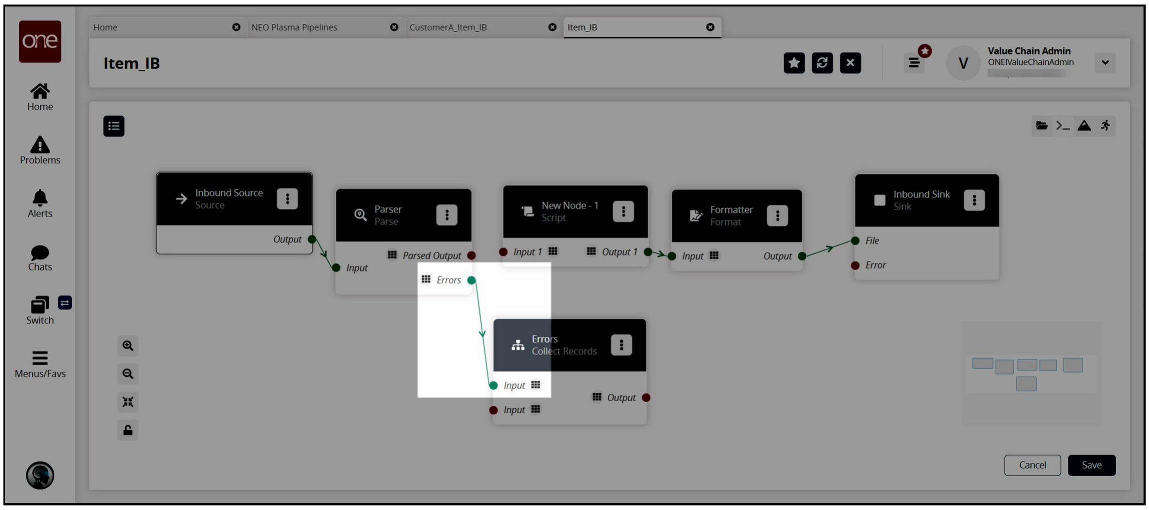


47. To set up error handling, click the node list icon in the top left corner again.
    The Node List slideout reappears.
48. Click the **+ (plus)** icon next to **Collect Records**.
    A Collect Records node is added to the pipeline.
49. On the new **Collect Records** node, click the icon with three vertical dots and click **Properties**.
    The Node Properties popup window appears.

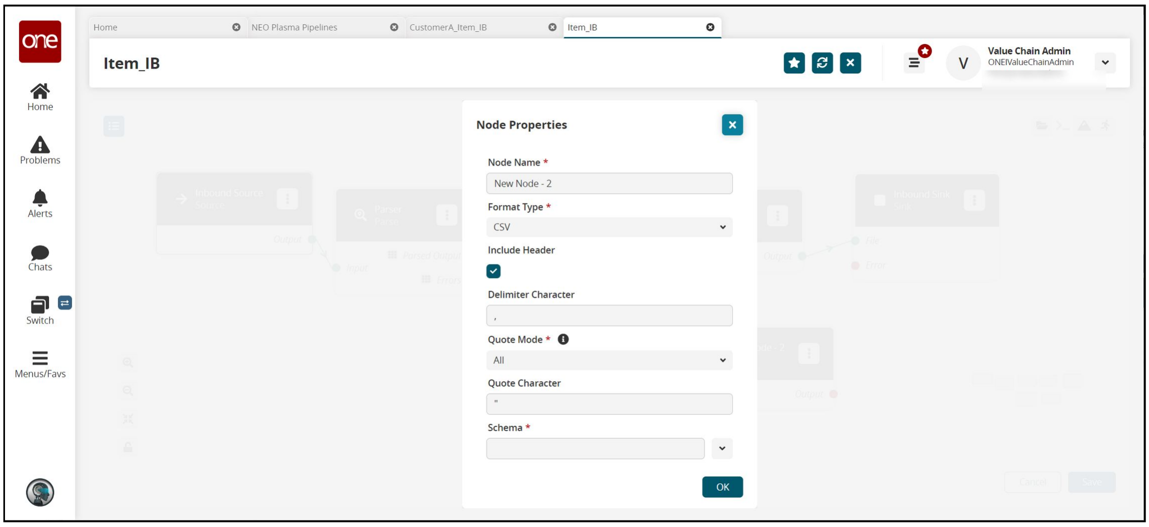


50. In the **Node Name*** field, enter a name for the collector node. This field is required.
51. In the **Type*** field, select **Stream of Records** from the dropdown list.
    The Schema field appears.
52. Select **Default/Errors** from the dropdown list.
53. Click **OK**.
    The pipeline details screen reappears.

54. Connect the **Parse** node (or the node with the Errors output) with the error collector node.



55. Click the node list icon in the top left corner again.
    The Node List slideout reappears.
56. Click the **+ (plus)** icon next to Format.
    A format node is added to the pipeline.
57. On the new **Format** node, click the icon with three vertical dots and click **Properties**.
    The Node Properties popup window appears.

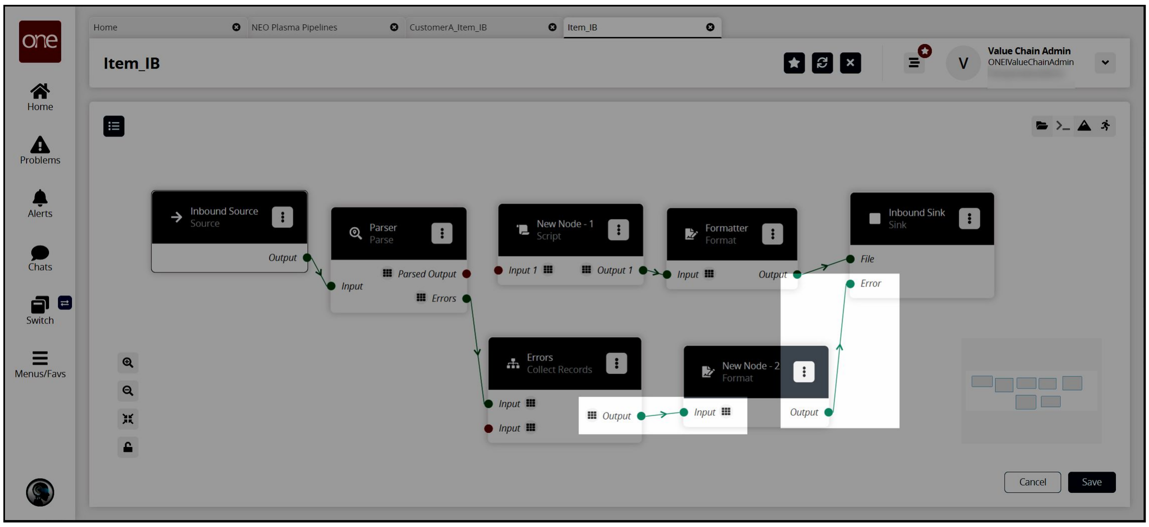


58. Complete the fields described in the table below. Fields with an asterisk (*) are required.

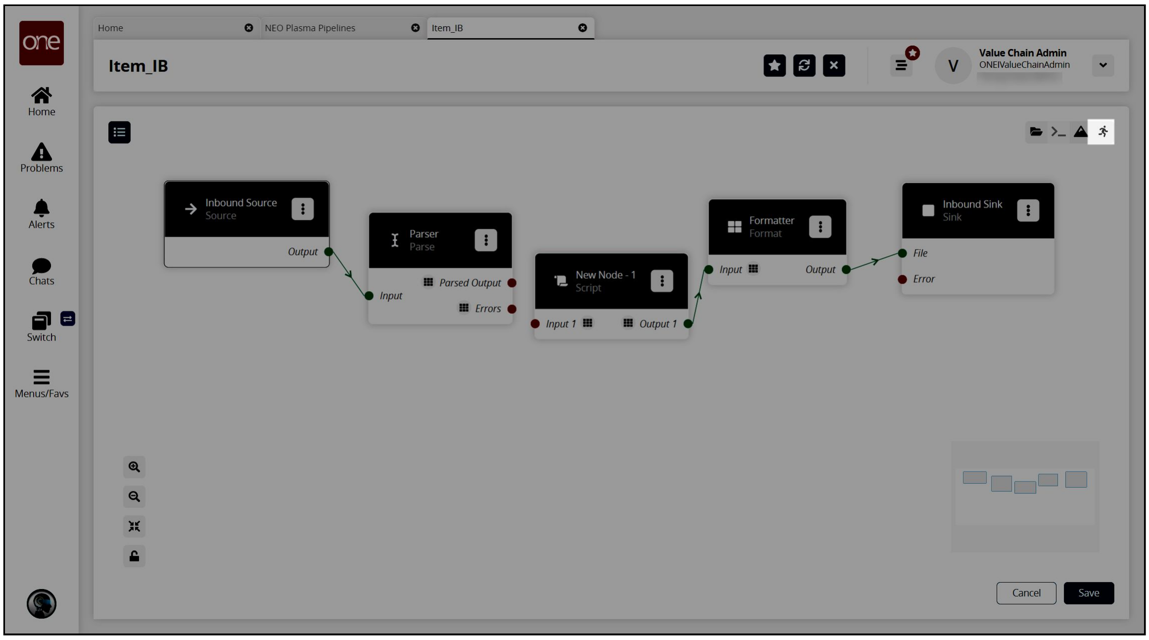
Field	Description
Node Name*	Enter a name for the node.
Format Type*	Select CSV from the dropdown list.

Field	Description
Include Header	Click the checkbox to include the header when formatting the data.
Delimiter Character	Enter a delimiter character or leave the default
Quote Mode*	Select Minimal from the dropdown list.
Quote Character	Enter a quote character or level the default
Schema*	Select the Default/Error output schema from the dropdown list.

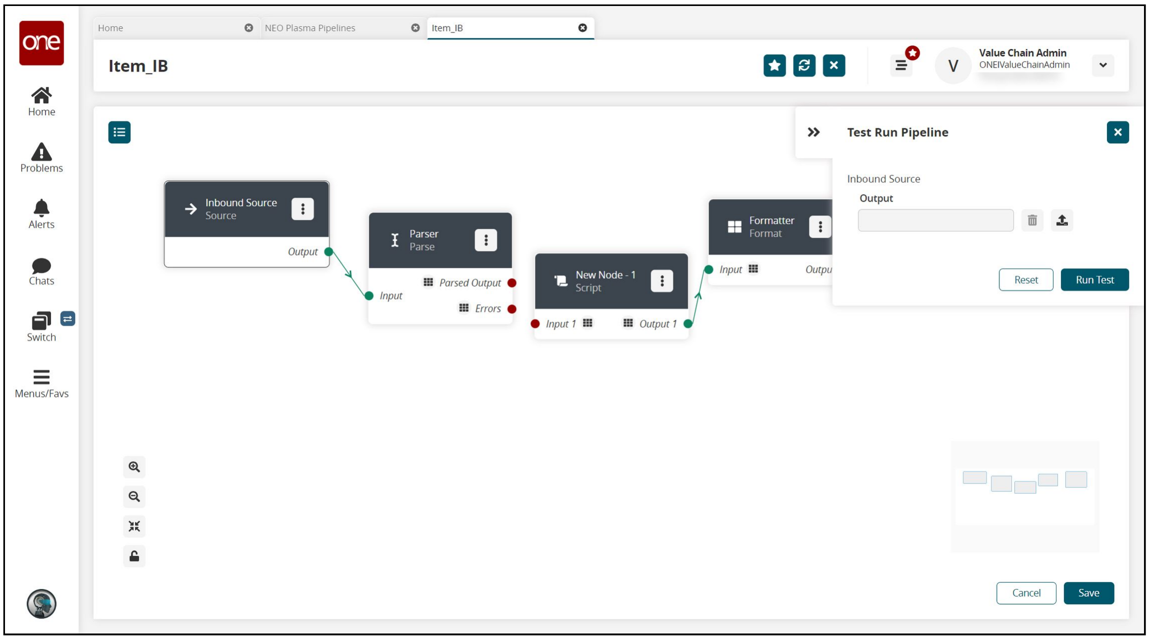
59. Click **OK**.
    The pipeline details screen returns.
60. Connect the error collector output to the format node input, and connect the format node output to the Inbound Sink node as shown below.



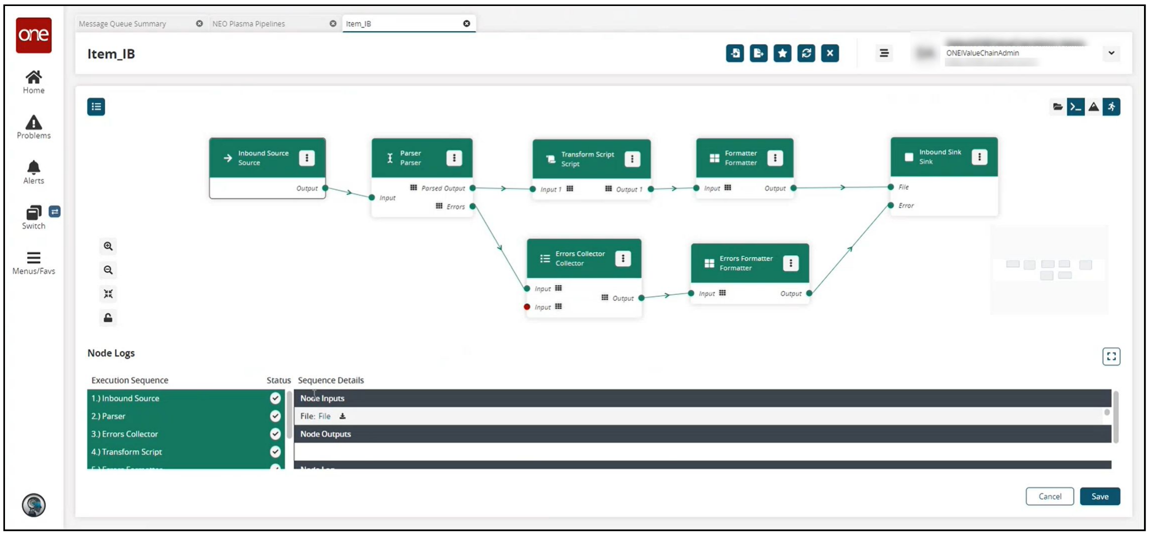
61. Click the **Save** button to save the pipeline.
62. Click the **Run Test** icon in the top right corner to test the pipeline.



The Test Run Pipeline slideout appears.



63. Click the upload icon to upload the inbound source file.
64. Click the **Run Test** button.
    The Node Logs section appears at the bottom of the screen with the successful nodes turning green in the Execution Sequence column.



65. In the **Sequence Details** column of the **Node Logs** section, click the **File** download link under node inputs to download the file created in the **Inbound Sink** node.
66. Go to your download location to view the output and verify that it is correct.
67. If the test run is correct, the next step is to create a pipeline interface. See the "Creating a Pipeline Interface" section for instructions.

See the "Added Integration Pipeline Framework and NEO Plasma Pipelines Screen" section in the current version of the *Release Notes* for more information.

1.12.2.2 Creating an Inbound Pipeline Interface

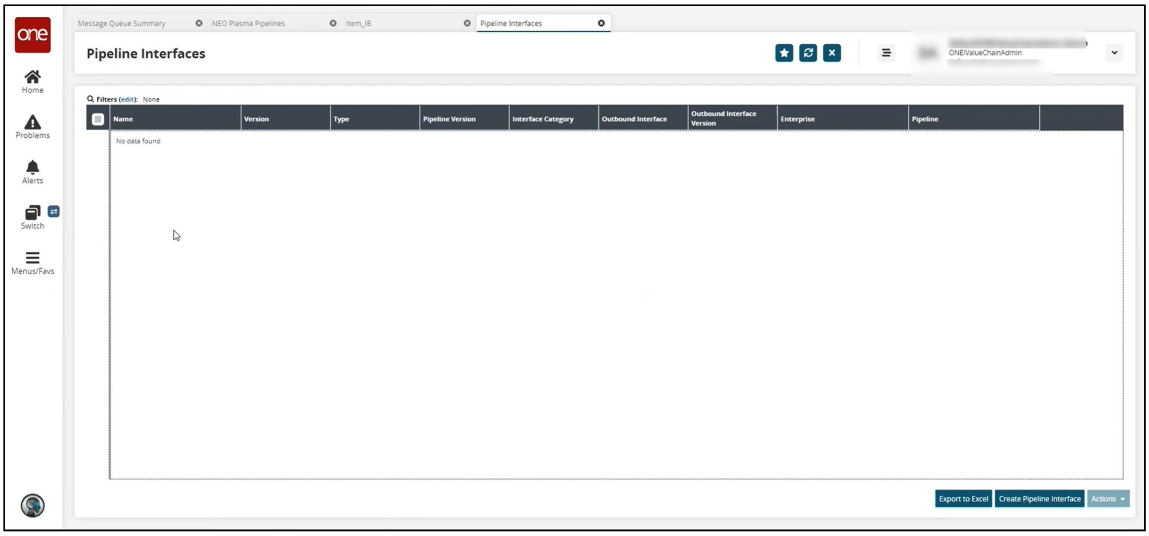
The basic workflow to create an inbound integration pipeline:

1. Create an integration pipeline.
2. Create a pipeline interface.
3. Create a message queue.
4. Execute the pipeline.
5. View the pipeline execution history.

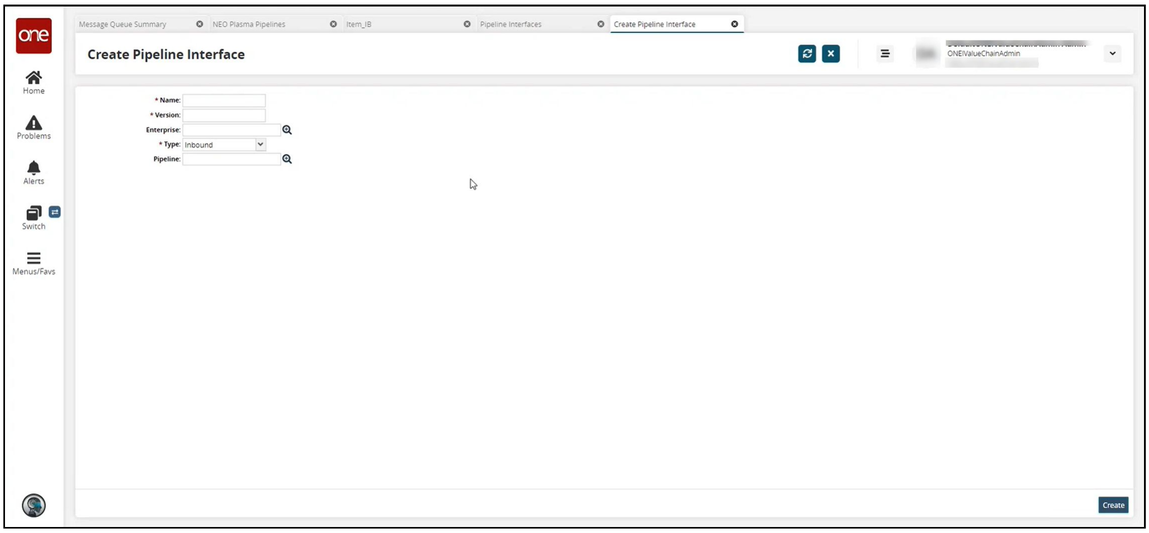
This page provides the instructions for the second step in this workflow. See the other sections for information on the other steps.

Complete the following steps to create a new pipeline interface:

1. Follow the steps to create an integration pipeline. See the "Creating an Integration Pipeline" section for more information.
2. Click **Menu/Favs > Tools > Integration > Pipeline Interfaces.**
   The Pipeline Interfaces screen appears.



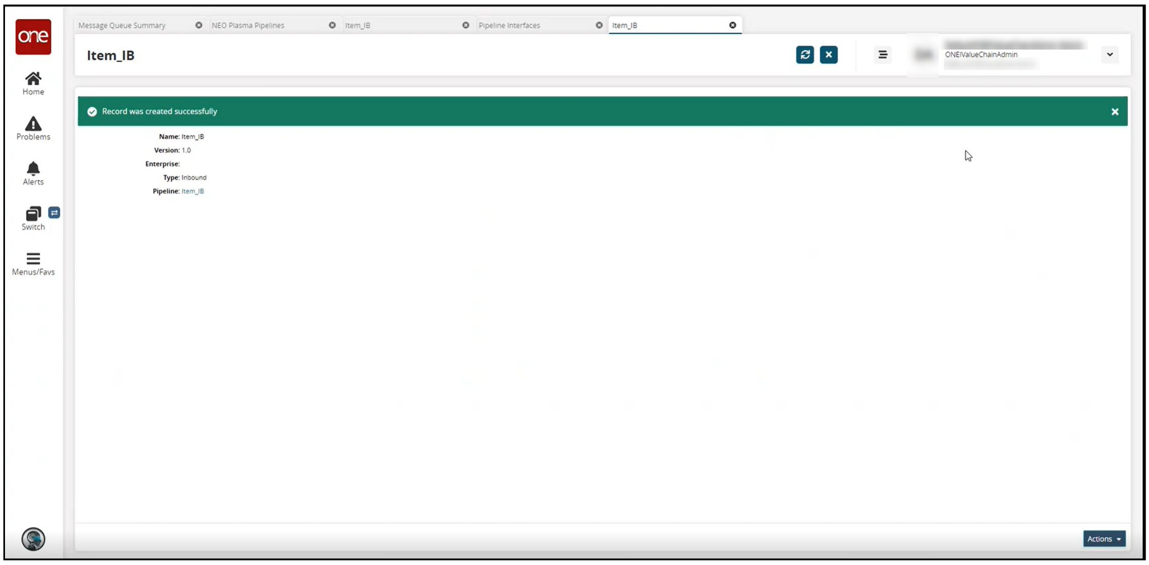
3. Click the **Create Pipeline Interface** button.
   The Create Pipeline Interface screen appears.



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

Field	Description
*Name	Enter a name for the pipeline interface.
*Version	Enter a version number.
Enterprise	Use the picker tool to select an enterprise.
*Type	Select the interface type from the dropdown list. The options are Inbound and Outbound. For this example, we selected Inbound.
Pipeline	Use the picker tool to select a pipeline you want to use with this interface.

5. Click **Create**.
   The pipeline interface detail screen appears with a green success message.



See the "Added Integration Pipeline Framework and NEO Plasma Pipelines Screen" section in the current version of the *Release Notes* for more information.

1.12.2.3 Creating a Message Queue

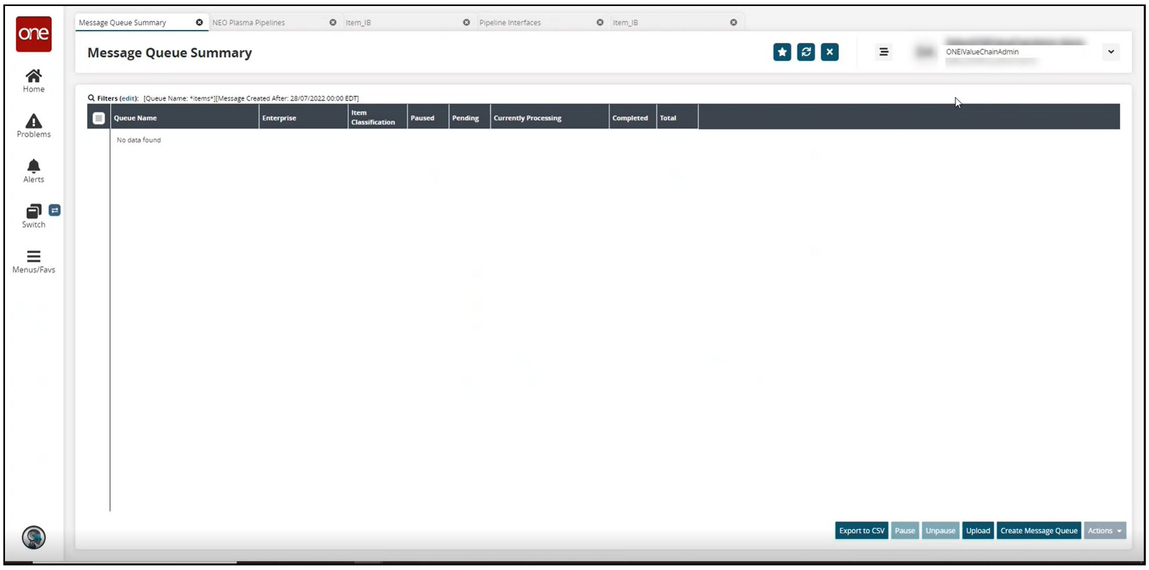
The basic workflow to create an inbound integration pipeline:

1. Create an integration pipeline.
2. Create a pipeline interface.
3. Create a message queue.
4. Execute the pipeline.
5. View the pipeline execution history.

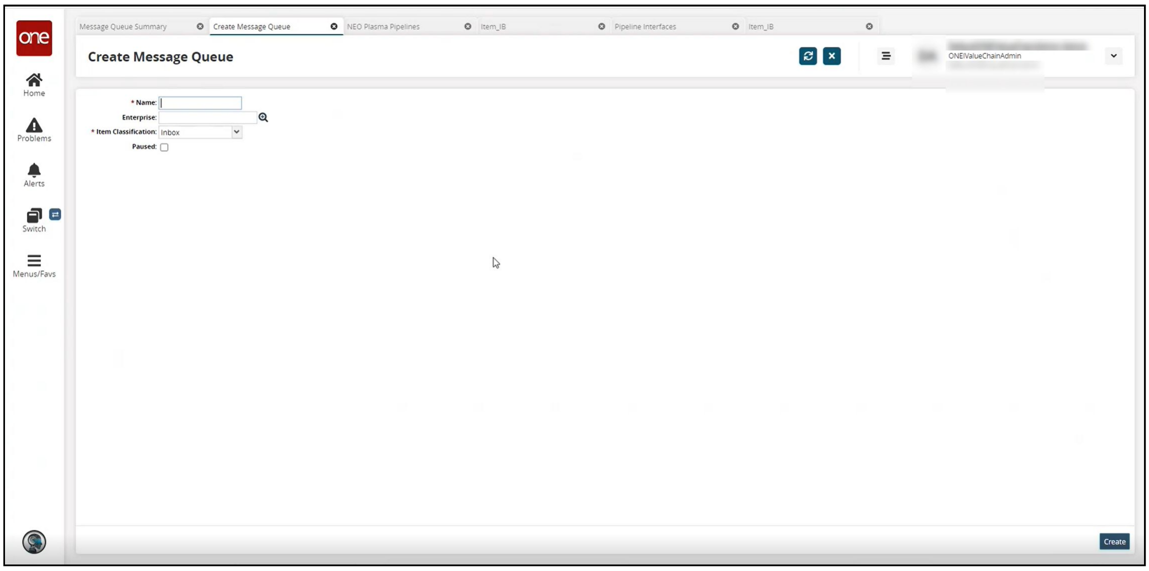
This page provides the instructions for the third step in this workflow. See the other sections for information on the other steps.

Complete the following steps to create a message queue:

1. Create an inbound integration pipeline and a pipeline interface. See the "Creating an Inbound Integration Pipeline" and "Creating a Pipeline Interface" sections for more information.
2. Click **Menu/Favs > Tools > Integration > Message Queue Summary.**
   The Message Queue Summary screen appears.



3. Click the **Create Message Queue** button.
   The Create Message Queue screen appears.



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

Field	Description
*Name	Enter a name for the message queue.
Enterprise	Use the picker tool to select an enterprise.
*Item classification	Select an item classification from the dropdown list.
Paused	Click the checkbox to pause the messages.

5. Click **Create**.
   The message queue detail screen appears with a green success message.
6. Returning to the Message Queue summary screen to view the newly created message queues.

See the "Added Integration Pipeline Framework and NEO Plasma Pipelines Screen" section in the current version of the *Release Notes* for more information.

1.12.2.4 Executing the Pipeline

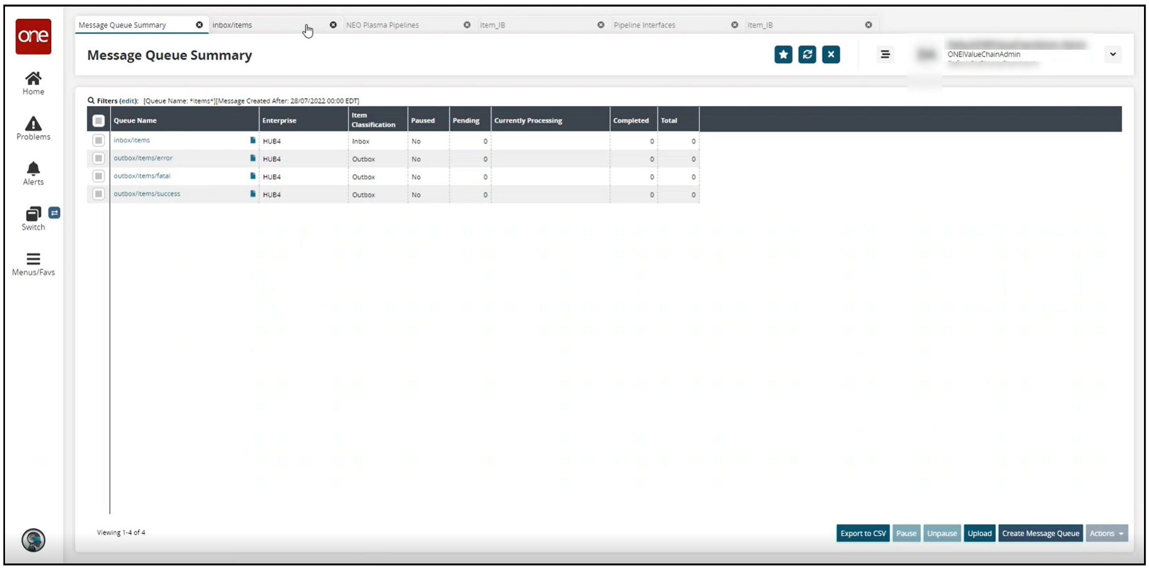
The basic workflow to create an inbound integration pipeline:

1. Create an integration pipeline.
2. Create a pipeline interface.
3. Create a message queue.
4. Execute the pipeline.
5. View the pipeline execution history.

This page provides the instructions for the fourth step in this workflow. See the other sections for information on the other steps. Once the Message Queue has been created, the next step is executing the pipeline.

Complete the following steps to execute the pipeline:

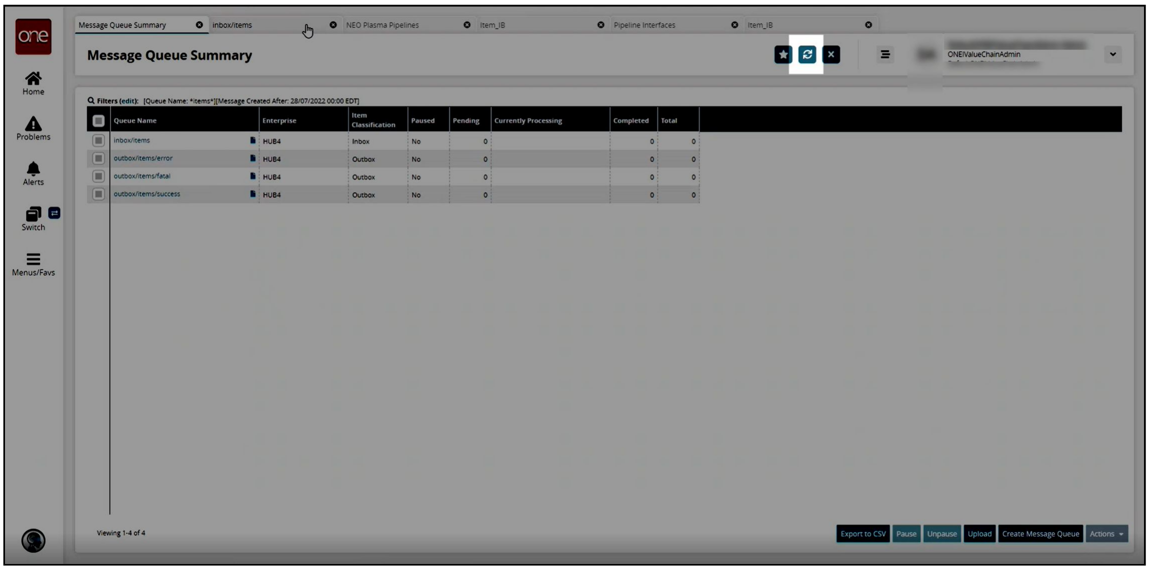
1. Begin at the **Message Queue Summary** screen.



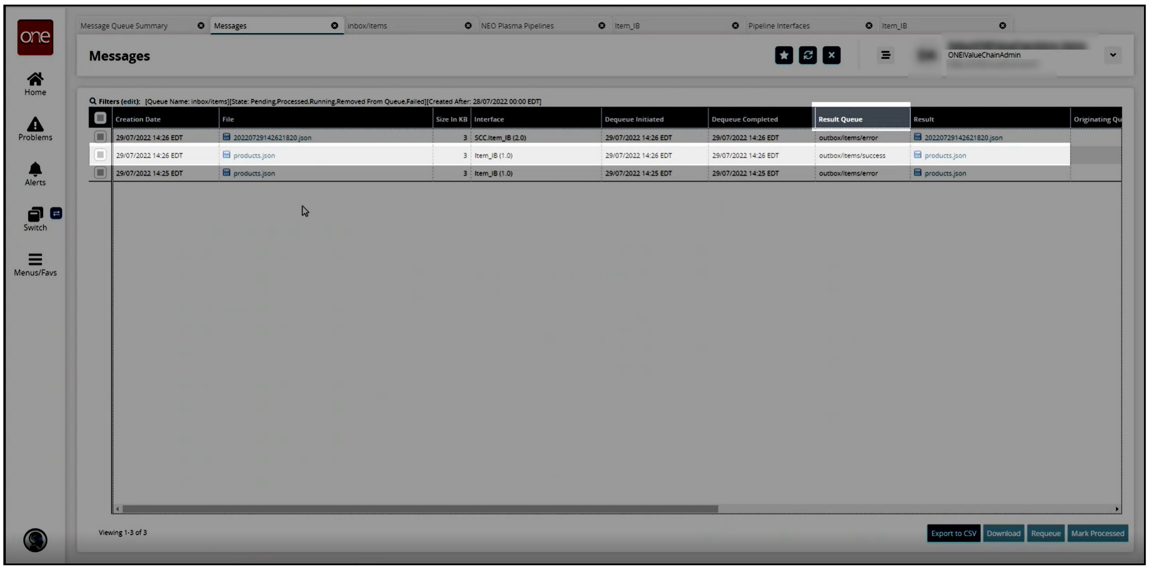
2. Run the **cURL (Client URL)** command for the created pipeline to upload the data. A sample is shown below.

```
curl -verbose -u "<Username>:<Password>" -H "Content-Type: application/
json" --data-binary "@products.json" https://<domain>/oms/rest/queue/
enqueue?QueueName=inbox/
items&Sender=<Username>&InboundInterface=Item_IB&InboundQueueEnterpriseName
=HUB4&InboundInterfaceVersion=1.0&ValueChainId=<VC
ID>&ClientFileName=products.json
```

3. Once the command runs, click the refresh icon to refresh the **Message Queue Summary** screen.



A Messages tab appears, showing the execution result in the Result Queue field.



4. The uploaded data now appears in the ONE system in the desired format.

See the "Added Integration Pipeline Framework and NEO Plasma Pipelines Screen" section in the current version of the *Release Notes* for more information.

1.12.2.5 Viewing the Pipeline Execution History

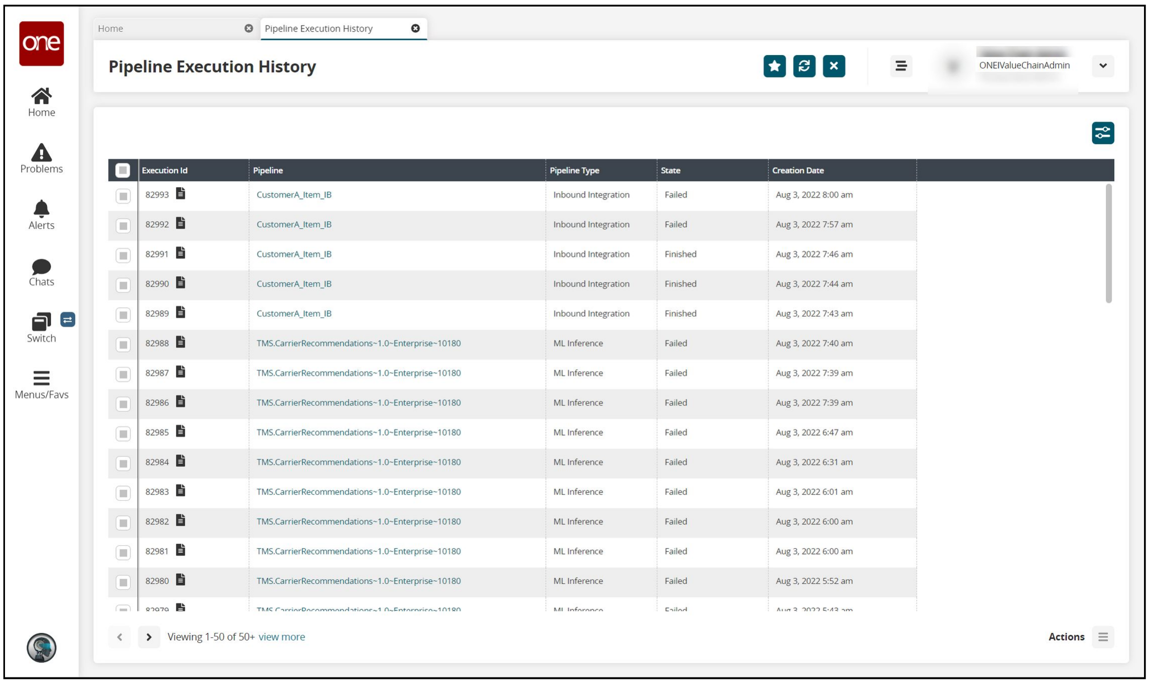
The basic workflow to create an inbound integration pipeline:

1. Create an integration pipeline.
2. Create a pipeline interface.
3. Create a message queue.
4. Execute the pipeline.
5. View the pipeline execution history.

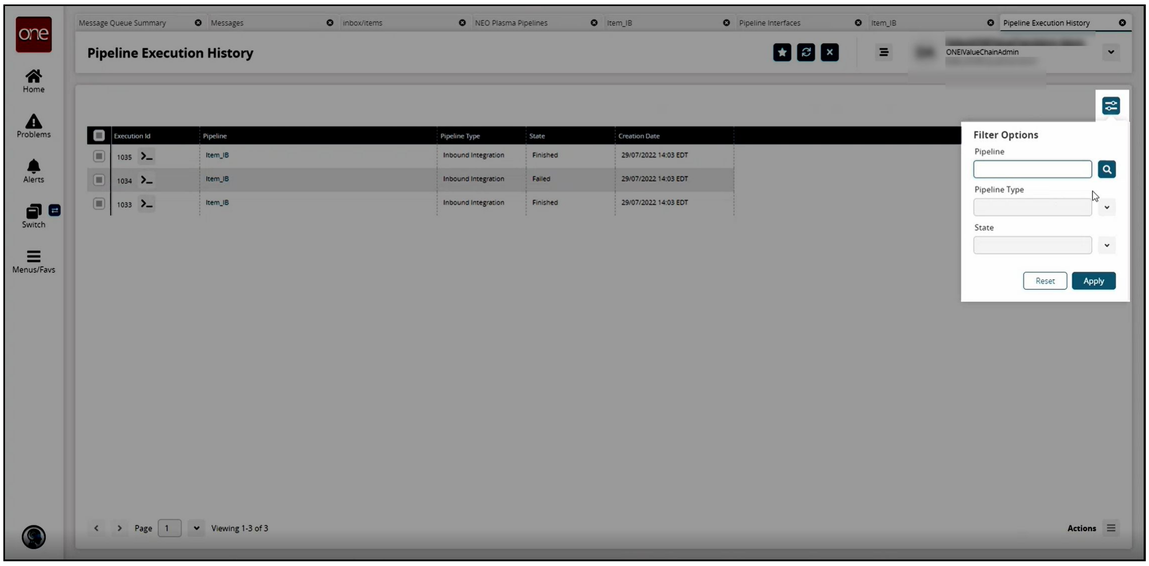
This page provides the instructions for the fifth step in this workflow. See the other sections for information on each step.

Complete the following steps to view the pipeline execution history:

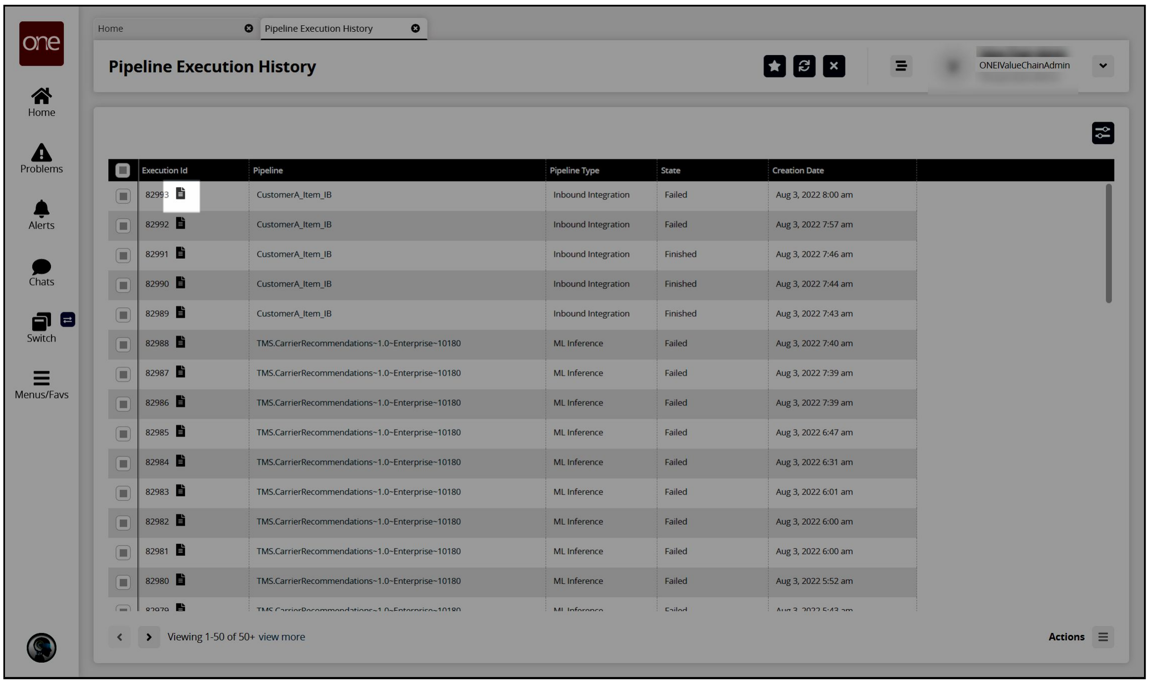
1. Log in to the ONE system.
2. Click **Menu/Favs > Tools > Integration > Pipeline Execution History.**
   The Pipeline Execution History screen appears.



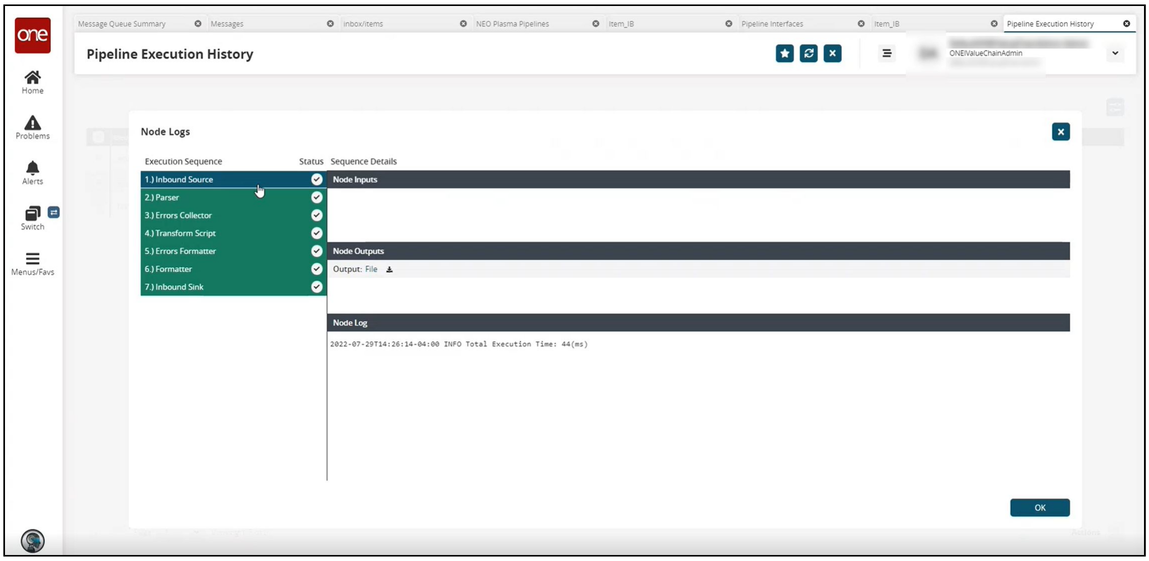
3. Click the filter icon in the top right to open the filter options and search for a specific pipeline or pipelines.



4. In the **Execution Id** column, click the icon beside the number to view the log.



The Node Logs popup window appears.



5. In the **Execution Sequence** pane on the left, click any node to view the details of its execution in the **Sequence Details** pane to the right. The nodes highlighted in green were executed successfully. The nodes highlighted in red contain an error.
6. Click **OK** to return to the **Pipeline Execution History** screen.
7. In the **Pipeline** column on the **Pipeline Execution History** screen, click a pipeline link to view and edit the pipeline in a new tab.

See the "Added Integration Pipeline Framework and NEO Plasma Pipelines Screen" section in the current version of the *Release Notes* for more information.

1.12.2.6 Sample JSON File


```
{
  "products": [{
    "productName": "Gym Tee",
    "description": "This short-sleeve wonder works hard to keep you comfortable
during hard workouts.",
    "entName": "HUB4",
    "upc": "9031101",
    "msrp": 12.99,
    "cost": 9.40,
    "currency": "USD",
    "weight": 4,
    "weightUom": "OZ"
  }, {
    "productName": "Running Shoes",
    "description": "Reach your limit and then some in these Running Shoes.",
    "entName": "HUB4",
    "upc": "35793237",
    "msrp": 35.49,
    "cost": 29.80,
    "currency": "USD",
    "weight": 1,
```

```
    "weightUom": "POUND"
  }, {
    "productName": "Digital Watch",
    "description": "This Digital Watch will help ensure you always know what time it
is.",
    "entName": "HUB4",
    "upc": "33276868",
    "msrp": 56.99,
    "cost": 45.10,
    "currency": "USD",
    "weight": 3,
    "weightUom": "OZ"
  }, {
    "productName": "Rainbow Umbrella",
    "description": "Keep the rain off but the style on with this rainbow-colored
umbrella. It protects you from all directions equally due to its patented circular
shape.",
    "entName": "HUB4",
    "upc": "14578567",
    "msrp": 21.99,
    "cost": 18.30,
    "currency": "USD",
    "weight": 4,
    "weightUom": "POUND"
  }, {
    "productName": "Handbag",
    "description": "This handbag is made for fans of every decade (past or present),
of shapes, and of handbags.",
    "entName": "HUB4",
    "upc": "69946620",
    "msrp": 72.99,
    "cost": 61.00,
    "currency": "USD",
    "weight": 1,
    "weightUom": "POUND"
  }, {
    "productName": "Modern Comb",
    "description": "Keep that bed head in check with this modern-looking comb.",
    "entName": "HUB4",
    "upc": "17234879",
    "msrp": 6.99,
    "cost": 6.40,
    "currency": "USD",
    "weight": 1,
    "weightUom": "OZ"
  }, {
    "productName": "Retro Sunglasses",
    "description": "Reduce the glare with these shades from the past.",
    "entName": "HUB4",
    "upc": "50608437",
    "msrp": 34.99,
    "cost": 30.50,
    "currency": "USD",
    "weight": 2,
    "weightUom": "OZ"
  }]
}
```

1.12.3 Working with Outbound Integration Pipelines

An integration pipeline is a linear sequence of specialized nodes that process and validate inbound and outbound data files, transforming the data into an existing integration framework. The user creates a new pipeline, defines a pipeline inbound or outbound interface and a message queue, then executes the pipeline. The user can also select and execute an existing pipeline and view a pipeline execution history.

Users can view the existing integration and machine learning pipelines from the NEO Plasma Pipelines (see page 129)screen. New inbound and outbound integration pipelines can be created from this screen. (Machine learning pipelines can be viewed on this screen, but they are created from the ML Plug Points screen. See the "Bring Your Own Intelligence" section in *Online Help* for more information.)

The basic workflow to create an outbound integration pipeline:

1. Create an integration pipeline.(see page 163)
2. Create a pipeline interface.(see page 177)
3. Set up an integration subscription and execute the pipeline.(see page 179)
4. View the pipeline execution history.(see page 183)

Prerequisites for following along with the example shown in each section of this documentation:

1. Identify the Value Chain ID (VC ID) for your dataset.
2. Identify the Enterprise & Organization you would like to use. You can either create a HUB4 Enterprise and HUB4 Organization to mimic the sample data and code provided, or use your own and change references to HUB4 within our sample data and code.
3. Load sample data into the system to use in the outbound pipeline. See the "Loading Sample Data(see page 162)" section for instructions.

See the "Added Integration Pipeline Framework and NEO Plasma Pipelines Screen" section in the current version of the *Release Notes* for more information.

1.12.3.1 Loading Sample Data

Complete the following steps to load sample data for use in the walkthrough provided in this guide:

1. Download this file. Alternatively, use the data found in the "Sample Site Data(see page 195)" section of this guide to create a CSV file to upload.
2. Log in to the ONE system.
3. Click **Menu/Favs > Administration > Site > Search Site**.
4. Click the **Upload** button.

5. Upload the previously saved file.
   The data needed for the outbound integration pipeline is now present in the ONE system.
6. Proceed to the "Creating an Outbound Integration Pipeline" section.

1.12.3.2 Creating an Outbound Integration Pipeline

The basic workflow to create an outbound integration pipeline:

1. Create an integration pipeline.
2. Create a pipeline interface.
3. Set up an integration subscription and execute the pipeline.
4. View the pipeline execution history.

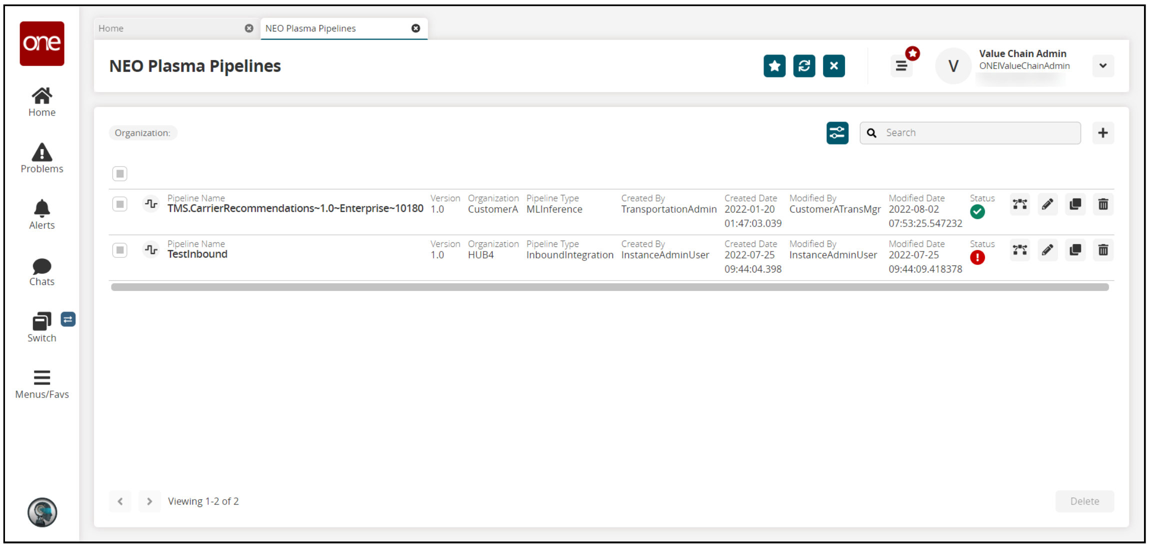
This page provides the instructions for the first step in this workflow. See the subsequent sections for information on each step. This example covers outbound integration from a CSV file. Users can also use the pipeline to integrate data from JSON and XML files.

Prerequisites for following along with the example shown in each section of this documentation:

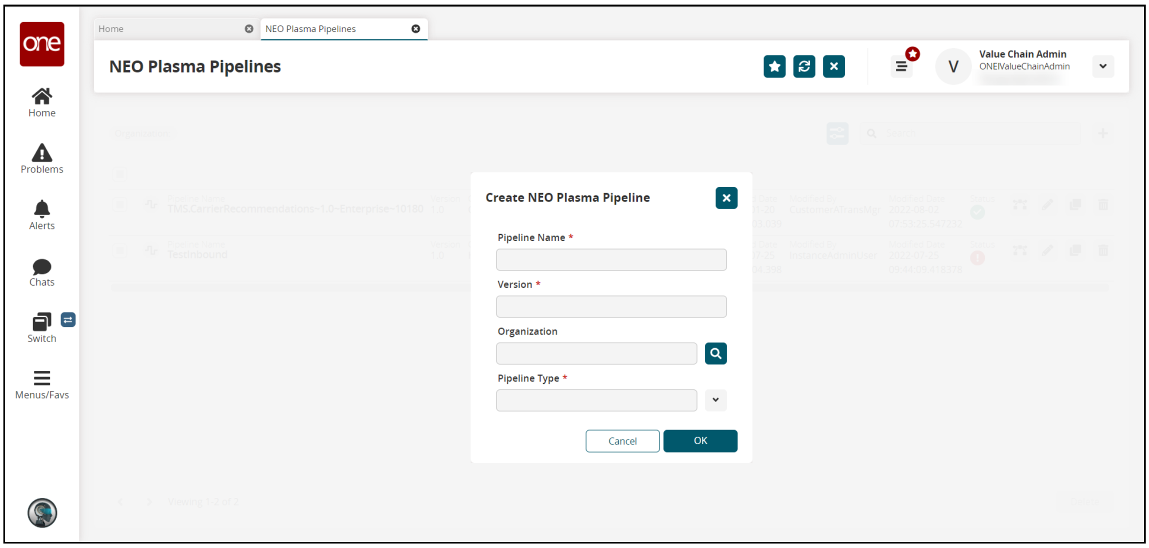
1. Identify the Value Chain ID (VC ID) for your dataset.
2. Identify the Enterprise & Organization you would like to use. You can either create a HUB4 Enterprise and HUB4 Organization to mimic the sample data and code provided, or use your own and change references to HUB4 within our sample data and code.
3. Load sample data into the system to use in the outbound pipeline. See the "Loading Sample Data" section for instructions.

Complete the following steps to create a new integration pipeline:

1. Log in to the ONE system.
2. Click **Menu/Favs > Tools > Integration > NEO Plasma Pipelines.**
   The NEO Plasma Pipelines screen appears.



3. Click the **+ (plus)** icon in the top right corner.
   The Create NEO Plasma Pipeline popup window appears.

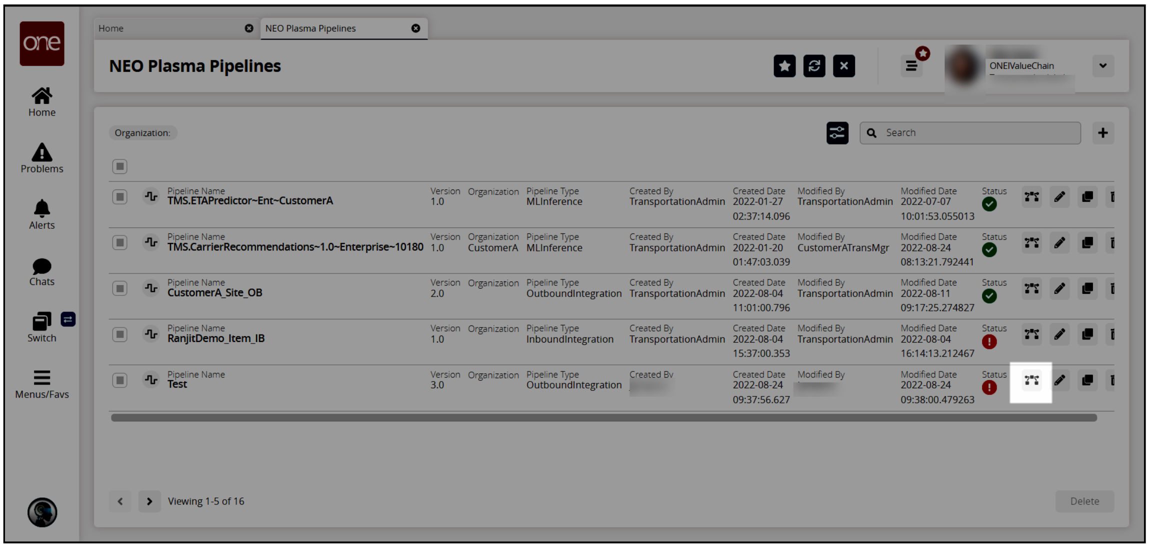


4. Complete the fields described in the table below. Fields with an asterisk (*) are required.

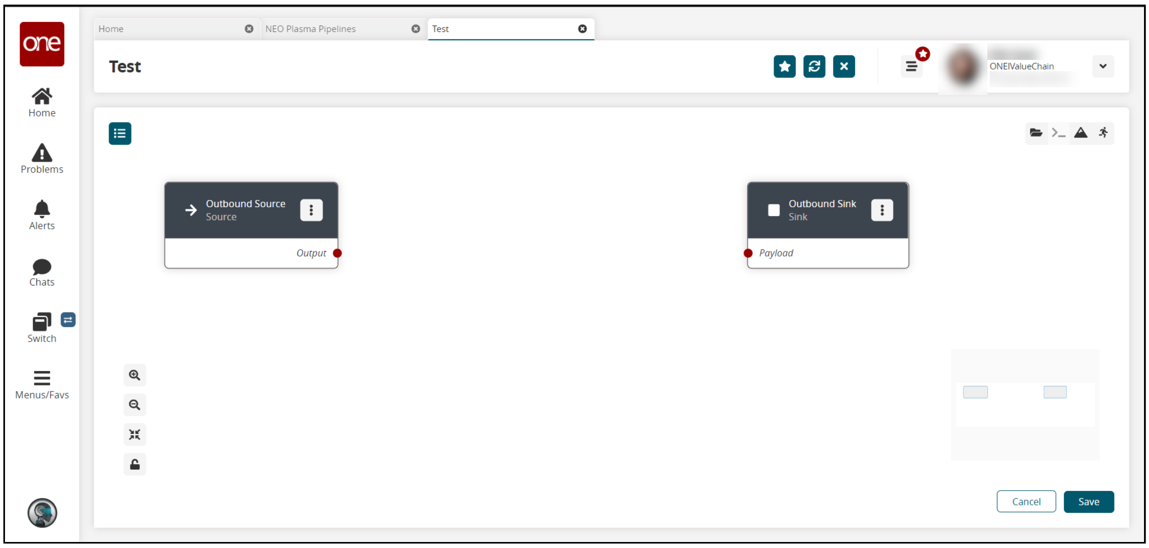
Field	Description
Pipeline Name*	Enter a name for the new pipeline.
Version*	Enter a version number for the new pipeline.
Organization	Use the picker tool to select the organization.

Field	Description
Pipeline Type*	Select the pipeline type from the dropdown menu. The options are Inbound Integration and Outbound Integration. For this example, select Outbound Integration.

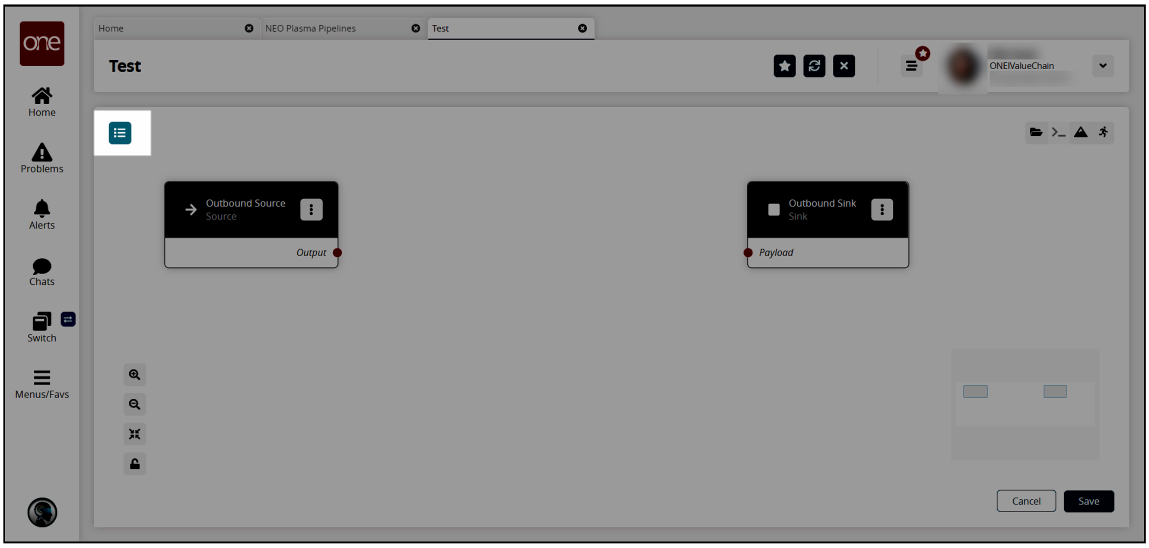
5. Click **OK**.
   A success message appears.
6. Click **OK**.
   The NEO Plasma Pipelines screen updates with the new pipeline listed.
7. Click the pipeline icon (highlighted below) to open the new pipeline.



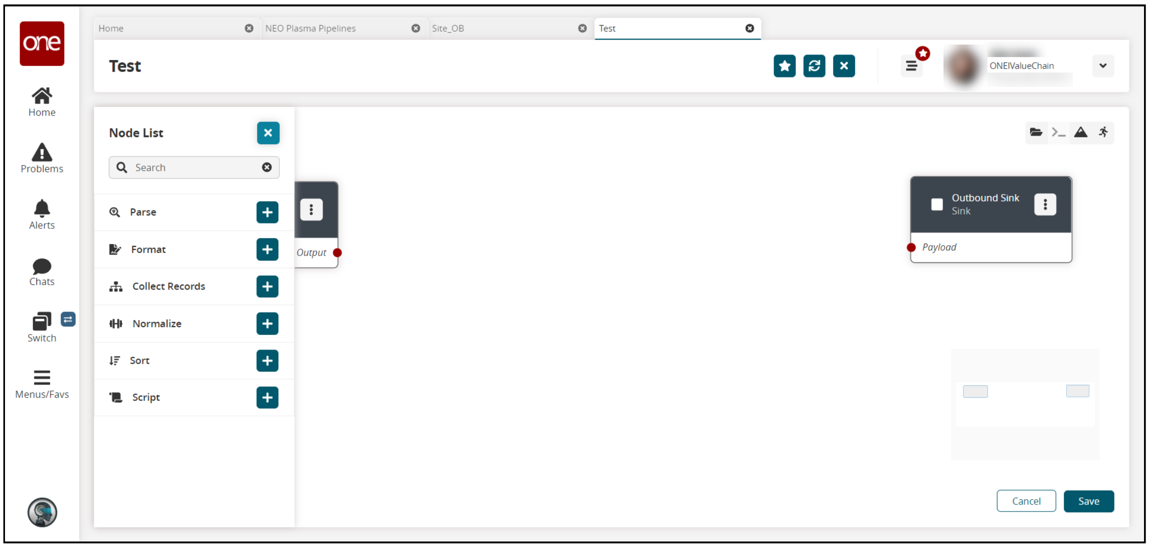
The new pipeline appears with Outbound Source and Outbound Sink nodes displayed.



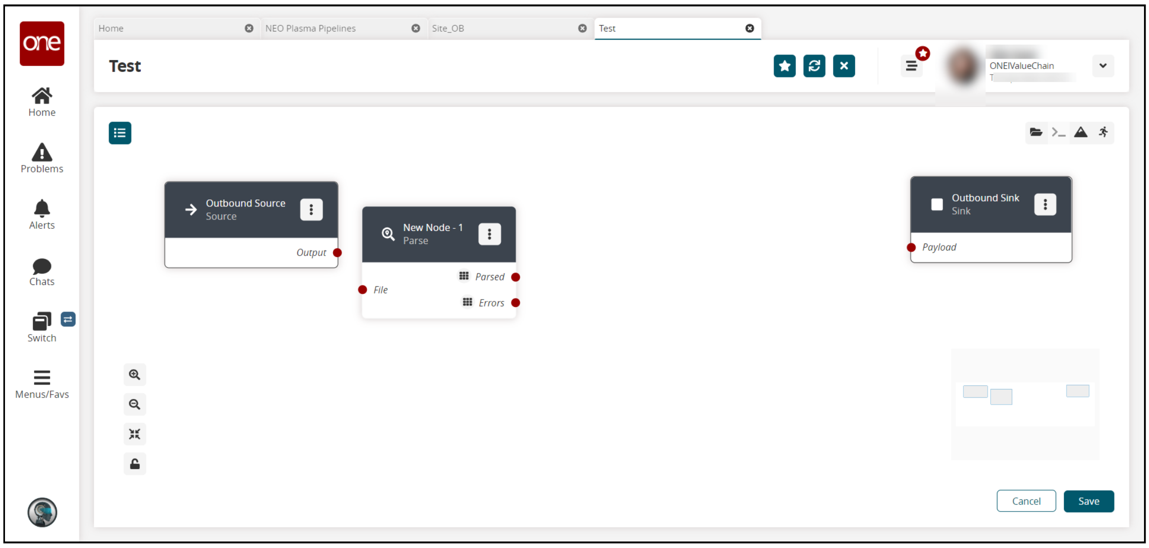
8. Click the **Node List** icon in the top left corner.



The Node List slideout appears.

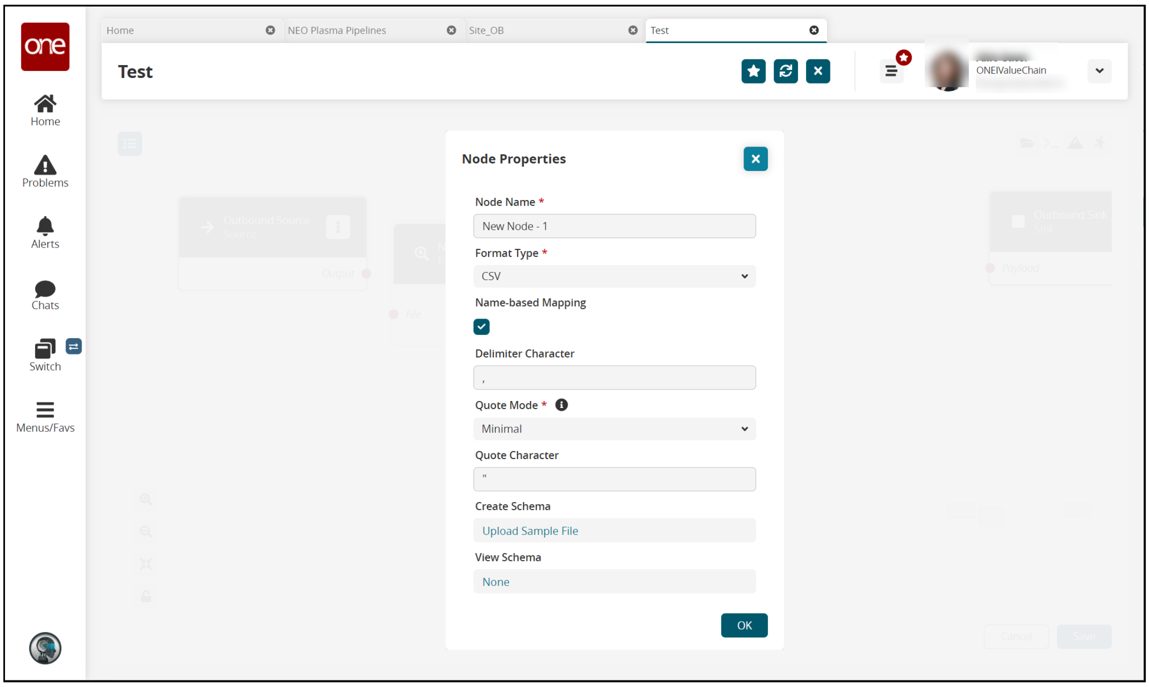


9. Click the **+ (plus)** icon for the type of node you want to add. For this example, we selected a parse node. The parse node parses the inbound file data into records. The parse node appears in the pipeline.



10. On the new node, click the icon with three vertical dots and click **Properties**. The Node Properties popup window appears.

> Click to download a CSV sample file to use in this example. You will upload this sample file in the next step. Alternatively, use the data in the "Sample Data to Create a Schema(see page 185)" section of this guide to create your own CSV file to upload in the next step.

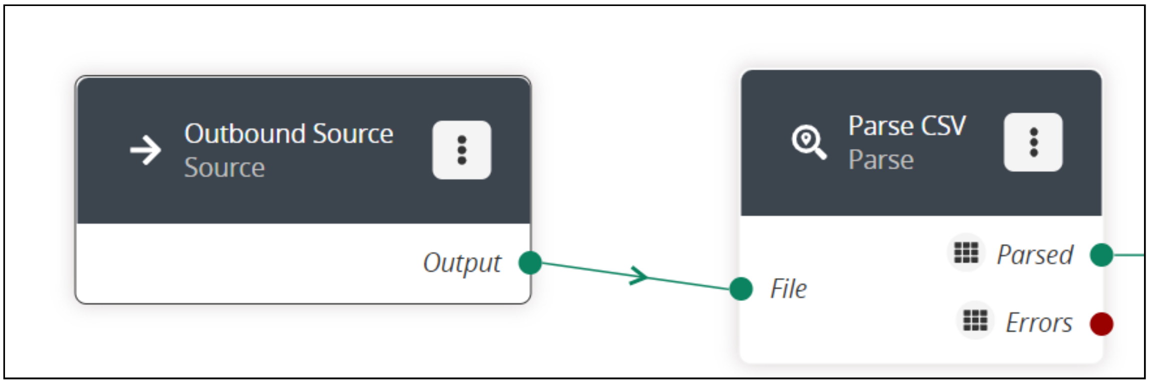


11. Complete the fields described in the table below. Fields with an asterisk (*) are required.

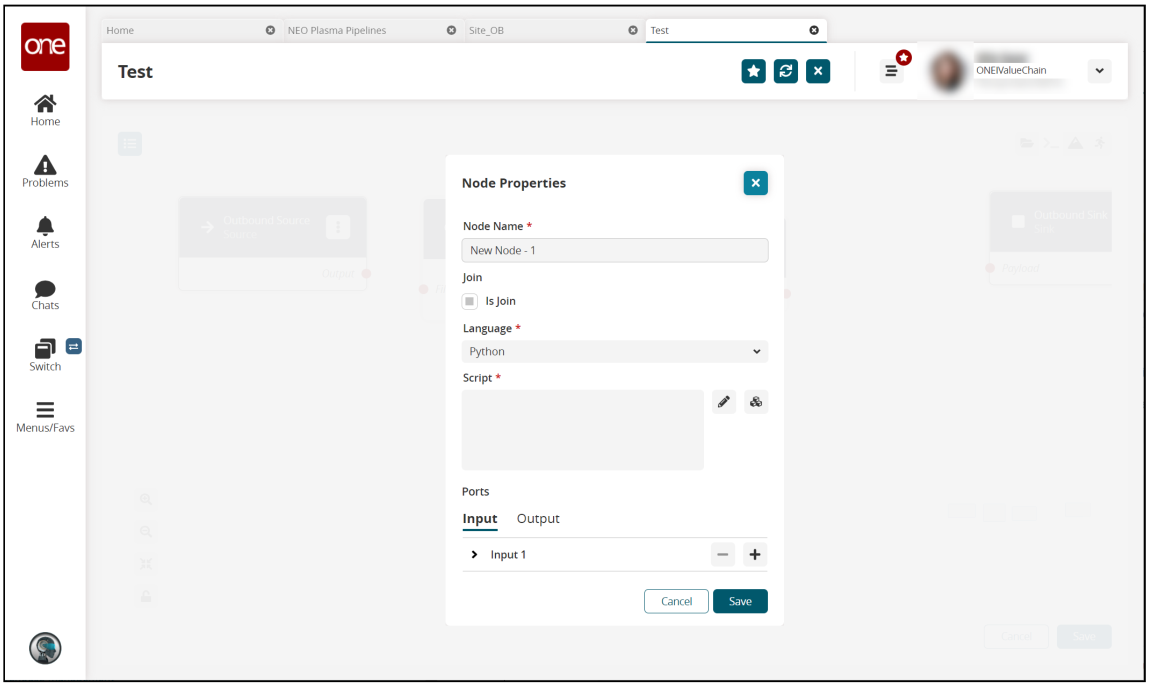
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Node Name*</td><td>Enter a name for the node.</td></tr>
<tr><td>Format Type*</td><td>Select a format type for the inbound file from the dropdown list. Options are JSON, CSV, and XML. The remaining fields vary according to the format chosen. For this example, we selected CSV.</td></tr>
<tr><td>Create Schema</td><td>a. Click the Upload Sample File link.
The Create Schema popup appears.

b. Complete the following fields. Fields with an asterisk are required.
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Namespace*</td><td>Enter a unique category to organize schema name fields. For this example, we used Input.</td></tr>
<tr><td>Schema*</td><td>Enter a unique name with which to associate the dataset. For this example, we used Sites.</td></tr>
<tr><td>Sample File*</td><td>Click the upload icon to upload a sample file for the parse node. For this example, you can use the same CSV file downloaded in the previous step, or create a CSV file using the data in the "Sample Data to Create a Schema(see page 185)" section.</td></tr>
</table>
c. Click OK.
The Node Properties updates.</td></tr>
<tr><td>View Schema</td><td>This field auto-populates with a link once the sample file is uploaded in the Create Schema field. Click the link to view or edit the record schemas.</td></tr>
</table>

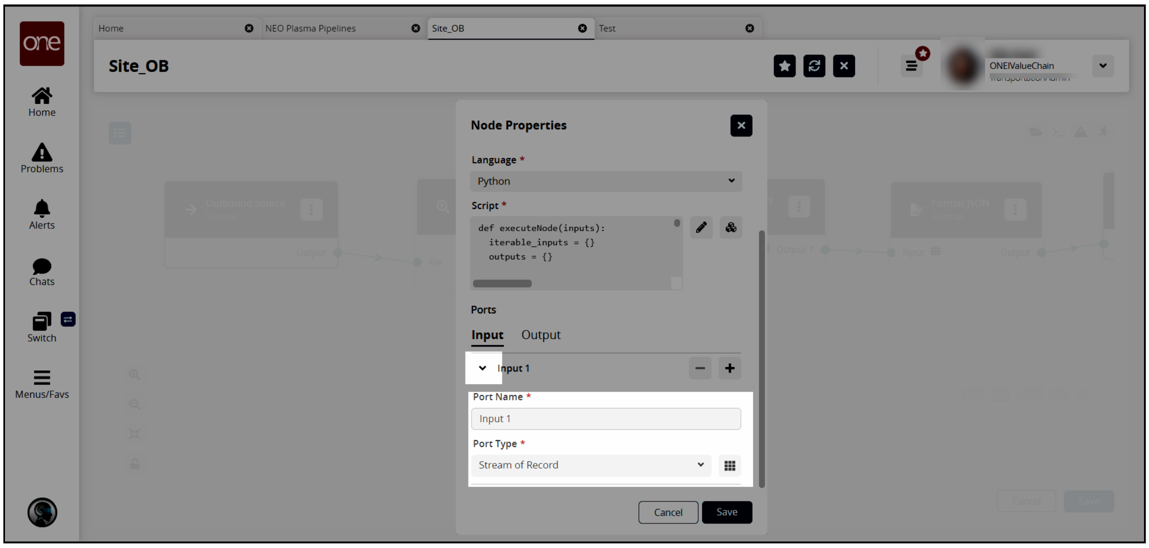
12. Click **OK.**
    The pipeline screen updates.
13. On the **Outbound Source** node, click the red dot next to **Output** and drag the cursor to connect to the **Input** on the **Parse** node.
    The connection turns green. The parse node can now parse the data from the outbound source.



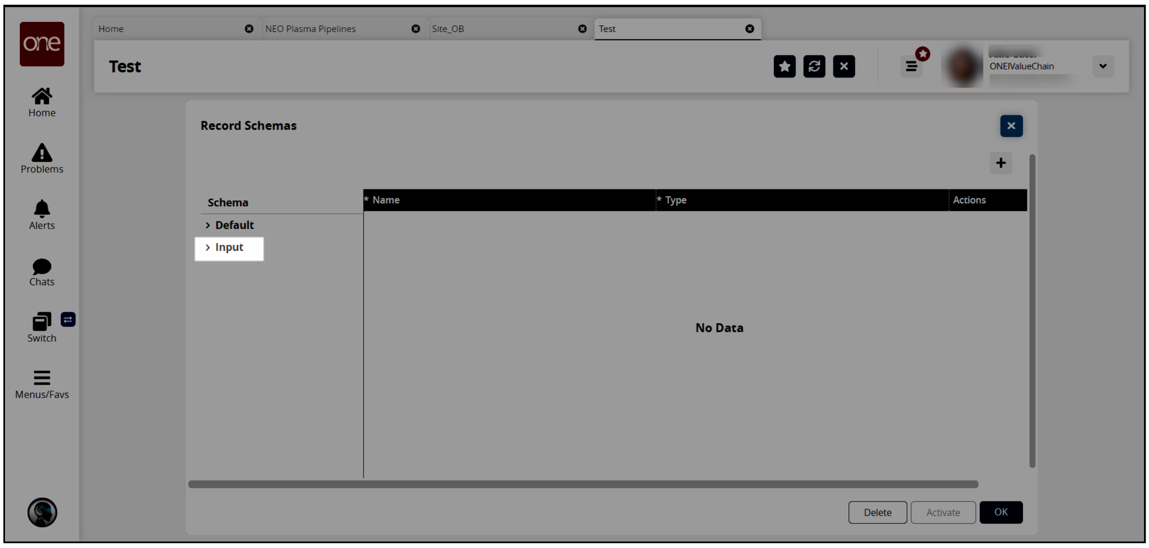
14. Click the node list icon in the top left corner again.
    The Node List slideout reappears.
15. Click the **+ (plus)** icon next to Script.
    A script node is added to the pipeline.
16. On the new script node, click the icon with three vertical dots and click **Properties**.
    The Node Properties popup window appears.



17. In the **Node Name*** field, enter a name for the node. For this example, we used Transform CSV to JSON.
18. On the **Input** tab in the **Ports** section, click the arrow to display the port fields.

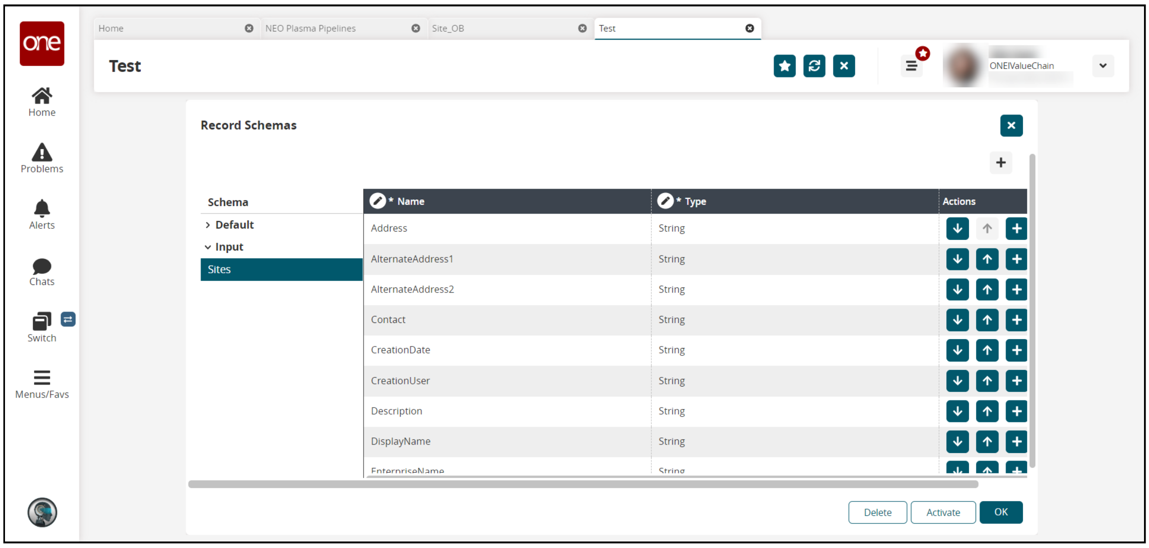


19. In the **Port Type*** field, select **Stream of Record** from the dropdown list.
    The icon beside the dropdown list becomes active.
20. Click the icon beside the **Port Type*** dropdown list.
    The Record Schemas popup window displays.
21. Click the arrow beside Input.

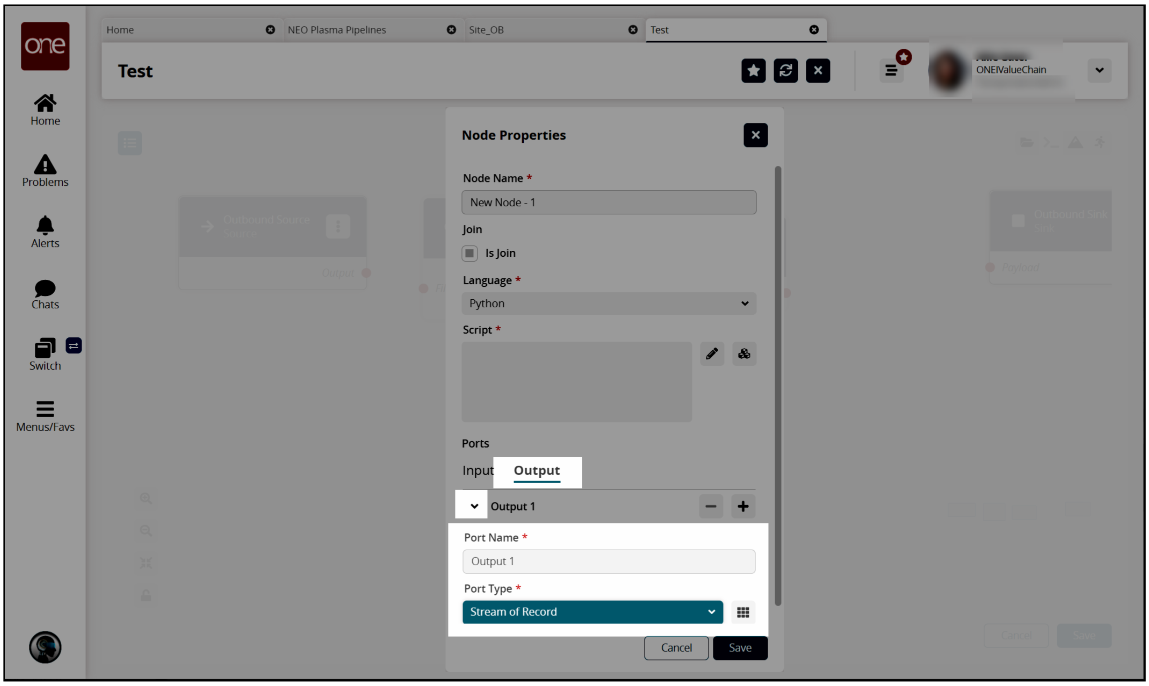


The list of schemas displays.

22. Select the input schema. For this example, we named the schema Sites.
    The schema displays in the pane to the right, and the **Activate** button becomes active.



23. Click the **Activate** button.
24. Click **OK.**
    The Node Properties popup window appears again.
25. In the **Ports** section, click the **Output** tab.
26. Click the arrow to the left of the output to display the **Port Name*** and **Port Type*** fields.



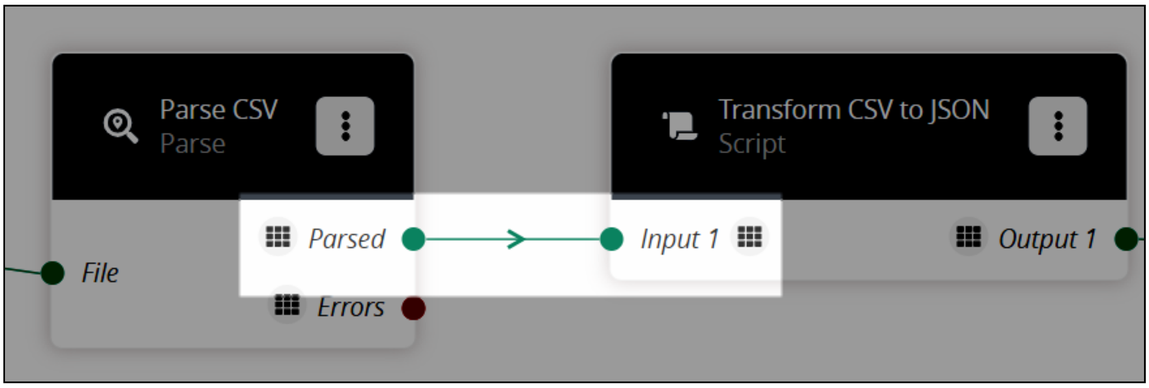
27. In the **Port Type*** field, select **Stream of Record** from the dropdown list.
28. Click the icon to the right of the **Port Type*** dropdown list.
29. In the **Schema** pane on the left, click the arrow beside **Output**.
    The Output record schemas display in the pane.
30. Click the output schema. For this example, select Sites.
    The schema displays in the pain to the right, and the **Activate** button becomes active.
31. Click the **Activate** button.

32. Click **OK**.
    The Node Properties popup window reappears.
33. In the **Script*** field on the **Node Properties** popup window, click the pencil icon.
    The Edit Script popup window appears.
34. Enter the script code for the node. A sample script code is shown below.

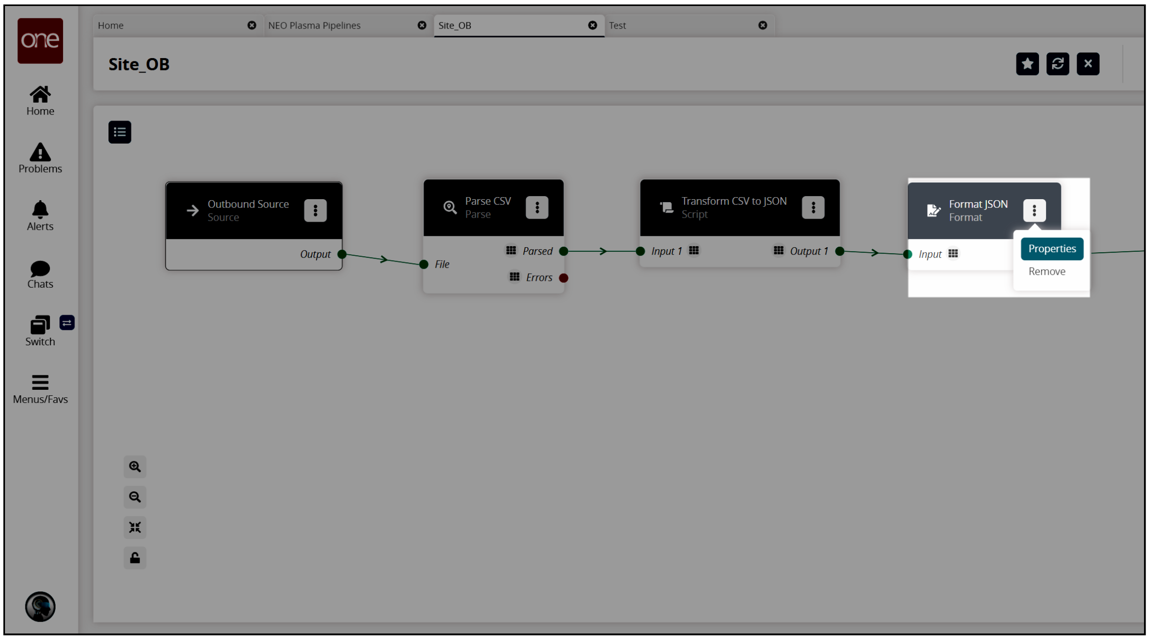
```
def executeNode(inputs):
  iterable_inputs = {}
  outputs = {}

  # Input ports

  iterable_inputs["Input"] = inputs["Input"]
  # Type = stream.record
  # Address, AlternateAddress1, AlternateAddress2, Contact, CreationDate,
CreationUser, Description, DisplayName,
  # EnterpriseName, ExternalRefNo, LastComputedDate, LastModifiedDate,
LastModifiedUser, Latitude, Longitude, Name,
  # OrganizationName, RunReplenishment, ActivationDate, AuthoritativeLevel,
AutoGenBuffer, BarCodeDelimiter,
  # BarCodeFormat, BarCodePrefixing, BillingContactEmail,
BillingContactFax, BillingContactMobile, BillingContactName,
  # BillingContactPhNum, County, DeactivationDate, HolidayCalendarName,
IsBilling, IsDC, IsPlant, IsPrimarySubSite,
  # IsPublic, IsShipping, IsStore, ManagingOrgEnterpriseName,
ManagingOrgName, ParentSiteName,
  # ParentSiteOrganizationEnterpriseName, ParentSiteOrganizationName,
PrimarySubSiteName, ReceivingCalendarName,
  # ReceivingContactEmail, ReceivingContactFax, ReceivingContactMobile,
ReceivingContactName, ReceivingContactPhNum,
  # ShippingCalendarName, ShippingContactEmail, ShippingContactFax,
ShippingContactMobile, ShippingContactName,
  # ShippingContactPhoneNum, TransportationInstructions,
TransSiteGroupName, TransSiteGroupOrganizationEnterpriseName,
  # TransSiteGroupOrganizationName, ApptSchedulingSystem,
ApptSchedulingSystemChangedDate, EnableSoftAppointments,
  # SiteGroupName, Tier, TimeZoneId, DefaultDockDoorCount, NotifyVASP,
TypeName, AllowedDetentionTime

  #
US~State~City~Address_ent~Address_org~Address_site~Street1~Street2~Street3~
Zip~Latitude~Longitude~Time_zone
  address_components = {
    'State': 1,
    'City': 2,
    'Street1': 6,
    'Street2': 7,
    'Zip': 9,
  }

  # Add node logic here
  for record in iterable_inputs["Input"]:
    o_record = {}
    o_record['Name'] = record['Name']
```

```
    o_record['Organization'] = record['OrganizationName']
    o_record['Enterprise'] = record['EnterpriseName']
    o_record['Contact'] = record['Contact']
    o_record['Address'] = parse_addr(record['Address'], address_components)
    yield { "Output": o_record }

  # Activate and set outputs (omit a port to prevent execution of nodes
that depend on that port)

  yield { "Output": None }
  # Type = stream.record
  # Name, Organization, Enterprise, Contact, Address

  return outputs

def parse_addr(addr, address_components):
  comps = addr.split('~')
  result = {}
  for key in address_components:
    result[key] = comps[address_components[key]]
  return result
```

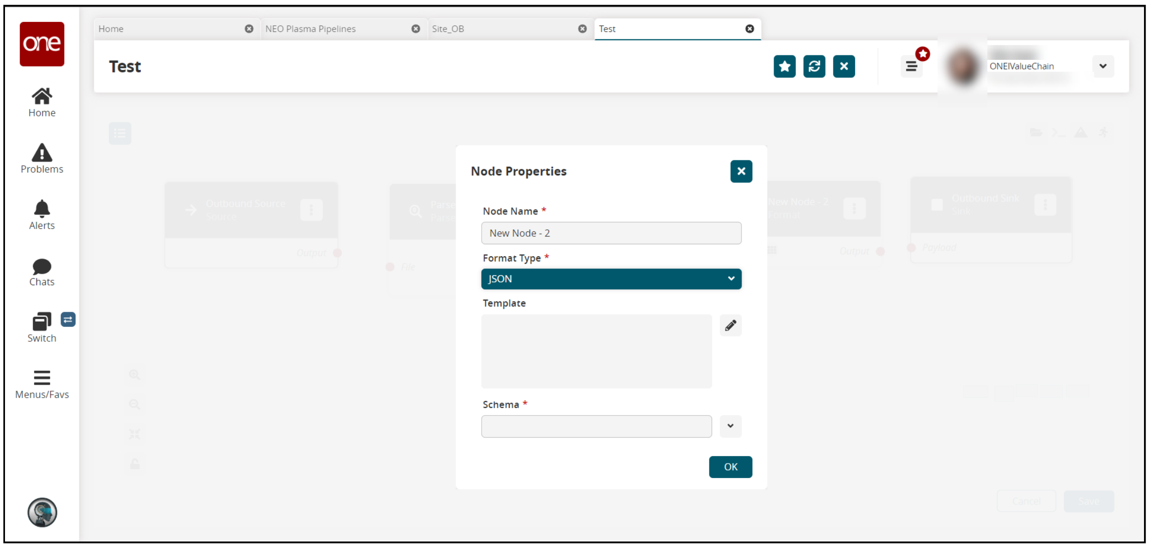
35. Click **Save**.
    The Node Properties popup window appears.
36. Click **Save**.
    The pipeline screen reappears.
37. On the **Parse** node, click the red dot next to **Parsed** and drag the cursor to connect to **Input 1** on the script node.
    The connection turns green. The stream of records from the parser has now been converted to the correct format.



38. Click the node list icon in the top left corner again.
    The Node List slideout reappears.
39. Click the **+ (plus)** icon next to **Format**.
    A format node is added to the pipeline.
40. On the new **Format** node, click the icon with three vertical dots and click **Properties**.



The Node Properties popup window appears.



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

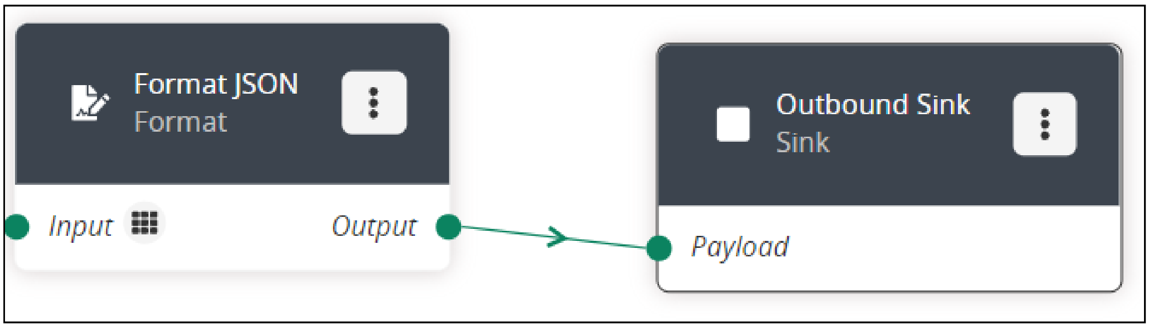
Field	Description
Node Name*	Enter a name for the node. In this example, we used Format JSON.
Format Type*	Select the desired format type from the dropdown list. For this example, we used JSON. Note that the remaining fields change based on the format type selected.

Field	Description

Template	A. Click the pencil icon.
	The Edit Script popup appears.
	B. In the **Edit Current Code** field, enter the script. For this example, we used the following script:
	`{`
	` "sites": [`
	`{% for record in records %}`
	`{% filter ppjson|indent(first=True) %}`
	`  {{ record|tojson }}`
	`{% endfilter %}{% if not loop.last %}{{ ',`
	`\n' }}{% endif %}`
	`{% endfor +%}`
	`  ]`
	`}`

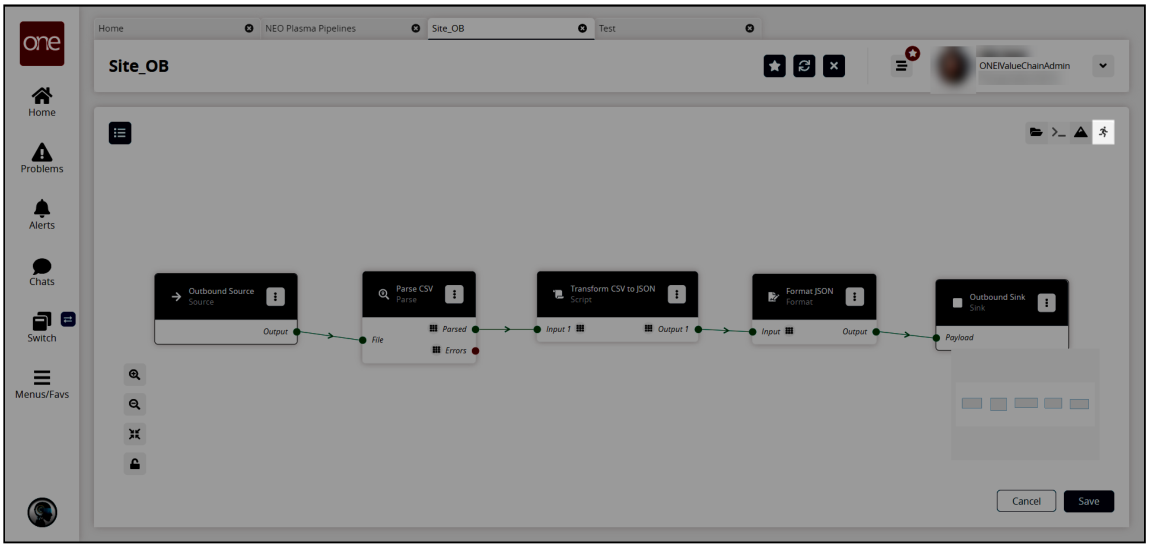
Schema*	Select the output schema from the dropdown list. For this example, we selected Output/Sites.

42. Click **OK**.
    The pipeline screen reappears.
43. On the **Format** node, click the red dot next to **Output** and drag the cursor to connect to **File** on the **Outbound Sink** node.

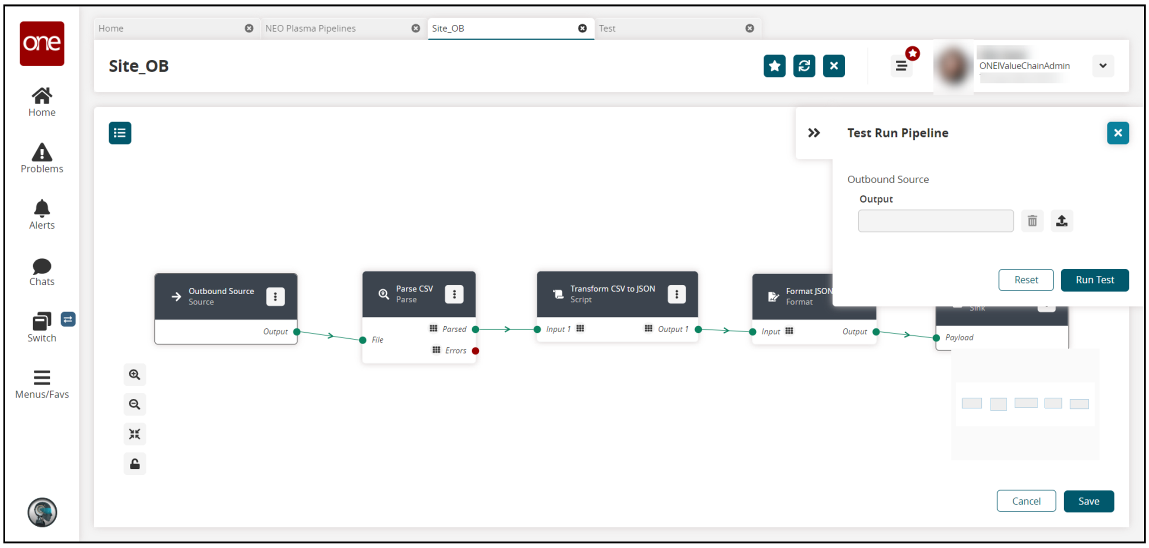


44. Repeat this process to add additional nodes as desired. The following node types are available:

    A. Parse
    B. Format
    C. Collect Records
    D. Normalize
    E. Sort
    F. Script
45. Click the **Save** button to save the pipeline.
46. Click the **Run Test** icon in the top right corner to test the pipeline.



The Test Run Pipeline slideout appears.



47. Click the upload icon to upload the inbound source file.
48. Click the **Run Test** button.
    The Node Logs section appears at the bottom of the screen with the successful nodes turning green in the Execution Sequence column.

49. If the test run is correct, the next step is to create a pipeline interface. See the "Creating a Pipeline Interface" section for instructions.

See the "Added Integration Pipeline Framework and NEO Plasma Pipelines Screen" section in the current version of the *Release Notes* for more information.

1.12.3.3 Creating a Pipeline Interface for an Outbound Integration Pipeline

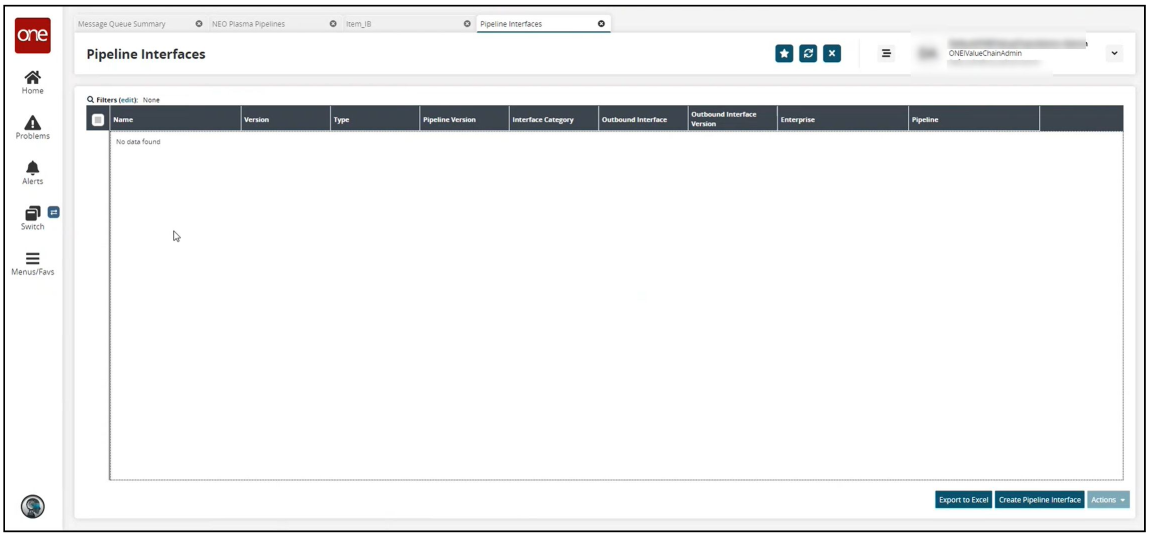
The basic workflow to create an outbound integration pipeline:

1. Create an integration pipeline.
2. Create a pipeline interface.
3. Set up an integration subscription and execute the pipeline.
4. View the pipeline execution history.

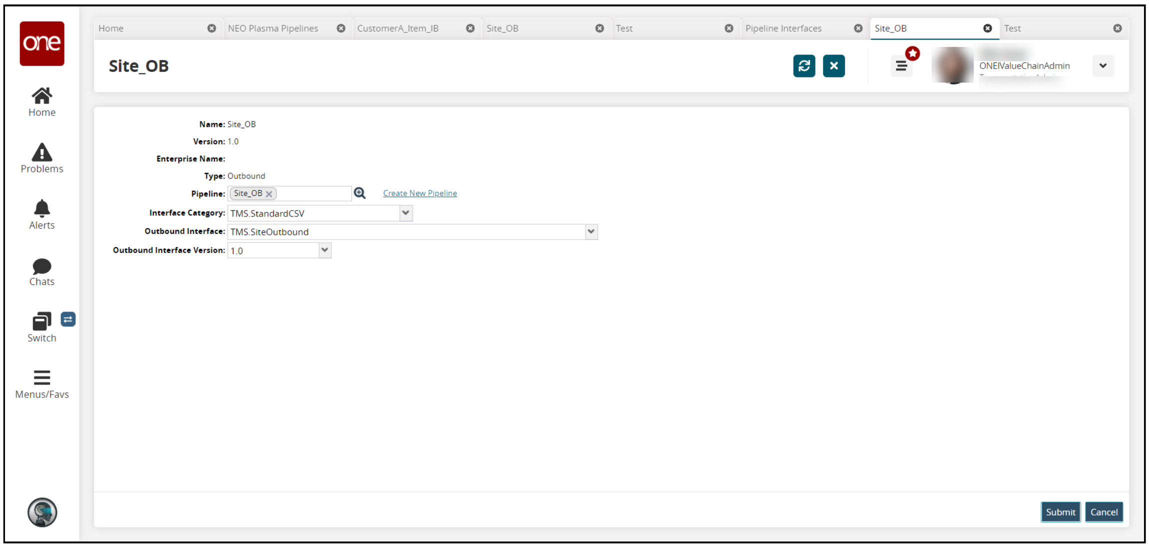
This page provides the instructions for the second step in this workflow. See the other sections for information on the other steps.

Complete the following steps to create a new pipeline interface:

1. Follow the steps to create an integration pipeline. See the "Creating an Integration Pipeline" section for more information.
2. Click **Menu/Favs > Tools > Integration > Pipeline Interfaces.**
   The Pipeline Interfaces screen appears.



3. Click the **Create Pipeline Interface** button.
   The Create Pipeline Interface screen appears.



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

Field	Description
*Name	Enter a name for the pipeline interface.
*Version	Enter a version number.
Enterprise	Use the picker tool to select an enterprise.
*Type	Select the interface type from the dropdown list. The options are Inbound and Outbound. For this example, we selected Outbound.
Pipeline	Use the picker tool to select a pipeline you want to use with this interface.
Interface Category	Select an interface category from the dropdown list.
Outbound Interface	Select an outbound interface from the dropdown list. The options vary based on the interface category selected.
Outbound Interface Version	Select an outbound interface version from the dropdown list.

5. Click **Create**.
The pipeline interface detail screen appears with a green success message.

See the "Added Integration Pipeline Framework and NEO Plasma Pipelines Screen" section in the current version of the *Release Notes* for more information.

1.12.3.4 Setting Up an Integration Subscription and Executing the Pipeline

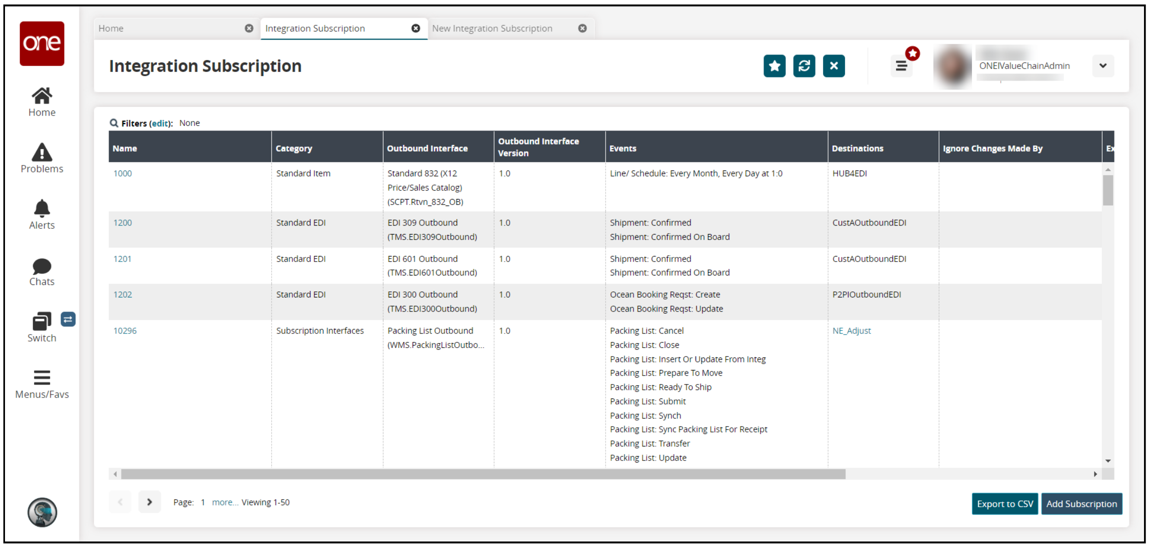
The basic workflow to create an outbound integration pipeline:

1. Create an integration pipeline.
2. Create a pipeline interface.
3. Set up an integration subscription and execute the pipeline.
4. View the pipeline execution history.

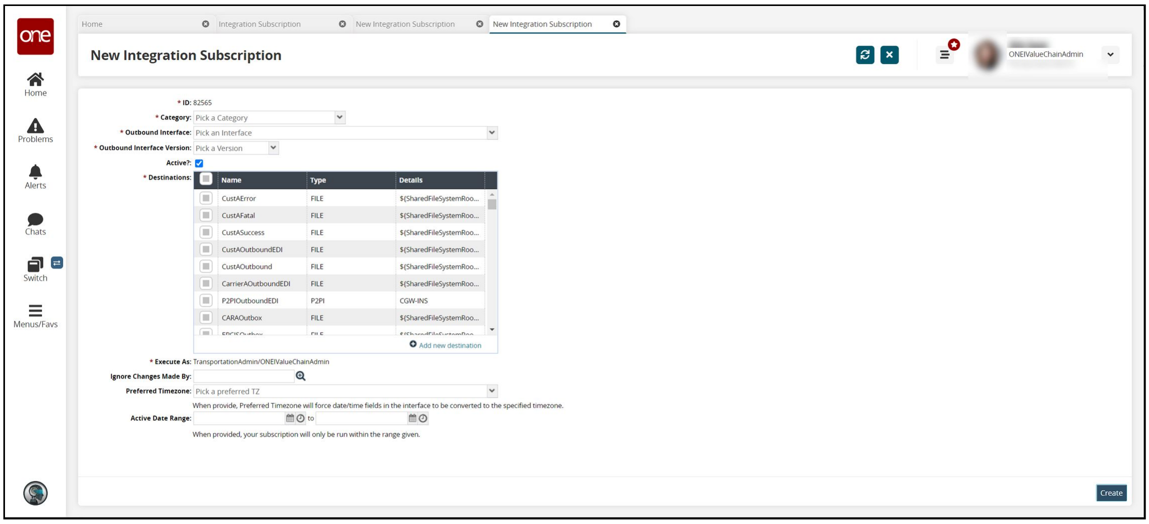
This page provides the instructions for the third step in this workflow. See the other sections for information on the other steps.

Complete the following steps to set up an integration subscription for an outbound integration pipeline:

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

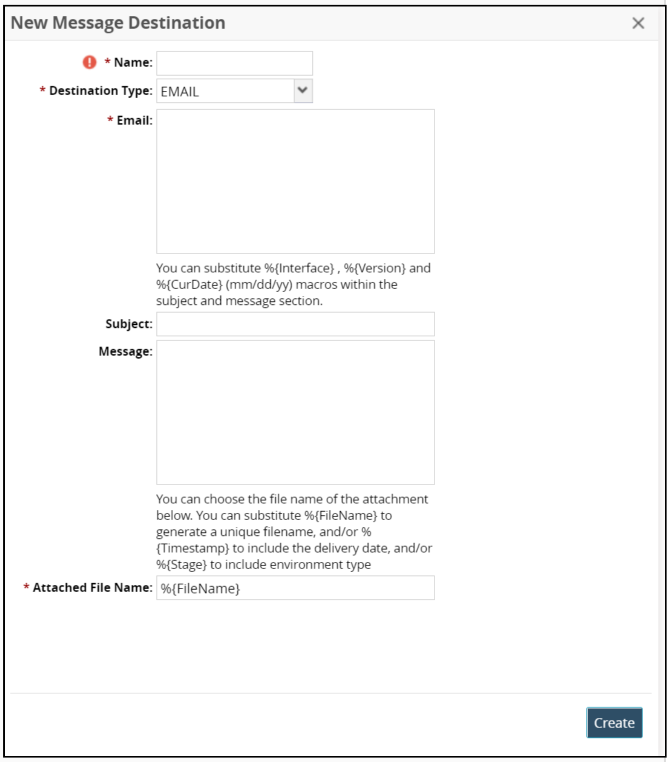


3. Click the **Add Subscription** button.
   The New Integration Subscription screen appears.



4. Complete the following fields. Fields with an asterisk (*) are required. The fields may vary depending on the outbound interface selected.

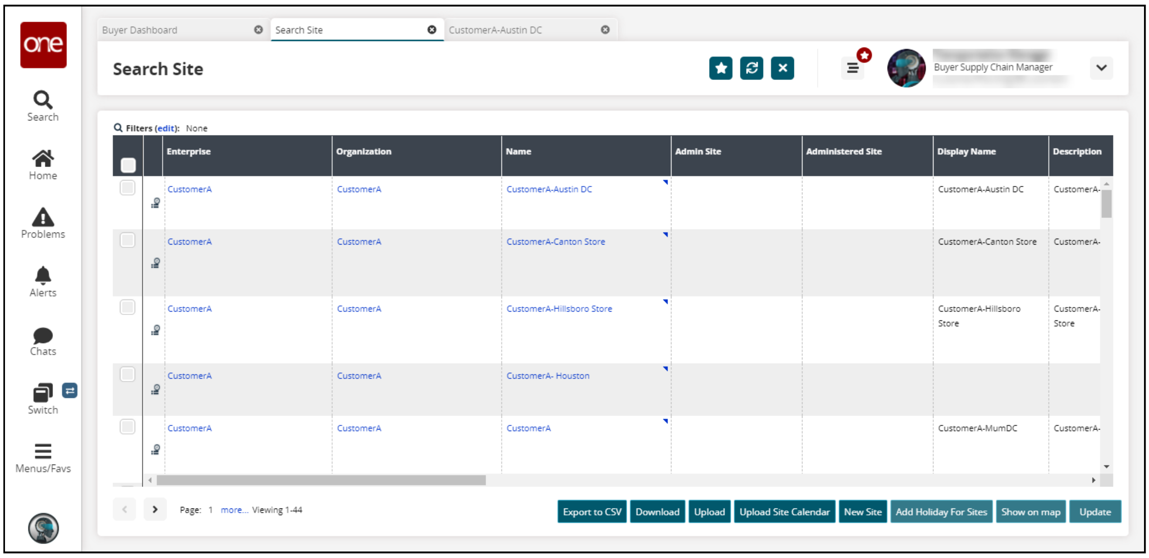
Field	Description
*ID	This field auto-populates.
*Category	Select a category for the integration subscription from the dropdown list. For this example, we selected Standard CSV.
*Outbound Interface	Select the outbound interface for this pipeline from the dropdown list. For this example, we selected **Site Outbound (TMS.SiteOutbound)**.
*Outbound Interface Version	Select the outbound interface version from the dropdown list. For this example, we selected 1.0.
Pipeline Interface	Select the pipeline interface from the dropdown list. This field may not appear depending on the outbound interface selected. For this example, we selected Site_OB.1.0.
Active	Check the box to make the subscription active.

Field	Description
*Destinations	A. Check the box for the destinations for the outbound file, or click the **+Add new destination** link to add a new destination for the file. The New Message Destination popup appears.  B. Fill out the fields. Fields with an asterisk (*) are required. C. Click the **Create** button. The new destination is added.
*Execute As	This field auto-populates.
Ignore Changes Made By	Use the picker tool to select any users whose changes you want the system to ignore.
Preferred Timezone	Select the preferred time zone from the dropdown list.
Events	This field appears because of the outbound interface selected in this example. Check the box to select the event that triggers the execution of the pipeline. For this pipeline, we selected Site: Update, which means the pipeline executes when a site is updated.
Active Date Range	Use the calendar and clock icons to specify a date range for the pipeline to run.

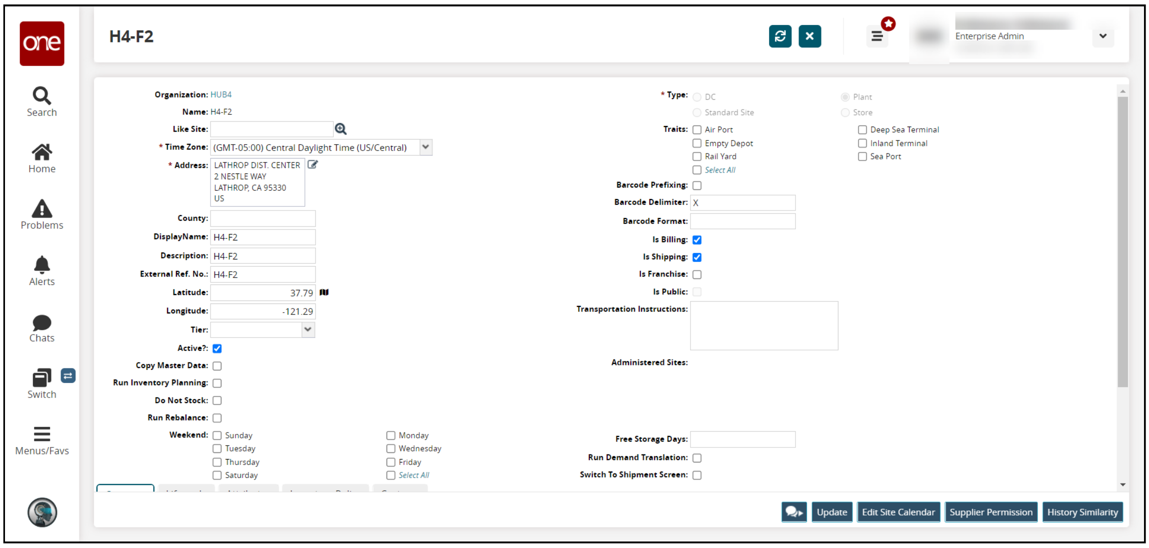
5. Click the **Create** button.
   A success message appears.

Executing the Pipeline

1. Because we selected **Site: Update** as the event that triggers the execution of this pipeline, navigate to a site uploaded in the sample site data created for this example. See the "Loading Sample Data" section in this guide for more information and the "Searching Sites" section in the *Online Help* for assistance in searching for a site.



2. Click the site name to open the site details screen.



3. Edit any field.
4. Click **Update**.
   The site updates, which triggers the execution of the pipeline.

See the "Added Integration Pipeline Framework and NEO Plasma Pipelines Screen" section in the current version of the *Release Notes* for more information.

1.12.3.5 Viewing the Pipeline Execution History for an Outbound Integration Pipeline

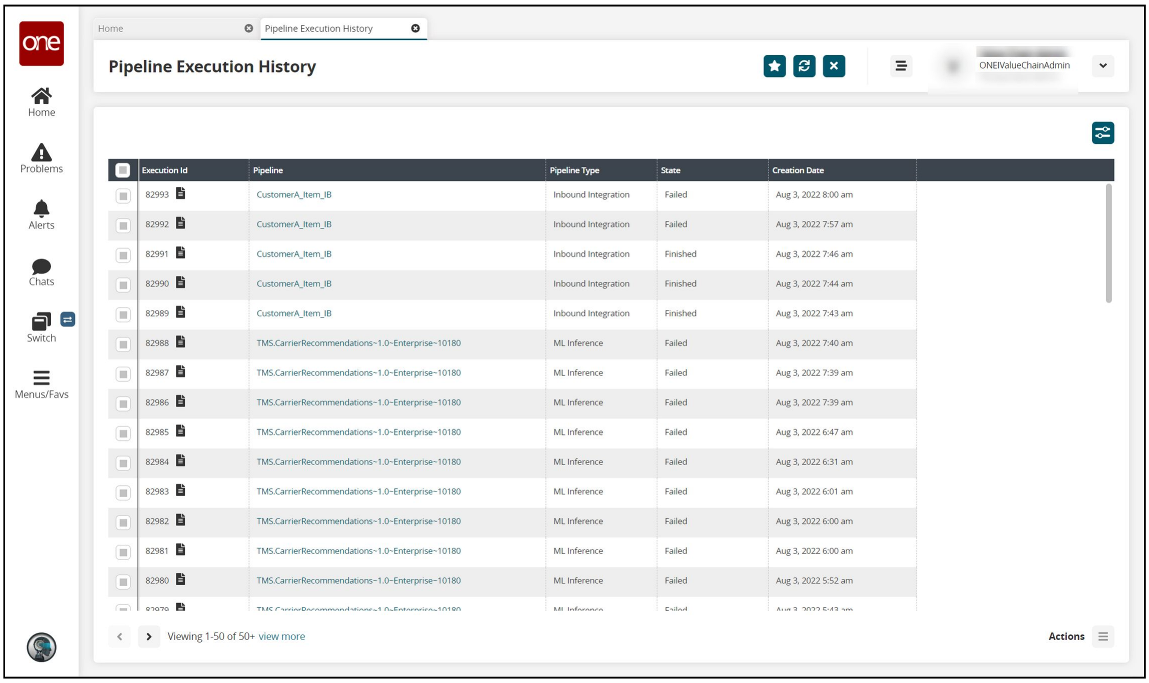
The basic workflow to create an inbound integration pipeline:

1. Create an integration pipeline.
2. Create a pipeline interface.
3. Set up an integration subscription and execute the pipeline.
4. View the pipeline execution history.

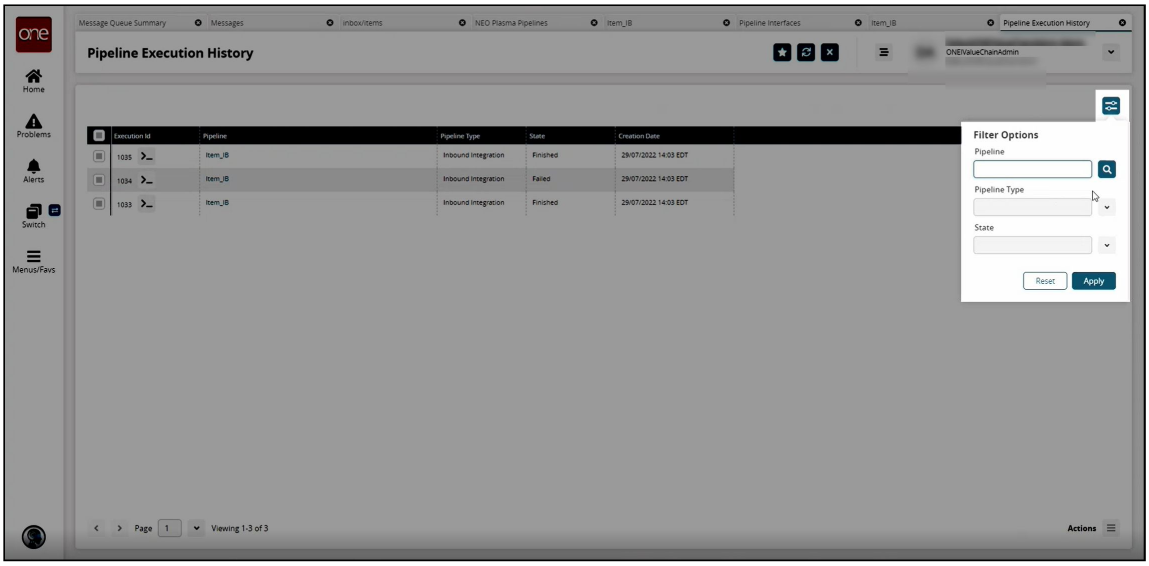
This page provides the instructions for the fourth step in this workflow. See the other sections for information on each step.

Complete the following steps to view the pipeline execution history:

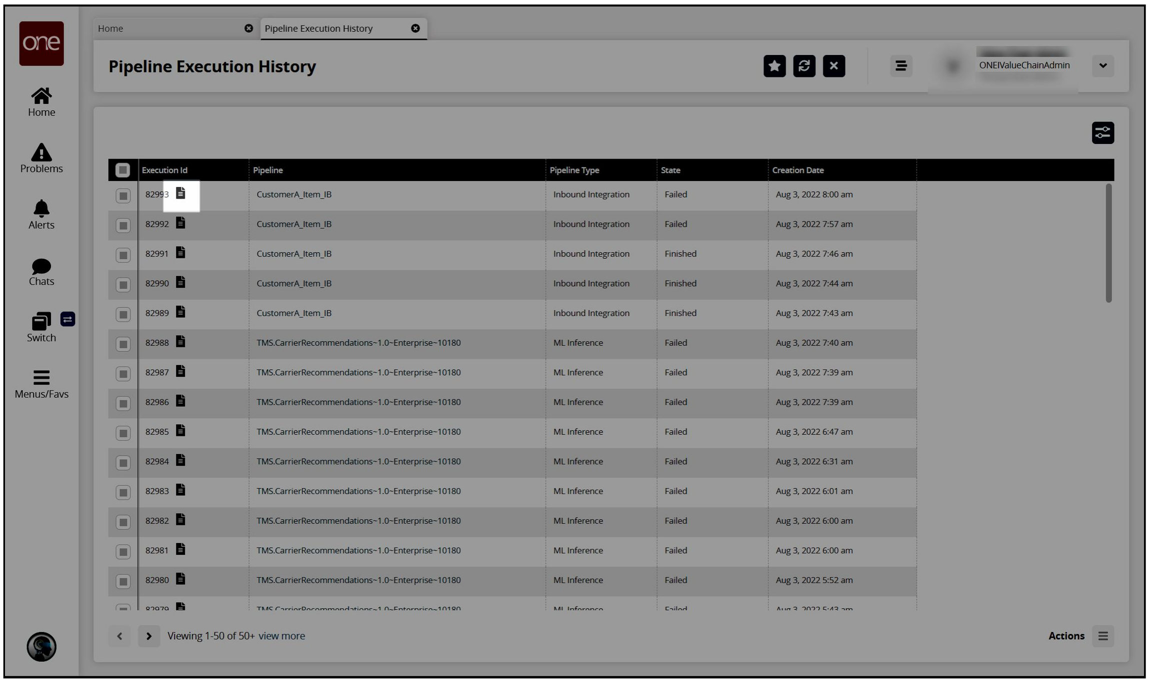
1. Log in to the ONE system.
2. Click **Menu/Favs > Tools > Integration > Pipeline Execution History.**
   The Pipeline Execution History screen appears.



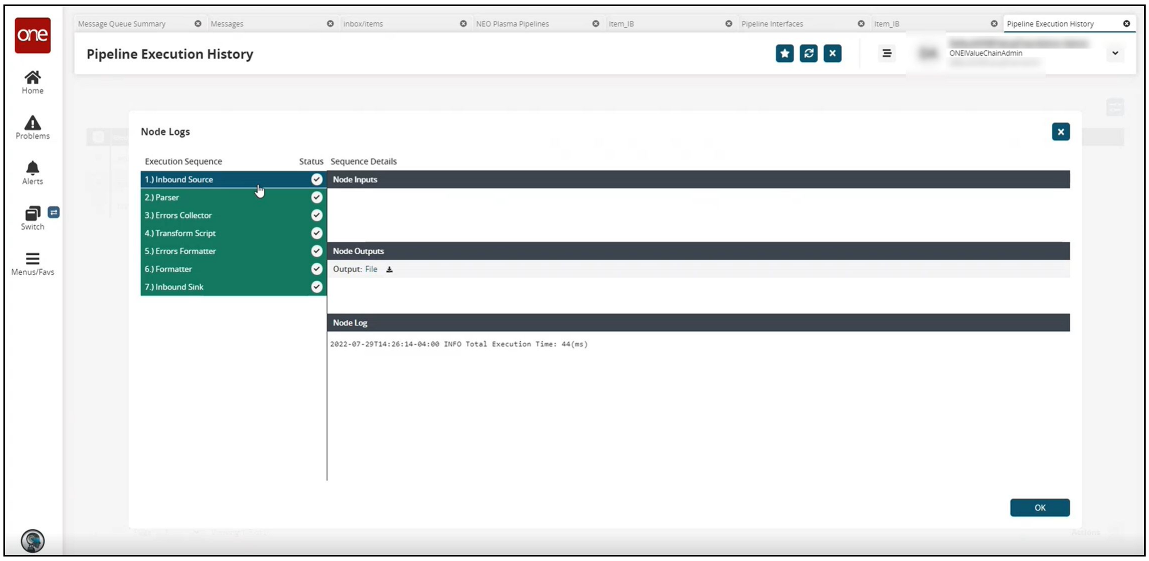
3. Click the filter icon in the top right to open the filter options and search for a specific pipeline or pipelines. You can search for the pipeline created in this example by name in the **Pipeline** field or by selecting Outbound Pipeline in the **Pipeline Type** field.



4. In the **Execution Id** column, click the icon beside the number to view the log for the desired pipeline.



The Node Logs popup window appears.



5. In the **Execution Sequence** pane on the left, click any node to view the details of its execution in the **Sequence Details** pane to the right. The nodes highlighted in green were executed successfully. The nodes highlighted in red contain an error.
6. Click **OK** to return to the **Pipeline Execution History** screen.
7. In the **Pipeline** column on the **Pipeline Execution History** screen, click a pipeline link to view and edit the pipeline in a new tab.

1.12.3.6 Sample Data to Create a Schema

Use the data below to create a CSV file to upload when creating a schema.

#Address(US~State~City~Address_ent~Address_org~Address_site~	AlternateAddress1(US~State~City~Address_ent~Address_org~Address_site~	AlternateAddress2(US~State~City~Address_ent~Address_org~Address_site~																	A					

#Address(US~State~City~Address_ent~Address_org~Address_site~	AlternateAddress1(US~State~City~Address_ent~Address_org~Address_site~	AlternateAddress2(US~State~City~Address_ent~Address_org~Address_site~																	A					

#Address(US~State~City~Address_ent~Address_org~Address_site~S	AlternateAddress1(US~State~City~Address_ent~Address_org~Address_site~S	AlternateAddress2(US~State~City~Address_ent~Address_org~Address_site~S																	A					

#Address(US~State~City~Address_ent~Address_org~Address_site~	AlternateAddress1(US~State~City~Address_ent~Address_org~Address_site~	AlternateAddress2(US~State~City~Address_ent~Address_org~Address_site~																	A					

#Address(US~State~City~Address_ent~Address_org~Address_site~	AlternateAddress1(US~State~City~Address_ent~Address_org~Address_site~	AlternateAddress2(US~State~City~Address_ent~Address_org~Address_site~																	A					

#Address(US~State~City~Address_ent~Address_org~Address_site~	AlternateAddress1(US~State~City~Address_ent~Address_org~Address_site~	AlternateAddress2(US~State~City~Address_ent~Address_org~Address_site~																	A					

#Address(US~State~City~Address_ent~Address_org~Address_site~	AlternateAddress1(US~State~City~Address_ent~Address_org~Address_site~	AlternateAddress2(US~State~City~Address_ent~Address_org~Address_site~																	A					

#Address(US~State~City~Address_ent~Address_org~Address_site~	Alternate Address1(US~State~City~Address_ent~Address_org~Address_site~	Alternate Address2(US~State~City~Address_ent~Address_org~Address_site~																	A					

#Address(US~State~City~Address_ent~Address_org~Address_site~	AlternateAddress1(US~State~City~Address_ent~Address_org~Address_site~	AlternateAddress2(US~State~City~Address_ent~Address_org~Address_site~																	A					

1.12.3.7 Sample Site Data

Use the data below to create a CSV file to upload as sample data.

#ManagingEntName	ManagingOrgName	SiteName	PartnerName	Description	TimeZoneId	Street1	Street2	City	State	Zip	Country	ExternalRefNo	ReassignExternalRefNo	IsPlant	IsDC	IsStore	IsPublic	Tier	Latitude	Longitude	ActivationDate	DeactivationDate	Active	BarcodePrefixing	BarCodeDelimiter
HUB4	HUB4	Site23		Site23	America/New_York	92 Kirkland Road	Waterford	MI	48329	US	Site23	0	1	0	0	0		34.06	-117.51			1	0	X	

#ManagingEntName	ManagingOrgName	SiteName	PartnerName	Description	TimeZoneId	Street1	Street2	City	State	Zip	Country	ExternalRefNo	ReassignExternalRefNo	IsPlant	IsDC	IsStore	IsPublic	Tier	Latitude	Longitude	ActivationDate	DeactivationDate	Active	BarcodePrefixing	BarCodeDelimiter
HUB4	HUB4	Site22A		Site22A	America/New_York	20 Summit Street	Lynchburg	VA	24502	US	Site22A	0	1	0	0	0		34.06	-117.51			1	0	X	

#ManagingEntName	ManagingOrgName	SiteName	PartnerName	Description	TimeZoneId	Street1	Street2	City	State	Zip	Country	ExternalRefNo	ReassignExternalRefNo	IsPlant	IsDC	IsStore	IsPublic	Tier	Latitude	Longitude	ActivationDate	DeactivationDate	Active	BarcodePrefixing	BarCodeDelimiter
HUB4	HUB4	Site46		Site46	America/New_York	394MeadowCourt	Jenison	MI	49428	US	Site46	0	1	0	0	0		34.06	-117.51			1	0	X	

#ManagingEntName	ManagingOrgName	SiteName	PartnerName	Description	TimeZoneId	Street1	Street2	City	State	Zip	Country	ExternalRefNo	ReassignExternalRefNo	IsPlant	IsDC	IsStore	IsPublic	Tier	Latitude	Longitude	ActivationDate	DeactivationDate	Active	BarcodePrefixing	BarCodeDelimiter
HUB4	HUB4	Site2B		Site2B	America/New_York	443 Orchard Drive	Calumet	IL	60409	US	Site2B	0	1	0	0	0		34.06	-117.51			1	0	X	

#ManagingEntName	ManagingOrgName	SiteName	PartnerName	Description	TimeZoneId	Street1	Street2	City	State	Zip	Country	ExternalRefNo	ReassignExternalRefNo	IsPlant	IsDC	IsStore	IsPublic	Tier	Latitude	Longitude	ActivationDate	DeactivationDate	Active	BarcodePrefixing	BarCodeDelimiter
HUB4	HUB4	Site6C		Site6C	America/New_York	2 Park Circle	Pasadena	MD	21122	US	Site6C	0	1	0	0	0		34.06	-117.51			1	0	X	

#ManagingEntName	ManagingOrgName	SiteName	PartnerName	Description	TimeZoneId	Street1	Street2	City	State	Zip	Country	ExternalRefNo	ReassignExternalRefNo	IsPlant	IsDC	IsStore	IsPublic	Tier	Latitude	Longitude	ActivationDate	DeactivationDate	Active	BarcodePrefixing	BarCodeDelimiter
HUB4	HUB4	SiteA3		SiteA3	America/New_Yor k	9328EdgemontDrive	PalmHarbor	FL	34683	US	SiteA3	0	1	0	0	0		34.06	-117.51			1	0	X	

#ManagingEntName	ManagingOrgName	SiteName	PartnerName	Description	TimeZoneId	Street1	Street2	City	State	Zip	Country	ExternalRefNo	ReassignExternalRefNo	IsPlant	IsDC	IsStore	IsPublic	Tier	Latitude	Longitude	ActivationDate	DeactivationDate	Active	BarcodePrefixing	BarCodeDelimiter
HUB4	HUB4	SiteA4		SiteA4	America/New_York	732 Atlantic Street	Stone Mountain	GA	30083	US	SiteA4	0	1	0	0	0		34.06	-117.51			1	0	X	

#ManagingEntName	ManagingOrgName	SiteName	PartnerName	Description	TimeZoneId	Street1	Street2	City	State	Zip	Country	ExternalRefNo	ReassignExternalRefNo	IsPlant	IsDC	IsStore	IsPublic	Tier	Latitude	Longitude	ActivationDate	DeactivationDate	Active	BarcodePrefixing	BarCodeDelimiter
HUB4	HUB4	SiteA5		SiteA5	America/New_York	54ShipleyAvenue	WestIslip	NY	11795	US	SiteA5	0	1	0	0	0		34.06	-117.51			1	0	X	

#ManagingEntName	ManagingOrgName	SiteName	PartnerName	Description	TimeZoneId	Street1	Street2	City	State	Zip	Country	ExternalRefNo	ReassignExternalRefNo	IsPlant	IsDC	IsStore	IsPublic	Tier	Latitude	Longitude	ActivationDate	DeactivationDate	Active	BarcodePrefixing	BarCodeDelimiter
HUB4	HUB4	SiteA7		SiteA7	America/New_York	7068 Fairfield Lane	Milwaukee	WI	53204	US	SiteA7	0	1	0	0	0		34.06	-117.51			1	0	X	

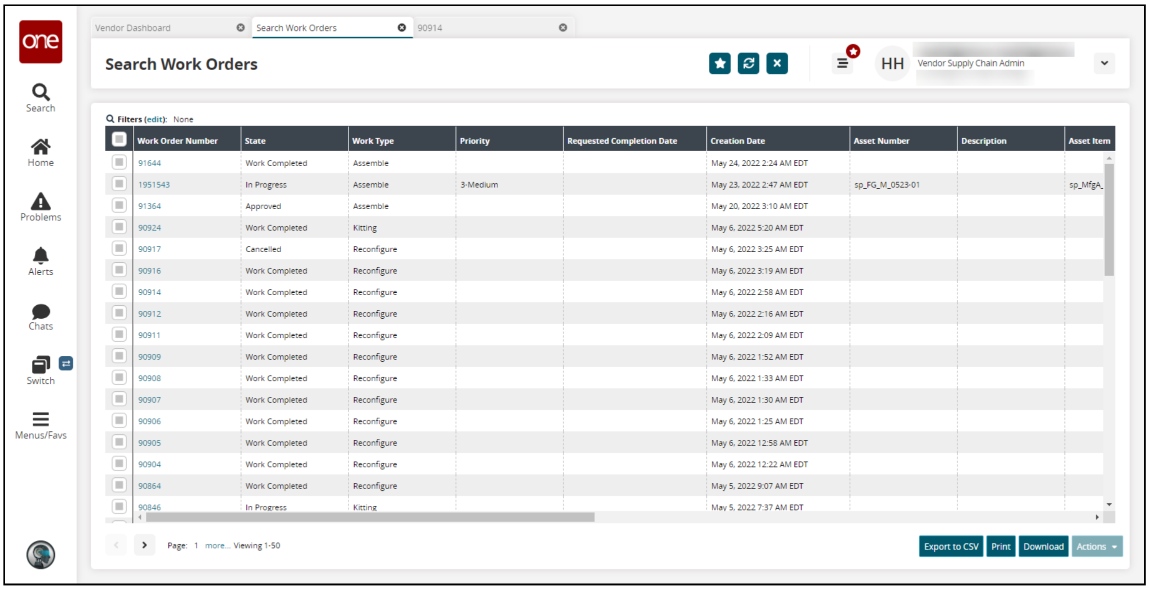
1.13 Warehouse Management

1.13.1 Accessing the Assembled Tab for Reconfigured Work Orders

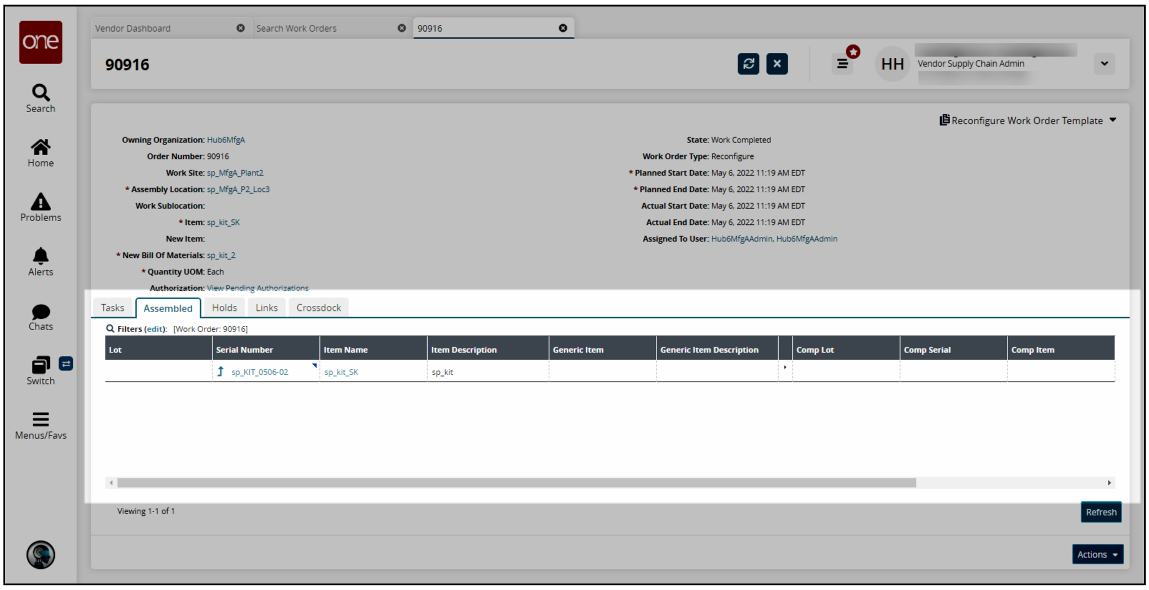
Relevant assembly information is available on the Assembled tab on the work order details screen for work orders of type Reconfigure. This tab lists reconfigured kits related to the given work order and contains links to kit serial numbers and kit details.

Complete the following steps to access the Assembled tab for reconfigured work orders:

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



3. Click the **Filters (edit)** link.
   The Filters menu appears.
4. In the **Work Type** dropdown menu, select **Reconfigure**.
5. Click **Search**.
   The search results appear.
6. Click a **Work Order** link.
   The work order details screen appears with the Assembled tab visible.



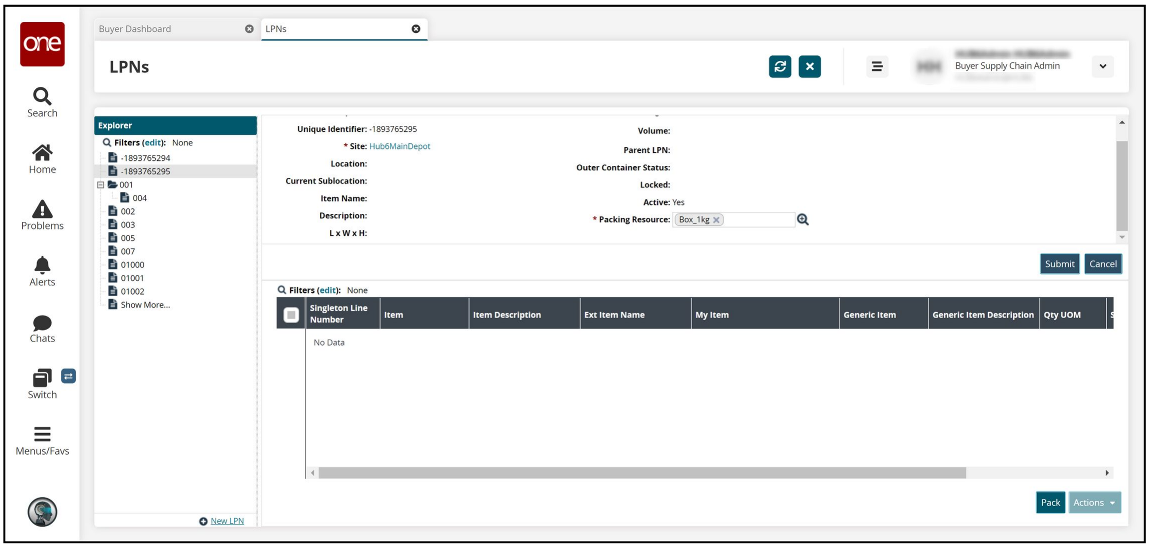
See the "Add Assembled tab to WMS Reconfigure Work Order" section in the current version of the *Release Notes* for more information.

1.13.2 Associating LPN with Packing Resources

Users can associate Licence Plate Numbers (LPN) with packing resources while creating or updating LPNs.

Complete the following steps to associate LPN with packing resources:

1. Log in to the ONE system.
2. Click **Menu/Favs > Warehouse Mgmt > LPNs**.
3. Click the desired LPN record in the left Explorer panel that you want to associate with the packing resource.
4. Click the **Actions** button and then select **Associate With Packing Resource**.
   The *Packing Resource field is enabled for editing. Fields with an asterisk (*) are required.
5. Click the picker tool.
   The Packing Resource popup displays.
6. Select a value on the popup and click the **OK** button.
7. Click the **Submit** button.
   A green success message appears.



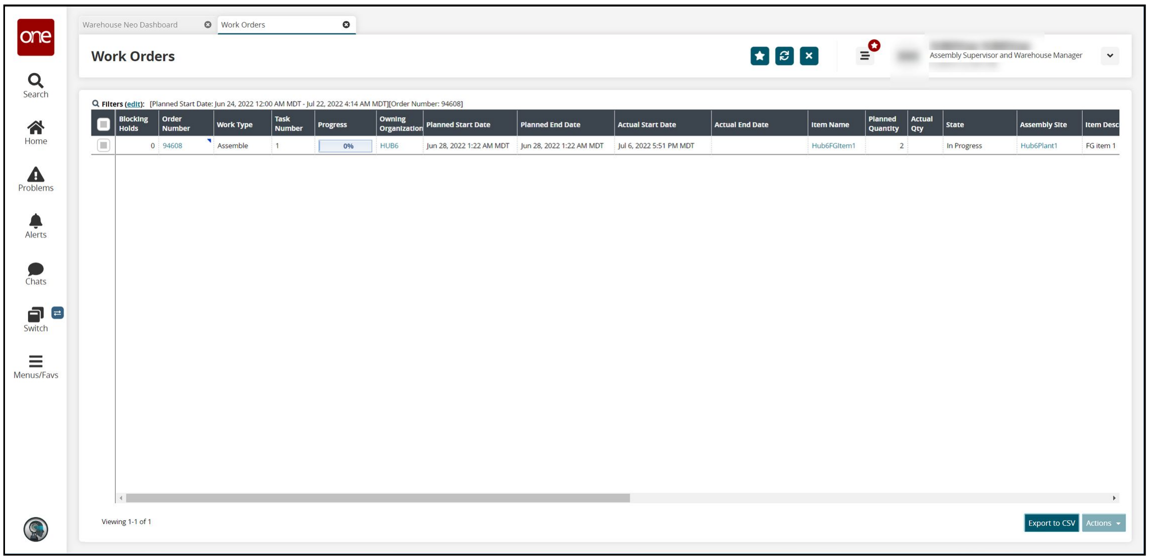
See the "Associate LPNs with Packing Resources" section in the current version of the *Release Notes* for more information.

1.13.3 Computing Expiration Dates for Assembly and Kits

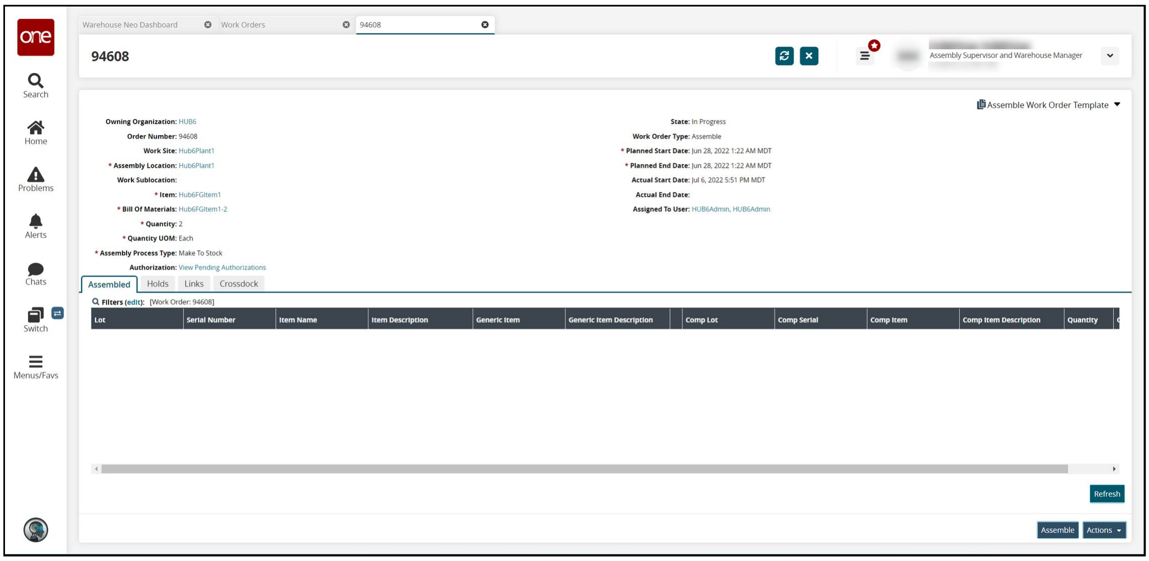
Users can compute an expiration date for assembly or kits based on the expiration dates of the components involved.

Complete the following steps to compute the expiration dates for assembly or kits:

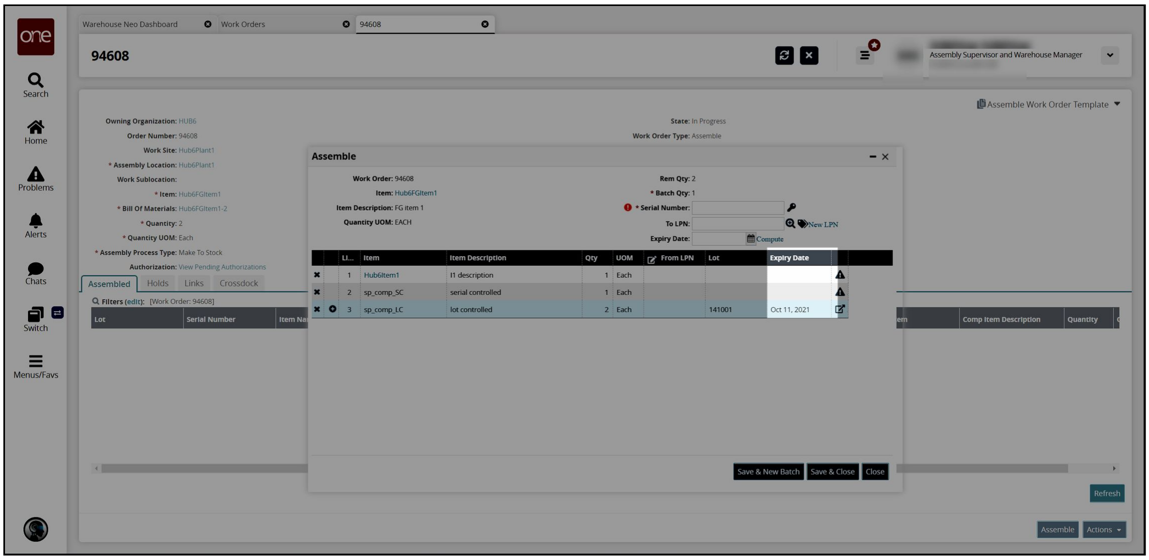
1. Log in to the ONE system.
2. Search for the desired work order using the global search icon or the **Work Orders** screen. See the "Searching Assembly Work Orders" or the "Global Search" section in the *Online Help* for more information.
   The Work Orders screen appears with the work order listed.



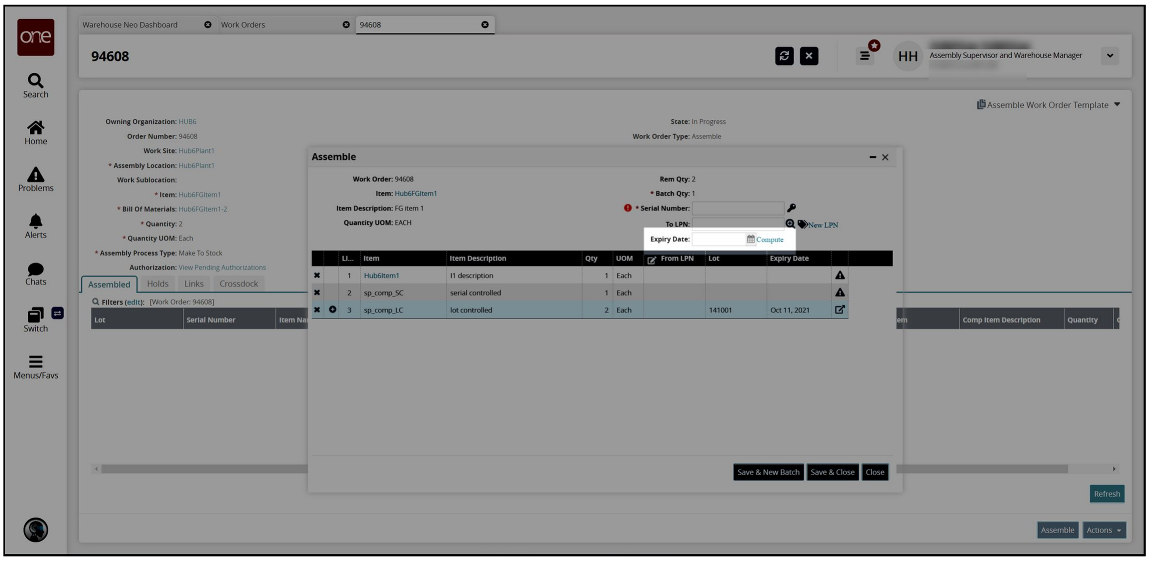
3. In the **Order Number** column, click the work order number link.
   The work order detail screen appears in a new tab.



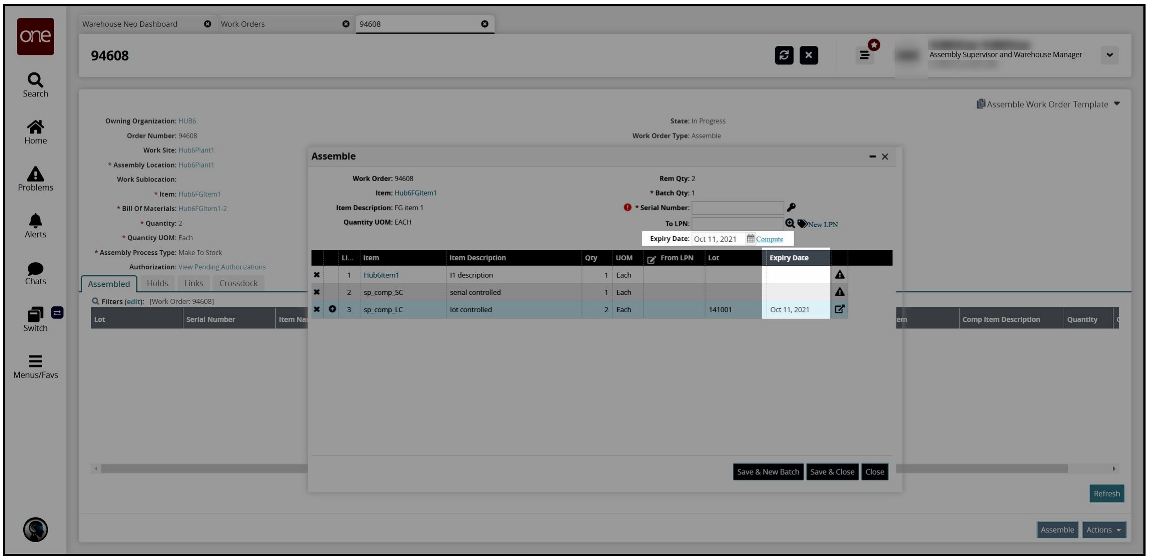
4. Click the **Assemble** button.
   The Assemble popup window appears with the components listed. Note the expiration dates in the Expiry Date column.



5. In the **Expiry Date** field in the Assemble popup window header, click the **Compute** link.



The Expiry Date from the components list appears in the Expiry Date field in the header.



If multiple expiration dates exist for the components, the system defaults to the soonest expiration date.

6. If desired, click the calendar icon in the **Expiry Date** field to override the computation and select a different expiration date.
7. Click the **Save & Close** button.
   A success message appears.

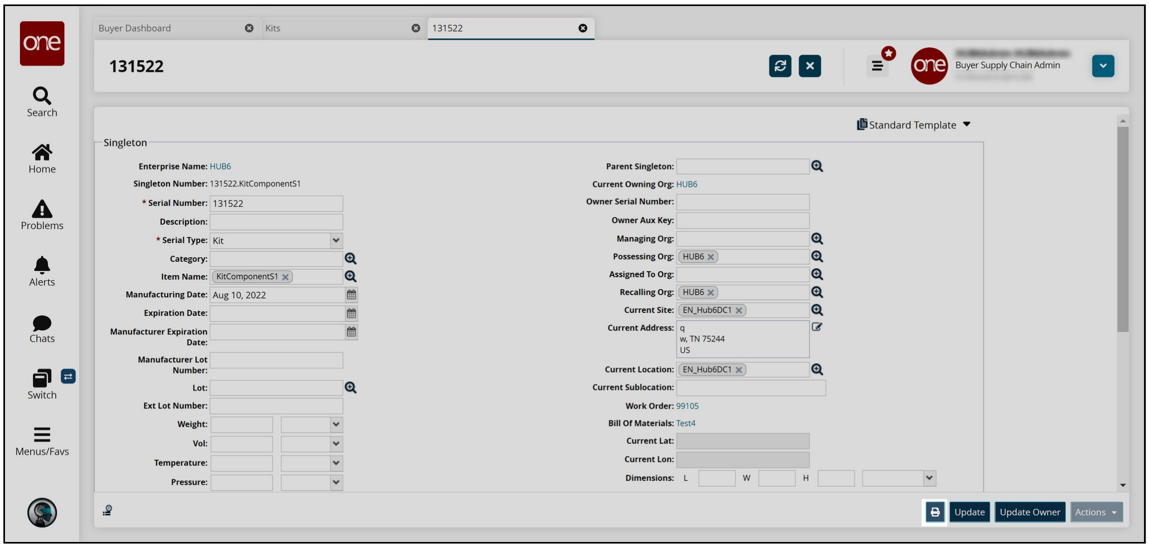
See the "Enhancement to Compute Assembly and Kit Expiration Dates" section in the current version of the *Release Notes* for more information.

1.13.4 Printing Kit Information

Users can print kit information from the kit details screen.

Complete the following steps to print kit information:

1. Log in to the ONE system.
2. Navigate to **Menus/Favs** > **Warehouse Mgmt > Reports > Kits**.
   The Kits report screen appears with a list of kits.
3. Find the desired record by applying filters.
   The result screen appears.
4. Click the kit name link under the **Kit** column.
   The Kit details screen appears.
5. Click the **Print Kit** icon.
   The PDF file is generated and downloaded to the Downloads folder.



6. Open the file and click **Print**.

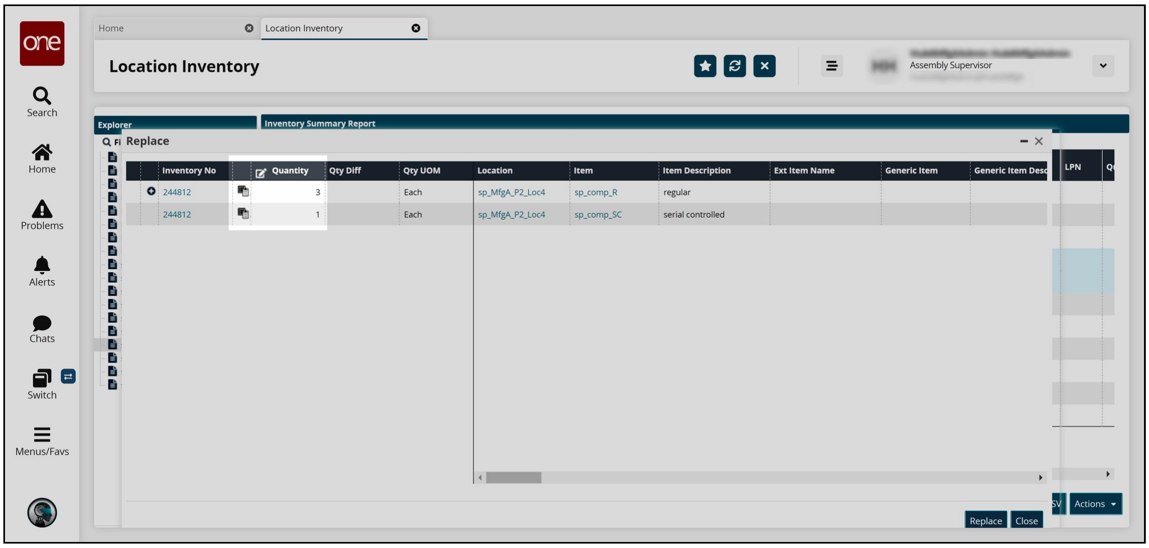
See the "Print Action on Kit Details Screen Name Here" section in the current version of the *Release Notes* for more information.

1.13.5 Replacing Assembly Kit Components

Users can replace kit components using the Replace action from the Location Inventory screen.

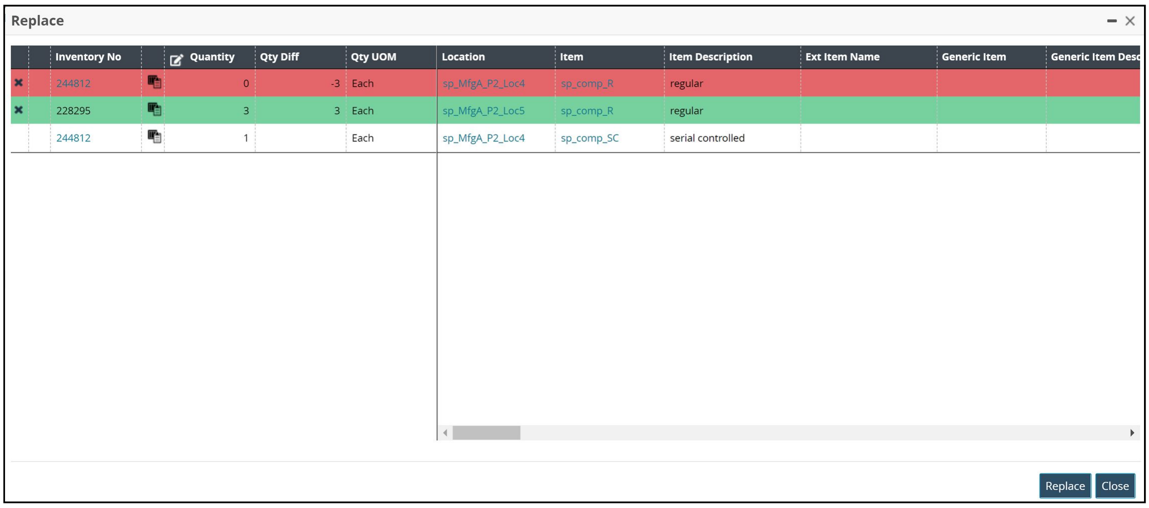
Complete the following steps to replace kit components:

1. Log in to the ONE system with the Assembly Supervisor role.
2. Click **Menus/Favs** > **Warehouse Mgmt** > **Location Inventory**.
   The Location Inventory screen appears.
3. Select the desired site in the **Explorer** pane.
   The Inventory Summary Report appears in the right pane.
4. Select the desired records to replace kit components, and click **Actions** > **Replace**.
   The Replace dialog box appears.

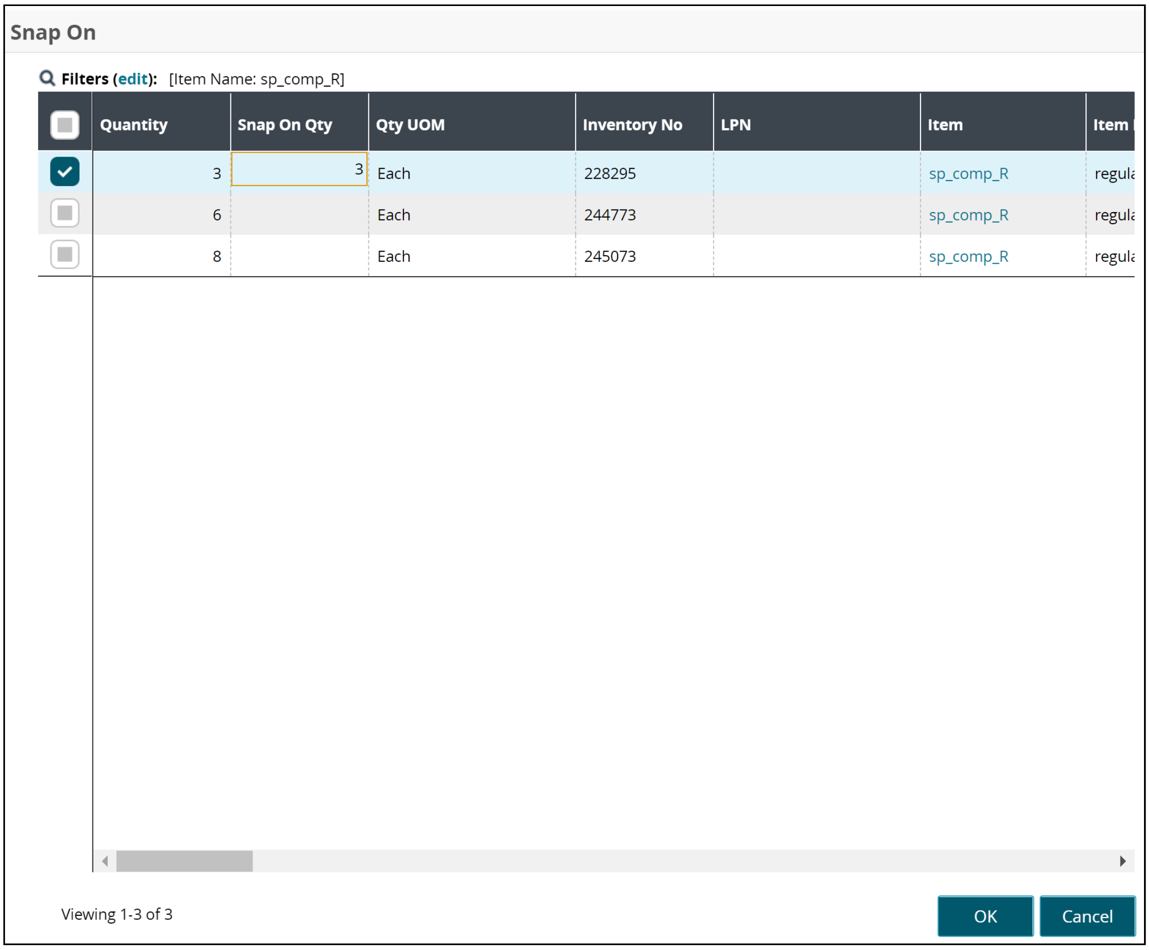


5. Enter a new value in the **Quantity** field.

> **Note**
>
> In the Replace popup, the Quantity field is editable. When a new quantity is entered, the rows are highlighted with colors in the following scenarios:
>
> - Green: If a new line is added.
> - Yellow: If the quantity is reduced.
> - Red: If the quantity is reduced to 0.



6. Click the replace inventory icon () to replace the current inventory.
   A popup displays based on the item type. The example below shows Snap On replacements.



7. Select the desired record and enter the value for the **Snap On Quantity** field.
8. Click the **OK** button.
   Depending on the values, a new row may display in the Replace popup.
9. Click **Replace** to replace the components.
   The success message appears.

See the "Replace Action on Assembly Kit Components" section in the current version of the *Release Notes* for more information.

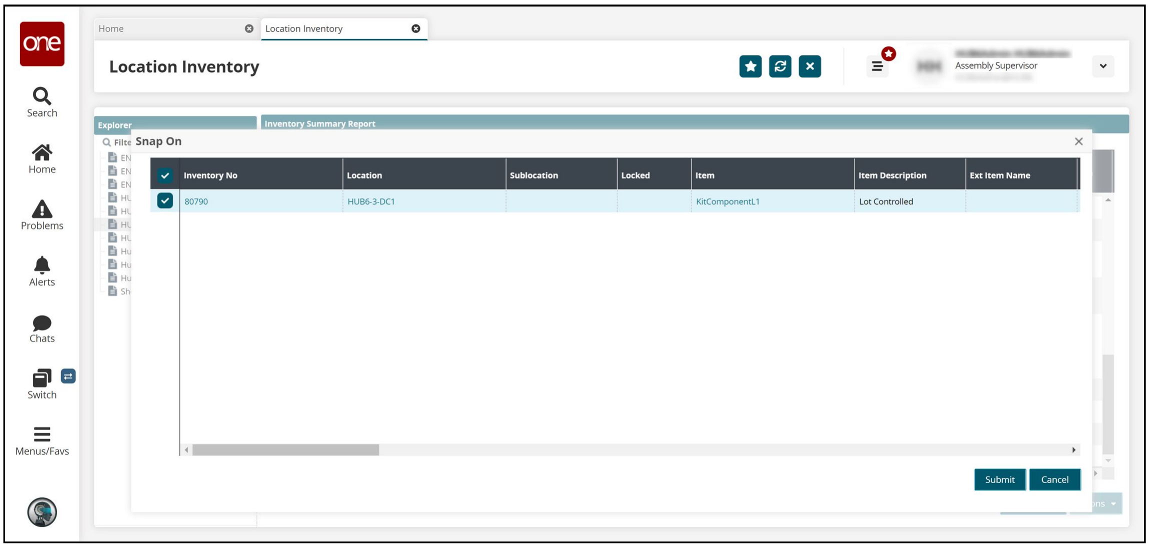
1.13.6 Using Snap On and Snap Off Actions on Location Inventory Screen

Users can add or remove components from the location inventory using the newly introduced Snap On and Snap Off actions.

Complete the following steps to add components using the Snap On action:

1. Log in to the ONE system with the Assembly Supervisor role.
2. Click **Menus/Favs** > **Warehouse Mgmt** > **Location Inventory**.
   The Location Inventory screen appears.
3. In the **Explorer** pane, select the desired site name.
   The Inventory Summary Report appears in the right pane.
4. Click the **Filters (edit)** link to apply desired filters.

5. Select the desired record, click **Actions**, and then click **Snap On**.
   The Snap On dialog box appears.



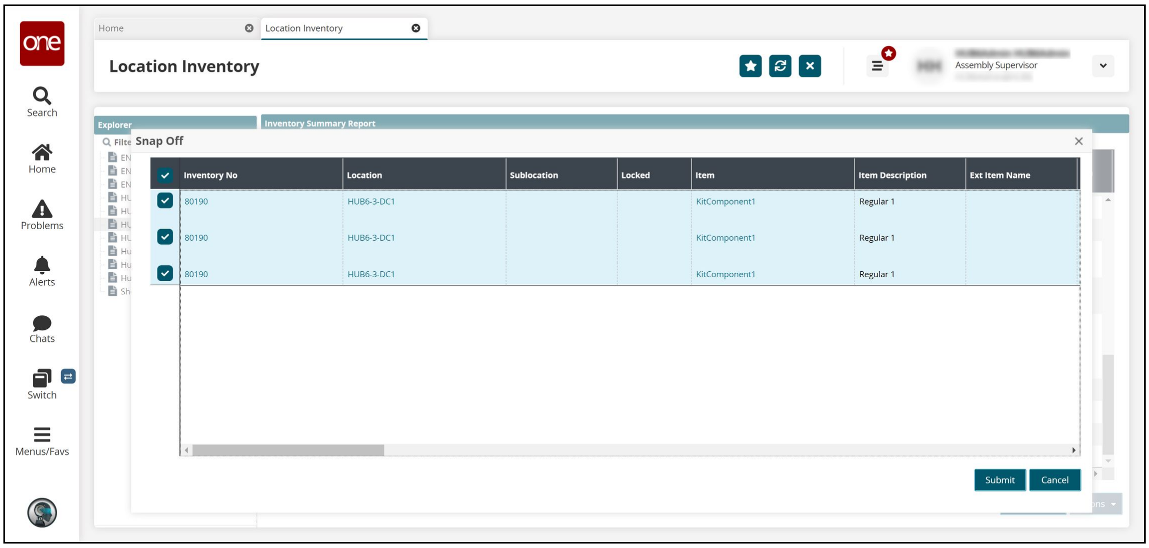
6. Enter the desired values for the fields as shown in the following table:

Field Name	User Action
Snap Qty	Enter the quantity to snap on.
Snap Into	Enter or select the Lot number to snap on the quantity.
New Lot Expiry Date	Enter the lot expiry date.
New Kit Expiry Date	Enter the kit expiry date.
Units per Package	Select the unit per package.

7. Click **Submit**.
   The success message appears.

Complete the following steps to remove components using the Snap Off action:

1. Log in to the ONE system with the Assembly Supervisor role.
2. Click **Menus/Favs** > **Warehouse Mgmt** > **Location Inventory**.
   The Location Inventory screen appears.
3. In the **Explorer** pane, select the desired site name.
   The Inventory Summary Report appears in the right pane.
4. Click the **Filters (edit)** link to apply desired filters.
5. Select the desired record, click **Actions**, and then click **Snap Off**.
   The Snap Off dialog box appears.



6. Enter the desired values for the fields as shown in the following table:

Field Name	User Action
Snap Qty	Enter the quantity to snap off.
Snap Into	Enter or select the Lot number to snap off the quantity.
New Lot Expiry Date	Enter the lot expiry date.
New Kit Expiry Date	Enter the kit expiry date.
Units per Package	Select the unit per package.

7. Click **Submit**.
   The success message appears.

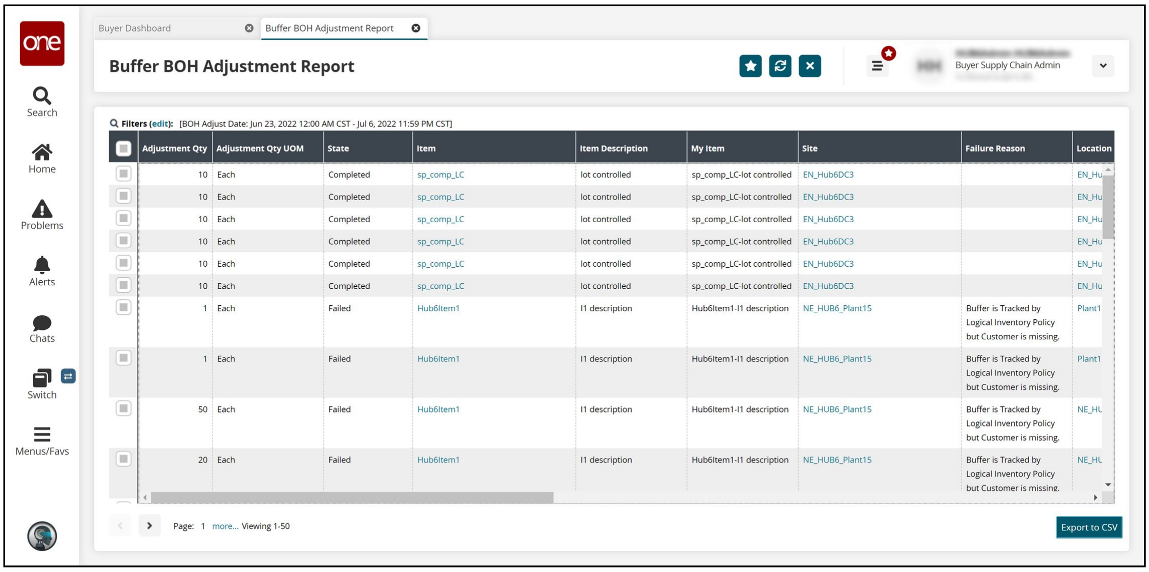
See the "Snap On/Snap Off Actions on Location Inventory Screen" section in the current version of the *Release Notes* for more information.

1.13.7 Viewing Buffer BOH Adjustment Report

This section describes how to view the Buffer BOH Adjustment report.

Complete the following steps to view the Buffer BOH Adjustment report:

1. Log in to the ONE system.
2. Navigate to **Menus/Favs** > **Buffer BOH Adjustment Report**.
   The Buffer BOH Adjustment Report screen appears.
3. Click the **(edit)** link to view the Filters screen.
4. Enter the required filter values and click the **Search** link.



The search result screen appears. Live links are available to take users to various screens.

5. Click **Export to CSV** to export this report in the CSV format.

See the "Failure Reason Column on Buffer BOH Adjustment Report" section in the current version of the *Release Notes* for more information.

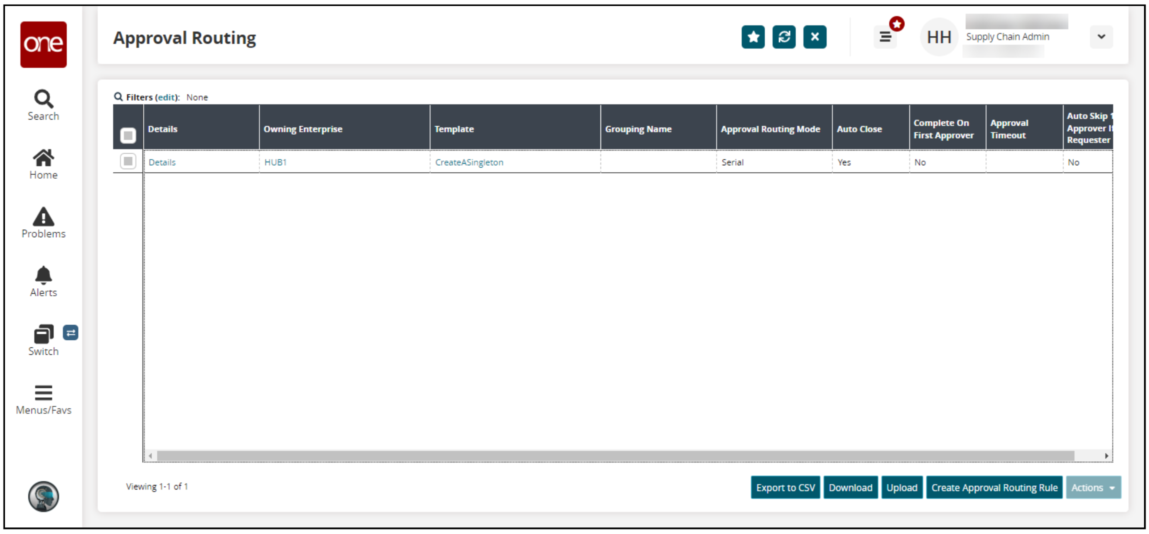
1.14 Supply Chain Core (SCC)

1.14.1 Configuring Business Rules as Approvers for Singletons

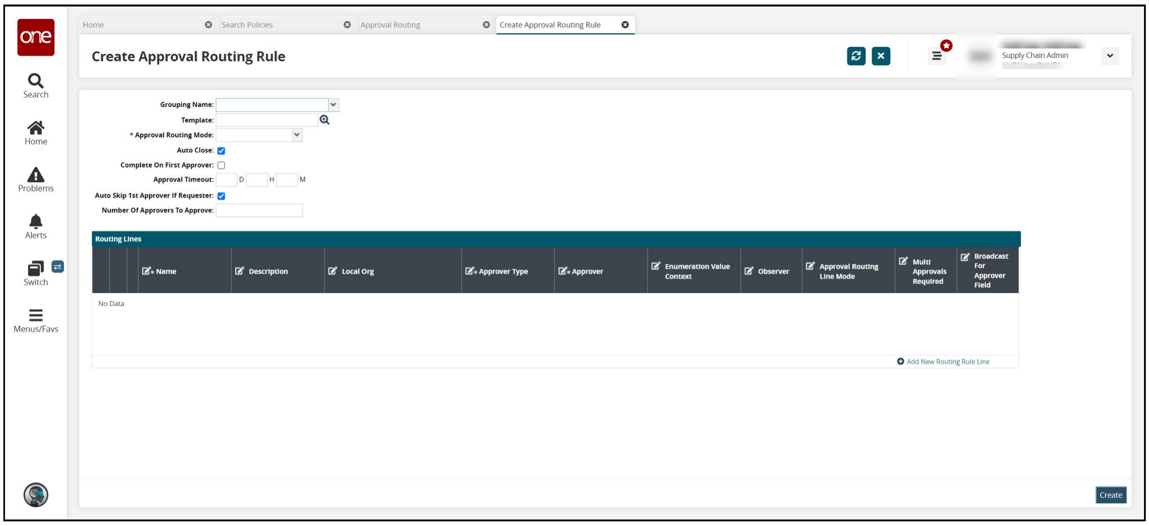
This topic describes how to create and apply business rules as approvers for singletons.

Complete the following steps to use business rules as approvers for singletons:

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



3. Click **Create Approval Routing Rule**.
   The Create Approval Routing Rule screen appears.



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

Field	Description
Grouping Name	Select a grouping name from the dropdown menu.
Template	Click the picker tool to select the template for creating or updating a singleton. Though not shown as mandatory, this field must be completed before adding a routing line or the business rule option is not shown.

*Approval Routing Mode	Select an approval routing mode from the dropdown menu.
Auto-Close	Select this checkbox to auto-close the approval routing rule.
Complete On First Approver	Select this checkbox to complete the approval routing rule after the first approver.
Approval Timeout	Enter a timeframe in days, hours, and minutes that the approval is valid.
Auto-Skip 1st Approver If Requester	If this checkbox is selected and the first approver is also the requester, the first approval line is skipped and automatically approved. If this checkbox is not selected, then even if the requester is the first approver, the requester must explicitly provide their approval. This field is enabled by default.
Number of Approvers to Approve	Enter the number of approvers.

1.14.1.1 Adding a Routing Line with a Business Rule as an Approver

Complete the following steps to add business rules as approvers:

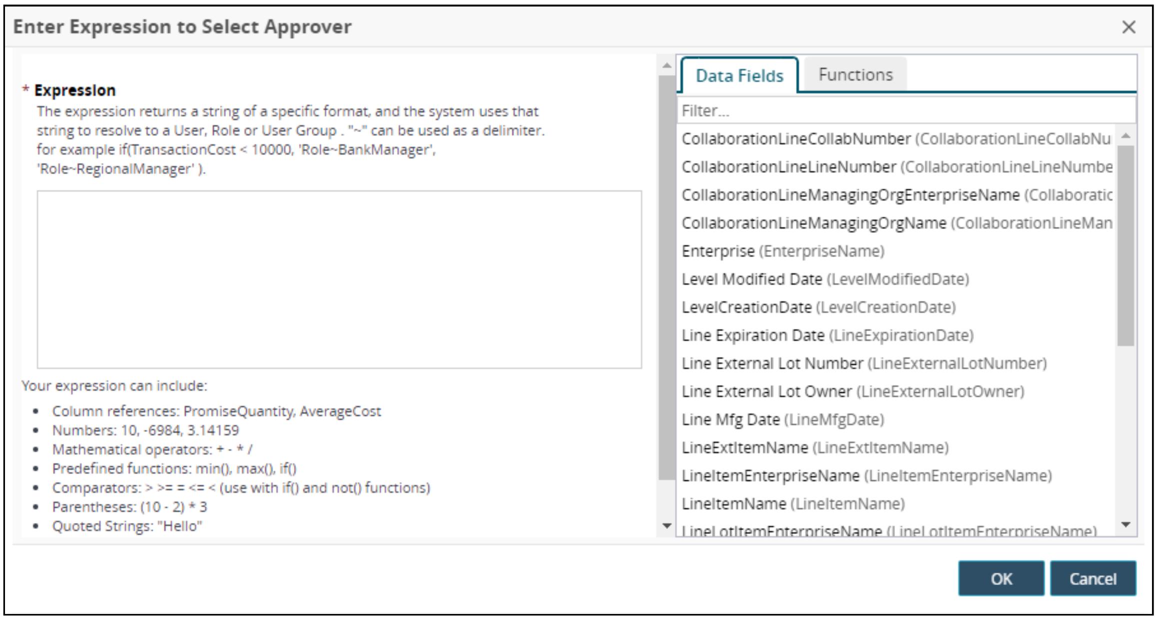
1. Under the **Routing Lines** section, click the **+Add New Routing Rule Line** link.
2. Enter the details of a new routing line. Fields with an asterisk (*) are required.

Field	Description
*Name	Enter a name for the new routing line.
Description	Enter a brief description of the new routing line.
Local Org	Enter the local org using the picker tool.
*Approver Type	Select **Business Rule** from the dropdown list. This option is not displayed unless a template for a singleton is selected in the Template field.

Field	Description
*Approver	Click to display the Select Approver popup screen. Follow steps 3 to 10 below to configure the business rules and expressions to validate them as approvers.
When Line Applies	Select conditions for using the routing line.
Observer	Select Yes from the dropdown to set the routing line as an observer.
Approval Routing Line Mode	Select a line mode from the dropdown list.

3. Click in the **Approver** field. The **Select Approver** pop-up screen appears.

4. In the ***SubContext** field, select a subcontext for the selected approver from the dropdown menu.
5. Click the text in the **Expression** field to set parameters for validating the business rule:



6. Under ***Expression**, create custom expressions as needed.

> **Note**
>
> Refer to the on-screen information to view what you can include in an expression.

7. Alternatively, select entries from the **Data Fields** tab in the right pane to use existing expressions.
8. Click the **Functions** tab to add conditions like current date, date format, specific values, and if-else conditions to the validation expression.
9. Click **OK.**
   The **Create Approval Routing** screen updates and appears.
10. Click the **Create** button.

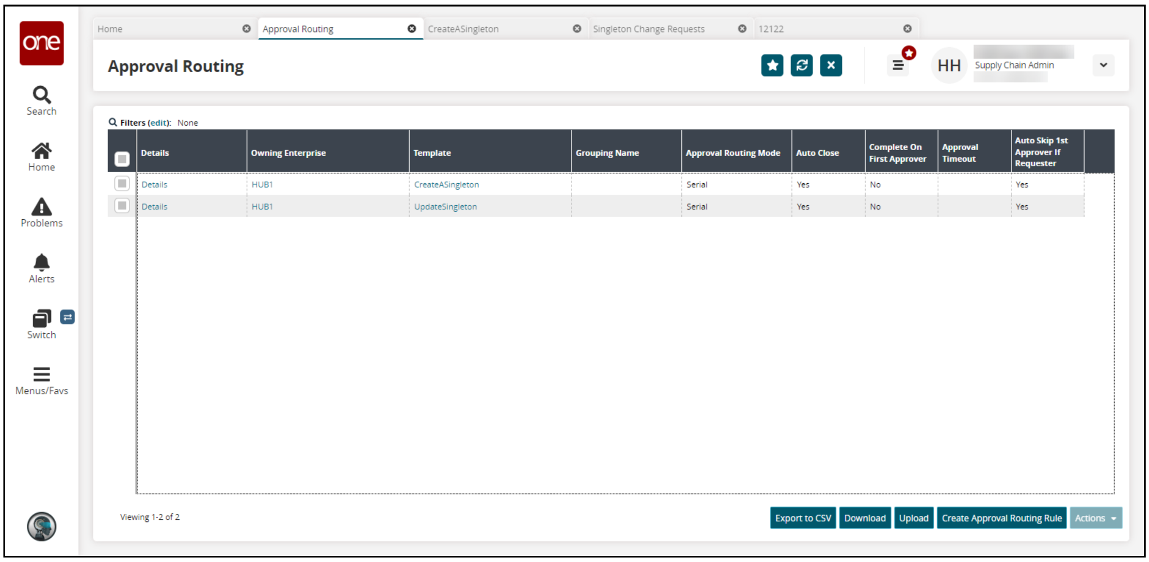
See the "Business Rules as Approver Type for Singletons" section in the current version of the *Release Notes* for more information.

1.14.2 Using the Quorum Approval Routing Mode

The approval routing mode Quorum (also called "X of Y") is available for Supply Chain Admin roles. With this approval process, if X users of Y total users approve, then the approval process completes. For example, if 7 of 10 users approve, the approval process completes.

Complete the following steps to configure and use the Quorum approval routing mode:

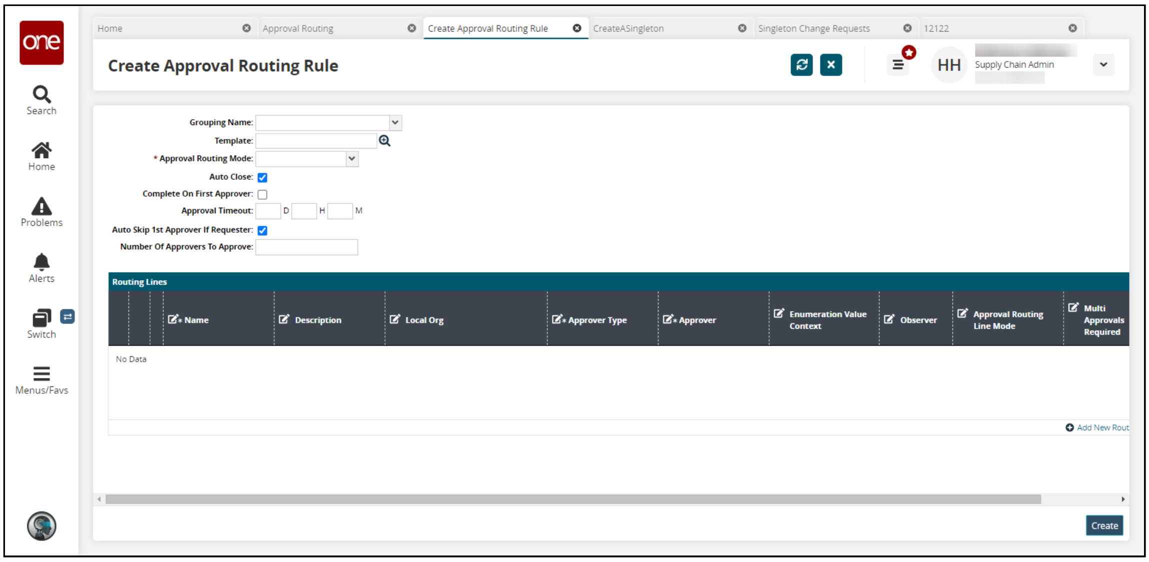
1. Log in to the ONE system as a Supply Chain Admin role.
2. Click **Menu/Favs > Approval Routing > Approval Routing**.
   The Approval Routing screen appears.



Currently, only two templates are supported, CreateASingleton and UpdateSingleton, and duplicate templates are not allowed. The number of templates is determined by the specific modules that use this feature in the ONE system. If two rows already exist, as found in this current example, one must be deleted before another can be created.

A. If the maximum number of templates already exists, and you would like to create another, click the checkbox for that row and click **Actions > Delete.**
The Delete popup appears. For the following steps, we will assume that the CreateASingleton has been deleted.
B. Click **Submit**.
The Approval Routing screen appears with the row deleted.

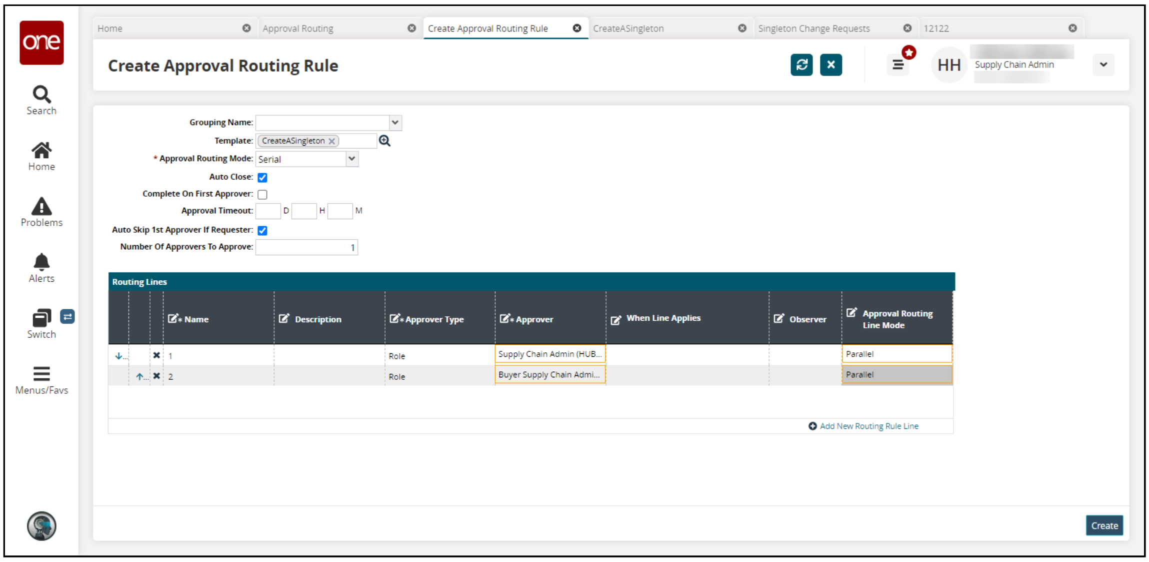
3. Click the **Create Approval Routing Rule** button.
The Create Approval Routing Rule screen appears.



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

Field	Description
Grouping Name	Select a grouping name from the dropdown menu.
Template	Select a template using the picker tool. For this example, we selected CreateASingleton.
*Approval Routing Mode	Select an approval routing mode from the dropdown menu. For this example, we selected Serial.
Auto-Close	Select this checkbox to auto-close the approval routing rule.
Complete On First Approver	Select this checkbox to complete the approval routing rule after the first approver.
Approval Timeout	Enter a time frame in days, hours, and minutes the approval is valid.
Auto-Skip 1st Approver If Requester	If this checkbox is selected and the first approver is also the requester, the first approval line is skipped and automatically approved. If this checkbox is not selected, then even if the requester is the first approver, the requester must explicitly provide their approval. This field is enabled by default.
Number of Approvers to Approve	Enter the number of approvers. This field determines how many approvers must approve for the approval to "pass". For this quorum workflow example, if this value is "1" and there are two routing lines, if either of the routing lines is approved, the entire singleton is approved. For this example, we will enter 1in this field.

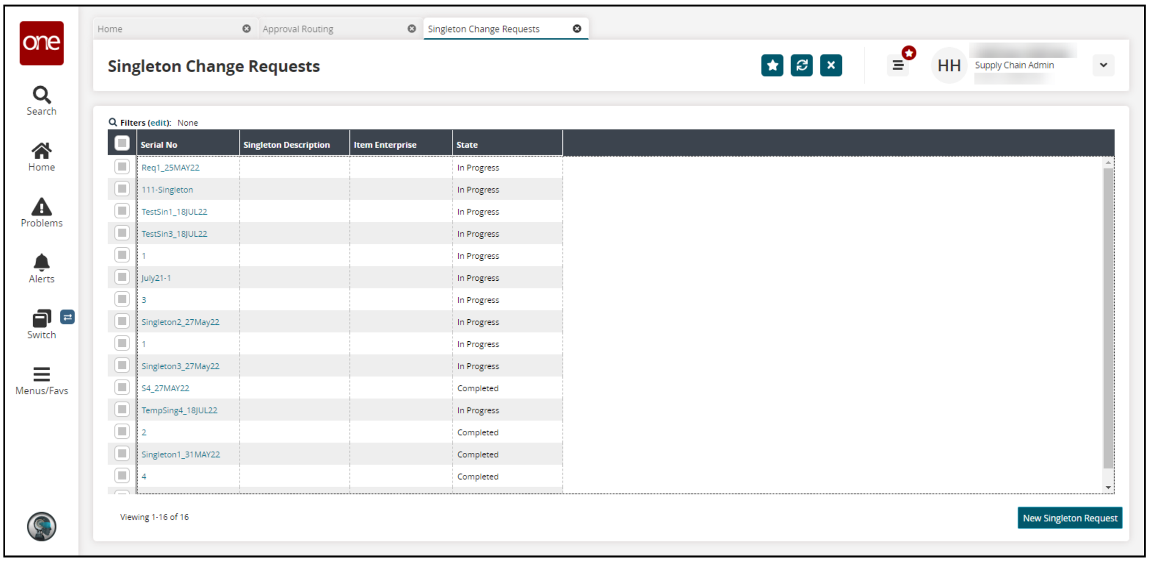
5. In the **Routing Lines** table, click the **Add New Routing Rule Line**.
   A new row appears. For this example, add two rows.
6. Enter a ***Name** for each row.
7. Select an ***Approver Type** for each row. For this example, select **Role** for all rows.
8. Select an ***Approver** for each row. For this example, select **Supply Chain Admin** for one of the rows.
9. Select an **Approval Routing Line Mode** for each row. For this example, select **Parallel** for all rows.



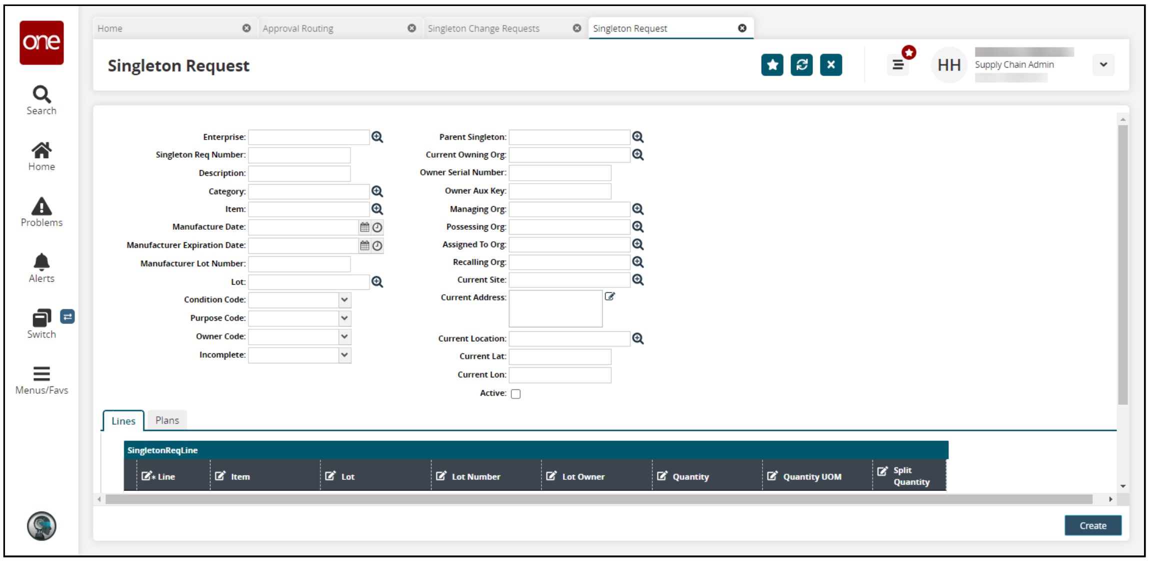
10. Click the **Create** button.
    A success message appears.
11. Click the **Export to CSV** button to export the report to your computer.
12. Click the **Download** button to download a file.
13. Click the **Upload** button to upload CSV files to the ONE system.

Complete the following steps to create a singleton and approve it using the quorum settings configured earlier:

1. Click **Menu/Favs,** and in the search bar, enter **Singleton Change Request.**
   The Singleton Change Request screen appears.



2. Click the **New Singleton Request** button.
   The Singleton Request screen appears.

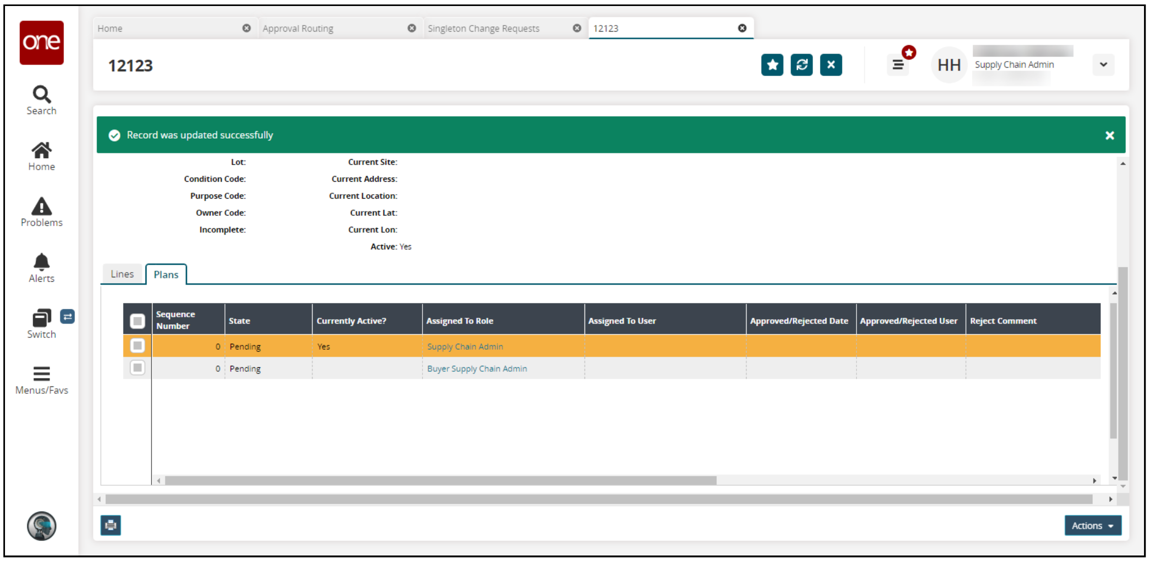


3. Fill in the following fields.

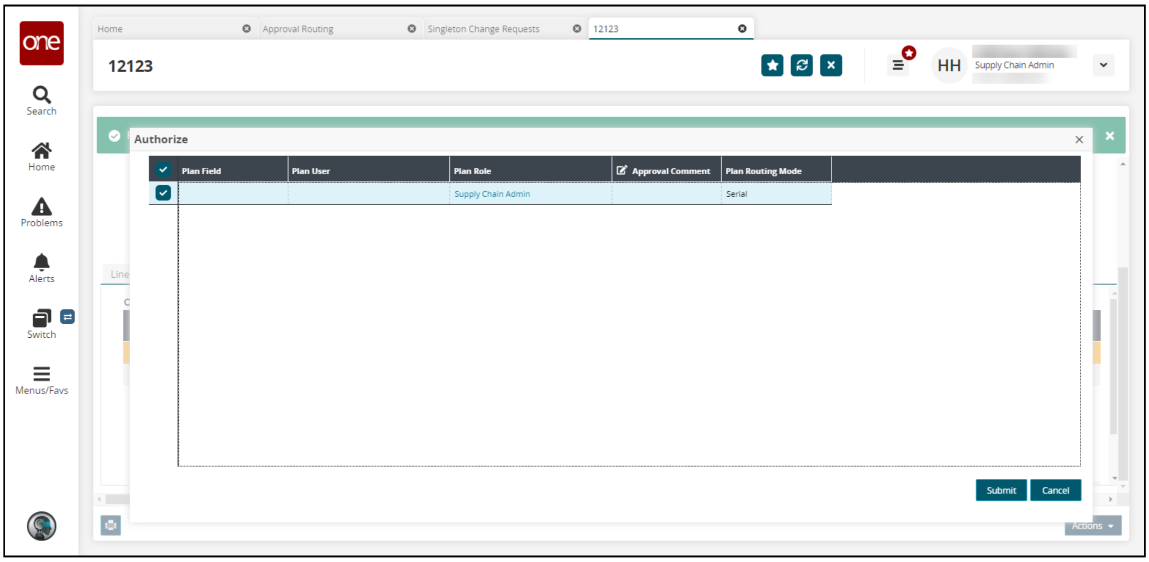
Field	Description
Enterprise	Use the picker tool to select an enterprise. In this example, we selected HUB1.
Singleton Req Number	Enter a unique name/number for the singleton.
Description	Enter a description.
Category	Use the picker tool to select a category.
Item	Use the picker tool to select an item.
Manufacture Date	Use the date and time buttons to select a manufacture date.
Manufacturer Expiration Date	Use the date and time buttons to select a manufacture expiration date.
Manufacturer Lot Number	Enter a manufacturer lot number.
Lot	Use the picker tool to select a lot.
Condition Code	Select a condition code from the dropdown menu.
Purpose Code	Select a purpose code from the dropdown menu.
Owner Code	Select an owner code from the dropdown menu.

Field	Description
Incomplete	Select an incomplete code from the dropdown menu.
Parent Singleton	Use the picker tool to select a parent singleton.
Current Owning Org	Use the picker tool to select an enterprise. In this example, we selected HUB1.
Owner Serial Number	Enter an owner serial number.
Owner Aux Key	Enter an owner auxiliary key.
Managing Org	Use the picker tool to select a managing organization.
Possessing Org	Use the picker tool to select a possessing organization.
Assigned To Org	Use the picker tool to select an assigned to organization.
Recalling Org	Use the picker tool to select a recalling organization.
Current Site	Use the picker tool to select a current site.
Current Address	Enter the current address.
Current Location	Use the picker tool to select a current location.
Current Lat	Enter the current latitude.
Current Lon	Enter the current longitude.
Active	Select the Active checkbox if the singleton request is active. In this example, select this checkbox.

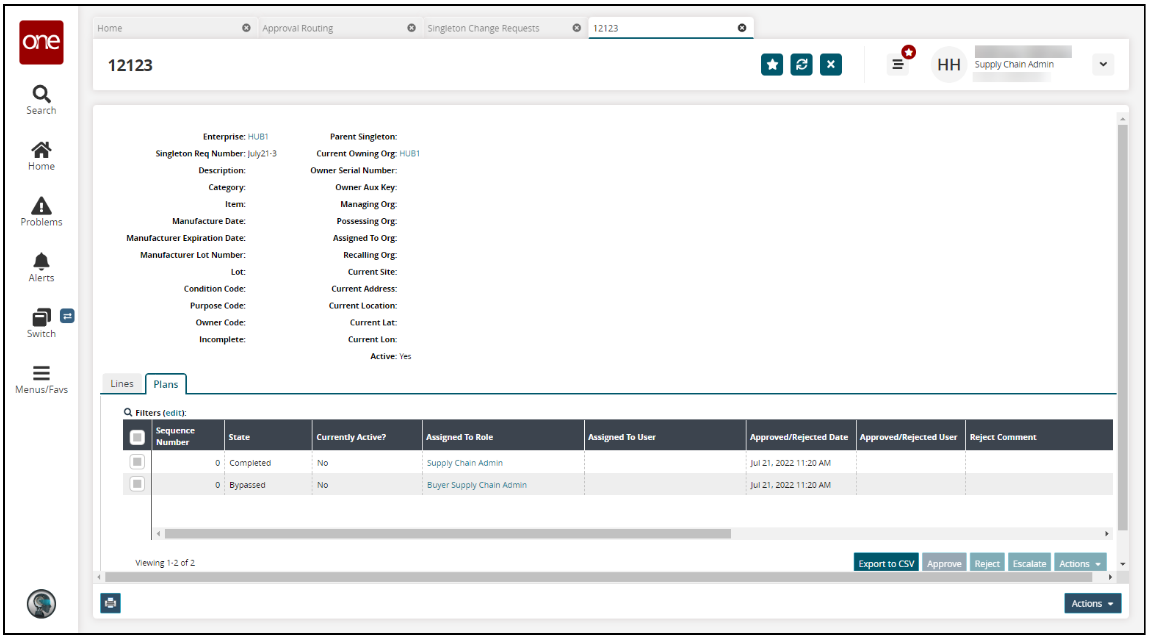
4. Click the **Create** button.
   A success message appears.
5. Click **Actions > Submit**.
6. Click the **Submit** button.
   A success message appears.
7. Click the **Plans** tab.
   The table is populated with information from the approval routing rule created earlier.



8. Select the row matching your current user. In this example, select the row for Supply Chain Admin.
9. Scroll down, and click **Approve**.
   The Authorize popup appears.



10. Enter an approval comment if desired, and click the **Submit** button.
    A success message appears. The Plans tab is updated. Notice that the approved line has a state of Completed, and the other line(s) have a Bypassed state. This indicates the quorum setting has worked as intended and bypassed all other approvals once the required number of approvals has happened (in this example, one).



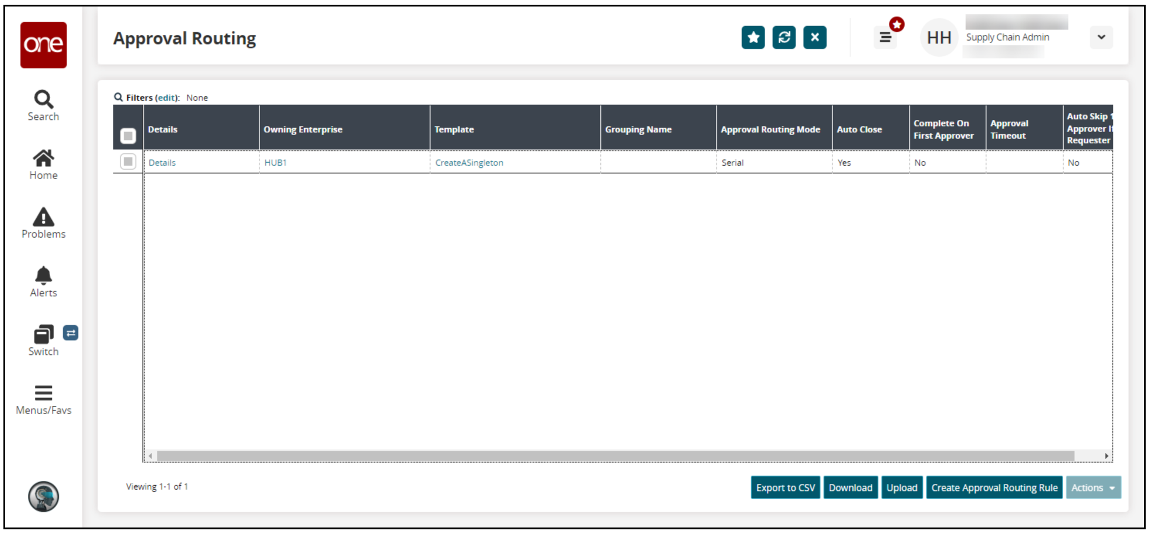
11. Click the **Export to CSV** button to export the report to your computer.
12. Select a plan and click the **Approve** button to approve the approval plan.
13. Select a plan and click the **Reject** button to reject the approval plan.
14. Select a plan and click the **Escalate** button to escalate the approval plan.

See the "TD-5977" section in the current version of the *Release Notes* for more information.

1.14.3 Working with the Approval Framework

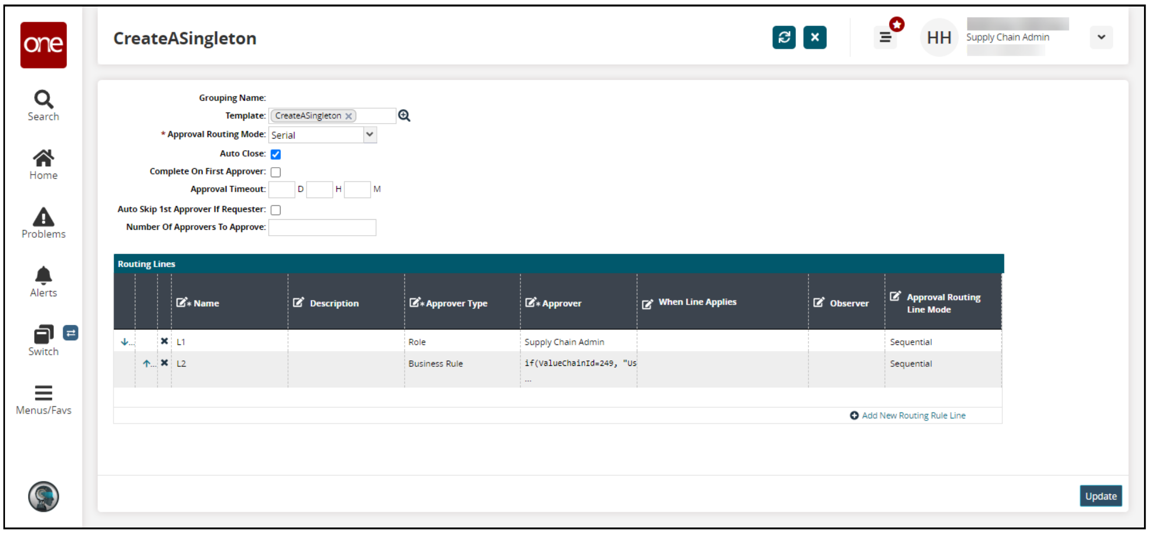
Complete the following steps to use the Approval Framework UI:

1. Log in to the ONE system.
2. Click **Menu/Favs** and in the search bar enter "Approval Framework".
   The Approval Framework screen appears.



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

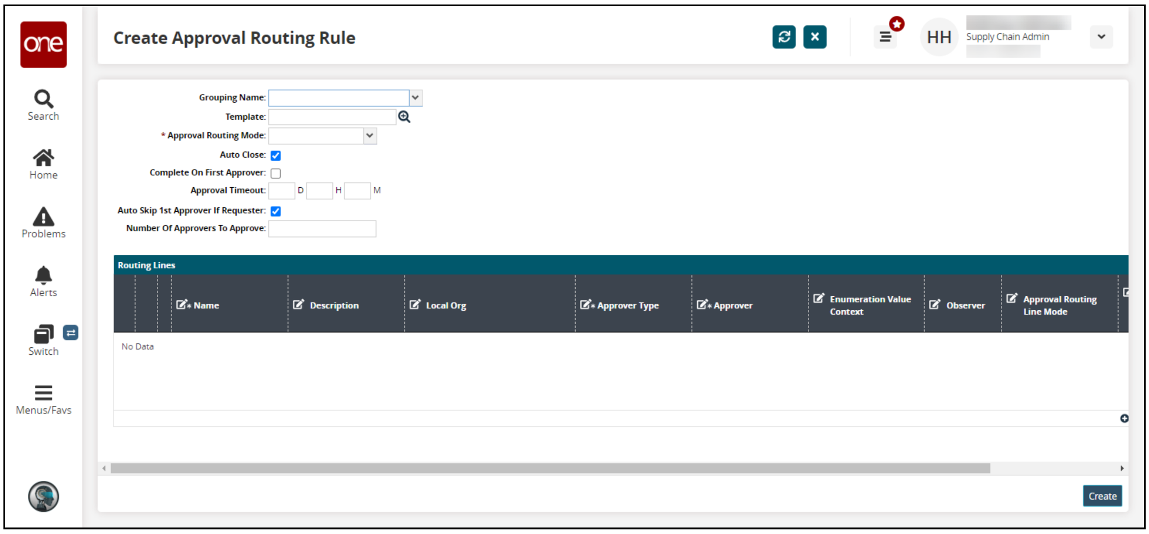
4. Click the **Download** button to download the report results to a spreadsheet.
5. Click the **Upload** button to upload information. See the "Uploading Files" section in the *Online Help* for more information.
6. Click the **Create Approval Routing Rule** to create new approval routing rules. See the next section for more information.
7. Select a checkbox and click the **Actions** button to perform various actions, such as deleting an approval routing rule.
8. Click a **Details** link in the **Details** column to view approval routing rule details. The approval routing rule details screen appears.



9. Edit fields as desired and click **Update** to save your changes. See the next section for more information on fields.

Complete the following steps to create approval routing rules:

1. Click the **Create Approval Routing Rule** to create new approval routing rules. The Create Approval Routing Rule screen appears.



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

Field	Description
Grouping Name	Select a grouping name from the dropdown menu.
Template	Select a template using the picker tool.
*Approval Routing Mode	Select an approval routing mode from the dropdown menu.
Auto-Close	Select this checkbox to auto-close the approval routing rule.
Complete On First Approver	Select this checkbox to complete the approval routing rule after the first approver.
Approval Timeout	Enter a time frame in days, hours, and minutes the approval is valid.
Auto-Skip 1st Approver If Requester	If this checkbox is selected and the first approver is also the requester, the first approval line is skipped and automatically approved. If this checkbox is not selected, then even if the requester is the first approver, the requester must explicitly provide their approval. This field is enabled by default.
Number of Approvers to Approve	Enter the number of approvers.

3. Click the **Add New Routing Rule Line**.
   A new row appears in the Routing Lines table.
4. Enter values in each field for each row.
5. Click the **Create** button to create a new approval routing rule.

See the "Added Auto-Skip 1st Approver If Requester flag to Create Approval Routing Rule" section in the current version of the *Release Notes* for more information.

2 Revision History

Version	Release Date	Author	Comments
1.7	23 Sep 2022	Tech Docs	• Updated "Campaign Management Work Order" section.
1.6		Tech Docs	Updated the "Appointment Scheduling in the NEO Workbench UI(see page 24)" section based on UI changes and added descriptions of prescriptions.
1.5	09 Sep 2022	Tech Docs	Added and updated SMRO topics: • "Raising an Issue for an Asset in Operation" section. • "Adding Notes and Attachments to an Asset History Number." • "Adding History Tab to the Asset Details Page."
1.4	02 Sep 2022	Tech Docs	Added the "Appointment Scheduling in the NEO Workbench UI(see page 24)" section.
1.3	26 Aug 2022	Tech Docs	Added the "Working with Inbound Integration Pipelines" section (plus subsections) and the "Working with the NEO Plasma Pipelines Screen" section.
1.2	16 Aug 2022	Tech Docs	Updated the "Creating a Databot with Reviewers and Reviewing Participant Responses" and "Creating a Databot with Auditors" sections with additional information.
1.1	05 Aug 2022	Tech Docs	• Updated "Using the Quorum Approval Routing Mode" with more accurate information. • Updated "Search Production Orders with Material Holds Report." • Multiple pages were updated for clarity and edits.
1.0	29 Jul 2022	Tech Docs	Initial Draft Release for UAT

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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