

One Network Enterprises NEO 3.6 Feature Guide

Published 14 November, 2022

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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.
- 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.

one	Buyer Dashboard	Material PIV		0					
One	Material PIV	1				₽ ×	в 👘	Buyer Supply Chain Admi	n 💌
Q Search									_
	Q Filters		-						
	Buyer:	u	Q	Vendor:	Q				
Home	Site Name:		ଭ	Location:	Q				
	Item Name:		Q	Program:	Q				
	Planner Code:	BP1 X	Q	View Type:	~				
Problems	Disable My Preferences:	*	PIV	uffer Level:	*				
	* Timeline:	DAILY, Jun 3, 2022 - Jul 3, 2022	£						
Alerts	Work Order:		🔍 🛛 Product	iroup Level:	Q 🛛				
Vieros	Site Group Level:		🔍 🛛 🛛 Flas	iback Time:	±0 ₩				
							Q Search	d Clear O Add Filter	× Close
Chats									
-									
Switch									
Menus/Favs									
Wenus/Favs									

- 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.



Material PIV										ଟ x		Ξ		Buy	er Supply	Chain Ac	lmin
Q Filters (edit): [Site Nam	ie: Hub6Plant1][Planner Code: BP1][Timeline: DAILY, Jun 3, 2022 12:01	0 AM to Jul 3, 20	22 11:59 P	PM]						l.	un 2022						
		Fri Sat Su	in Mon	Tue W	ed Thu	Fri Sat	Sun j	Mon Tu	e Wed	Thu Fr	i Sat Su	un Mor	n Tue W	ed Thu	Fri	Sat S	un Mo
Item Name	Data Measure	03 04 0	5 06	07 0	8 09	10 11	12	13 1	4 15	16 17	7 18 1	9 20	21	22 23	24	25 2	26 27
EN_Test1	 Production 																
Item Description:	Production Order																
EN_Test1	Production Work Order																
BOH:	Inbound Bucketized Order Forecast																
221 Each 🕚	Order Forecasts																
	Awaiting Approval Purchase Orders																
	On Hold Purchase Orders																
	Confirmed Purchase Orders																
	Confirmed Purchase Order In The Past																
	Planned Shipments																
	Planned Shipments In The Past																
3	Intransit Shipments																
-	Awaiting Approval Deployment Orders																
	On Hold Deployment Orders																
	Approved Deployment Orders																
	Approved Deployment Orders In The Past																
s	Planned Shipments For Deployment Orders																
	Planned Shipments For Deployment Orders In The Past																
	Insurante Chinese and Tax Dealer means Outland																

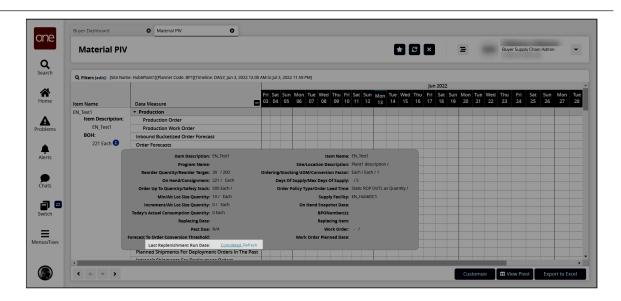
- 5. Scroll to find the item for which you want to run the replenishment engine.
- 6. In the Item Name column for the desired item, hover the mouse over the information icon under the Buffer On Hand (BOH) field. The Buffer On Hand information popup appears.

Material PIV	1				e ×	Ξ	Buyer Suppl	y Chain Adm	in
-									
Q Filters (edit): [Site Nar	ne: Hub6Plant1][Planner Code: BP1][Timeline: DAILY, Jun 3, 202	2 12:00 AM to Jul 3, 2022 11:59 PM]			lun 202	2			
Item Name	Data Measure	Fri Sat Sun Mon Tue 03 04 05 06 07			Thu Fri Sa	Sun Mon			
EN Test1	Production								
Item Description:	Production Order								E.
EN_Test1	Production Work Order								
BOH:	Inbound Bucketized Order Forecast								
221 Each 🕕	Order Forecasts				_				æ
	Item Description: EN_Test1	Item M	lame: EN_Test1						
	Program Name:	Site/Location Descri	ption: Plant1 description /						
	Reorder Quantity/Reorder Target: 30 / 200 Or	rdering/Stocking UOM/Conversion F	actor: Each / Each / 1						
	On Hand/Consignment: 221 / Each	Days Of Supply/Max Days Of Si	ipply: /5						
	Order Up To Quantity/Safety Stock: 500 Each /	Order Policy Type/Order Lead	Time: Static ROP OUTL as (Quantity /					
	Min/Alt Lot Size Quantity: 10 / Each	Supply Fa	cility: EN_Hub6DC1						
	Increment/Alt Lot Size Quantity: 0 / Each	On Hand Snapshot	Date:						
	Today's Actual Consumption Quantity: 0 Each	BPONum							
	Replacing Date:	Replacing							
	Past Due: N/A		Order: - /						
	Forecast To Order Conversion Threshold:	Work Order Planned	Date:						
L L	Last Replenishment Run Date: Run								
	Planned Shipments For Deployment Orders In The	e Past							
	Insurante Chinananas Feu Denleyanana Ouders								

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.
- 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.



Searc	h Shipments						*	₽ ₽ ×	=	Transportati TMSTRANSPC	RTATION MANAGER
Q Filters (edit): [State: Draft,Awaltin;	;Tendered][Deliv	ery Range: 01/01/22 -	03/30/22][Freight Control: Contro	olled]						
ickup	Delivery	Client 🔺	Carrier Invoice Status	Next Stop/ Next Stop ETA	Links	Total Distance	Cost	Static Route	Price	Quote Status	Final Stop/ Final Stop ETA
:00 AM PST	7:00 AM CST Appt Required				Tracking Quote More						
1/08/22 5:0 :00 AM PST	0 AM - 01/09/22 7:00 AN 7:00 AM CST Appt Required	- ClientA		VendorA-Austin DC	History Tracking Quote More	0 Mile				Approved	CustomerA-Brando
1/12/22 11: 1:27 PM CS		И - ClientA		VendorA-Emory DC	History Tracking Quote More	0 Mile				Rejected	CustomerA-Brando
1/12/22 12 2:29 AM PS		- ClientA		VendorA-Austin DC	History Tracking Quote More	0 Mile				Open	CustomerA-Brando
1/03/22 5:0 :08 AM CST ppt Require	5:08 AM CST	- ClientA		CustomerA-Brandon DC	History Tracking More	1,042 Mile	No Cost		0 USD	Approved	CustomerA-Canton
1/12/22 11: 1:22 PM CS ppt Require	T 11:22 PM CST	M - ClientA		CustomerA-Brandon DC	History Tracking More	1,042 Mile	No Cost		60 USD	Waiting for Approval	CustomerA-Canton

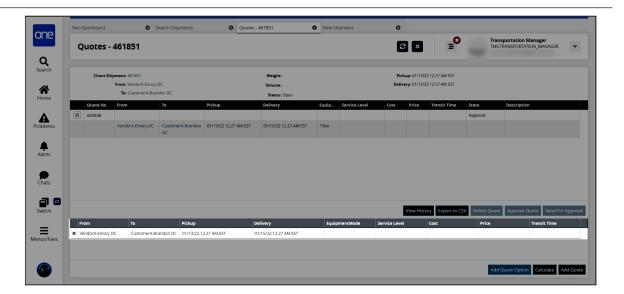
4. In the **Links** column, click the **Quote** link. The Quotes screen appears for the selected shipment with the rejected quote.

Sou may have to click the **More...** link to view the **Quote** link.

	O S	Search Shipments	Quotes	461851	New Sh	ipment	0		~	-	
Quotes	- 461851						Ŕ	* ×	⊒	T	ransportation Manager MS.TRANSPORTATION_MANAG
Client S	hipment: 461851			Weight:			Pic	kup: 01/13/2	2 12:27 AM EST		
	From: VendorA-Emory			Volume:			Deliv	ery: 01/15/2	2 12:27 AM EST		
	To: CustomerA-Bran	ndon DC		Status: Rejected							
Quote No	From	То	Pickup	Delivery	Equip	Service Level	Cost	Price	Transit Time	State	Description
603448										Rejected	
	VendorA-Emory DC	CustomerA-Brandon DC	01/13/22 12:27 AM EST	01/15/22 12:27 AM EST	1Ton						
									_	_	
								View Histo	ery Export to C	V Delete Qu	ote Approve Quote Sene
	то	Pickup	c	elivery	Equip	mentMode	Service Leve	1	Cost	Price	Transit Tim
From											
From											
From											
From											

 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.

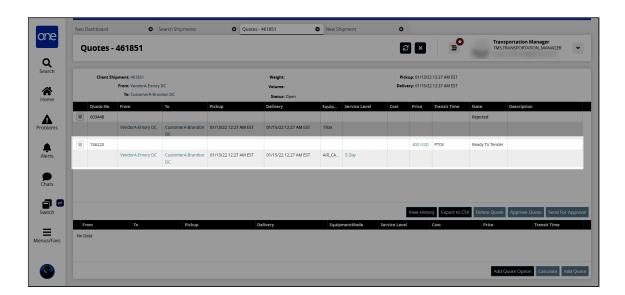
7. Click the **Add Quote** button.

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.
- Click Menu/Favs > Tools > Upload > Parcel Shipment Events. The Parcel Shipment Events screen appears with the Select File to Upload popup displaying.



Parcel Shipment Events	+ 8 ×	
	Select File to Upload	
	Upload Type *	Inbound Interface
	Parcel Shipment Events	
	Upload File *	
	Drag and drop a file here or Choose File Upload	
	Sample Files	
	Format Description File Download this file to view the data structure (field name, field type, maximum length, etc.) of an incound interface.	- Inbound Interface
	Template File Download this file to use as a template to enter your data	-

- 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.
- Click Menu/Favs > Tools > Alert Subscriptions. The Alert Subscriptions page displays.

Sub	scriptions Search					
Filte	rs (edit): None					
	Subscription Name	Alert Type	Subscription Type	Partner Types	Priority	System D
	Pending Payment Alert	Pending Payment	RegularSubscription			Yes
	Milestone failed	Milestone Failed	RegularSubscription			Yes
	RFQ	RFQ Responded	RegularSubscription			Yes
	Milestone Failed	Milestone Failed	RegularSubscription			Yes
	Reject Vendor Changes	Reject Vendor Changes	RegularSubscription			Yes
	Order Acknowledgement Pending	Order Acknowledgement Pending	RegularSubscription			Yes
	Contract Expiration	Contract Expiration	RegularSubscription			Yes
	VCWC- Buyer	Vendor Confirmed Purchase Order Change	RegularSubscription			Yes
	BCWC- Buyer	Buyer Confirmed Purchase Order Change	RegularSubscription			Yes
	Received Order- Buyer	Received Order	RegularSubscription			Yes
	DO-Partial Pallet	Partial Pallet	RegularSubscription			Yes
	RFQ Attachment2	New Attachment	RegularSubscription			Yes
	Shipment Cancelled	Shipment Cancelled	RegularSubscription			Yes
-	Delayed Order TE	Tracking Event Added	RegularSubscription		Med	Yes

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

New Subscription		(£	3 ×	Transportation Man	nager 🗸
Alert Information					
4 * Subscription Name:					
* Category:	Shipment Milestone 🗸				
Neo Dashboard Category Name:					
* Alert Type:	Milestone Alert 🗸				
Publish:					
	When Published, other users in your enterprise can "join" this sub	oscription to receive alerts.			
Active:					
Priority:	~				

- 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*.
 Complete all fields as necessary for the Shipment Milestone alert subscription. Fields with an asterisk (*) are required.
- 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".

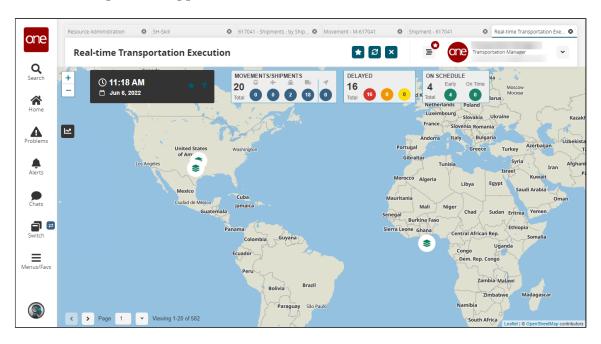
For more information, see the Creating Templates subsection of the "Organizational Resource Administration" section of the current version of the *Online Help*.

- 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.

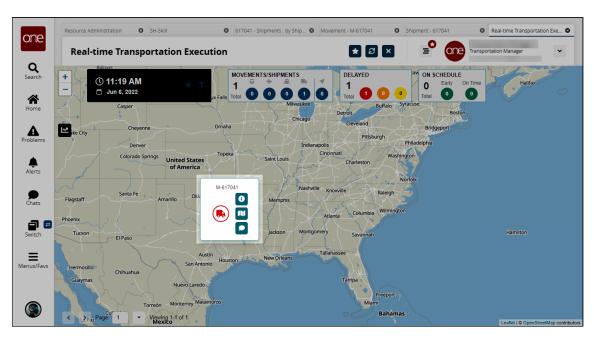
Complete the following steps to chat with the driver:



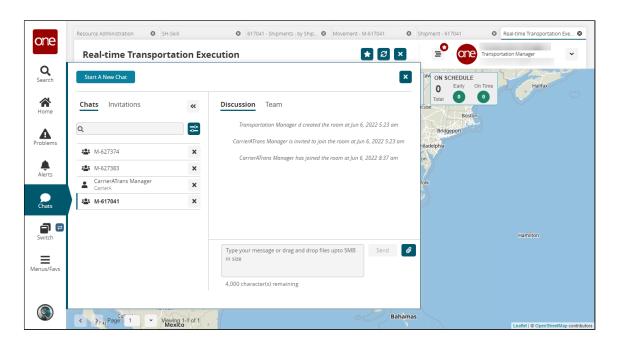
1. Click **Menu/Favs > Transportation > Real-Time Transportation Execution**. The RTTE Map screen appears.



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



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

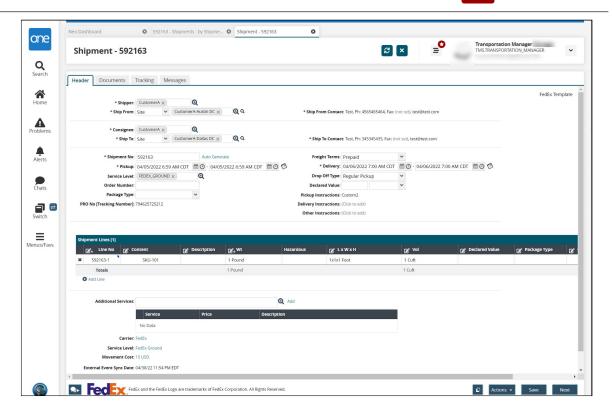
Users can track requests and responses for parcel shipments (FedEx, DHL, and UPS shipments) in the Messages tab on parcel shipment detail pages.

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

- 1. Log in to the ONE system.
- 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.

Ship	oment - 592163			C ×		Ation Manager
Header	Documents Tracki	ng Messages				
 _	ers (edit): [Created After: 05/0	6/21 8:04 AM EDTI				
	Creation Date	File	Interface	Dequeue Initiated	Dequeue Completed	Result Queue
	05/06/22 6:47 AM EDT	B 2022050606471269039.nullvTMS.ShipmentOutbound_10.6.12	TMS.ShipmentOutbound	05/06/22 6:47 AM EDT	05/06/22 6:47 AM EDT	
	04/30/22 11:54 PM EDT	592163_Response_20220430235405591.xml	FedExResponse	04/30/22 11:54 PM EDT	04/30/22 11:54 PM EDT	
	04/30/22 11:54 PM EDT	592163_Request_20220430235405497.xml	FedExRequest	04/30/22 11:54 PM EDT	04/30/22 11:54 PM EDT	
	04/30/22 9:52 PM EDT	592163_Response_20220430215214233.xml	FedExResponse	04/30/22 9:52 PM EDT	04/30/22 9:52 PM EDT	
	04/30/22 9:52 PM EDT	B 592163_Request_20220430215214135.xml	FedExRequest	04/30/22 9:52 PM EDT	04/30/22 9:52 PM EDT	
	04/30/22 7:53 PM EDT	B 592163_Response_20220430195357991.xml	FedExResponse	04/30/22 7:53 PM EDT	04/30/22 7:53 PM EDT	
	04/30/22 7:53 PM EDT	B 592163_Request_20220430195357916.xml	FedExRequest	04/30/22 7:53 PM EDT	04/30/22 7:53 PM EDT	
	04/30/22 5:53 PM EDT	B 592163_Response_20220430175313801.xml	FedExResponse	04/30/22 5:53 PM EDT	04/30/22 5:53 PM EDT	
	04/30/22 5:53 PM EDT	B 592163_Request_20220430175313523.xml	FedExRequest	04/30/22 5:53 PM EDT	04/30/22 5:53 PM EDT	
	04/30/22 3:53 PM EDT	592163_Response_20220430155329108.xml	FedExResponse	04/30/22 3:53 PM EDT	04/30/22 3:53 PM EDT	
	04/30/22 3:53 PM EDT	B 592163_Request_20220430155329025.xml	FedExRequest	04/30/22 3:53 PM EDT	04/30/22 3:53 PM EDT	
	04/30/22 1:53 PM EDT	B 592163_Response_20220430135356234.xml	FedExResponse	04/30/22 1:53 PM EDT	04/30/22 1:53 PM EDT	
	04/30/22 1:53 PM EDT	B 592163_Request_20220430135356093.xml	FedExRequest	04/30/22 1:53 PM EDT	04/30/22 1:53 PM EDT	
	04/30/22 11:53 AM EDT	B 592163_Response_20220430115318646.xml	FedExResponse	04/30/22 11:53 AM EDT	04/30/22 11:53 AM EDT	
	04/30/22 11:53 AM EDT	B 592163_Request_20220430115318567.xml	FedExRequest	04/30/22 11:53 AM EDT	04/30/22 11:53 AM EDT	
	04/30/22 9:54 AM EDT	B 592163_Response_20220430095459865.xml	FedExResponse	04/30/22 9:55 AM EDT	04/30/22 9:55 AM EDT	
	04/30/22 9:54 AM EDT	B 592163_Request_20220430095459767.xml	FedExRequest	04/30/22 9:55 AM EDT	04/30/22 9:55 AM EDT	
	04/30/22 7:52 AM EDT	592163_Response_20220430075224844.xml	FedExResponse	04/30/22 7:52 AM EDT	04/30/22 7:52 AM EDT	
	04/30/22 7:52 AM EDT	B 592163_Request_20220430075224746.xml	FedExRequest	04/30/22 7:52 AM EDT	04/30/22 7:52 AM EDT	
	04/30/22 5:54 AM EDT	592163_Response_20220430055437501.xml	FedExResponse	04/30/22 5:54 AM EDT	04/30/22 5:54 AM EDT	
	•	-				
	> Page: 1 more Vie	wing 1.50				Ex

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



Shipment - 592163				e ×	Transp TMS.TRA	ortation Manager
5mpment - 592105					_	and one month and a children
Header Documents Trackin Message Queue Summary	g Messages					
Q Filters						
* Created After: 05/09/2021	9:53 AM EDT	Queue Nam	e:			
Created Before:	0 1	Fil	le:			
Result Queue: Originating Queue:		Interfac				
State: Running	Pending	Enterprise Nam				
Processer						
Message Id:	Holli Queue					
						Q Search 👌 Clear 🗙
05/07/22 5:54 PM EDT	B 592163_Response_20220507175411373.	xml Fed	ExResponse	05/07/22 5:54 PM EDT	05/07/22 5:54 PM EDT	
05/07/22 5:54 PM EDT	B 592163_Request_20220507175411300.x	ml Fed	ExRequest	05/07/22 5:54 PM EDT	05/07/22 5:54 PM EDT	
05/07/22 3:52 PM EDT	592163_Response_20220507155200784.	xml Fed	ExResponse	05/07/22 3:52 PM EDT	05/07/22 3:52 PM EDT	
05/07/22 3:52 PM EDT	B 592163_Request_20220507155200729.x	ml Fed	ExRequest	05/07/22 3:52 PM EDT	05/07/22 3:52 PM EDT	
Page: 1 more View	ng 1-50					Expo
· · · · · · · · · · · · · · · · · · ·						

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.

	Ale	rts Subscriptions		2 × =	Transportation Manager TMS:TRANSPORTATION_MANAGER
h	My Su	bscriptions Search			
	Q Filt	ters (edit): None			
e		Subscription Name	Alert Type	Subscription Type Partner Type	s Priority System I
		Movement with NO GPS Device	Vehicle Event Alert		Yes
ns		Shipment Update	Shipment Update Alert	Regular Subscription	Med Yes
		Vehicle Delay Alert	Vehicle Event Alert	Regular Subscription	High Yes
		Vehicle with No Valid Movement	Vehicle Event Alert	Regular Subscription	High Yes
		Hold alert	Hold Alert	Regular Subscription	Yes
		Vehicle Delayed	Vehicle Event Alert	Regular Subscription	Med Yes
		Reg-Ship-21-1	Shipment Update Alert	Regular Subscription	Yes
_		Reg-mov-21	Movement Event Alert	Regular Subscription	High Yes
2		Milestone Failed-Partner	Milestone Failed	Regular Subscription	Yes
		Milestone failed-SSC	Milestone Failed	Regular Subscription	Yes
		Milestone missed-Site	Milestone Missed	Regular Subscription	Yes
/S		Milestone missed-Partner	Milestone Missed	Regular Subscription	Yes
		Milestone missed-SSC	Milestone Missed	Regular Subscription	Yes

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

New Subscription			C ×	≡	Transportation Manager TMS.TRANSPORTATION_MANAGER	*
Alert Information						
🕕 * Subscription Name						
* Category:	Container Move	~				
Neo Dashboard Category Name						
* Alert Type:	Container Rollover	~				
Publish						
	When Published, other users in your enterprise can "join" this	s subscription to receive alerts.				
Active?						
Priority	~					



- 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**.
- 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

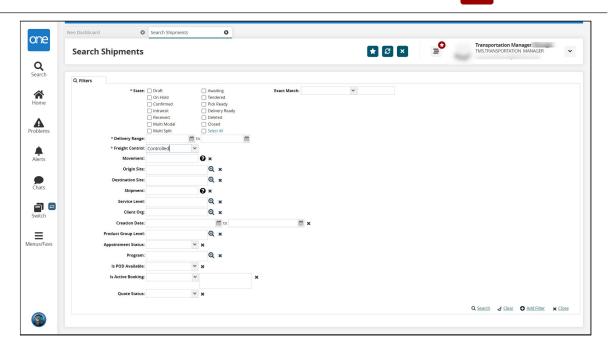
Users can filter and view shipments based on their booking status from the following screens:

- Search Shipments screen(see page 16)
- Shipment State reports(see page 18)
- <u>Multi Modal reports(see page 18)</u>

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

- 1. Log in to the ONE system.
- 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.



- 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

 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.
- 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.
- 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
 - $^{\circ}$ 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.

	Con	tainer View	/					* 2	× = ^O		portation Mana ANSPORTATION_F	MANAGER
	UNASS 40	IGNED ASSIGNED		BOOKING CANCELE		DELIVERED	INTRANSIT REAL	DY FOR DELIVERY RI				
	Q Filte	ers (edit): [Retrieve Fo										
		Container Booking	Equipment Mode	Container #	State	Gross Weight	Net Weight	Gross Volume	Net Volume	Free/ Incurred Demurrage Days	Active Leg	Return Mo
		CM-10000_01		CM-10000_01	Unassigned	15 Pound	12 Pound	52 Cuft	10 Cuft	Days 🖽		
		1111111122 🕅		1111111122	Unassigned							
		12345678902		12345678902	Unassigned							
		12345678999		12345678999	Unassigned							
		CM-Test-222		CM-Test-222	Unassigned							
3		CM-Test-111		CM-Test-111	Unassigned							
		CM-31477111		CM-31477111	Unassigned							
		CM-31452111		CM-31452111	Unassigned							
		Container_CHCS2		Container_CHC	Unassigned							
		CM-52322111		CM-52322111	Canceled							

- 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.

									× =°		
	nassi 0	IGNED ASSIGNED		BOOKING CANCELI		RIVED DELIVERED	INTRANSIT REA				
q		ers (edit): [State: Assign	ned,Intransit)[Retrieve Equipment Mode	For: Last 90 Days] Container#	State	Gross Weight	Net Weight	Gross Volume	Net Volume	Free/ Incurred Demurrage Days	Active Leg Return M
		> CM-119341_0 ₩	Ocean	CM-119341_0	Intransit						M-604756
ľ	•	> TestFIFO	π	TestFIFO	Assigned	200 KILOGRAM					y Pick-Up And Return Move y Pick-Up Movement
1		> CM-59419711	Ocean	CM-59419711	Assigned					Create Empt Update Cont	y Return Movement tainer Details
		> CM-61336912 ₪	Ocean	CM-61336912	Intransit					Create Manu Submit VGM	

5. Click **Container Rollover**.

The Container Rollover popup window appears.



	Neo Dast	iboard		ntainer View				Transportation Manager TMS.TRANSPORTATION_MANAGER
	UNASS 40 Q Filt	IGNED ASSIGNEI 15 v ars (edit): [State: Assi Container Booking	gned,Intransit	Container Rollover * Container Rollover Reason Code:		* Vessel Name: * Voyage No: ccharge Port ETA:	mo	X Active Leg Return Move
		> CM-119341_0 10	Ocean	Container Number	Booking Number	Container Type		M-604756
		> CM-59419711	Ocean	TestFIFO	74880	20 Bulk		74880TestFIFO
			Ocean					M-613414
/s	Viev	ving 1-23 of 23					Save Close	Export to CSV View Route Action

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.



one	Neo Dashboard O	Container View		
	Container View		🗙 🛛 🗶 📑 🐨 🗄	Transportation Manager MS.TRANSPORTATION_MANAGER
Q Search	UNASSIGNED ASSIGNED BOO	Container Rollover	×	1
Home	40 C 15 25 Q Filters (edit): [State: Assigned.Intrans	t) 📀 Container rolledover successfully	×	_
Problems	Container Booking Equipment	* Container Rollover Reason Code: Missed Cut-Off Date ¥ * Container Rollover Location: Site 1	* Vessel Name: Vessell 1 * Voyage No: 4	Active Leg Return Move
	CM-119341_0 🚺 Ocean		* Discharge Port ETA: 05/18/2022 11:55 AM 🛗 🕐	M-604756
Alerts	> TestRIFO TL			M- 74880TestFIFO
Chats		Container Number Booking Number	Container Type	
Switch	CM-59419711 Ocean	TestFIFO 74880	20 Bulk	M-594197
Menus/Favs	CM-61336912.10 Ocean			M-613414
	✓ Viewing 1-23 of 23			
	viewing 1-25 of 23		Close And Refresh	Export to CSV View Route Actions -

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.

	Bookings					* 2 ×		nsportation Manager S.TRANSPORTATION_MANAGER
	Q Filters (edit): None							
	Booking ID	Flags	State	Action Code	Links	Actual Delivery Date	Actual Pickup	Assigned Number
	10191_22T0_1019	1			Shipments		10/30/19 4:13 AM CDT	
	10060_22T0_1006	0			Shipments		10/17/19 2:18 AM CDT	
s	15654_22T0_1608	7			Shipments		10/17/19 3:34 AM CDT	
	10040_22T0_1004	0			Shipments		10/11/19 1:13 AM CDT	
	10183_22T0_1018	3			Shipments		10/30/19 3:00 AM CDT	
	11061_2280_1106	a					12/10/19 6:00 AM CST	
	11062_22G0_1106	12					12/10/19 6:03 AM CST	
	39531_22T0_4315	2			Shipments		12/25/19 3:10 AM CST	
	11503_22T0_1150	3			Shipments		12/25/19 4:33 AM CST	
8	11940_22T0_1194	0			Shipments		01/08/20 12:21 AM CST	
	11502_22T0_1150	2			Shipments		12/25/19 3:39 AM CST	
	12700_2280_1270	0					04/06/20 5:02 AM CDT	
vs	64131_22T0_7379	9			Shipments		04/06/20 5:11 AM CDT	
	69775_2280_8069	0			Shipments		05/30/20 5:46 AM CDT	

- 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.



	-									
U		s (edit): [State: Bill of Lading Is Booking ID	ssued) Flags	State	Action Code	Links	Actual Delivery Date	Actual Pickup	Assigned Number	ві
	1	10462		BL Issued	A	Container View More		04/13/21 3:56 AM CDT		Те
		22501		BL Issued	A	Container View More		01/20/22 10:13 PM CST 03/31/22 11:43 AM CDT		50 BL
								Surrender Bil	-	
9								Request for S	ll of Lading iplit Bill of Lading / Pick-Up Movement	
,								Request for S Create Empty	plit Bill of Lading	

5. Click **Container Rollover.**

The Container Rollover popup window displays.

Bookings			* 8 ×		Transportation Manager TMS.TRANSPORTATION_MAN	LAGEF
Q Filters (edit): [State: Bill of Lading	Isue				_	
Booking ID	Container Rollover * Container Rollover Reason Code:	Vessel Issues	* Vessel Name: Vessel 2		Assigned Numbe	er.
10462	* Container Rollover Location:		* Voyage No: 47			
22501	Bill Of Ladding:	479	* Discharge Port ETA: 05/18/2022 12:00	PM 🛱 🕗		
86001						
					_	
	Container Number	Booking Number	Container Type			
	Container Number	Booking Number 10462	Container Type 20' Non Operating	Reefer		
				g Reefer	-	
				Reefer	-11	
				, Reefer	1	
				, Reefer	1	
				r Reefer	1	

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.

l Number

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.

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



- Rescheduling and Canceling an Appointment(see page 33)
- <u>Actions for Appointments(see page 33)</u>
- Viewing Shipments(see page 34)

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.

000	Neo Dashboard	Search S	hipments : by Shipment 🛛 Create Liv	e Delivery Appointment					
one	Create L	ive Delivery App	ointment			* 3 ×	_ ●		*
Q Search	Reservatio	n Shipments							
A Home	Ƴ Appoint	ment Specification							
	Shipment		Site		Reservation Id		Carrier		
Problems	7598511 -	Ð							- 14
	Movement M-759851		Target		Appointment Type		Contact Edit		- 14
Alerts			9/19/2022 11:59 am C	DT 🗰 O 🗄					- 14
Alerts	Max Candic	ates	Supplier Partners		Load 1 Pallet / 50 Pound	/ 30 Cuft	Notes Add Notes		- 14
Chats	✓ Reservation	ion Candidates					£ ₩		
Switch		🖉 * Start Time	🕗 * End Time	💉 tock Door	Duration	Slot Type		R	
=	•	9/19/22 9:00 am CDT	9/19/22 10:00 am CDT	1999 Barrison (1980)	1 H	Regular (Live)	<	NEO Prescriptions	>
Menus/Favs	•	9/19/22 10:00 am CDT	9/19/22 11:00 am CDT	(p. 6	1 H	Regular (Live)			Ξ.
	• #	9/19/22 11:00 am CDT	9/19/22 12:00 pm CDT		1.H	Regular (Live)	•	Candidates for Overridden Policies	
						Schedule Co	onfirmed Appointment	Schedule Soft Appoint	ment

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



Field		De	escription
Shipment		ent's details screen.	a live link for the shipment that opens Users can also add shipments to this
	ic S		nts to this appointment, click the plus lect Shipments button in the pup displays.
		Filter Options	
		Search By	
			▼
		State *	
		Unselect All	
		 Awaiting 	Confirmed
		Pick Ready	Intransit
		Delivery Ready	Received
		Retrieve For	
			~
		Date Tolerance	
		Consignee	
		Equal	•
		Restrict By Commod	ity Codes
			~
		Equipment	
			~
			Reset Apply
	D O	omploto the following	ng fielde to filter for your desired
			ng fields to filter for your desired vith an asterisk (*) are required.



Field		Des	cription
		Field	Description
		Search By	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.
		State *	Check the box(es) for the state of the shipments.
		Retrieve For	Select the time frame for the search from the dropdown list.
		Date Tolerance	Enter a date tolerance for the allowed limit before and after the target date.
		Consignee	Select Equal or Not Equal from the dropdown list, and enter the consignee.
		Restrict by Commodity Codes	Select Yes or No to restrict the shipment search by commodity codes.
		Equipment	Select the equipment type from the dropdown list.
	D. (1 5 E. (popup. Check the selection bo filter button is availabl shipment results. The Add button is now Click the Add button. The shipment is now a	display in the Select Shipments x for your desired shipment(s). A e on the popup for further specific active. dded to the Shipments field.
Moveme nt	This field screen.	auto-populates with a	live link to the movement details
Max Candidat es		e maximum number of vation Candidates tabl	available candidates to display in e. See below.



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.
Reservati on ID	This field populates when the appointment is created.
Appointm ent 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.
	Add Note OK Close
	 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.

		🕗 * Start Time	🕗 * End Time	🕗 * Dock Door	Duration	Slot Typ e
)	曲	Aug 27, 2022 00:00 CDT	Aug 27, 2022 01:15 CDT	Door1	1 H 15 M	Regular (Live)
	苗	Aug 27, 2022 13:00 CDT	Aug 27, 2022 14:15 CDT	Door2	1 H 15 M	Regular (Live)
	曲	Aug 27, 2022 01:00 CDT	Aug 27, 2022 02:15 CDT	Door2	1 H 15 M	Regular (Live)

Complete the following steps to view possible appointment candidates:

1. Click the **Get Candidates** icon (



- 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.

/ Aug 3,	2022	Wedr	nesday																	l e	2	Q	Q	
														Op	en 🔵 St	anding B	lock 😐 I	nternal E	llock 😑	Drop App	oointmen	: 🔵 Live	e Appoint	
		August		04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00	Thu 00:0
Dry Doors																								
Door2																								
Door1																								

- 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

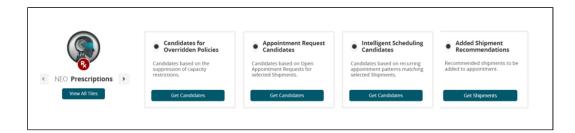
The NEO Prescriptions provide users with more candidates/shipments based on requirements for candidates.

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.
- 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:

 Click the radio button to select an appointment in the Reservation Candidates section.
 The Schedule Confirmed Appointment and the Schedule Soft Appointment

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.

Schedule Soft Appointment
Expired In * Days 1 Hours Minutes
Schedule Close

- 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.
- 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.

one	Neo Dashboard 📀 Search Shipments : by Shipment 😋	reate Live Delivery Appointment	0			
Q	Create Live Delivery Appointment				Image: Second	٠
Search	Reservation Shipments					
Home	(PRIMARY) H/T					
Problems	Target Delivery Date Aug 31, 2022 03:12 EAST	Partner		Р	lartner Profile	
Alerts	Order Ref No(s).	Freight Terms COLLECT			uddress 4055 Valley View Suite# 400 Dallas, TX 75244 US	ß
Chats	Special Instructions	Ordered Pieces 1		c	Ordered Pieces 2	
Switch	Shipped Pieces 1	Shipped Pieces 2		P	ickup Load Type	
Menus/Favs	Delivery Load Type	Partner Contact	Ed		ppointment Code	٩
	Weight	Delivery Schedule Type			Schedule Confirmed Appointment Schedule Soft	Appointment

- 2. Click the trash can icon in the section header bar. The shipment is deleted from the reservation.
- Click the H in the section header bar. The shipment's history displays in a new tab.
- 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.	



Field	Description		
Address	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.		
	Field	Description	
	Country*	Select the country abbreviation from the dropdown list.	
	Line 1*	Enter address information.	
	Line 2	Enter additional address information if necessary.	
	Line 3	Enter additional address information if necessary.	
	City*	Enter the city.	
	State*	Select the state from the dropdown list.	
	Zip*	Enter the ZIP code.	
Ordered Pieces 2	Enter a numerical value for the ordered pieces.		
Pickup Load Type	This field auto-populates.		
Appointment Code	Enter or select the appointment code using the picker tool.		

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

Viewing the Available Variable Capacity Settings on the Site 1.2.3.2 **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.



one Q	Neo Dashboard	Site Scheduling Policies	0			ଥ ×		sportation Ma	nager er V
Search Home	Q. Filters * Site Name:	ଷ୍						Q Search	Clear 🗙 Close
Problems									
Alerts									
Switch									
Menus/Favs									Export to CSV
	Basic Site Level Policy Dock I	Door Group Basic Policy	Work Shifts	Reservation Frequency Rule	Concurrent Reservation Rules	Load Time Settings	Auto Date Tolerance	UI Policies	Restrict Other Tim +

- 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.
- 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.

one	Neo Dashboard	Site	Scheduling Policies	0							
Q	Site Sche	eduling Policie	s					C ×		Transportation Manage	ager 🗸
Search	Q Filters (<u>edit</u>):	[Site Name: AutoTenderSch	_Site1]						1		
A Home	Enforce Lane Requirements	Period	Enforce Load Type Requirement	Pickup Appt Required	Delivery Appt Required	Allow Multi Appt Scheduling	Allow Combined Appts	Enable Appointment Request	Enable Appointment Request - All Partners	Enable Appointment Reques Selected Partner(s)	t - Enable Appoint Partners excep
•	No	01/01/70 - 01/01/70	No	Yes	Yes	Yes	No	Yes	Yes		
Problems	No	01/01/70 - 01/01/70	No	Yes	Yes	Yes	No	Yes	Yes		
Alerts Chats											
Switch	< Viewing 1-2 of	2									,
											Export to CSV
	* Basic Site Le	vel Policy Dock Doc	r Group Basic Policy	Work Shifts	Reservation Frequ	ency Rule Cor	ncurrent Reserva	tion Rules Load Time	e Settings Auto Date	Tolerance UI Policies	Restrict Other Tim +

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

The Available Variable Capacity Settings display.



Q Filters (edit): [Site Name: A	utoTenderSch_Site1]					
Dock Door Group Name	Name	Based On	Applies To	Capacity UOM	Limit	
Frozen Group	•					
AutoTenderSch_Site1 - DropYa	rd					
Drop Frozen Door						

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.

Q Filters (edit): [Site Name: Auto Dock Door Group Name	TenderSch_Site1]	Based On	Applies To	Capacity UOM	Limit		
Frozen Group		Subco on	Applies to	capacity com			
	SH-NEW-1	Load Type	STILLAGE	EACH		40	
	SH-NEW-1	Load Type	STILLAGE	PALLET		40	
	SH-NEW-1	Load Type	STILLAGE	APPOINTMENT		2	
	SH-VCS	Load Type	CLAMP	EACH		40	
	SH-VCS	Load Type	CLAMP	APPOINTMENT		2	
	SH-VCS-2	Appointment Code	Dry Grocery	EACH		150	
	Variable Capacity Setting 1	Partner	SupplierA	PALLET		100	
	Variable Capacity Setting 1	Load Type	ROLL	EACH		500	
AutoTenderSch_Site1 - DropYard							
Drop Frozen Door							

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.
- Click the Schedule tab. The Schedule tab appears.
- 4. Click the **Live** link in the Delivery Appointment section.

one	Neo Dashboard O Search Shipments O Shipmen	
	Shipment - 589951-2	Image: Transportation Manager Manager Image: The Stransportation Manager Manager Image: The Stransportation Manager Manager
Q Search	Header Content Codes Other Info Schedule Carrier Tra	cking Documents Holds Problems Milestones History Packing References Contacts 🕈
Home	Pickup Appointment	Delivery Appointment
nome	Appt Required: 🗹 Create [Live 🖉 / Drop 😰 / Both 💟]	Appt Required: 🗹 Create [Live 🖉 / Drop 🖉]
A	Partner: Q Partner Profile: Q	Partner: Q Partner Profile: Q
Problems	Commodity Code: Q	Partner Profile: Commodity Code: Cod
	Appt Code:	Appt Code:
.	Pickup Load Type: Stillage	Delivery Load Type: Stillage
Alerts	Reqd No Of Appts: 1	
	Pickup Schedule	Delivery Schedule
Chats	Planned:	Planned:
	Original: 03/13/22 10:43 PM CDT - 03/13/22 10:43 PM CDT	Original: 05/30/22 1:00 AM CDT - 05/30/22 1:00 AM CDT
	Target: 03/13/22 10:43 PM CDT Appointment:	Target: 05/30/22 1:00 AM CDT Appointment:
Switch	Actual:	Actual:
_		
Menus/Favs		
	9 1	© Actions ▼ Save Next

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.



		opointment		× =		ISPORTATION_MANAGE	
Reser	rvation Shipments						
	* Shipment: 589951-2 • Add		Reservation Id:			Operating F	Hours: 05/30
	Site: CustomerA-Fortworth		Appointment Type:			Capacity Information	
	* Type: Delivery V Live	*	Contact: Phone:			Capacity Type 🔺	Мах
	Target: 05/30/2022 1:00 AN	ICDT C A	Load: 20 Each. 20 F	Pallet		APPOINTMENT	50
	Notes:	View/Add Notes			0 Each, 20 Pallet	EACH	
			Supplier Partners: CustomerA			PALLET	2400
			Max Candidates: 3	~		Reason Unable to Sch on Target	
Reserv	vation Candidates				C »		
	😰 Start Time	🕑 End Time	🕑 Dock Door	Duration	Slot Type		
-	05/30/22 12:00 PM CDT	05/30/22 1:15 PM CDT	Door1	1H 15M	Regular (Live)		
	05/30/22 6:00 PM CDT	05/30/22 7:15 PM CDT	Door2	1H 15M	Regular (Live)		
	05/30/22 1:00 PM CDT	05/30/22 2:15 PM CDT	Door2	1H 15M	Regular (Live)		
				Add Candidate: Inlin	e via Calendar		
s							

- 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.

one	Neo Dashboard 🛛 Sear	ch Shipments 🛛 Ship	oment - 589951-2 OCreate	Live Delivery Appointment	Shipment - 589951	0
Q	Create Live Delivery A	ppointment	Ø	⊻ ≘⁰	Transportation Mana, TMS.TRANSPORTATION_M	
earch	Reservation Shipments					
*	Appointment Warnings					
lome	The ShiftCapacityConstraint is not satisfi	able based on Load Type "STILLAGE" for UC	DM "APPOINTMENT" from Mon 12:00 AM to Mor	n 12:00 PM.		
	The ShiftCapacityConstraint is not satisfied	able based on Load Type "STILLAGE" for UC	OM "EACH" from Mon 12:00 AM to Mon 12:00 Pf	vl.		
	The ShiftCapacityConstraint is not satisf	able based on Load Type "STILLAGE" for UC	OM "PALLET" from Mon 12:00 AM to Mon 12:00	PM.		•
blems	* Shipment: 589951-2 • Add		Reservation Id:		Ope	erating Hours: 05/30/22
•	Site: CustomerA-Fortworth	Store 🛗	Appointment Type:		Capacity Info	rmation
erts	* Type: Delivery 💙 Liv	e 💙	Contact:		Capacity Type	e 🔺 Maximur
erts	Movement: M-589951-2		Phone:		APPOINTMEN	T 50
_	Target: 05/30/2022 1:00 AI	View/Add Notes	Load: 20 Each, 2	20 Pallet	EACH	
nats	Notes:	View/Add Notes			PALLET	2400
			Supplier Partners: Customer Max Candidates: 5	×		le to Schedule n Target Date:
			max callulates. 5	-	Ŭ	in tanget bate.
vitch	Reservation Candidates				0	
= 1	🛃 Start Time	🕑 End Time	Dock Door	Duration	Slot Type	
us/Favs	🔳 🗰 05/30/22 12:00 PM CDT	05/30/22 1:15 PM CDT	Door1	1H 15M	Regular (Live)	
	05/30/22 6:00 PM CDT	05/30/22 7:15 PM CDT	Door2	1H 15M	Regular (Live)	
		05/20/22 2-15 DM CDT	Deer?	10.1014	Domilar (Live)	
				Scher	lule Confirmed Appointment	chedule Soft Appointm

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.
- Click Menus/Favs > Transportation > Policies > ESG Policies. The ESG Policies screen appears. The *Organization field is auto-populated by default.

SG Policie	s					З ×	_ 0	Transportation Manager
* Organization	Custo	omerA						
efault Weight UOM	KILO	OGRA	м	*				
Compute ESG By		Rank	k	ESG Method	Active			
	×		+	Based on Private Fleet	Yes			
	×		+	Based on EDF Green Freight Handbook	Yes			
	×	+	+	Based on Smart way Carrier Performance Ranking by EPA	Yes			
	×	+	+	Based on Common Carrier	Yes			
	×		+	Based on miles per gallon	Yes			
	ф			Based on DEFRA UK Government	No			

- 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.

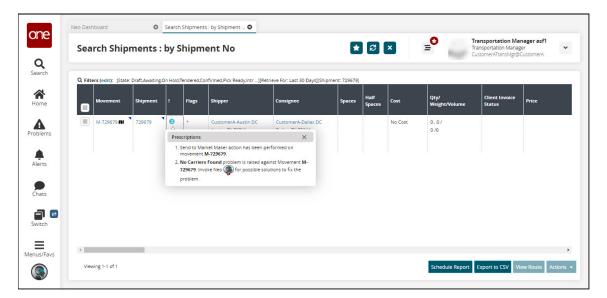
1.2.4.2 Viewing the Sent to Market Maker Action Notification in the Movement Shipment Report

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.
- 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.

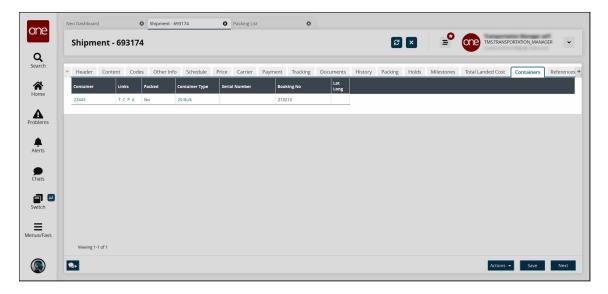
See the "Enhancement in the Movement Shipment Report to Identify the Movements Sent to Market Maker" section in the current version of the *Release Notes* for more information.

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.



Packing List Container Move Container Move: 23443	Packing List			8 ×	= ° or	TMS.TRANSPORTA	tion_Manage
Container Move: 23443							
Booking No: 213213	Pack list No: * Site:						
Container Asset: 23443							
Pack Line mapping							
B* Pack Line B* Line Type	😰 Item 🛛 Item Descrip	ti 😰 Shipment Line Shipment	Order	🖉 Quantity	🖉 Quantity 2	🕑 ^{Weight} (🕑 Volume
× 1 Item	BBIItem BBIItem	693174-1 693174	746931	10 Bin			

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

1.2.5 Financials

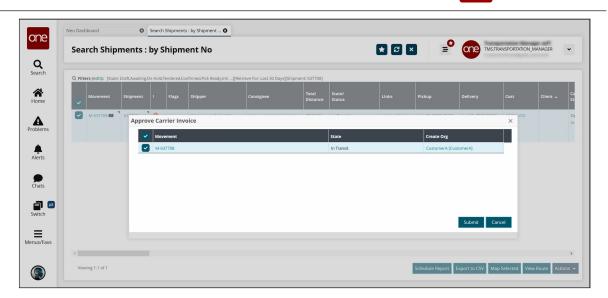
1.2.5.1 Approving Client and Carrier Invoices From Search Shipments Screen

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.





- 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.

one	test O Search Production Demand Fore O	
	Search Production Demand Forecast Detail	★ 🖉 🗙 😑 Production Manager 🗸 ∨
Search Home	Q. Filters State: Analong Approval Select All Item: Continuity Select All Item: Continuity Continui	
Alerts	Forecast Date: m O to m O	Q. Search of Clear O Add Filter 🗙 Close
Chats Switch		
Menus/Favs		
۲		

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

•	Sea	arch Production	n Demand I	Forecast Detail				* 8 ×	≡	Production Manager	
h	0.53	ters (<u>edit</u>): None									
e	Show	v k F Model Type	Forecast Date	Item Name	Request Quantity	Quantity UOM	Prod Order Forecast Number	Prod Order Forecast Date	Parent Item Name	Parent Item Forecast Quantity	Par Qu
	•	SCC.ProdDemandForecast	May 23, 2022	Test_MFG_RMItem5	1,00	EACH					
ms	•	SCC.ProdDemandForecast	May 30, 2022	Test_MFG_RMItem5	1,00	EACH					
	•	SCC.ProdDemandForecast	May 23, 2022	Test_MFG_RMItem6	1,00	EACH					
s	•	SCC.ProdDemandForecast	May 30, 2022	Test_MFG_RMItem6	1,00	EACH					
	•	SCC.ProdDemandForecast	May 23, 2022	Test_MFG_RMItem9	1,00	EACH					
	•	SCC.ProdDemandForecast	May 30, 2022	Test_MFG_RMItem9	1,00	EACH					
s	•	SCC.ProdDemandForecast	May 23, 2022	Test_MFG_RMItem10	1,00	EACH					
_	•	SCC.ProdDemandForecast	May 23, 2022	Test_MFG_WIPItem1	1.00	EACH					
	•	SCC.ProdDemandForecast	May 30, 2022	Test_MFG_WIPItem1	1,00	EACH					
h	•	SCC.ProdDemandForecast	May 23, 2022	Test_MFG_WIPItem2	1.00	EACH					
	•	SCC.ProdDemandForecast	May 30, 2022	Test_MFG_WIPItem2	1,00	EACH					
Favs	•	SCC.ProdDemandForecast	May 23, 2022	Test_MFG_WIPItem3	1,00	EACH					
	•	SCC.ProdDemandForecast	May 30, 2022	Test_MFG_RMItem10	1,00	EACH					
	•	SCC.ProdDemandForecast	May 23, 2022	Test_MFG_RMItem11	1,00	EACH					

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



~	Searc	h Production D	emand For	ecast Detail				* 8 ×	_	Production Manager	~
Q earch	Q Filters (edit): None									
M ome	Show Work Order Forecast	Model Type	Forecast Date	Item Name	Request Quantity	Quantity UOM	Prod Order Forecast Number	Prod Order Forecast Date	Parent Item Name	Parent Item Forecast Quantity	Pa Qu
A		SCC.ProdDemandForecast	May 23, 2022	Test_MFG_RMItem5	1,00	EACH					
olems		SCC.WorkOrderForecast	May 23, 2022	Test_MFG_RMItem5	1,00	EACH	05/23/2022	May 23, 2022	Test_MFG_WIPItem2	100	Đ
	•	SCC.ProdDemandForecast	May 30, 2022	Test_MFG_RMItem5	1,00	EACH					
rts		SCC.WorkOrderForecast	May 30, 2022	Test_MFG_RMItem5	1,00	EACH	05/30/2022	May 30, 2022	Test_MFG_WIPItem2	100	Đ
		SCC.ProdDemandForecast	May 23, 2022	Test_MFG_RMItem6	1,00	EACH					
	,	SCC.ProdDemandForecast	May 30, 2022	Test_MFG_RMItem6	1,00	EACH					
its	•	SCC.ProdDemandForecast	May 23, 2022	Test_MFG_RMItem9	1,00	EACH					
	•	SCC.ProdDemandForecast	May 30, 2022	Test_MFG_RMItem9	1,00	EACH					
	•	SCC.ProdDemandForecast	May 23, 2022	Test_MFG_RMItem10	1,00	EACH					
ch	,	SCC.ProdDemandForecast	May 23, 2022	Test_MFG_WIPItem1	1,00	EACH					
	,	SCC.ProdDemandForecast	May 30, 2022	Test_MFG_WIPItem1	1,00	EACH					
;/Favs	,	SCC.ProdDemandForecast	May 23, 2022	Test_MFG_WIPItem2	1,00	EACH					
	,	SCC.ProdDemandForecast	May 30, 2022	Test_MFG_WIPItem2	1,00	EACH					

- 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.
- 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.



					SS Production Ma	
Search P	roduction Orders	With Material Ho	lds	🛨 🕄 🗙	SS Production Ma	ager
Q Filters						
	State: New Closed	Open Cancelled				
	Select All					
	ls Order Late: 🗌					
	Order Number:					
Reference	e Order Number:					
	Item:					
	Production Site:					
Prod	luction Location:					
	Storage Site:					
	Production Date:	🛗 🕐 to	0			
	Retrieve For:	~				
	orecast Number:					
	Order Number 1:					
	Order Number 2:					
	Order Number 3:					
Reference	Order Number 4:					
	Planner Code:					
	Bill Of Material:					
	Routing:					
					Q Search 🤞 Clear 🕒 Add F	lter

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

ne	Home	0	Search Production Orders With							
	Sea	arch Production	Orders With Mate	erial Holds			* 2	× =	SS Production Manager	*
λ arch	Q Filt	ters (edit): [Is Order Late: No]								
8		Order Number	Item Name	Item Description	Production Site Name	State	Planned Production Quantity	Quantity UOM	Planned Production Start Date	Plan
ne		1950918	Test_MFG_FGItem5	Test_MFG_FGItem5	Test_MFG_Plant2	Canceled		D Each	May 30, 2022 4:48 AM	Jun 9
		1952883	Test_MFG_FGItem5	Test_MFG_FGItem5	Test_MFG_Plant2	Canceled	120	0 Each	May 30, 2022 7:28 AM	Jun 5
ems		1967618	Test_MFG_FGItem5	Test_MFG_FGItem5	Test_MFG_Plant2	Canceled	100	0 Each	May 30, 2022 1:58 AM	Jun 7
erts										
) 15										
) is l 2										
ats 1 🖻										
ats		1								

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. Edit fields with the pencil icon as desired and click the Submit button.
Close d	Reopen - The Reopen popup displays	 Edit fields with the pencil icon as desired and click the Submit button.
Canc eled	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.
- Click Menu/Favs > Reports > Search Store Demand Forecasts. The Search Store Demand Forecasts report screen appears with the filters visible.

one	Search Store Demand Forecasts	
	Search Store Demand Forecasts	★ 2 Production Manager
Q Search	Q Filters	
Home	* Item Name: Adv_CDTRMItem11 X Q Site: DTStore1 X Q Site Group Level Name: Q	
Problems	Bucketization: WEEKLY WEEKLY WeEKLY V Date Range: Jul 15, 2022 12:00 AM EDT O to Aug 31, 2022 11:59 PM EE O	
Alerts		Q Search & Clear * Close
Chats		
Switch		
Menus/Favs		

 Select the desired filters and click the Search link. Fields with an asterisk (*) are required.

The search results appear.

Search Stor	e Demand Forecast	S				* 8	_ 0	One Produ	ction Manager	
Q Filters (edit): [Buck	etization: WEEKLY][Site: DTStore1][Item	Name: DTRMitem111][D	late Range: May 1, :	2022 12:00 AM EDT	Aug 20, 2022 11:5	PM EDT]	1			
Forecast Number	Forecast Date	Forecast Quantity	Baseline Forecast Quantity	Promotional Adjust Quantity	Seasonal Adjust Quantity	Waste Quantity	Override 1 Quantity	Override 2 Quantity	Quantity UOM	1
FCSTRMAR101017	Aug 15, 2022 12:00 AM EDT	1	া						Each	
07/25/2022	Jul 25, 2022 12:00 AM EDT	20	10	0	0	10			Each	,
08/01/2022	Aug 1, 2022 12:00 AM EDT	60	30	0	0	30			Each	1
08/08/2022	Aug 8, 2022 12:00 AM EDT	20	10	0	0	10			Each	
08/15/2022	Aug 15, 2022 12:00 AM EDT	60	30	0	0	30			Each	
07/25/2022	Jul 25, 2022 12:00 AM EDT	20	10	0	0	10			Each	
08/01/2022	Aug 1, 2022 12:00 AM EDT	60	30	0	0	30			Each	1
08/08/2022	Aug 8, 2022 12:00 AM EDT	20	10	0	0	10			Each	1
08/15/2022	Aug 15, 2022 12:00 AM EDT	60	30	0	0	30			Each	1
07/25/2022	Jul 25, 2022 12:00 AM EDT	1	1	0	0	0			Each	1
08/01/2022	Aug 1, 2022 12:00 AM EDT	1	1	0	0	0			Each	1
08/08/2022	Aug 8, 2022 12:00 AM EDT	1	1	0	0	0			Each	b



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.
- Click the FilterOptions (²) 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.



one	Buyer Dashboard		2 = + 0 2	Buyer Supply Chain Planner
Q Search		Production Order Failed Milestone		×
A Home		Title * Production Order Failed Milestone Auto Refresh Widget *	Last Refreshed May 26, 2022 @ 1:36 am	
Problems		Do Not Auto Refresh	Refresh Widget Now	Export to CSV
Alerts		Filter Options State Unselect All		8
Chats		Completed Pending		Estimated Behind Completion Completion Date By Date
Switch		Milestone Type Failed ATA		18107:00:00 18107:30:00 84 2022-05- 18108:30:00
Menus/Favs		Failed ETA		
			Reset To Default Apply Change	es

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.



	Create CDT Engine Policy			🖈 🗷 🗙 🚍 Production Manager
in f	PolicyName *			
ie	Basic Advanced			
ms	Plan Start Adjustment			Plan End Adjustment
ms	Planning Bucketization		*	Plan Horizon
s	Planning Mode		•	Planning Scenario
	Production Order States			Historical Order Shipment Adjustment in Days
5	Do Not Write RM Supply			Write Intermediate
•	Write Raw Material Stockout			Enable Aggragation Of Lead Time Lost Sales
	Consider Intermediate Item Demand			Write Production Order
	Consider Freeze Period			Associate Transactions With Site Source
avs	Write Raw Material Consumptions			Carry In Freeze Period Demand
	Include Raw Material Items With No Supply For Allocation Compu	tation		

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 Bucketizatio n	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 Intermediat e 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 Consumptio ns	Check the box if you wish the run to write any raw materials consumed.
Include Raw Material Items With No Supply For Allocation Consumptio n	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 Intermediat e	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.
ls 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.
- Click Menu/Favs > Production Planning > Production Order > Production Order Lead Time References.
 The Production Order Load Time References screen appears

The Production Order Lead Time References screen appears.



ch						
Ļ	Q Filters (<u>edit</u>): [Active?: Yes] Field Name	Model Level	Enterprise	Active?		
ne	Previous Milestone	Production Order		Yes		
	Actual Production Start Date	Production Order	HUB4	Yes		
۱.	Approved On	Production Order	HUB4	Yes		
ems	Creation Date	Production Order	HUB4	Yes		
	Planned Consumption Date	Production Order	HUB4	Yes		
ts	Planned Production Date	Production Order	HUB4	Yes		
	Planned Production Start Date	Production Order	HUB4	Yes		
ts ch /Favs						

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

0700	test Production Order Lead Time Ref O Actual Production Start Date O		
one	Actual Production Start Date	₽ × ≡ 0	Production Manager
Q Search	Model Level: Production Order		
Home	Field Name: Actual Production Start Date Exterprise Name: H084 Active?: 0		
Problems			
Alerts			
Chats			
Switch			
Menus/Favs			
			Update

- 4. Enable or disable the **Active?** field and then click **Update**. A green success message displays.
- 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.



one	test O Production Order Lead Time Ref. O New Lead Time Ref	
One	New Lead Time Ref	~
Q Search		-
A Home	Model Level: Production Order * Field Name: Previous Milestone Finterprise Name: HUB4 Active:	
Problems		
Alerts		
Chats		
Switch		
Menus/Favs		
٢		Create

- 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.
- 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.



Q earch											
	Q Filte	ers (edit): None		1							
me		PolicyName	Planning Bucketization	Planning Mode	Plan Start Adjustment	Plan End Adjustment	Plan Horizon	Planning Scenario	Production Order States	Do Not Write RM Supply	V
lems			Weekly	Un Constrained Demand Translation			40			No	Y
			Daily							No	N
rts			Monthly							No	N
nis -			Monthly	Capacity Constrained Demand Translation	10	10	1,80			Yes	Y
ats			Daily	Capacity And Material Constrained Supply Propagation	20	20	3,65			Yes	Y
_			Monthly	Capacity Constrained Demand Translation	12,34	12,34	10,52			Yes	Y
Switch		Tear (process)	Monthly		12,34	12,34	10,52			Yes	

- 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.



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

C Filters (edit): None					_			
Schedule Group Name	Schedule Name	Status	Last Run Time	Run Immediately	Last Fail Time	Last Failure Reason	Disable Until	Actions
8001	AMS.WorkOrderMil	FAILED	Jun 15, 2022 2:10 AM	Run	Jun 15, 2022 2:10 AM	Task attempted maximum number of timesORA 01795: maximum number of expressions in a list is 1000 Caused By: ORA- 01795: maximum number of expressions in a list is 1000	Edit	Override
8001	AchievementConfi	SUCCEEDED	Jun 15, 2022 12:31 AM	Run		Task expired latest_start_time earlier than Tuesday 14 June 2022 00:37:44 EDT	Edit	Override
8001	AchievementConfi	SUCCEEDED	Jun 15, 2022 4:00 AM	Run		Task expired latest_start_time earlier than Wednesday 1 June 2022 12:30:35 EDT	Edit	Override
8001	AchievementConfi	SUCCEEDED	Jun 15, 2022 1:10 AM	Run		Task expired latest_start_time earlier than Wednesday 1 June 2022 12:30:35 EDT	Edit	Override
8001	AchievementConfi	SUCCEEDED	Jun 15, 2022 1:20 AM	Run		Task expired latest_start_time earlier than Wednesday 1 June 2022 12:30:35 EDT	Edit	Override

The Override Schedule Entry popup appears.

Override Schedule	e Er	ntry					×
RepeatingSchedule:	Day		Minutes				
Schedule:	_	Complex Recurring	🕑 Day	🕑 ^{Ti}	🕑 Timezone		
	×	Every Month	Every Day	01:10	America/New_York (E	ST, EDT)	
			·				
	•						
	4				0	Add	
	1					L	Jpdate Cancel

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.



	Alert Sub	scriptions					e ×	=O	Buyer Supply Chain Admin
	My Subscriptions	Search							
	Q Filters (edit): N	Email Delivery	Secondary Delivery	Author/Organization	Generates Problems	Assigned Roles	Auto-Resolve	Active?	Action
				HUB4User				Yes	Publish Delete Deactivate Problem Settings
				HUB4User				Yes	Publish Delete Deactivate Problem Settings
		skalokhe@onenetwork.c		HUB4User				Yes	Publish Delete Deactivate Problem Settings
				HUB4User				Yes	Publish Delete Deactivate Problem Settings
			abhat@onenetwork.com	HUB4User				Yes	Publish Delete Deactivate Problem Settings
2		abc@onenetwork.com		HUB4User				Yes	Publish Delete Deactivate Problem Settings
		ajadhav@onenetwork.com		HUB4User				Yes	Unpublish Delete Deactivate Problem Settings
s						1			

The Problem Generation Settings popup window appears.

,	ubscriptions		ទ	× = ⁰	Buyer Supply Chain Admin
My Subscrip	tions Search				
Q Filters (ed	lit): None	Problem Generation Settings		×	
🔲 m De		ndu		Active?	
		Generates Problems Auto-Resolve (if checked, the problem	n will be generated in the Resolved state.)	Yes	Publish Delete Deactivate Problem Settings
		Roles Allowed to see problem:		Yes	Publish Delete Deactivate Problem Settings
	skalokhe@onenetwork.c			Yes	Publish Delete Deactivate Problem Settings
				Yes	Publish Delete Deactivate Problem Settings
	abha	100	Accept	Cancel Yes	Publish Delete Deactivate Problem Settings
	abc@onenetwork.com	HUB4User		Yes	Publish Delete Deactivate Problem Settings
	ajadhav@onenetwork.com	HUB4User		Yes	Unpublish Delete Deactivat Problem Settings
					Problem Settings

- 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.

one	Neo Dashboard 🛛 Bookings 🔘 Search Shipments 🔘 Multi Modal	Tendeneel O Search Movements O Atens Subscriptions O New Subscription O
		2 ■ ■ ■ 2 ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■
		Problem Summary
		Reg-mov-21 ship up retest A-Shipment Not C Container Move U
	Confirm Max Mode Are you sure you want to open t	the perspective in full screen mode?
		3 C > Viewing 1-4 of 8 Expert to CSV
		Scheduling Early Delivery Scorecard
		CarrierA EcrierG
		March 0 January 0 ↓

4. Click Yes.

The screen displays without the global sidebar and with an updated heading.

Neo Dashboard							One Network Enterprises
131 203	3 178	3					
lert Summary			8	Problem Summary			8
Carrier Invoice Re	Dock Door Group	Attachment	Invoice	Reg-mov-21	ship up retest	A-Shipment Not C	Container Move U
Carrier Invoice Re 2	20 PCV Capacity Aler 2 SH-Dock Door Gr 18	Document Alert 20 New Attachment 20	Carrier Invoice u 52 Invoice 6	30	10	114	
		TPL-1294 20 Test DocumentAl 20 test doc generate 1	Invoice approved 10 Invoice cancelled 3 Invoice submitte 6 View More	View States	View States	View States	View States Export to CSV
Viewing 1-4 of 1	18		Export to CSV	Scheduling Early Deli	very Scorecard		~
cheduling Early Picku	in Scorecard		R	 CarrierA 	@ C	arrierB	
 CarrierA 		CarrierB		March	O Jar	nuary	0↓
March	0 De	cember	5↑				
				• •	•		
~							

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.
- Click Menu/Favs > Inventory Planning > Configuration > Demand Management Data > New Demand Mgmt Rule.
 The New Demand Mgmt Bule screen appears

The New Demand Mgmt Rule screen appears.

	New Demand Mgmt Rule	🖈 🗗 🗙 🚍 Buyer Suppy Chain Admin
1	Enterprise *	Rule Name *
		٩
	Rule Type *	Data Source Model *
	Active?	Site Organization
	Yes	
	Site	Replacement Site
		٩ 🛛
	Product Group	Item Category
		٩
2	Item	Effective Date
		Q.
s		
		Add a condition for this rule(Optional) Add Condition

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.
ltem	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.

one	er Dashboard O New Demand Mgmt Rule O	D Exper Suppy Chain Admin 🗸
Search Home	Site Product Group	Replacement Site
Problems Alerts	Item	Effective Date
Chats	Condition 1 Condition Field *	Field Value *
Menus/Favs		Add a condition for this rule(Optional) Add Condition Reset Create

- 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.
- Click the New Item Substitution button. The New Item Substitution screen displays.



	Buyer Dashboard	Search Item Substitution	New Item Substitution	٥					
one	New Item Subst	itution				C ×	Buyer	Supply Chain Admin	*
Q Search									
	* Base Item:	Q			Buyer Organization:	Q			
*	* Replacing Item:	Q			Buyer Site:	ପ୍			
Home	* Record Type:	~			Seller Organization:	Q			
	* Start Date:	0			Seller Site:	Q			
Δ	* End Date:	0			Precedence:				
Problems	* Substitution Key:	P							
	Reason:								
	Exclude:								
Alerts	Allocate Amount Percentage:								
	Max Quantity:								
	Use Base Inventory:								
Chats	Balance on hand code:								
	Active?:	2							
a 🖻									
Switch									
≡									
Menus/Favs									
									Create

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.
SellerSiteOrganizatio n	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.



	Home	Search Policies	0			
	Search Policies					Enterprise Admin
	Explorer	Go To Tab:	~	Policy Name:		
	Q Filters (edit): None	GO TO TAD:	•	Policy Name:		
	ONElValueChain(ValueChain) rplCompanyA(Enterprise)	+ ASN Advance	d Replenishment Engine	Alerts Allocati	on Engine AssembleStateConfig AssetStatusConfiguration Attributes	BillOfMaterials Bucketized Order Forecast
	🖻 🖢 rplCompanyA(Organizatio		a repletion intere engine	- Meres Milocati	on engine resentateering resectateeringaration ritanaates	Bucketized Order Porecast
	promoCustomerSite1(S		Value	Inherited Value	Description	
IS	promoVendorPlant promoVendorWarel	Bucketized Forecast Po	Icy COLLABORATION		Policy to decide the way we handle bucketized order forecast in engine	
	E profCmpADC1(Site)		false 🍠			
	- PicmpADC1-rpiCm				Notify User via Email on BOF Collaboration	
	 Protection Protection Protection 		true 🖉		When set to true this will allow default split logic to be applied when BOF records are created	
	- E rpiCmpADC1-rpiCm				on BOF engine run.	
	- PICmpADC1-rpICm		es faise 🖉		If this flag is on then Buyer or Vendor will have to set the proposed request and promise	
	- PicmpADC1-rpiRes				quantities first.	
	- piCmpADC2-rpiCm					
	 Protection Protection Protection 					
_	- Protopadoc-rpicm					
8	- ProvenAPwdDC1-rpl					
	- ProvenAFwdDC11-rp					
	- Provena					
	 Providence Providence					
rs	- Provencewabc1-rpl					
	Show More					
	🖽 🖿 rplCmpADC2(Site)					
	 PicmpADC2-rpiCm 					
	- piCmpADC2-rpiCm					
	– Protect - P					
	- PicmpADC3-rpicm					
	< →	Viewing 1-4 of 4				

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

Policy Value		
	Level: rplCompanyA(Enterprise)	
	Name: Email Notification Value:	
		Save Delete Close

- 5. Check or uncheck the **Value** checkbox.
 - False (unchecked) to turn off the notifications
 - True (checked) to turn them on
- 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

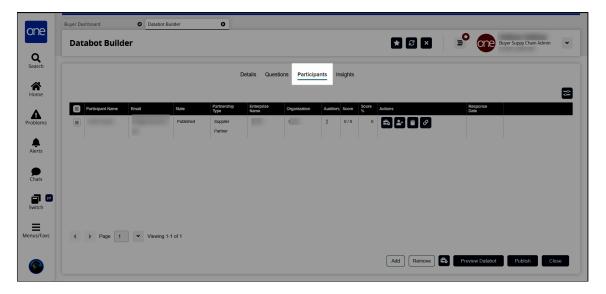
Databot creators and participants can add auditors to a databot to audit participant responses. Each participant's response can be assigned to one or more auditors.



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:

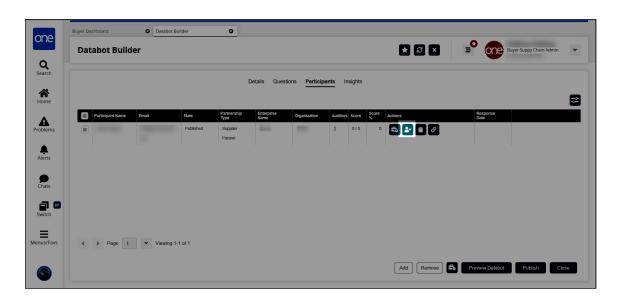
- 1. Log in to the ONE system.
- Create and publish a With Audit databot. See the "Creating a Databot Using the Databot Builder" section in the Online Help for more information.
- 3. To add auditors for a participant, click the **Participants** tab.



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.

Dokup New Auditors					
Participant Name	Contact Name Email	Partnership Type	Enterprise Name	Organization	Partner Organization
, r	John Supplier	Supplier Partner	1		
	John Supplier	Supplier Partner	1		
	John Supplier	Supplier Partner			
	John Supplier1	Supplier	1		

- 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.



okup New Auditors		
First Name *	Last Name *	
First Name	Last Name	
Email *		
Email		

- 7. Enter the **First Name**, **Last Name**, and **Email** of the person you want to add as an auditor.
- 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.
- 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.



Databot Builder			×	Buyer Suppy Ch	ain Admii
Databot Saved Successfully.		_		_	
	Det	ails Questions Participants Reviewers Invite			
Name *		Description		Databot Type *	
test				With Reviewer	
Expiry Date *		Effective Date Range			
Aug 25, 2022			1 🗰 ta	•	
State		Is Active *		Support Score *	
New		Yes	•	Yes	
Use As Template *		Allow Multiple Responses *		Allow Revision *	
No	•	Yes		Yes	
Avg Time To Complete (Minutes)		Reminder Post Publish (Days)		Recurring Databot *	
				No	

Adding Reviewers

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

one	Buyer Dashboard	Databot Builder	0			
	Databot Builder				* 2 ×	Buyer Suppy Chain Admin 🗸
Q Search						
*			Details Questions	Participants Reviewers Invite		
Home	Participant Name	Email		Enterprise Name	Organization	Response Date
Problems						
Alerts						
				No Data		
Chats						
Switch						
Menus/Favs						
9						Add Remove Preview Databot

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



One Network Enterprise	∋s™
------------------------	-----

okup					
	Participant Name	Contact Name	Email	Partnership Type	Enterprise Name
	F DataAdmin		testBO@	Internal	HUB4
	BuyerUser	-		Internal	HUB4
	Admin		testBO@4	Internal	HUB4
	IntegUser		testBO@+	Internal	HUB4

- 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:

			F	Reviewer Question
Q#	Question Type *		Group	
		•		+
Question Title *				

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

Add Question Edit Option			Reviewer Question
Q# Question Title *	Question Type * Matrix Dynamic	Group	+
Question Title *	Question	n Type *	~ + ×
			Clear Save Question

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.



Name	State	Description	Expiry Date	Start Date	End Date	Questions	Participants	Reviewers	Linked Model Type	Creation Date	Actions
ReviewTest101 [Reviewer]	Partially Published		05/01/22 11:59 pm IST			2	2	2		03/28/22 5:34 pm IST	0
ReviewTest 28	New		05/01/22 11:59 pm IST			0				03/28/22 5:34 pm IST	0
ReviewTest	New	1	03/31/22 11:59 pm IST			0				03/28/22 5:21 pm IST	0
ReviewerTest12	New		04/24/22 11:59 pm IST			1				03/28/22 3:40 pm IST	0
Rev28040001	Partially		04/30/22			2	2	2		03/28/22 3:28	0

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

ReviewTest101					×	Ξ	Buyer Suppl	ly Chain Admin		~
			Details	Participants						_
Par	rticipant Name	Email	State	Partnership Type	Enterprise Name	Organization	Score	Score %	Actions	Response Date
SUI	P6-Partner	-	Responded	1	SUP6	SUP6			0	03/28/22

- 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.
- 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.



Peri	formance Scorecard Config		* 8	Buyer Sup	ply Chain Adm
Com	ponents Ranking Policy				
•	Scorecard Group Order Type None All			Q Search	
	🔗 KPI Name	🕗 Description	Formula		🔗 Weig
	Buyer Accuracy Percent				
	Order Fill Rate				
	Order In Window Delivery Percent				
	Order In Window Delivery Percent (By Quantity)				
	Order On time Delivery Percent				
	Order On time Delivery Percent (Against Original)				
	Order On time Delivery Percent (By Quantity)				
	Order On time Delivery Quantity Percent (Against Original)				
	Total Component Weightage		Total	component weightage must equal 1009	6
	> Page 1 Viewing 1-17 of 17		۲	Delete Reset Add N	ew KPI

- 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.

Edit Formula		×
Formula		
		Search
Field References	Field Name	Description
OMS	RequestQuantity	Order Requested quantity for the day
OMS	PromiseQuantity	Order Promised quantity for the day.
OMS	AgreedQuantity	Order Agreed quantity for the day
OMS	OriginalRequestQuantity	Total Original Request Quantity.
OMS	OriginalPromiseQuantity	Total Original Promise Quantity for that day.
OMS	ShippedQuantity	Total Shipped quantity for the day.
0.00		
< > Page 1	 ✓ Viewing 1-25 of 158 	Save



- 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.

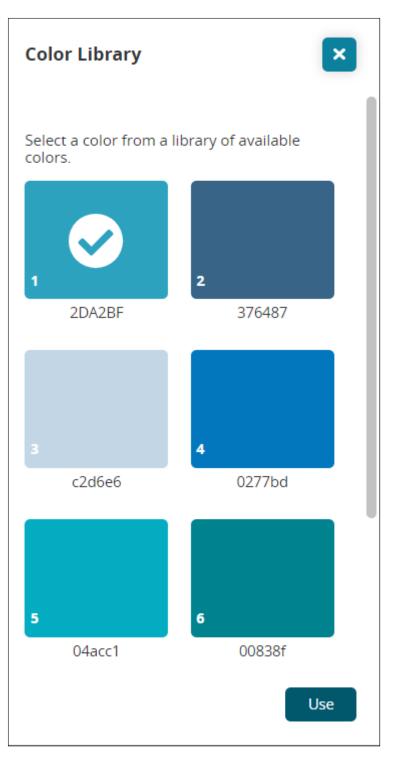
Complete the following steps to create a new ranking policy from the Performance Scorecard Configuration screen:

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.

Buyer Dashboard Performance Scorecard	ormance Scorecard Config d Config	★ 🖉 × 😑 Buyer Supply Chain Admin ♥
Components Ranking Policy	<u>y</u>	
Home Max Range	🖉 Min Range	Range Color
A Doblems	100	80 60
♠ E	60	40
Chars	40	0
us/Favs		
9		Delete Reset Add Rank Seve

- 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.



- Click your preferred color.
 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.

Buyer Da:	shboard	Performance Scorecard Conf	ig 🛛 Audit Trail: Formula Audit	0			
Aud	Audit Trail: Formula Audit				e ×	⊒ ^{C2} Buj	yer Supply Chain Admi
KPI Name		Fleid	Old Value	New Value			
		Action: Update Formula User:					
	uracy Percent	Weight	0	20			
Vendor acc	curacy Percent	Color	#366183				
Order InW	indow Delivery Percent	Weight	0	20			
Order InW	indow Delivery Percent	Color		#F19500			
Order InW (By Quanti	indow Delivery Percent ty)	Weight	0	20			
Order InW (By Quanti	indow Delivery Percent ty)	Color		#229978			
Order Onti	ime Delivery Percent	Color	#2DA2BF	#366183			
Order Onti	ime Ship Percent	Weight	20	0			
Order Onti	ime Ship Percent	Color	#F19500				
Order Onti Quantity)	ime Ship Percent (By	Color	#F19500				
Order Pror	mise Cut Percent	Color	#F19500				
Shipment	Accuracy Percent	Color	#229978				
Shipment (Original)	Accuracy Percent (Against	Color	#229978				
Order Fill F	Rate	Color	#D9443F	#2DA2BF			
Date: Jun	27, 2022 5:23 AM MDT	Action: Update Formula User: H	UB4User				
Order Fill F	Rate	Weight	0	20			
Order InW (By Quanti	indow Delivery Percent ty)	Color	#229978				
Order Ont	ime Delivery Percent	Weight	0	20			



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.
- 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.

one	Buyer Dashboard O Item C	atalog O							
	Item Catalog			🛨 😥 🗙 😑 Buyer Supply Chain Admin 🗸					
Q Search									
*	\$	Q Search		Search	= = = \Xi				
Home	Search Results				Sort By * Price: Lowest to Highest				
Problems									
Alerts									
	ItemCatalog1	ltemCatalog5	ItemCatalog15	ltemCatalog25	Catalogitem25				
Chats	catalog- this the the description on the item	catalog	catalog	catalog	catalog				
_ ■	US\$5.00 - US\$10.08	US\$6.08	US\$6.08	US\$6.08	US\$6.08				
Switch	Add To Cart	Add To Cart	Add To Cart	Add To Cart	Add To Cart				
=	Available from 5 vendors	Available from 4 vendors	Available from 4 vendors	Available from 4 vendors	Available from 4 vendors				
Menus/Favs									
	< > Page 1 Viewin	ng 1-20 of 25							

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



Item Catalog		😧 😰 🗶 😑 Buyer Supply Chain Adm					
Search Results Filter	× Q Search		Search	= = =			
Availability				Sort By * Price: Lowest to Highes			
More than a Year				Price: Lowest to Hignes			
Price							
Below \$25							
\$25 - \$50							
\$50 - \$100							
\$100 - \$200	ltemCatalog5	ItemCatalog15	ltemCatalog25	Catalogitem25			
Brand	catalog	catalog	catalog	catalog			
ALLELECTRICAL	US\$6.08	US\$6.08	US\$6.08	US\$6.08			
	Add To Cart	Add To Cart	Add To Cart	Add To Cart			
MECHLIGHT	Available from 4 vendors	Available from 4 vendors	Available from 4 vendors	Available from 4 vendors			

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

-	Search									
Search Results				Sort By * Price: Lowest to Highe						
				Price: Lowest to Highest Price: Highest to Lowest						
ItemCatalog1	ItemCatalog5	ItemCatalog15	ItemCatalog25	Catalogitem25						
catalog- this the the description on the item	catalog	catalog	catalog	catalog						
US\$5.00 - US\$10.08	US\$6.08	US\$6.08	US\$6.08	US\$6.08						
Add To Cart	Add To Cart	Add To Cart	Add To Cart	Add To Cart						
Available from 5 vendors	Available from 4 vendors	Available from 4 vendors	Available from 4 vendors	Available from 4 vendors						

- 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.



	*	Q Search		= = = ⁰		
	Search Results			Search	Sort By * Price: Lowest to Highe	
	ItemCatalog1	ltemCatalog5	ItemCatalog15	ltemCatalog25	Catalogitem25	
	catalog- this the the description on the item	catalog	catalog	catalog	catalog	
	US\$5.00 - US\$10.08	US\$6.08	US\$6.08	US\$6.08	US\$6.08	
3	Add To Cart	Add To Cart	Add To Cart	Add To Cart	Add To Cart	
	Available from 5 vendors	Available from 4 vendors	Available from 4 vendors	Available from 4 vendors	Available from 4 vendors	
	Compare 🔿	✓ Compare	■ Compare →	■ Compare →	■ Compare →	

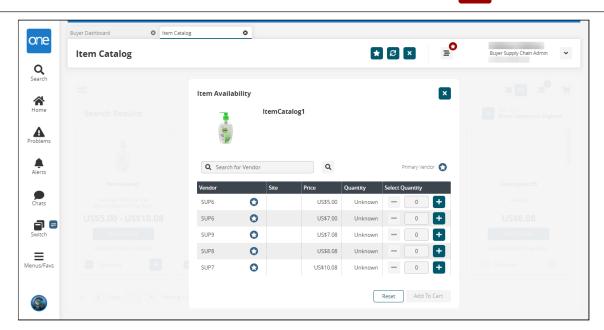
The Compare Items screen appears.

one Q	Buyer Dashboard Item Catalog	🗙 🔁 🗙 🚍 Buyer Supply Chain Admin 🗸
Search Rome	Back Q Search Compare Items	Search :: • • •
Problems	×	×
Alerts Chats		
Switch	ItemCatalog1	ltemCatalog5
Menus/Favs	US\$5.00 - US\$10.08 Add To Cart	USS6.08 Add To Cart
		Remove All Items

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.

one	Buyer Dashboard Item Catalog	Catalog	* 8 ×	Buyer Supply Chain Admin				
Q Search	2	Q Search		»	Shopping List	×		
Home	Search Results				ltemCa	talog1		
Problems	(e)				-	2 +		
	ltemCatalog1	ItemCatalog5	ItemCatalog15	h				
Chats	catalog- this the the description on the item	catalog	catalog					
a e	US\$5.00 - US\$10.08	US\$6.08	US\$6.08	1				
Switch	Add To Cart	Add To Cart	Add To Cart					
=	Available from 5 vendors	Available from 4 vendors	Available from 4 vendors	Availa				
Menus/Favs	Compare >	Compare >	Compare >	Con				
	< > Page 1 View	ing 1-20 of 25			Create Order	US\$10.00		

- 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.



Bu	iyer Dashboard	Item Catalog		O New R	equisition	۵						
	New Requisi	tion						ଞ	≡	Buyer Supp	ly Chain Admin	~
h	ew Requisition									L ^B DD Correc	lard Template 🔻	þ
	Requisition	er:				State:				PR Stand	ard template	
		rg: InternalOrg ⊻ HUE	14		* F	equisition Type:	Requisition	¥ 😣				
e	* Requested Delivery Da		<u>ا</u>			Requesting Org:						
	* Curren		~			Requested By:	HUB4User					
ms	Additional Cos				Requisition Management Org:							
	Total Amou					Buyer Agents:						
	Ext Requisition Numb					Creation Date:						
s	Is Emergen	<u> </u>				Expiry Date:		1 C)			
ſ	ines Billing Info	Notes & Attachments	References	Documents	Holds Links							¢
	Line Numbe	r 🛃 Line Type	2 Item	State	ピ 🕻 ShipTo			🔊 🖁 Quantity	🕑 Vendor	😰 Ship From	Contract Info	
s 🗍	1	Product	temCatalog1	Draft				2	SUP6			
												_
h												
Favs												
4											O Adr	id Li
									_			
									Pop	oulate Current BOH Ad	d Line(s) Save S	ul

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.
- 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.



2	SSO Store Orde	rs	* 8		letail Buyer Planner		
irrch me lems erts	Event Name: * Store Name: * Request Ship:	Draft Planned Planned Intransit Select All TryICmpA5core1 - rpICmpADC1 O 29/06/2022 12:00 am EDT O 03/08/2022 12:00 am EDT O O	Order New York	Q	۹		
1 Itch	Expedite: User Preference:	ItemswithoutFromSite x		Q Search	🕹 Clear 🗿 Add Filter 🗙 Close		

 Click the picker tool to select the respective preference items in the User Preference field.

The Entity Group popup appears.

		ilters (<u>edit)</u> : None								
me	Entity Group Type	Active	Owner Name	Enterprise						
mswithoutFromSite	Product	Yes	rplCmpAUser	rplCompanyA						
traattribute	Product	Yes	rplCmpAUser	rplCompanyA						
r	nswithoutFromSite	nswithoutFromSite Product	nswithoutFromSite Product Yes	nswithoutFromSite Product Yes rpICmpAUser	nswithoutFromSite Product Yes rpICmpAUser rpICompanyA	nswithoutFromSite Product Yes rpiCmpAUser rpiCompanyA				

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.



earch												2
A Home	Code	Ent	erprise	User Name	First Name	Last Name	Email	Create Date	Active?	Code Type	is Primary	S
A		н	IB4	HUB4User	HUB4User	HUB4User		Jul 24, 2019 7:10 am EST	Yes	Buyer Planner	Yes	,
blems		н	JB4	HUB4User	HUB4User	HUB4User		Nov 18, 2021 4:53 am EST	Yes	Buyer Planner	No	,
erts		н	/B4	HUB4MidUser	HUB4MidUser	HUB4MidUser		May 10, 2022 5:26 pm EDT	Yes	Buyer	No	
		HU	/B4	HUB4DataAdmin	HUB4DataAdmin	HUB4DataAdmin		May 6, 2022 8:31 pm EDT	Yes	Buyer	Yes	
hats		н	JB-4	HUB4BuyerUser	HUB4BuyerUser	HUB4BuyerUser		May 12, 2022 8:52 am EDT	Yes	Buyer Planner	No	
nitch												
is/Favs												

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



ssign User Code			×
User Code *			
Code Type *			
			~
User *			
			Q
Active?			_
Yes			~
ls Primary			
No			~
Create Date			
May 10, 2022 5:07 pm	EDT	苗	0
	Reset	Assig	n

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.
- 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.
- 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.
- 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.

Reassign Code Conflict

Selected user code must not be primary in order to reassign to a different user. Please update user code details.

3. Click the Secondary User tab.

Primary User Secondary User			
User Code			
		Code Type	
OS		Buyer	~
User *		Reassign Date	
	٩	Jun 27, 2022 7:50 pm EDT	₿ 0
Secondary Effective Start Date *		Secondary Effective End Date *	
	₩ 0		₿ 0

- 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.
- 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:

- 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.
- 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.

- <u>Viewing Customer Scorecards(see page 92)</u>
- <u>Configuring Customer Scorecards(see page 0)</u>

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.

one	Vendor Dashboard O Customer Scorecard O	🖈 🤣 🗙 😑 Vender Supply Chain Admin 🗸
Q Search	Customer Scorecard	🖈 🤪 🙁 😑 Vendor Supply Chain Admin 💌
Home	Q. Filters * Year: * Wear: * Month: 6 Buying/7g: Order Type:	
Problems	over type.	Q Search of Clear x Close
Alerts		
Chats		
Switch		
Menus/Favs		
٢		

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.



Ve	endor Dashboard	Custome	er Scorecard	Customer Scorecard Overview				
	Customer S	corecard				* 8 ×	∍ °	Vendor Supply Chain Admin
	Q Filters (edit): [Year:	20223[Month: 6]						
	Customer	BuyingOrg	From Site	From Site Description 🖽 From Site Or	g SellingOrg	Score	Order Type	
	HUB4	HUB4			SUP6	14	Purchase Order	
s								
=								
-								
vs								
	Viewing 1-1 of 1							Exp

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 corporatelevel scorecard.)

The Customer Scorecard Overview screen appears in a new tab.

one	Vendor Dashboard O Customer Scorecard	Customer	Scorecard Overview	0			
One	Customer Scorecard Overview					🚼 💋 🗙 😑 Vendor Supply Chain Admin	*
Q Search							_
*	Cu	istomer: SUP6	- HUB4(HUB	4) - Corporate			
Home		• • • •					
Problems		Custome How does yo	er Scorecard f our score stack up?	or June, 2022	14	Score Components How is your score determined?	
Alerts		Score	14			19% 19%	
Chats		Last Month	16			10% Charles Accuracy Ferent Charles Accuracy Ferent Charles Accuracy Ferent Charles Accuracy Ferent Charles Accuracy Ferent Charles Accuracy Ferent	
		Score	Grade	Customer Count	% of Vendors	Total Measures: 100%" Code: Code: Ship Percent	
Switch		100-90	Bad Not Good	0	0%	Conder Promise Cut	
		80-70	Good	0	0%	10% Chipment Accuracy Percent	
Menus/Favs		70-60	Very Good	0	0%	C Vendor accuracy Percent	
wienus/ravs		60-0	Great	1	100%	- 20.9	
						2079	
۲							

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.



Custome	r Scorecard De	tails			🗙 🕄 🗙	≡	Vendor Supply Chai	n Admin
Q Filters (edit):	[Year: 2022][Month: April]							
SellingOrg	Score	Previous Score Year	Month	Order Fill Rate	Order On-Time Delivery	Vendor Accuracy	Order On-Time Ship	Formula
SUP6		17 11 2022	April	23	3	0	2	23
3								
5								

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.

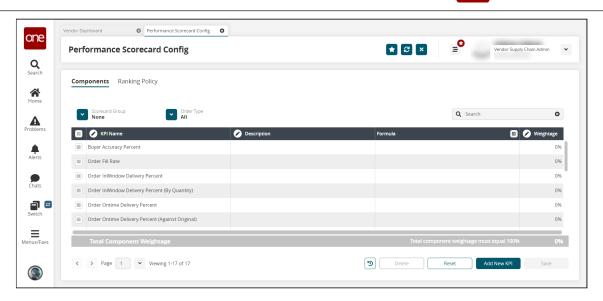
O Filters (edit):	Order Type:	Purchase Order1	Year: 202211Month	APRIL][Measure Name	• Order Fill Rate1					
Order Number	Line/ Schedule	Vendor	Buyer	Seller Organization	Ship From Site	Ship To Site	Line Type	Item	Item Description	Order Sta
ONE#1887759	001/1/1	SUP6	HUB4	SUP6	SUP6 DC	SUP6 DC	Product	SK_Item1	SK_Item1	Closed
T-221750-001	001/1/1	SUP6	HUB4	SUP6	SUP6 DC	SUP6 DC	Product	omsvmipoitem1	omsvmlpoitem1	Closed
T-221749-001	001/1/1	SUP6	HUB4	SUP6	SUP6 DC	SUP6 DC	Product	SK_Item1	SK_Item1	Closed
ONE#1889581	001/1/1	SUP6	HUB4	SUP6	SUP6 DC	SUP6 DC	Product	SBHUB4Item1	SBHUB4Item1	Closed
ONE#1890670	001/1/1	SUP6	HUB4	SUP6	SUP6 DC	SUP6 DC	Product	SBHUB4Item1	SBHUB4Item1	Closed
ONE#1899063	001/1/1	SUP6	HUB4	SUP6	SUP6 DC	SUP6 DC	Product	Ajitem1	desc	Closed

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.



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----------------------	-------

Edit Formula		×
Formula		
		Search
Field References	Field Name	Description
OMS	RequestQuantity	Order Requested quantity for the day
OMS	PromiseQuantity	Order Promised quantity for the day.
OMS	AgreedQuantity	Order Agreed quantity for the day
OMS	OriginalRequestQuantity	Total Original Request Quantity.
OMS	OriginalPromiseQuantity	Total Original Promise Quantity for that day.
OMS	ShippedQuantity	Total Shipped quantity for the day.
< > Page 1	✓ Viewing 1-25 of 158	Save

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

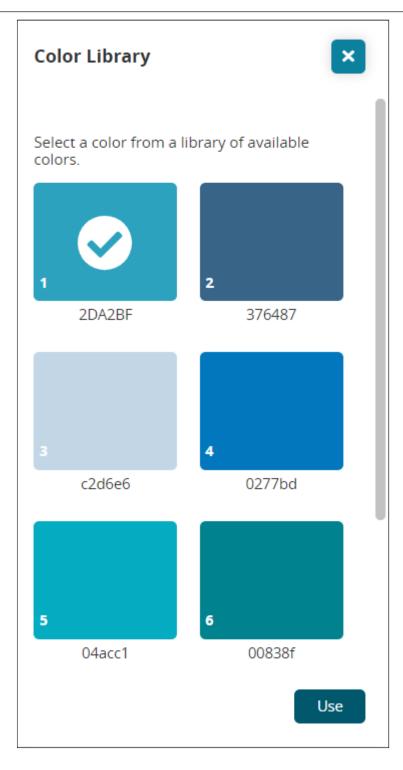
1. From the Performance Scorecard Config screen, click the **Ranking Policy** tab. The Ranking Policy tab appears.



Performance Scoreca	rd Config		or Supply Chain Admin
Components Ranking Poli	<u>.</u>		
Max Range	🧭 Min Range	Range Color	
	1,00	80	
	80	60	
	60	40	
	40	20	
	20	0	

- 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.
- 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.

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- 10. Click your preferred color.
- Click the Use button. The slide-out closes and the color updates.
 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.
- 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.

Vendor Dashboard	Customer Scorecard	Customer Scorecard Overview	vendor scorecard Details	Performance Scorecard Config	Audit Iraic Formula Audit	0		
Audit Trail: Form	nula Audit					8 ×	Vendo	or Supply Chain Ac
KPI Name	Field	Old Value	New Value					
Date: Jul 13, 2022 1:04 AM Acti								
Buyer Accuracy Percent	Weight	100	10					
Order InWindow Delivery Percent	Color		#D9443F					
Order InWindow Delivery Percent (By Quantity)	Color		#D9443F					
Order Ontime Delivery Percent	Weight	0	10					
Order Ontime Delivery Percent	Color		#F19500					
Order Ontime Ship Percent	Weight	0	10					
Order Ontime Ship Percent	Color	#2DA2BF	#229978					
Order Promise Cut Percent	Weight	0	10					
Order Promise Cut Percent	Color	WF19500	#366183					
Order Received vs Shipped Cut Percent	Color		#D9443F					
Shipment Accuracy Percent	Weight	0	20					
Shipment Accuracy Percent	Color	W229978	WBCBCBC					
Vendor accuracy Percent	Weight	0	20					
Vendor accuracy Percent	Color	#366183	#990000					
Order Fill Rate	Weight	0	10					
Date: Jun 27, 2022 5:12 AM Act	ion: Update Formula User: SU	NoUser						
Buyer Accuracy Percent	Weight	90	100					
Date: Jun 27, 2022 5:10 AM Act	Ion: Update Formula User: SU	Y6User						
Order Ontime Delivery Percent	Weight	10	0					

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.
- 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.
- Click the Search link. The Customer Scorecard report displays.

one	Vendor Dashboard	Custome	r Scorecard	Customer Scorecard Overview					
	Customer	Scorecard			1	* 8 ×	_	Vendor Supply Chain Admin	~
Q Search	Q Filters (edit): [Yea	ar: 2022][Month: 6]							
Home	Customer HUB4	BuyingOrg	From Site	From Site Description 🔳 From Site Org	SellingOrg		der Type		- 1
	HUB4	HUB4			5096	U 14 PU	irchase Order		
Problems									
Alerts									
Chats									
a 8									
Switch									
Menus/Favs									
								_	_
	Viewing 1-1 of 1							Expo	rt to CSV

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.

one	Vendor Dashboard	Customer Scorecard	Custo	mer Scorecard Overview	Customer Scorecard De	etails O Customer Sco	recard Schedule R 😫		
On C	Customer Sco	precard Details				★ 8 ×		Vendor Supply Chai	n Admin 👻
Q Search									
*	Q Filters (edit): [Year: 20 SellingOrg	22][Month: April] Score Previous	Score Year	Month	Order Fill Rate	Order On-Time Delivery	Vendor Accuracy	Order On-Time Ship	Formula1
Home	SUP6	17	11 2022	April	23	3	0	2	23
Problems									
Alerts									
Chats									
Switch									
Menus/Favs	1								
۲	Viewing 1-1 of 1								Export to CSV

 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.

O Filterer (adia):	Korder Tures I	Burchaso Orderd	Diago 202200 Aparts	: APRIL][Measure Nam	o Order Fill Patel					
Order Number	Line/ Schedule	Vendor	Buyer	Seller Organization	Ship From Site	Ship To Site	Line Type	item	Item Description	Order Stat
ONE#1887759	001/1/1	SUP6	HUB4	SUP6	SUP6 DC	SUP6 DC	Product	SK_Item1	SK_Item1	Closed
T-221750-001	001/1/1	SUP6	HUB4	SUP6	SUP6 DC	SUP6 DC	Product	omsvmipoitem1	omsvmipoltem1	Closed
T-221749-001	001/1/1	SUP6	HUB4	SUP6	SUP6 DC	SUP6 DC	Product	SK_Item1	SK_Item1	Closed
ONE#1889581	001/1/1	SUP6	HUB4	SUP6	SUP6 DC	SUP6 DC	Product	SBHUB4Item1	SBHUB4Item1	Closed
ONE#1890670	001/1/1	SUP6	HUB4	SUP6	SUP6 DC	SUP6 DC	Product	SBHUB4Item1	SBHUB4Item1	Closed
ONE#1899063	001/1/1	SUP6	HUB4	SUP6	SUP6 DC	SUP6 DC	Product	AJItem1	desc	Closed

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.
- 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.
- Click the Search link. The Vendor Scorecard report displays.



Vendor So	orecard					🗶 ខ 🗴	_	Buyer Supply Chain Adi
Q Filters (edit):	/ear: 2022][Month: 4][Vendor: SUP	6 - Vendor][Site: H4-F1]						
Vendor	Vendor Description	SellingOrg	Site	Site Description	From Site	Score	BuyingOrg	Order Type
SUP6	Vendor	SUP6	H4-F1	H4-F1			10 HUB4	Purchase Order

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

one	Buyer Dashboard 🛛 Vendor Scorecard	O Ve	ndor Scorecard Overview	0						
	Vendor Scorecard Overview						* 2 ×	= O	Buyer Supply Chain Admin	*
Q Search										
Home	,	/endor: SUP6(SUP6) - HUB4 - H4-	F1						- 1
		Vendo	r Scorecard for April,	, 2022	1	0				- 1
Problems		How does	s your score stack up?		1	0				- 1
Alerts										- 1
-		Vendor Score								- 1
Chats		Last Month	35							
a 🗉		Score	Grade	Vendor Count	% of Vendors					
Switch		100-80	Excellent	0	0%					
111		80-60	Good	0	0%					
=		60-40	Needs Improvement	0	0%					
Menus/Favs		40-20	Recovery Required	0	0%					
		20-0		4	100%					
S										*

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.

	corecard Deta										8 × 3	Buye	r Supply Chain Admin
Q, Filters (edit):	Year: 2022]Max Score: 20]M	forth: April[Site: H4-F1]			_					_	_		
Vendor	Site	From Site	Vendor Description	Vendor Organization	BuyingOrg	Score	Previous Score	Year	Month	Order On-Time Delivery	Order On-Time Delivery Vs Orig	Order Received Vs Shipped Cut	Order On-Time Delive By Qty
SUP10	H44F1		Wandor	SUP10	HUB4	0		2022	April	0	0	0	0
SUP110	H4-F1		SUP105 org	SUP105	HUB4	0		2022	April	0	0	0	0
SUP6	144-61		Vendor	SUP6	HUB4	10	35	2022	April	5	6	77	11
			Wandor	SUP8	HUB4	0		2022	April	0	0	0	0
SUP8	14681												
SLP8	14683												

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.

													_	_	-		
Q, Filters (edit):	[fear: 2022]]	Aorth: April@Mea	sure Name: Order O	ntime Delivery Vs C	rig[Site: H4-F1]								1	1	1	1	
Order Number	Line/ Schedule	Vendor	Buyer Org	Seller Org	Ship From Site	Ship To Site	Line Type	Item	Item Description	Order State	Order Type	Delivery Schedule State	Request Quantity	Promise Quantity	Agreed Qty	Received Qty	Shipped Qa
Training_Task10	001/1/1	SUP6	HU64	9JP6	SUP6 DC	H4-F1	Product	Training_item	Training_item	Closed	Purchase Order	Closed	700	800			
ONE#1906848	001/1/1	SUP6	HU84	SUP6	SUP6 DC	H4F1	Product	SK_Item1	SK_Item1	Closed	Purchase Order	Closed	100				
ORDPO-108	001/1/1	SUP6	HU84	SUP6	SUP6 DC	H4F1	Product	H4IntegPOltem1	H4IntegPOltern1	Closed	Purchase Order	Closed	60				
ONE#1906897	001/1/1	SUP6	HU84	SUP6	SUP6 DC	H4F1	Product	SK_Item1	SK_Item1	Closed	Purchase Order	Closed	10				
ONE#1906487	002/1/1	SUPG	HUB4	SUP6	SUPG DC	H6F1	Product	Ajitem2	responded desso	Closed	Purchase Order	Closed	100	100	100		
ONE#1906755	001/1/1	SUP6	HUB4	SUP6	SUP6 DC	H4F1	Product	Ajitem1	desc	Closed	Purchase Order	Closed	10				

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.



ne	uyer Dash	board	O AVL Policies	0			-
	AVL	Policies			l	★ @ × = ⁰	Buyer Supply Chain Admin 🗸
λ arch	Q Filter	s (edit): [Show Inactivat	ted: No]				
		AVL Details Link	Organisation	Vendor Organization	Managing Organization	Order Mgmt Org	Item
me		Details	HUB4	OnBoardSupp601			Hub4FGitem101
lems		Details	HUB4	OnBoardSupp604			Hub4FGitem101
ts		Details	HUB4	OnBoardSupp605			Hub4FGitem101
ts		Details	HUB4	HUB4			Hub4FGitem101
th 🔁		Details	HUB4	CoMan1			Hub4FGitem101
/Favs		Details	HUB4	CoMan2			Hub4FGitem101
							•

- 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.

ALL Details Imaging operations: HUBB Imaging operations: HUBB <th>Buyer Dashboard</th> <th>AVL Policies AVL De AVL De</th> <th>etails O</th> <th></th> <th></th> <th></th>	Buyer Dashboard	AVL Policies AVL De AVL De	etails O			
Buger's Item: HubdFGleen101 Site: H=0C1 Managing Site: Sociage Site: Util: Price Per: Price Per: Details Contact Procurement Transportation Wit: Require VM Order Approvat: Contagriment: Micesone Receipt: Contact Procurement Private Active Code: Order Ship Confirm. Edges Provide Active Code: Provide Active Code:	AVL Details			Ø	× = ⁰	Buyer Supply Chain Admin
Skip HoR: Skip Fore Managing Org Orgen Skip Storage Skip Description: Storage Skip Orgen Skip Price Per Is Drop Skip: Details Contact Price Per Is Drop Skip: Details Contact VII: Auto Receipt: Require VMI Order Approval: Auto Receipt: Invoice Active Code Auto Order Skip Contact Order Skip Contact Kilke On Ready For PeckUp or PeckUp Auto Order Skip Contact Kilke On Shipp and Control Order Skip Contact Skip Fore Receipt: Ime Bucket: Mono On Shippe and Control Auto Order S Per Time Bucket: Min: Mase: Consignment	Buying Organization: HUB4		Vend	dor Organization: OnBoardSupp601		
Managing Org Q Storage Stir: Q Unit Price Active I Unit Price Borg Stir: Details Contact: Procurement: Tansportation VM: Active Receipt: Beguine VMI Order Approvat Active One Receipt: Invice Active Code: Active One Starberg Invise Active Code: Active One Receipt: Invise Active Code: Active On Receipt: Invise Active On Shipp Active On Receipt: Active On Shipp Active On Shipp Active On Shipp Active On Sh		m101				
Storage Site: Active: Active:				· · ·	•	
Unit Price Milestone Process Q Price Per: Is Drop Ship: Is Drop Ship: Details Contact Procurement Transportation Wit: Auto Receipt: Is Drop Ship: Require VMI Order Approval: Auto Receipt: Consignment Auto Receipt: Immotic Active Code: V Order Lead Time, Days: Auto O Receipt: Immotic Active Code: V Promise QP Iderance, March On Receipt: Auto Receipt: Auto O Receipt: Auto Con Ship Contact Active On Ship: Auto Receipt: Auto Con Ship Control Lead Time, Days: Auto Con Ship Contact Active On Ship Contact Auto Con Ship Contact Active On Ship Contact Auto Contine Layer Mode: Orders Per Time Bucket: Min: Marc Orders Per Time Bucket: Min: Marc						
Price Per is Drop Ship:	Unit Price	u	м		e	
Details Contact Procurement Transportation Wit Auto Receipt: Auto Receipt: Require VMI Order Approvat: Consignment: Auto Close On Receipt: Torder Ship Confirm Eductive Code V Auto PO Ack Mode: Order Lead Time, Days: Marce Auto Ack more to Receipt: V Order Ship Confirm Eductive Code V Auto Ack more to Receipt: Promise Ryty Tolerance to Active On Receipt: V Active On Ship Confirm Eductive Tolerance to Auto Acknowledge Tolerance, Days: V Promise Ryty Tolerance to Active On Sprigment Confirm Orders Per Time Bucket: Min: Marc: Consignment Orders Per Time Bucket: Min: Marc: Marc: V					~	
Consignment Auto Close On Receipt: Imovice Active Code Auto PO Ack Mode: Order Lead Time, Days: Attive On Receipt: Promise Qry Tolerance to, Active On Receipt: Active On Ship Auto Ack on Time Laped Mode: Time Bucket: Active On Ship Active On Ship Orders Per Time Bucket: Min: Consignment Maxc		VMI:			<u> </u>	
Order Lead Time, Days Buyer Auto Approvat Status Acknowledge Tolerance, Bays Time Buyer Active On Receipt Auto Acknowledge Tolerance, Days: Active On Shipment Confirm Consignment Maxe 					<u> </u>	
Order Ship Confirm Lead Time, Days Active On Ready For PickUp or PickUp Auto Ack On Time Lapsed Mode Active On Ship Active On Ship Active On Ship Order Ship Order	Invoice Active	Code: 🗸 🗸		Auto PO Ack Mode:		~
Promise day Tolerance, Marchard Active On Receipt Active On Ship Time Bucket: Marchard Confirm Consignment Confirm				Buyer Auto Approval		~
Active On Ship Time Bucket: Min: Max:						
s		Active On Shin	A			
	Time B	icket		Orders Per Time Bucket: Min	n: Max	
		Consignment				

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.

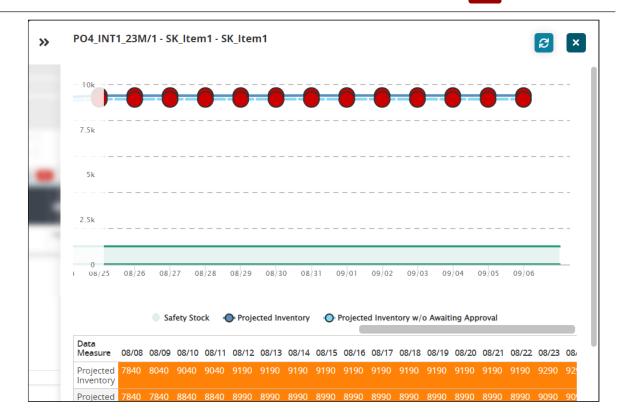
Complete the following steps to view the projected inventory slide-out:

- 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.

ONE#1950775			8	≤ ₽	Buyer Supply Chain Admin 👻
Order : ONE#1950775 🖤 🔳				🗎 Star	ndard Order Template 👻 🔭 🗙
Order No: ONE#1950775	State:	Closed			
Buying Org: HUB4	Vendor:	SUP6 - Vendor			
* Ship To: My Site H4-F1	Ship From:	Vendor's Site SUP6 DC			
Ext Ship To Site Name:	Ext Ship From Site Name:				l
Ship To Address: FONTANA DC, 13521 SANTA ANA FONTANA, CA 92337, US	Ship From Address:	: 055 Valley View Ln Dallas, TX 75244, US			
* Trans Mode: TRCK	Parent Order No:				
Equipment:	Fulfillment Org:				
Request Delivery Date: Jun 28, 2026 9:00 AM EDT	Seller Agents:				
Lines Billing & Contact Terms Codes Trac	king Milestones Notes & Attachments Hold	ls References Problems Other	Links Documents Authori	zation	õ *
Line No 🖉 🖥 Item	☑ + Line Type Promise Quantity	State 📝 Drop Shipment	🗭 Request Promise Unit Unit Price Price	Promise item UOM	Agreed Planned Ship S Quantity Quantity C
🖉 🚒 📷 🔛 001 💦 SK_item1 - SK_item	n1 Product 10	Closed No	30.00	Case	
Viewing 1-1 of 1					Populate Current BOH Update

 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.

	CON	Contract Netting Report						🛨 💋 🗙 😑 🖗 Buyer Supply Chain Admin			
	Q. Filters (edit): [Contract Type: Standard]										
	Audit	Contract Type	Transaction	Contract No	Item Name	Partner Name	Partner	Ship To Site	Ship From Site	Cumulative C	
	9	Standard	T-232454-001/001/1/1	Contract-245954/T- 232454/L-1	SBHUB4ltem1	SUP6	SUP6	H4-F1			
s	9	Standard	T-232454-001/002/1/1	Contract-245954/T- 232454/L-2	SBHUB4Item2	SUP6	SUP6	H4-F1			
	9	Standard	T-232454-001/003/1/1	Contract-245954/T- 232454/L-3	SBHUB4Item3	SUP6	SUP6	H4-F1			
	9	Standard	T-233472-001/001/1/1	Contract-247092/T- 233472/L-1	AJitem1	SUP6	SUP6	H4-F1			
	2	Standard	T-233472-003/001/1/1	Contract-247092/T- 233472/L-1	Ajitem1	SUP6	SUP6	H4-F1			
	9	Standard	T-233392-001/001/1/1	Contract-247012/T- 233392/L-1	psitem1	SUP6	SUP6	H4-F1			
۲	2	Standard	T-233392-002/001/1/1	Contract-247012/T- 233392/L-1	psitem1	SUP6	SUP6	H4-F1			
	2	Standard	T-233673-001/001/1/1	Con#101-247254/T- 233673/L-1	SK_Item1_13Dec	SUP6	SUP6	H4-F1			
vs	2	Standard	T-233393-001/001/1/1	Contract-247013/T-	psitem1	SUP6	SUP6	H4-F1			

- 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.



2	Sea	irch Asset					* 8	= °	Asset Admin
rch	Q Filt	ers (edit): [Show Activ	ve: Yes]						
*		Asset Number	Serial Number	Category	Туре	Item	Serviceable	Asset Status	Lot Number
me		007	1234 (Hub_Engine1)				No	Available	
lems		10261	10261				Yes		
		10360	10360				No		
rts		10623	10623				No	Available	
		10626	10626				No	Available	
ats		10660	10660				No	Available	
j tch		10991	10991				No	Available	
		122584	122584				No	Available	

- 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.

126441				Asset Admin
Asset Asset Number 1264 Serial Number 1264 Serial Type Seria Description				Asset Category Asset Type Name Item (Make & Model) Bill of Materials
Status In Op Location Structure (peration Dwnership Meters			
Location Structure (Ownership Meters	Life	Condition	ents & Lines Maintenance & Financial Warranty History Addi Repair Record Info
Location Structure (+ 3) History Number	Ownership Meters	Life History Record	Condition Record Type Details	ents & Lines Maintenance & Financial Warranty History Addi Repair Record Info
Location Structure (Ownership Meters	Life	Condition	ents & Lines Maintenance & Financial Warranty History Addi Repair Record Info

- 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.



126441	2022046	0	
202204	46		★ 3 × = Asset Admin
Histor	у		
Asset Hi	istory Number 2022046		Transaction
History	Record LocationChange		Defect Code
Record	Type Details		Resolution Code
Priority	Medium		Lot
Item			Quantity
Serial N	umber 126441		Attachments 💼 🛓
Installed	d Under		Notes 🖉 (0)
Updated	d By		
Updated	d On		

- 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.

Note	Created By	Last Modified	Printable	Public	Contents	Action
Note 1	HUB8Admin	09/0 6/2022 6:05 pm EDT				ľ

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

The Notes pane appears.



	Confirr	ned					
	Note	Created	Last Modified	Printable	Public	Contents	Action
_	Note 1	By HUB8Admin	09/0 6/2022 6:05 pm EDT				ľ

- 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.

one	126441	© 2022046	0				
	2022046				* 8 ×	Asset A	dmin 🗸
Q Search	-History						
	Asset History N	umber 2022046		Transaction			
Home	History Record	LocationChange		Defect Code			
Home	Record Type De	tails		Resolution Code	e		
A	Priority	Medium		Lot			
Problems	Item			Quantity			
	Serial Number	126441		Attachments	Asset History Note	1 3 1	
Alerts	Installed Under			Notes	ℤ (1)		
	Updated By						
•	Updated On						
Chats	s						
							Update
Switch							
Ξ							
Menus/Favs							
-							



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.

	earch Asset					* 8	=° (Asset Admin
c	. Filters (edit): [Show Ac	tive: Yes]					1	
	Asset Number	Serial Number	Category	Туре	Item	Serviceable	Asset Status	Lot Number
	007	1234 (Hub_Engine1)	Hub_Categ1	Hub_Type1	Hub_Engine1	No	Available	
	10261	10261	Hub_Categ1	Hub_Type1	Hub_Crankshaft1	Yes		
	10360	10360_ABC			ST_SS001_Item6	No		
	10623	10623			CrankShaftCmp1	No	Available	
	10626	10626	Category1	Type1	CrankShaftCmp1	No	Available	
	10660	10660			ST_SS001_Item5	No	Available	
	10991	10991			D_ltem_001	No	Available	
	122584	122584	Category2	Type4	CAR	No	Available	

- 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.



_	126441					* 8 ×	•	Asset Admin
ch								Standard Template 🗸
cn	Asset							Standard Template
Ļ	Asset Number 126	441			Asset Category	Smart-Watch-Series		
e	Serial Number 126	441			Asset Type Nam	e 45mm		
	Serial Type Seria	alized Item			Item (Make & M	odel) Smart-Watch-1		
ms	Description				Bill of Materials	SWatch-45MM		
1115					Current Status			
	Location Structure	ownership Meters	Attributes Manufact Life	turing & Measuremen Condition		faintenance & Financial epair Record	Warranty His	Additional Info
, ;; ;;	Location Structure	Ownership Meters	Life	Condition	R	epair Record	-	
5	Location Structure + C History Record: Chang History Number	Ownership Meters ed Asset Status History Id	Life History Record	Condition Record Type Details	R Updated By	epair Record	Priority	Info
s I =	Location Structure	Ownership Meters	Life	Condition	R	epair Record	-	Info
s I 🖃	Location Structure + C History Record: Chang History Number	Ownership Meters ed Asset Status History Id	Life History Record Changed Asset Status	Condition Record Type Details From: "In Operation" To:	R Updated By	epair Record	Priority	Info
s E	Location Structure	Ownership Meters red Asset Status History Id 15,722	Life History Record	Condition Record Type Details From: "In Operation" To: "In Inspection"	R Updated By TransportationAdmin	epair Record Updated On 25/08/2022 2:20 pm	Priority Medium	Info
s E	Location Structure	Ownership Meters red Asset Status History Id 15,722	Life History Record Changed Asset Status	Condition Record Type Details From: "In Operation" To: "In Inspection" From: "In Stock" To: "In	R Updated By TransportationAdmin	epair Record Updated On 25/08/2022 2:20 pm	Priority Medium	Info
s h	Location Structure + C History Record: Chang History Number 2202131 2022043	Ownership Meters ed Asset Status History Id 15,722 11,831	Life History Record ChangeoAssetStatus ChangeoAssetStatus	Condition Record Type Details From: "In Operation" To: "In Inspection" From: "In Stock" To: "In Operation"	R Updated Dy TransportationAdmin HUB8Admin	Updated On 25/08/2022 2:20 pm 22/06/2022 6:18 am 22/06/2022 6:18 am	Priority Medium Medium	Info
s E	Location Structure + C History Record: Chang History Number 2202131 2022043	Ownership Meters ed Asset Status History Id 15,722 11,831	Life History Record ChangeoAssetStatus ChangeoAssetStatus	Condition Record Type Details From: 'In Operation'' To: 'In Inspection'' From: 'In Stock' To: 'In Operation'' From: 'Available'' To: 'In	R Updated Dy TransportationAdmin HUB8Admin	Updated On 25/08/2022 2:20 pm 22/06/2022 6:18 am 22/06/2022 6:18 am	Priority Medium Medium	Info

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 <u>Adding Notes and Attachments to an Asset History Number(see</u> <u>page 108)</u> page.
History ID	A chronological history ld 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.
Transact ion	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	
Resoluti on Code	
Attachm ents	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 <u>Initiating</u> <u>Raise Issue Action for an Asset in Operation(see page 123)</u> page.

7. On the top-right side of the History grid, click the **FilterOptions** (²⁾) button. The Filter Options pop-up displays.



	126441						*	C	= °	Asset Admin	
k rch	Location Structure	Ownership Meters	Attributes Manufact Life	uring &	Measurements & Condition	Lines Mainte Repair		Financial Record	Warranty	History Add Info	
me	History Number	History Id	History Record	Record	Filter Options						2
lems	2304150	15,577	RepairType	Work C	Updated On						
h	2304148	15,576	RepairType	Work C	24/08/2022 1:52 pm		🗰 0 to	25/08/202	2 1:53 pm		0
rts	<u>2304147</u>	15,575	RepairType	Work C	Serial Number						
	2022049	11,834	AddedNewComponent	Watch-							
ats	2022046	11,833	LocationChange		History Record						
1	2022044	11,832	InspectionType		Changed Asset Status						*
tch	<u>2022043</u>	11,831	ChangedAssetStatus	From: ' Operat						Reset	Apply
s/Favs	2022042	11,830	ChangedAssetStatus	From: "/	wailable" To: "In HUB8Adn	in 23	//06/2022 6:18 am		Medium		

- 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.

Q Search				
*	⊢Work Order		🗎 S	tandardWorkOrderTemplate *
Home	Work Order Type * Repair	•	Item * Hub_Oneplus X	۹ *
Problems	Work Sub Type * Campaign	•	Lot L-Oneplus X	
Problems	State		Serial Number	٩
Alerts	Priority * 3 - Medium	•		4
			Quantity * 2 Each	~
Chats			Work Site H8-Org1-Site1 ×	۹
a			Work Location H8-0151-Loc1 ×	۹
Menus/Favs	Instructions Task Inspection Che Description General information		ck List Work Order Milestone Tracking Events Dates Links Problem Code C Problem Details	
	RMA Number 12458701			
	Instructions		Work Details	
			Attachments	±.
			Notes	

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.
*ltem	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.

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

One Network Enterprises™



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.

e	Maintenance Dashboard O 2330476 O	
	2330476	★ 🕫 💌 🖻 Maintenance Admin
		🖺 StandardWorkOrderTemplate 🔨
	Work Order	\$
	Order Number 2330476 Item	
	Work Order Type Repair Lot	
	Work Sub Type Campaign Serial Number	
	State Draft	
	Quantity 2	2 Each
	Priority 3 - Medium Work Site	
	Work Location	
2	Instructions Task Inspection Check List Manage & Assign Review Check List Work Order Milestone	Tracking Events Dates Links
	Creation Date 08/09/2022 9:02 pm Actual Start Time	le
	Scheduled Start Time 08/09/2022 9:06 am Actual End Time	1
		Actions

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.



StandardWorkOrderTemplat						/ork Order—
		Item			2330476	Order Number
		Lot			Repair	Work Order Type
		Serial Number			Campaign	Work Sub Type
	Each	Quantity 2			In Planning	State
	Each				3 - Medium	Priority
		Work Site				
		Work Location				
	Tracking Events Dates Links	Work Order Milestone	Paulau Chack List	st Manage & Assign	Inspection Check Lis	ructions Task
	i i i i i i i i i i i i i i i i i i i	Work Order Milestone	Review Check List		Inspection check Lis	
🖉 New Item	🖉 ltem	Serial Number	🖉 State	Task Description	🔗 * TaskType	k Number
			New	Task 001	Repair	1
			New	Task 002	Repair	2 .

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



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.

one	Search Work Orders	2330476	>		-		
	2330476			E	1 8 × =	Maintenance Admin	~
Q earch	Work Order						
*	Order Number 2330476			Item			*
ome	Work Order Type Repair			Lot			
A	Work Sub Type Campaig	n		Serial Number			
blems	State In Planni	ng					
	Priority 3 - Mediu	im		Quantity 2	Each		
erts				Work Site			
				Work Location			
lats							
7 😑	Instructions Task Inspection	on Check List Manage & Assign	Review Check List W	ork Order Milestone Trac	king Events Dates Links		۰
itch	Task Number 📀 * 1	faskType	🖉 State	Serial Number	🕗 Item	🖉 New Item	•
s/Favs	001 🗸 Repair	Task 001	New	132165			
						Actions A	

- 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.)

Se	arch Work Orders	© 2330476		0					
	2330476					* 8 ×	=°	Maintenance A	dmin
	Order Number	2330476			Item				¢
	Work Order Type	Repair			Lot				
	Work Sub Type	Campaign			Serial Number				
	State	Approved			Quantity 2	Each			
	Priority	3 - Medium			Quantity 2	. Each			
					Work Site				
					Work Location				
	Instructions Task	Inspection Check L	ist Manage & Assign	Review Check List	Work Location	Tracking Events Dat	es Links		
		Inspection Check L	ist Manage & Assign	Review Check List		Tracking Events Dat	es Links Child Work Order State	Notes	K Attac
	Repair Code				Work Order Milestone		Child Work	Notes	

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.

one	Search Work Orders	2364453	G	2330476	٥				_
	2364453					* 8 ×	=°	Maintenance Admin	~
Q Search									
	-Work Order						🕒 Standa	ardWorkOrderTemplate	~
Home	Order Number	2364453			Item			4	2
	Work Order Typ	e Repair			Lot				
Problems	Work Sub Type	Campaign			Serial Number 1	132165			
	State	Draft			Quantity 1	Each			
Alerts	Priority	3 - Medium			Quantity 1	i Each			
					Work Site				
Chats					Work Location				
a e	Instructions Task	Inspection Check List	Manage & Assign	Review Check List	Work Order Milestone	Tracking Events Dates	s Links		•
Switch		inspection check list				i decing events outes	Links		i l
≡	Task Number	🖉 * TaskType	 Task Description 	🖉 State	Serial Number	🕗 Item		🕗 New Item	9
Menus/Favs	-	ţ.				E.			-
								Actions ^	格

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.

one	Search Work Orders 2330476 2364453 O
	2364453 ★ 2 × = Maintenance Admin ×
Q Search	-Work Order
*	Order Number 2364453 Item
Home	Work Order Type Repair Lot
A	Work Sub Type Campaign Serial Number 132165
Problems	State In Progress Quantity 1 Each
	Priority 3- Medium
Alerts	Work Site Work Location
Chats	Work Location
	Instructions Task Inspection Check List Manage & Assign Review Check List Work Order Milestone Tracking Events Dates Links 🗘
Switch	Task Number Image: Task Type Task Description State Serial Number Item New Item
lenus/Favs	001 V Repair Task 001 New 132165 <u>Hub Oneplus</u>
	Actions 🔨 🖉 👼

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.

one	Search Work Orders	O 23304	76 🛛	2364453	٥				
Q	2330476					* 3 ×	= °	Maintenance Admin	*
Search	Order Number	2330476			ltem				•
*	Work Order Typ	e Repair			Lot				11
Home	Work Sub Type	Campaign			Serial Number				
	State	In Progress			Quantity 2	Each			
Problems	Priority	3 - Medium				2001			
Alerts					Work Site				
Alerts					Work Location	1			
Chats	Instructions Task	Inspection Chec	k List Manage & Assign	Review Check List Wo	ork Order Milestone	Tracking Events Dates	Links		۰
Switch	Task Number	🖉 * TaskTyp	e Stask Description	🖉 State	Serial Number	🖉 ltem		🕗 New Item	•
=	001	✓ Repair	Task 001	Ready To Start	132165	Hub Oneplus			
/lenus/Favs	002	✔ Repair	Task 002	New	133382	Hub Oneplus			
								Actions ^	뢂

- 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

Se	arch Work Orders	O 233	0476	2364453	0			-		
	2364453					* 2	×	=0	Maintenance	Admin 🖌
	-Work Order-									
	Order Number	2364453			ltem					*
	Work Order Ty	pe Repair			Lot					
	Work Sub Type	Campaign			Serial Number	132165				
	State	In Progress			Quantity	1	Each			
	Priority	3 - Medium			Quantity	1	Each			
					Work Site					
					Work Location					
	Instructions Task	Inspection Ch	eck List Manage & Assign	Review Check List V	Vork Order Milestone	Tracking Ever	nts Dates	Links		•
	001	✓ Repair	Task 001	Task Completed	132165					
									Actions	. *

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
Procession Procesi	Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Description Image: Section Descripti
Image: sector basic from the sector basic from the sector basic from the sector basic form Image: sector basic form<	Improvementation Improvementation Improvementation Improvementation Improvementation Improvementation Improvementation

- 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.
- 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.



ne	Search Work Orders 2330476	2364453	0	
	2364453		🛨 🛃 🗙 😑 🔜 Mair	tenance Admin 👻
Q	Work Order			
*	Order Number 2364453		Item	۰
lome	Work Order Type Repair		Lot	
A	Work Sub Type Campaign		Serial Number 132165	
oblems	State Review Completed		Quantity 1 Each	
	Priority 3 - Medium			
Alerts			Work Site	
•			Work Location	
Chats	Instructions Task Inspection Check List	Manage & Assign Review Check List	Work Order Milestone Tracking Events Dates Links	٥
in 🔁		2015 UND		
	Description		Problem Code 🛛 🖬	
nus/Favs	RMA Number		Work Details	
	Instructions		THUR Details	
5			Action	s^ 🔳 뫎

- 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.

one	Search Work Orders	2330476	c	2364453	0				
Une	2364453					* 8 ×	≡ ^O	Maintenance Admin	~
Q Search	-Work Order-								
~	Order Number	2364453			ltem				•
Home	Work Order Typ	e Repair			Lot				
Δ	Work Sub Type	Campaign			Serial Number 13	32165			
Problems	State	Closed			Quantity 1	Each			
	Priority	3 - Medium				Each			
Alerts					Work Site				
•					Work Location				
Chats	Instructions Task	Inspection Check List	Manage & Assign	Review Check I	ist Work Order Milestone	Tracking Events Da	tes Links		\$
-		inspection check list	wanage & Assign	Review check t	ist work order milestone	Tracking Events Da	LES LITIKS		
Switch	Description				Problem Code	8			
≡	RMA Number				Problem Details				
Menus/Favs	Instructions				Work Details				
								Actions ^	品
					k orders, the	en the ad	min u	ser can	
	proceed	d to execute	e the pa	arent v	vork 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.

Asset Dashboard	Search Asset	12546	1	123881	0	0			
Search As	set					*	C ×	Asset	Admin
Q Filters (edit): [Asset Status: In Operation][Show Active	: Yes]							
Asset Nun	nber Serial Number	Category	Туре	ltem	Serviceable	Asset Status	Lot Number	Lot Owner	Lot Ite
123881	123881		45mm	1	Yes	In Operation			
125425	ABC125425		Hub_Truck	1	No	In Operation			
125461	125461		Hub_Truck	tes has	Yes	In Operation			
125505	125505	10.000	Hub_Truck	6	Yes	In Operation			
126401	126401		45mm		No	In Operation			
 Viewing 1-24 of 2 	24							Export to CS	V Downloa

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.



123881							c) 🗙 📄 🚅	Asset Admin
								Standard Ter
Asset Number 12								
					Asset Category			
Serial Number 12					Asset Type Name 45	imm		
Serial Type Ser	ialized Item				Bill of Materials			
Location Structure	Operation Ownership Meters	s Attributes Manufac	turing & Life Measureme	nts & Condition Lin	Current Status es Maintenance & Repair Fina	incial Record Warranty	History Additional Info	
Status In I	Ownership Meters				es Maintenance & Repair Fina			
Status In I Location Structure + C History Number	Ownership Meters	History Record	Record Type Details	Updated By	es Maintenance & Repair Fina	Priority	History Additional Info Serial Number	Installed Under
Status In I	Ownership Meters				es Maintenance & Repair Fina			Installed Under 123831
Status In I Location Structure + C History Number	Ownership Meters	History Record	Record Type Details	Updated By	es Maintenance & Repair Fina	Priority		
Status In I Location Structure C History Number 2189556	Ownership Meters	History Record RepairType	Record Type Details Work Order created	Updated By	es Maintenance & Repair Fina Updates On 19/07/2022 4:25 am	Priority Medium		123881

6. Click **Raise Issue** (+) button.

A popup displays with the Issue Line option displayed as the default in the Select Issue Type field.



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.

Raise Issue Line-				
History Record *		~	Transaction	
Record Type Details			Defect Code	~
			Resolution Code	~
Priority	Medium	•	Status	
ltem		٩	Lot	٩
Serial Number		٩	Quantity	~
Installed Under		٩	Attachments	i 1
Updated By *			Updated On *	((

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.
ltem	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.

Raising an Issue for a New Work Order 1.11.1

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. T

h	ne popup	updates	with	the f	ields	display	red in	the	following	g scree	enshot.

-New Work Order Sim	ple		
Work Order Type	Repair	Executing Organization	* H&JE × Q
Work Sub Type *	Lot-Controlled 🗸	Work Site *	H8-Org ×
State		Work Location *	H8-01 × Q
Description	Lot Controlled WO	Assigned To User *	0510C ×
RMA Number		Assigned To Role *	Assem ×
ltem	Smart-Watch-1	Problem Code Attachments	e 1
Asset Number	126441		
Scheduled Start Time *	25/08/2022 2:13 pm	 0	
Scheduled Finish Time *	31/08/2022 2:14 pm	m 0	

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.
ltem	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 Organizatio n*	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.
Attachment s	Click the attachments icon to upload a file attachment.

 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.

-Inspection					
Inspection Number *	132261	2	Inspection Type	Internal Production Che	eck
Planned Inspection Type	Internal		Inspected By	HUB8Admin 🗙	
State			Actual Start Date	25/08/2022	曲
Planned Start Date	24/08/2022	曲	Actual End Date	26/08/2022	
Planned End Date	26/08/2022				
Assigned To	0510CarrierNew 🗙	٩			

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.

 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.
- 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).

Organi	izatior	n:						*	Q Search				
	ſ	Pipeline Name TMS.CarrierRecommendations~1.0~Enterprise~10180	Version 1.0	Organization CustomerA	Pipeline Type MLInference	Created By TransportationAdmin		Modified By CustomerATransMgr	Modified Date 2022-08-03	Status	2*5		1
	ŀ	Pipeline Name Item_IB	Version 1	Organization HUB4	Pipeline Type InboundIntegration	Created By	01:47:03.039 Created Date 2022-08-02 10:27:44.394	Modified By	03:33:30.702603 Modified Date 2022-08-02 13:36:34.416399	Status	2*5		Ĺ
	Ъ	Pipeline Name CustomerA_Item_IB	Version 1.0	Organization CustomerA	Pipeline Type InboundIntegration	Created By TransportationAdmin	Created Date	Modified By TransportationAdmin	Modified Date 2022-08-03 07:55:42.438662	Status	25		1
	ŀ	Pipeline Name CustomerA_Site_OB	Version 1.0	Organization CustomerA	Pipeline Type OutboundIntegration	Created By TransportationAdmin	Created Date 2022-08-02 11:28:00.315	Modified By TransportationAdmin	Modified Date 2022-08-02 11:28:12.435297	Status	2"5	ø	,
					000001011102.0001					U			

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



					-				
Organization:					*	Q Search			
	Filter Options								
Pipeline Name TMS.CarrierRecommendations~1	Pipeline Type	•	Organization		٩	Modified Date ansMgr 2022-08-03 03:33:30.702603	Status	2*5	
Pipeline Name Item_IB	Pipeline Name		Version			Modified Date 2022-08-02 13:36:34.416399	Status	3.2	1
Pipeline Name CustomerA_Item_IB	Created Date		0 to	#	0	Modified Date nAdmin 2022-08-03 07:55:42.438662	Status	2*5	ø
Pipeline Name CustomerA_Site_OB	Modified Date	#	0 to	#	0	Modified Date nAdmin 2022-08-02 11:28:12.435297	Status	2*5	ø
	Status								
				Reset	pply				

- 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.

NEO Plasma Pipelines					* 8 ×	=0		Chain A alueChain
Organization:					2	Q Search		
Pipeline Name TMS.CarrierRecommendations~1.0~Enterprise~10180	Version Organ 1.0 Custo	nization Pipeline Type omerA MLInference	Created By TransportationAdmin	Created Date 2022-01-20 01:47:03.039	Modified By CustomerATransMgr	Modified Date 2022-08-03 03:33:30.702603	Status	2*5
Pipeline Name Item_IB	Version Organ 1 HUB	nization Pipeline Type 4 InboundIntegration	Created By	Created Date 2022-08-02 10:27:44.394	Modified By	Modified Date 2022-08-02 13:36:34.416399	Status	75
Pipelne Name CustomerA_Item_IB	Version Orga 1.0 Cust	nization Pipeline Type omerA InboundIntegration	Created By TransportationAdmin	Created Date 2022-08-02 10:46:31.429	Modified By TransportationAdmin	Modified Date 2022-08-03 07:55:42.438662	Status	275
	Version Organ 1.0 Custo	nization Pipeline Type omerA OutboundIntegration	Created By TransportationAdmin	Created Date 2022-08-02 11:28:00.315	Modified By TransportationAdmin	Modified Date 2022-08-02 11:28:12.435297	Status	2"5

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.



dit NEO Plasm	a Pipeline	×
Pipeline Name *		
TMS.CarrierReco	ommendations~1.0~	-Enterprise~
Version *		
1.0		
Organization		
CustomerA 🗙		Q
Pipeline Type *		
ML Inference		~
	Cancel	ОК

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

one	Home		NEO Plasma Pipelines	0						_ 0	Valu	e Chain	Admir	
	NEC) PI	asma Pipelines						* 2 ×			ValueCh	ainAdmi	in
Home	Organ	nizatio	n:						2	2 Search				
roblems														
Alerts		r	Pipeline Name TMS.CarrierRecommendations~1.0~Enterprise	Version 2~10180 1.0	Organization CustomerA	Pipeline Type MLInference	Created By TransportationAdmin	Created Date 2022-01-20 01:47:03.039	Modified By CustomerATransMgr	Modified Date 2022-08-03 03:33:30.702603	Status	3.2		e
Chats		·	Pipeline Name Item_IB	Version 1	Organization HUB4	Pipeline Type InboundIntegration	Created By	Created Date 2022-08-02 10:27:44.394	Modified By	Modified Date 2022-08-02 13:36:34.416399	Status	2*5		
		Ъ	Pipeline Name CustomerA_Item_IB	Version 1.0	Organization CustomerA	Pipeline Type InboundIntegration	Created By TransportationAdmin	Created Date 2022-08-02 10:46:31.429	Modified By TransportationAdmin	Modified Date 2022-08-03 07:55:42.438662	Status	2*5	ø	
Switch		Ъ	Pipeline Name CustomerA_Site_OB	Version 1.0	Organization CustomerA	Pipeline Type OutboundIntegration	Created By TransportationAdmin	Created Date 2022-08-02 11:28:00.315	Modified By TransportationAdmin	Modified Date 2022-08-02 11:28:12.435297	Status	2°5		
enus/Favs														

The Clone NEO Plasma Pipeline popup window appears.

One Network Enterprises™



Pipeline Nam	e *	
CustomerA_	Site_OB - Copy	
Version *		
1.0		
Organization		
CustomerA >	•	Q
Pipeline Type	*	
Outbound Ir	ntegration	~

- 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 <u>NEO Plasma</u> <u>Pipelines (see page 129)</u>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. <u>Create a pipeline interface.(see page 152)</u>
- 3. <u>Create a message queue.(see page 154)</u>
- 4. Execute the pipeline.(see page 156)
- 5. <u>View the pipeline execution history.(see page 158)</u>

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.

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I)	Դ	Pipeline Name TestInbound		Version 1.0	Organization HUB4	Pipeline Type InboundIntegration		Created Date 2022-07-25 09:44:04.398	Modified By InstanceAdmInUser	Modified Date 2022-07-25 09:44:09.418378	Status	2"5	6 12	٠
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 Click the + (plus) icon in the top right corner. The Create NEO Plasma Pipeline popup window appears.



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2		Version *			
		Organization Q Pipeline Type *			
rs					
		Cancel OK			

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.

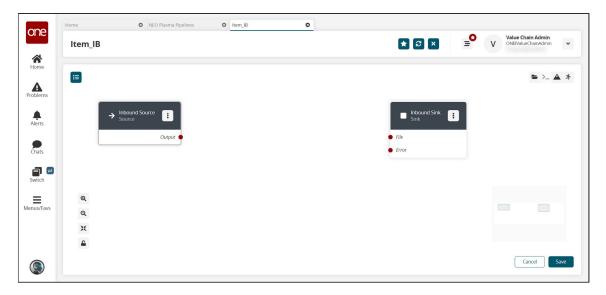
The new pipeline appears on the NEO Plasma Pipelines screen.

6. Click the pipeline icon (highlighted below) to view the new pipeline.

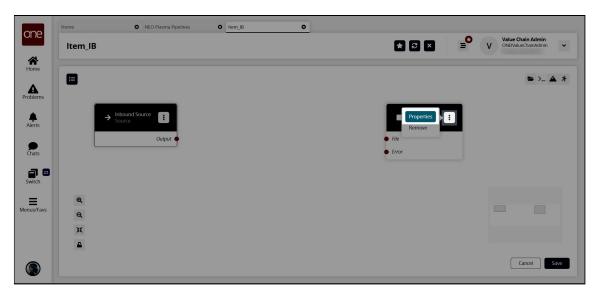
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		Ŀ	Pipeline Name Item_IB		Version 1	Organization HUB4	Pipeline Type InboundIntegration	Created By	Created Date 2022-08-02 10:27:44.394	Modified By	Modified Date 2022-08-02 10:39:17.203526	Status	2"5	ø	٠	
		ŀ	Pipeline Name TMS.CarrierRecom	mendations~1.0~Enterprise~10180	Version 1.0	Organization CustomerA	Pipeline Type MLInference	Created By TransportationAdmin	Created Date 2022-01-20 01:47:03.039	Modified By CustomerATransMgr	Modified Date 2022-08-02 07:53:25.547232	Status	25	/	٠	•
		ŀ	Pipeline Name TestInbound		Version 1.0		Pipeline Type InboundIntegration		Created Date 2022-07-25 09:44:04.398	Modified By InstanceAdminUser	Modified Date 2022-07-25 09:44:09.418378	Status	3.2	1	٠	•
	<	>	Viewing 1-4 of 4												Delete	e



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.



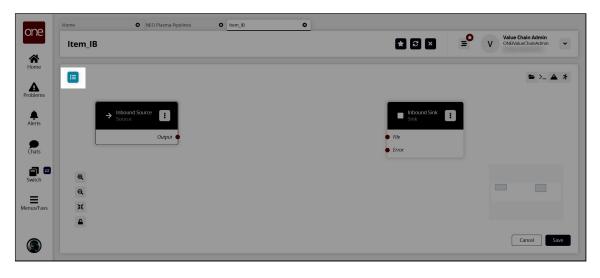
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		Node Name *		
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		Inbound Interface Name & Version		
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rs		Error Message Queue		
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			ок	

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.

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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.

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Problems						►>_ ▲ ★
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Menus/Favs	ж					
						
۲						Cancel Save

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 "<u>Sample JSON File(see page 160)</u>" section of this guide to create your own JSON file to upload in the next step.



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us/Favs			View Schema		
			Input/Input		
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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.



Field	Description			
Create Schema	a. Click the Upload Sample File link. The Create Schema popup appears.			
	b. Complete the following fields. Fields with an asterisk are required.			
	Field	Description		
	Namespace*	Enter a unique category to organize schema name fields.		
	Schema*	Enter a unique name with which to associate the dataset.		
	Sample File*	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 " <u>Sample JSON file(see page 160)</u> " section.		
	JSON Root*	Select the JSON root you want the parser to use.		
	c. Click OK. The Node Prope	erties updates.		
View Schema	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.			

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

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.

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Home Problems Alerts Chats Switch		Node Properties	
۲		Ports Input Output Input 1 - + Cancel Save	

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



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		Join Join Is Join Language * Python Script *		
e Ivs		Ports Input Output		
		Port Name * Input 1 Port Type * Integer	- II	
			Cancel Save	

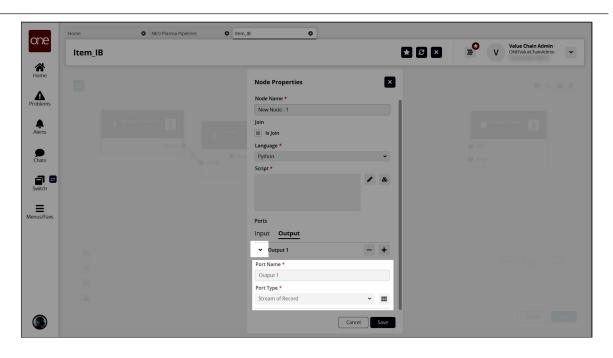
- 20. In the **Port Type*** field, select **Stream of Record** from the dropdown list. The icon beside the dropdown list becomes active.
- 21. Click the icon beside the **Port Type*** dropdown list. The Record Schemas popup window displays.
- 22. Click the arrow beside Input. The list of schemas displays.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

The schema displays in the pane to the right, and the Activate button becomes active.

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0				Delete Activate OK

- 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.
- Click the icon to the right of the Port Type* dropdown list. The Record Schemas popup window displays.
- In the Schema pane on the left, click the arrow beside Default. The Output record schemas display in the pane.
- 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.



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	×				
					
					Cancel Save

- 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**.

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The Node Properties popup window appears.



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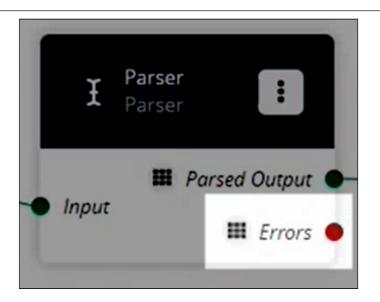
42. Complete the fields described in the table below. Fields with an asterisk (*) are required.

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.

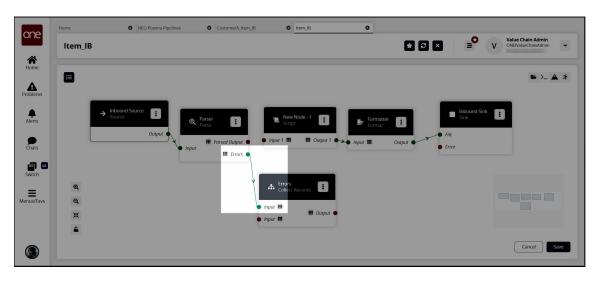
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- 50. In the **Node Name*** field, enter a name for the collector node. This field is required.
- 51. In the **Type*** field, select **Stream of Records** from the dropdown list. The Schema field appears.
- 52. Select **Default/Errors** from the dropdown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

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ems			Node Name *						
			New Node - 2						
s			Format Type *						
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			Quote Mode * 🚯						
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			Schema *	•					
				*					

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.

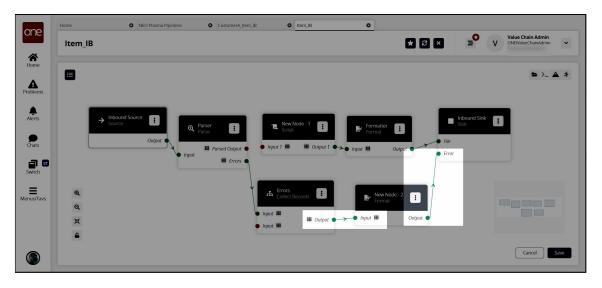


Field	Description
Include Header	Click the checkbox to include the header when formatting the data.
Delimiter Character	Enter a delimiter character or leave the default
Quote Mode*	Select Minimal from the dropdown list.
Quote Character	Enter a quote character or level the default
Schema*	Select the Default/Error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

59. Click OK.

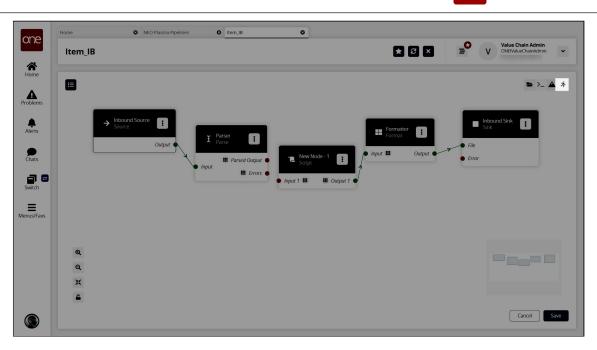
The pipeline details screen returns.

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.

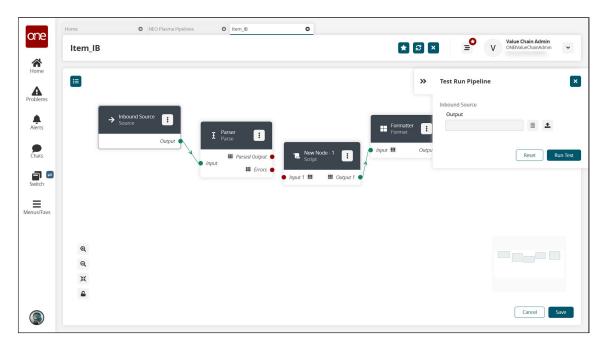


- 61. Click the **Save** button to save the pipeline.
- 62. Click the **Run Test** icon in the top right corner to test the pipeline.



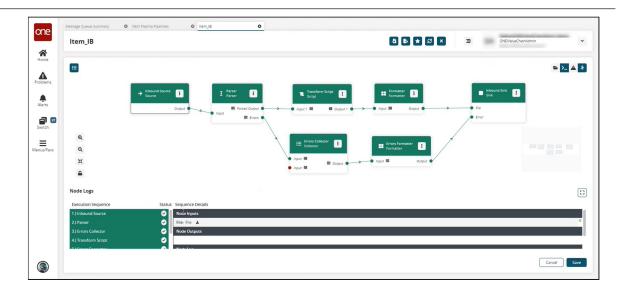


The Test Run Pipeline slideout appears.



- 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:

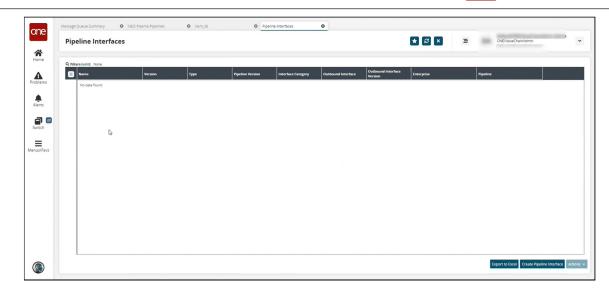
- 1. Create an integration pipeline.
- 2. Create a pipeline interface.
- 3. Create a message queue.
- 4. Execute the pipeline.
- 5. View the pipeline execution history.

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

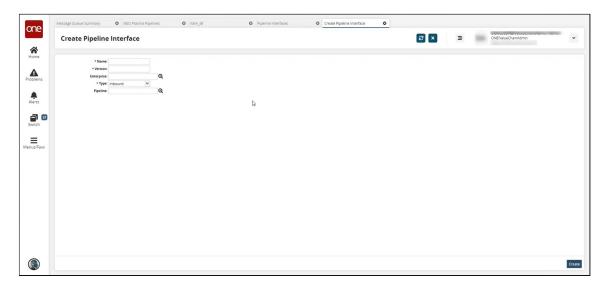
Complete the following steps to create a new pipeline interface:

- 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.



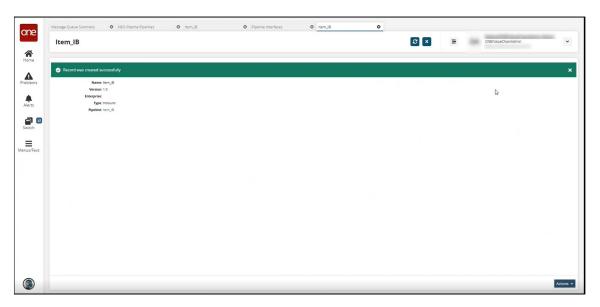
4. Complete the fields described in the table below. Fields with an asterisk (*) are required.

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:

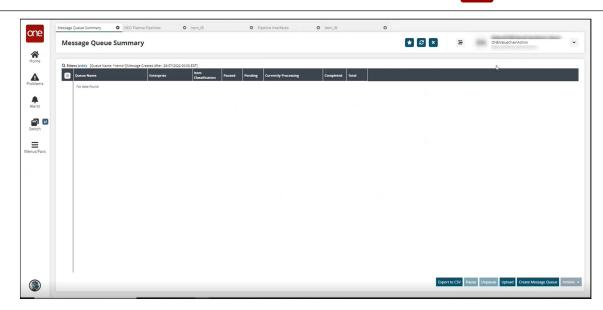
- 1. Create an integration pipeline.
- 2. Create a pipeline interface.
- 3. Create a message queue.
- 4. Execute the pipeline.
- 5. View the pipeline execution history.

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.

Message Queue Summary O Create Message Queue	NEO Plasma Pipelines	O Item_IB	O Pipeline	Interfaces O	Item_IB	0		
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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.
*ltem 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:

	Summary								* 8 ×	=	
Q. Filters (edit): IQueue Nan	*items*][Message Created After: 28/07/2023	1.00:00 EDTI									
Queue Name	Enterprise	Item Classification	Paused	Pending	urrently Processing	Complete	d Total				
inbox/items	HU84	Inbox	No	0			0	0			
outbox/items/error	HU84	Outbox	No	0			0	0			
utbox/items/fatal	HUB4	Outbox	No	0			0	0			
outbox/items/success	HU84	Outbox	No	0			0	0			

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.

	*)[Message Created After: 28/07/2022								
Queue Name	Enterprise	Item Classification	Paused	Pending Currently Pro	cessing	Completed Total			
inbox/items	B HUB4	Inbox	No	0		0	0		
outbox/items/error	HUB4	Outbox	No	0		0	0		
utbox/items/fatal	HUB4	Outbox	No	0		0	0		
utbox/items/success	HU84	Outbox	No	0		0	0		

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

Q. Filters (edit): [Queue Name: in Creation Date	box/items][State: Pending,Processed.Running.Removed From Que	ue.Failed][Created After: 28/07/2022 00:00 EDT] Size In XB Interface	Dequeue Initiated	Dequeue Completed	Result Queue	Result
29/07/2022 14:26 EDT	🗎 20220729142621820.json	3 SCC.item_IB (2.0)	29/07/2022 14:26 EDT	29/07/2022 14:26 EDT	outbox/items/error	20220729142621820.json
29/07/2022 14:26 EDT	🖶 products.json	3 Item_IB (1.0)	29/07/2022 14:26 EDT	29/07/2022 14:26 EDT	outbox/items/success	🖶 products.json
29/07/2022 14:25 EDT	🖶 products.json	3 Item_I8 (1.0)	29/07/2022 14:25 EDT	29/07/2022 14:25 EDT	outbox/items/error	🖶 products.json
	Da					

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.

	ыр	eline Exect	ution History			★ 8 × =	ONEIValueChainAdmin
		Execution Id	Pipeline	Pie dine Trees	State	Creation Date	
		82993	CustomerA_Item_IB	Pipeline Type Inbound Integration	Failed	Aug 3, 2022 8:00 am	
		82992 🖺	CustomerA_Item_IB	Inbound Integration	Failed	Aug 3, 2022 7:57 am	
		82991 🖺	CustomerA_Item_IB	Inbound Integration	Finished	Aug 3, 2022 7:46 am	
		82990 🖹	CustomerA_Item_IB	Inbound Integration	Finished	Aug 3, 2022 7:44 am	
3		82989 🖺	CustomerA_Item_IB	Inbound Integration	Finished	Aug 3, 2022 7:43 am	
		82988 🖺	TMS.CarrierRecommendations~1.0~Enterprise~10180	ML Inference	Failed	Aug 3, 2022 7:40 am	
		82987 🖺	TMS.CarrierRecommendations~1.0~Enterprise~10180	ML Inference	Failed	Aug 3, 2022 7:39 am	
s		82986 🖺	TMS.CarrierRecommendations=1.0=Enterprise=10180	ML Inference	Failed	Aug 3, 2022 7:39 am	
		82985 🖹	TMS.CarrierRecommendations-1.0-Enterprise-10180	ML Inference	Failed	Aug 3, 2022 6:47 am	
		82984 🖺	TMS.CarrierRecommendations-1.0-Enterprise-10180	ML Inference	Failed	Aug 3, 2022 6:31 am	
		82983	TMS.CarrierRecommendations~1.0~Enterprise~10180	ML Inference	Failed	Aug 3, 2022 6:01 am	
		82982	TMS.CarrierRecommendations~1.0~Enterprise~10180	ML Inference	Failed	Aug 3, 2022 6:00 am	
		82981	TMS.CarrierRecommendations-1.0-Enterprise-10180	ML Inference	Failed	Aug 3, 2022 6:00 am	
		82980	TMS.CarrierRecommendations~1.0~Enterprise~10180	ML Inference	Failed	Aug 3, 2022 5:52 am	

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



e	Message Queue Summary	O Messages	inbox/items NEC	Plasma Pipelines	O Item_IB	Pipeline Interfaces	Item_IB	Pipeline Execution History
	Pipeline Exec	ution History				* 3 ×	=	ONEIValueChainAdmin
. 7								
ns								_
ns	Execution Id	Pipeline	Pipeline Type	State	Creation Date			Filter Options
	1035 >_	item_18	Inbound Integ	ation Finished	29/07/2022 14:03 EDT			Pipeline
s	🔳 1034 >_	item_18	Inbound Integ	ation Failed	29/07/2022 14:03 EDT			Pipeline Type
•	I 1033 >_	item_IB	Inbound Integ	acion Finished	29/07/2022 14:03 EDT			Pipeline Type
h	1							State
avs								
								Reset
								-
		 Viewing 1-3 of 3 						Action

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

ripenne Lice	ution History				ONEIValueChainAdn
Execution Id	Pipeline	Pipeline Type	State	Creation Date	
82993	CustomerA_Item_IB	Inbound Integration	Failed	Aug 3, 2022 8:00 am	
82992	CustomerA_Item_IB	Inbound Integration	Failed	Aug 3, 2022 7:57 am	
82991	CustomerA_Item_IB	Inbound Integration	Finished	Aug 3, 2022 7:46 am	
82990	CustomerA_Item_IB	Inbound Integration	Finished	Aug 3, 2022 7:44 am	
82989	CustomerA_Item_IB	Inbound Integration	Finished	Aug 3, 2022 7:43 am	
82988	TMS.CarrierRecommendations-1.0-Enterprise-10180	ML Inference	Failed	Aug 3, 2022 7:40 am	
82987	TMS.CarrierRecommendations-1.0-Enterprise-10180	ML Inference	Failed	Aug 3, 2022 7:39 am	
82986	TMS.CarrierRecommendations~1.0~Enterprise~10180	ML Inference	Failed	Aug 3, 2022 7:39 am	
82985	TMS.CarrierRecommendations~1.0~Enterprise~10180	ML Inference	Failed	Aug 3, 2022 6:47 am	
82984	TMS.CarrierRecommendations-1.0-Enterprise-10180	ML Inference	Failed	Aug 3, 2022 6:31 am	
82983	TMS.CarrierRecommendations~1.0-Enterprise~10180	ML Inference	Failed	Aug 3, 2022 6:01 am	
82982	TMS.CarrierRecommendations~1.0~Enterprise~10180	ML Inference	Failed	Aug 3, 2022 6:00 am	
82981	TMS.CarrierRecommendations~1.0~Enterprise~10180	ML Inference	Failed	Aug 3, 2022 6:00 am	
82980	TMS.CarrierRecommendations-1.0-Enterprise-10180	ML Inference	Failed	Aug 3, 2022 5:52 am	
(=) 97070 =	TMS CarrierDecommondations=1.0=Entermice=10190	ML Informera	Cailori	Aug 3 2022 5:43 am	

The Node Logs popup window appears.



one	Message Queue	Summary O Messages	Inbox/items	NEO Plasma Pipelines	O item_IB	Pipeline Interfaces	O Item_IB	Pipeline Execution History	y O
Home	Pipelin	e Execution History				★ 2 ×	2	ONEIValueChainAdmin	*
Problems		Node Logs						×	
		Execution Sequence	Status Sequence Details						
Alerts		1.) Inbound Source	Node Inputs						
		2.) Parser	0						
Switch		3.) Errors Collector 4.) Transform Script	0						
		4.) Iransform Script 5.) Errors Formatter	Node Outputs					and the second	
enus/Favs		6.) Formatter	🗸 Output: File 🛓						
icitios for s		7.) Inbound Sink	0						
			Node Log						
			2022-07-29T14:26:14-04	:00 INFO Total Execution Time: 44	(ms)				
								ок	
								OK	

- 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 <u>NEO Plasma</u> <u>Pipelines (see page 129)</u>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. <u>Create an integration pipeline.(see page 163)</u>
- 2. <u>Create a pipeline interface.(see page 177)</u>
- 3. <u>Set up an integration subscription and execute the pipeline.(see page 179)</u>
- 4. <u>View the pipeline execution history.(see page 183)</u>

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 "<u>Sample Site Data(see</u> <u>page 195</u>)" 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.



- 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.

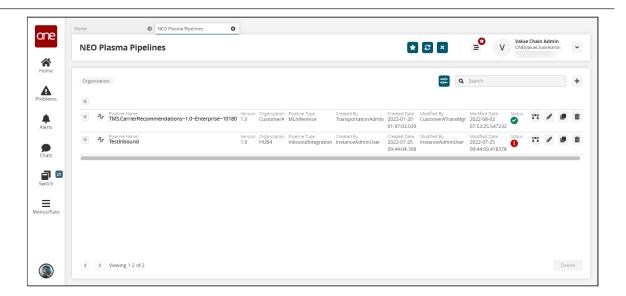
Prerequisites for following along with the example shown in each section of this documentation:

- 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.





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

one	Home NEO Plasma Pipelines						
_	NEO Plasma Pipelines		* 8 ×	≡ ° v	Value Chai ONEIValueC	n Admir hainAdmi	n in 🗸
Home							
Problems		Create NEO Plasma Pipeline 🗙					
		Pipeline Name *					
Switch		Organization					
Menus/Favs		Q Pipeline Type *					
		Cancel					
	€ > Verving 1.2 of 2						

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.

Org	nizati	n:						2 Q Se	earch				
	ሇ	Pipeline Name TMS.ETAPredictor~Ent~CustomerA	Version 1.0	Organization	Pipeline Type MLInference	Created By TransportationAdmin	Created Date 2022-01-27 02:37:14.096	TransportationAdmin	Modified Date 2022-07-07 10:01:53.055013	Status	3.2	ø	
	ľ	Pipeline Name TMS.CarrierRecommendations~1.0~Enterprise~101	Version 80 1.0	Organization CustomerA	Pipeline Type MLInference	Created By TransportationAdmin	Created Date 2022-01-20 01:47:03.039	CustomerATransMgr	Modified Date 2022-08-24 08:13:21.792441	Status	2"5	/	
	·Ŀ	Pipeline Name CustomerA_Site_OB	Version 2.0	Organization	Pipeline Type OutboundIntegration	Created By TransportationAdmin	Created Date 2022-08-04 11:01:00.796	TransportationAdmin	Modified Date 2022-08-11 09:17:25.274827	Status	2*5	ø	
	·	Pipeline Name RanjitDemo_Item_IB	Version 1.0	Organization	Pipeline Type InboundIntegration	Created By TransportationAdmin	Created Date 2022-08-04 15:37:00.353	TransportationAdmin	Modified Date 2022-08-04 16:14:13.212467	Status	2"5	1	
	·	Pipeline Name Test	Version 3.0	Organization	Pipeline Type OutboundIntegration	Created Bv	Created Date 2022-08-24 09:37:56.627	Modified By	Modified Date 2022-08-24 09:38:00.479263	Status	2"5		

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

one	Home	NEO Plasma Pipelines	C Test	٥		
_	Test				★ 8 × = ⁰	ONElValueChain 🗸
Home						
A						► >_ ▲ *
Problems						
Alerts		→ Outbound Source			Outbound Sink	
Chats		Output			• Payload	
Switch						
≡	Q					
Menus/Favs	Q					
	ଷ୍ ଷ୍ **					
	-					
						Cancel Save

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



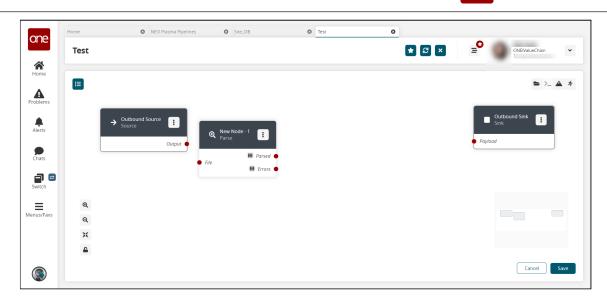


The Node List slideout appears.

one	Home	NEO Plasma Pipelines	Site_OB	C Test	0	
	Test				* 8 ×	ONElValueChain ~
Home	Node List	×				ニ 〉_ ▲ ネ
Problems	Q Search	8				
Alerts	© Parse	•				Outbound Sink
	🛃 Format	+ Output				Payload
Chats	Collect Records	+				
Switch	₩ Normalize	•				
Menus/Favs	↓₹ Sort	Ð				
	E supr					
۲						Cancel Save

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.

one	Home	NEO Plasma Pipelines	Site_OB	C Test	0	
	Test			*	e ×	ONEIValueChain V
Ame Home						
Problems			Node Properties	×		
			Node Name *			
Alerts			Format Type *	~		
Chats			Name-based Mapping			
Switch			Delimiter Character			
=			, Quote Mode * 🚯			
Menus/Favs			Minimal Quote Character	*		
			" Create Schema			
			Upload Sample File			
			View Schema None			
				ОК		

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



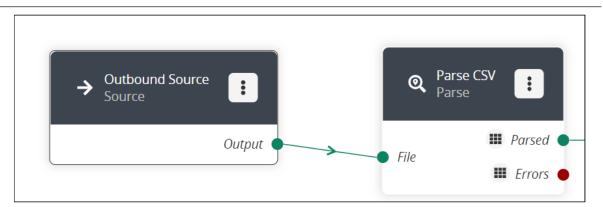
Field		Description				
Node Name*	Enter a name fo	r the node.				
Format Type*	Select a format type for the inbound file from the dropdown list. Options are JSON, CSV, and XML. The remaining fields vary according to the format chosen. For this example, we selected CSV.					
Create Schema		ad Sample File link. ema popup appears.				
	b. Complete the are required.	following fields. Fields with an asterisk				
	Field	Description				
	Namespace*	Enter a unique category to organize schema name fields. For this example, we used Input.				
	Schema*	Enter a unique name with which to associate the dataset. For this example, we used Sites.				
	Sample File*	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 " <u>Sample Data to Create a</u> <u>Schema(see page 185)</u> " section.				
	c. Click OK. The Node Properties updates.					
View Schema	is uploaded in t	oopulates with a link once the sample file he Create Schema field. Click the link to record schemas.				

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.
- 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.

ono	Home	NEO Plasma Pipelines	Site_OB	C Test	0		
one	Test				* 2 ×	∍° (ONEIValueChain
Home							
Problems			Node Properties	1	×		
Alerts			Node Name * New Node - 1				
Chats			Join				
Switch			Language * Python		*		
=			Script *	Ø	ŵ		
Menus/Favs							
			Ports Input Output				
			> Input 1	-	+		
				Cancel	2		
							Cancel Save

- 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.



Home Site_OB	NEO Plasma Pipelines	Site_OB	α Ο	* 8 ×	ONElValueChain
			_		Transportation marrier
		Node Properties	×		
		Language *			
		Python	~		
		C Script *			
		<pre>def executeNode(inputs): iterable_inputs = {} outputs = {}</pre>		l Ourput 1 🔶 🗩	
		Ports			
		Input Output			
		Input 1	- +		
		Port Name *			
		Port Type *			
		Stream of Record	× III		
		Stream of Record	• •		
			Cancel		

- 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.

one	Home	NEO Plasma Pipelines	Site_OB	C Test	0		0	
Home	Test				1	* 3 ×		ElValueChain 👻
		Record Schemas						×
Problems								•
Alerts		Schema > Default	* Name	* Ту	/pe		Actions	
Chats		> Input						
Switch					No Data			
Menus/Favs								
						Delet	e Activate C	ĸ

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.



Test			* 2	
ne	Record Schemas			×
ems				+
	Schema	🕢 * Name	✓ * Туре	Actions
ts	> Default	Address	String	★ +
	 Input Sites 	AlternateAddress1	String	¥ ↑ +
ts	sites	AlternateAddress2	String	V 🛧 🕂
1 😑		Contact	String	V 🗅 🕂
ch		CreationDate	String	¥ 🛧 🕂
Favs		CreationUser	String	V 🗅 🕂
reavs		Description	String	V 🛧 🕂
		DisplayName	String	V 🗅 🕂
		EnternriseName	String	

- 23. Click the **Activate** button.
- 24. Click **OK**.

The Node Properties popup window appears again.

- 25. In the **Ports** section, click the **Output** tab.
- Click the arrow to the left of the output to display the Port Name* and Port Type* fields.

one	Home	NEO Plasma Pipelines	Site_OB						
	Test			E ONErValueChain					
Home			Node Properties	×					
Problems			Node Name * New Node - 1						
Alerts			Join Is Join Language *						
Chats			Python Script *	· · ·					
Switch				/ &					
Menus/Favs			Ports Input Output						
			✓ Output 1	E +					
			Port Name * Output 1						
			Port Type * Stream of Record						
				Cancel					

- 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.

- 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.

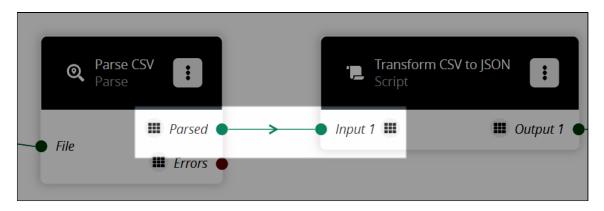
The Node Properties popup window appears.

36. Click Save.

The pipeline screen reappears.

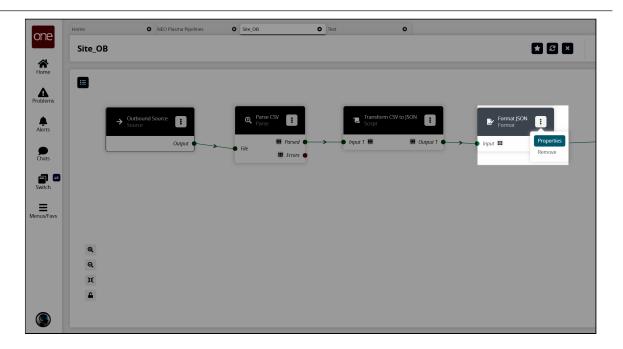
37. On the **Parse** node, click the red dot next to **Parsed** and drag the cursor to connect to **Input 1** on the script node.

The connection turns green. The stream of records from the parser has now been converted to the correct format.



- Click the node list icon in the top left corner again. The Node List slideout reappears.
- 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.

one	Home	NEO Plasma Pipelines	Site_O	B O	Test	0		<u> </u>		
*	Test						* 8 ×	∍ °	ONElValueChain 👻	
Home										
Problems				Node Properties		×				
Alerts				Node Name *						
				Format Type *		~				
Chats				Template		ø				
Switch						6				
Menus/Favs				Schema *						
						*				
						ок				

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.

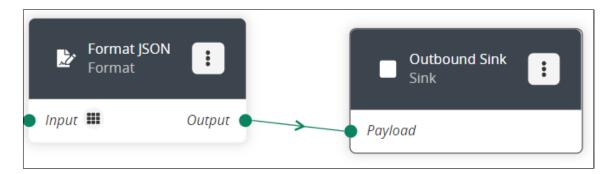


Field	Description
Template	A. Click the pencil icon. The Edit Script popup appears. B. In the Edit Current Code field, enter the script. For this example, we used the following script: {
Schema*	Select the output schema from the dropdown list. For this example, we selected Output/Sites.

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.

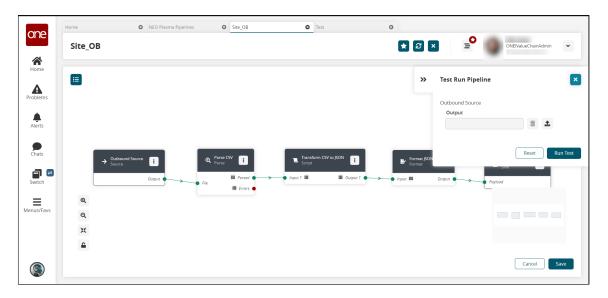


- 44. Repeat this process to add additional nodes as desired. The following node types are available:
 - A. Parse
 - B. Format
 - C. Collect Records
 - D. Normalize
 - E. Sort
 - F. Script
- 45. Click the **Save** button to save the pipeline.
- 46. Click the **Run Test** icon in the top right corner to test the pipeline.



one	Home	NEO Plasma Pipelin	nes Site_OB	C Test	0	
	Site_OB				* 2 ×	ONEIValueChainAdmin 👻
Home						►>_ ▲ *
Problems						
Alerts						
	_		_			
Chats	→ ⁰⁴	utbound Source	Q Parse CSV Parse	C Transform CSV to JSON Script	Format JSON Format	Outbound Sink
Switch	Q	Output	File Errors	• Input 1 🏙 🗰 Output 1 •	> Input III Output •	Payload
Menus/Favs	a a					
	×					
	_					Cancel

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.

one	Message Queue Summary	NEO Plasma Pipelines	O Item_IB	0 Pipel	ine Interfaces	0				-		
*	Pipeline Inter	faces						* 2 ×	Ŧ	ONEIValueChainAdmin	_	*
Home	Q Filters (edit): None								_			
Problems	Name No data found	Version	Туре	Pipeline Version	Interface Category	Outbound Interface	Outbound Interface Version	Enterprise		Pipeline		
٠	No cata lourio											
Alerts												
Switch		4										
Menus/Favs		4F										
Menus/Favs												
۲										Export to Excel Create Pipelin	e Interface Acti	ons •

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



one	Home 🕲	NEO Plasma Pipelines	CustomerA_Item_IB	Site_OB	🕲 Test	Pipeline Interface	s 🖸 Site_OB	🛛 Test	0
	Site_OB					e	× =	ONEIValueChainAdmin	~
Home								-	
Home	Name:	Site_OB							
Δ	Version:								
Problems	Enterprise Name:								
Troblems		Outbound	-						
		Site_OB 🗙	Q Create New Pipeline	2					
Alerts	Interface Category:		~						
, acres	Outbound Interface:				*				
	Outbound Interface Version:	1.0 👻							
Chats									
a e									
Switch									
=									
Menus/Favs									
								Submit	Cancel

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.

Integration S				* 2		
Q Filters (edit): None						
Name	Category	Outbound Interface	Outbound Interface Version	Events	Destinations	Ignore Changes Made By
1000	Standard Item	Standard 832 (X12 Price/Sales Catalog) (SCPT.Rtvn_832_OB)	1.0	Line/ Schedule: Every Month, Every Day at 1:0	HUB4EDI	
1200	Standard EDI	EDI 309 Outbound (TMS.EDI309Outbound)	1.0	Shipment: Confirmed Shipment: Confirmed On Board	CustAOutboundEDI	
1201	Standard EDI	EDI 601 Outbound (TMS.EDI601Outbound)	1.0	Shipment: Confirmed Shipment: Confirmed On Board	CustAOutboundEDI	
1202	Standard EDI	EDI 300 Outbound (TMS.EDI300Outbound)	1.0	Ocean Booking Reqst: Create Ocean Booking Reqst: Update	P2PIOutboundEDI	
10296	Subscription Interfaces	Packing List Outbound (WMS PackingListOutbo	1.0	Packing List: Close Packing List: Close Packing List: Wiset Or Update From Integ Packing List: Prepare To Move Packing List: Saydry To Ship Packing List: Synch Packing List: Synch Packing List: Synch Packing List: Tomfer Packing List: Update	NE_Adjust	

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



e	Integration Subscripti	on O	New Integration Subscription	New Integration Subscription	
lew Integration	Subscription				
* ID:	82565				
* Category:	Pick a Category	*			
* Outbound Interface:	Pick an Interface			~	
Outbound Interface Version:	Pick a Version 💙				
Active?:				_	
* Destinations:	Name	Туре	Details		
	CustAError	FILE	\${SharedRleSystemRoo	*	
	CustAFatal	FILE	\${SharedRileSystemRoo		
	CustASuccess	FILE	\${SharedRileSystemRoo		
	CustAOutboundEDI	FILE	\$(SharedRieSystemRoo		
	Cust4Outbound	FILE	\$(SharedRieSystemRoo		
	CarrierAOutboundEDI	FILE	\$(SharedFileSystemRoo		
	P2PIOutboundEDI	P2PI	CGW-INS		
	CARAOutbox	FILE	\${SharedFileSystemRoo		
	Enclementary	nie	#IChandElaGuttomDon	*	
			O Add new destination		
* Execute As:	TransportationAdmin/ONEIValue				
Ignore Changes Made By:		Q			
	Preferred Timezone: Pick a preferred TZ		~		
When provide, Preferred Timezone will force date/time fields in the interface to b Active Date Range: When provided, your subscription will only be run within the range given.			o the specified timezone.		
	inter protocologica policity and a second	, verurm			

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. T 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.
	New Message Destination ×
	* Name: * Destination Type: EMAIL * * Email:
	You can substitute %(Interface) , %(Version) and %(CurDate) (mm/dd/yy) macros within the subject and message section. Subject: Message:
	You can choose the file name of the attachment below. You can substitute %[FileName] to generate a unique filename, and/or % (Timestamp) to include the delivery date, and/or %[Stage] to include environment type * Attached File Name: %(FileName}
	Create
	 B. Fill out the fields. Fields with an asterisk (*) ar required. C. Click the Create button. The new destination is added.
*Execute As	This field auto-populates.
lgnore 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

 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								
arch	Q Filter	rs (edit): None						
		Enterprise	Organization	Name	Admin Site	Administered Site	Display Name	Description
ne		CustomerA	CustomerA	CustomerA-Austin DC			CustomerA-Austin DC	CustomerA-
ems		CustomerA	CustomerA	CustomerA-Canton Store	•		CustomerA-Canton Store	CustomerA-
rts		CustomerA	CustomerA	CustomerA-Hillsboro Store	•		CustomerA-Hillsboro Store	CustomerA- Store
D 🖃		CustomerA	CustomerA	CustomerA- Houston	•			
/Favs		CustomerA	CustomerA	CustomerA			CustomerA-MumDC	CustomerA-

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

	H4-F2					đ	× =	nterprise Admin
	Organization:	HUB4			* Туре	") DC	Plant	
	Name:	H4-F2				 Standard Site 	 Store 	
	Like Site:		Q		Traits	🗉 🗌 Air Port	Deep Sea Terminal	
	* Time Zone:	(GMT-05:00) Central Dayli	ght Time (US/Central)	~		Empty Depot Rail Yard	Inland Terminal Sea Port	
	* Address:	LATHROP DIST. CENTER				Select All	Sea Fort	
		2 NESTLE WAY LATHROP. CA 95330			Barcode Prefixing			
		US			Barcode Delimiter	X		
	County:				Barcode Format			
	DisplayName:	H4-F2			Is Billing	: 🔽		
	Description:	H4-F2			Is Shipping	_		
	External Ref. No.:	H4-F2			Is Franchise			
	Latitude:	37.79	N		Is Public	: 0		
	Longitude:	-121.29			Transportation Instructions			
	Tier:							
	Active?:							
	Copy Master Data:	-			Administered Sites			
2	Run Inventory Planning:	-						
	Do Not Stock:	_						
	Run Rebalance:							
	Weekend:	□ Sunday	□ Mo	ndav	Free Storage Days			
/S		Tuesday	U We	dnesday	Run Demand Translation			
		Thursday	Eric			-		
		Saturday	Sel	ect All	Switch To Shipment Screen	с <u> </u>		
							Update Edit Site Calendar Sup	pplier Permission History

- 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.

	Pip	eline Execu	ution History			🗙 🕄 🗙	ONEIValueChainAdmin
2							
ns		Execution Id	Pipeline	Pipeline Type	State	Creation Date	
		82993 🖺	CustomerA_Item_IB	Inbound Integration	Failed	Aug 3, 2022 8:00 am	
5		82992 🖺	CustomerA_Item_IB	Inbound Integration	Failed	Aug 3, 2022 7:57 am	
		82991	CustomerA_Item_IB	Inbound Integration	Finished	Aug 3, 2022 7:46 am	
5		82990 🖹	CustomerA_Item_IB	Inbound Integration	Finished	Aug 3, 2022 7:44 am	
•		82989 🖺	CustomerA_Item_IB	Inbound Integration	Finished	Aug 3, 2022 7:43 am	
n		82988	TMS.CarrierRecommendations=1.0=Enterprise=10180	ML Inference	Failed	Aug 3, 2022 7:40 am	
		82987 皆	TMS.CarrierRecommendations=1.0=Enterprise=10180	ML Inference	Failed	Aug 3, 2022 7:39 am	
avs		82986 🖺	TMS.CarrierRecommendations~1.0~Enterprise~10180	ML Inference	Failed	Aug 3, 2022 7:39 am	
		82985 🖺	TMS.CarrierRecommendations~1.0~Enterprise~10180	ML Inference	Failed	Aug 3, 2022 6:47 am	
		82984 🖺	TMS.CarrierRecommendations-1.0-Enterprise-10180	ML Inference	Failed	Aug 3, 2022 6:31 am	
		82983 🖺	TMS.CarrierRecommendations~1.0~Enterprise~10180	ML Inference	Failed	Aug 3, 2022 6:01 am	
		82982 🖺	TMS.CarrierRecommendations~1.0~Enterprise~10180	ML Inference	Failed	Aug 3, 2022 6:00 am	
		82981	TMS.CarrierRecommendations~1.0~Enterprise~10180	ML Inference	Failed	Aug 3, 2022 6:00 am	
		82980 🖹	TMS.CarrierRecommendations=1.0=Enterprise=10180	ML Inference	Failed	Aug 3, 2022 5:52 am	
		97070	TMC CarrierRecommendations=1.0=Enterprice=10190	ML Informaca	Called	Aur 2 2022 5:42 am	

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.





Message Queue Summary	Messages Messages	ov/items O NEO Plasma P	Pipelines O Item_IB	Pipeline Interfaces	Item_IB	Pipeline Execution History
Pipeline Execu	ition History			* 2 ×	3 88	ONE/ValueChainAdmin
Execution Id	Pipeline	Pipeline Type	State Creation Date			Filter Options
1035 >	item_16	Inbound Integration	Finished 29/07/2022 14:03 EC	τα		Pipeline
E 1034 >_	item_IB	Inbound Integration	Failed 29/07/2022 14:03 ED	тс		
III 1033 >	item_IS	Inbound Integration	Finished 29/07/2022 14:03 EC	τ		Pipeline Type
						State
						Reset
	 Viewing 1-3 of 3 					

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

	cution History			★ 2 × =	ONEIValueChainAdr
Execution Id	Pipeline	Pipeline Type	State	Creation Date	
82993	CustomerA_Item_IB	Inbound Integration	Failed	Aug 3, 2022 8:00 am	
82992	CustomerA_Item_IB	Inbound Integration	Failed	Aug 3, 2022 7:57 am	
82991	CustomerA_Item_IB	Inbound Integration	Finished	Aug 3, 2022 7:46 am	
82990	CustomerA_Item_IB	Inbound Integration	Finished	Aug 3, 2022 7:44 am	
82989	CustomerA_Item_IB	Inbound Integration	Finished	Aug 3, 2022 7:43 am	
82988	TMS.CarrierRecommendations~1.0-Enterprise~10180	ML Inference	Failed	Aug 3, 2022 7:40 am	
82987	TMS.CarrierRecommendations=1.0=Enterprise=10180	ML Inference	Failed	Aug 3, 2022 7:39 am	
82986	TMS.CarrierRecommendations~1.0~Enterprise~10180	ML Inference	Failed	Aug 3, 2022 7:39 am	
82985	TMS.CarrierRecommendations~1.0~Enterprise~10180	ML Inference	Failed	Aug 3, 2022 6:47 am	
82984	TMS.CarrierRecommendations=1.0=Enterprise=10180	ML Inference	Failed	Aug 3, 2022 6:31 am	
82983	TMS.CarrierRecommendations-1.0-Enterprise-10180	ML Inference	Failed	Aug 3, 2022 6:01 am	
82982	TMS.CarrierRecommendations~1.0~Enterprise~10180	ML Inference	Failed	Aug 3, 2022 6:00 am	
82981	TMS.CarrierRecommendations~1.0~Enterprise~10180	ML Inference	Failed	Aug 3, 2022 6:00 am	
82980	TMS.CarrierRecommendations-1.0-Enterprise-10180	ML Inference	Failed	Aug 3, 2022 5:52 am	
97070	TMS CarrierDecommondations-1.0-Entermice-10190	ML Informers	Enilod	Ares 2 7072 5-42 mm	

The Node Logs popup window appears.



Message Qu	ueue Summary O Messages	Inbox/items	NEO Plasma Pipelines	O Item_IB	Pipeline Interfaces	O Item_IB	Pipeline Execution	n History
Pipel	ine Execution History				* 2 ×	=	ONElValueChainAdmin	
	Node Logs						×	
	Execution Sequence	Status Sequence Details						
	1.) Inbound Source	Node Inputs						
	2.) Parser	0						
	3.) Errors Collector							
	4.) Transform Script	Ø						
	5.) Errors Formatter	Node Outputs						
	6.) Formatter	Output: File 🛓						
	7.) Inbound Sink	<u> </u>						
		Node Log						
		2022-07-29T14:26:14-0	4:00 INFO Total Execution Time: 4	4(ms)				
		1						
							ОК	
								-

- 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~Addr	AlternateAddress1(US~State~City~Address_ent~Address_org~Addr	AlternateAddress2(US~State~City~Address_ent~Address_org~Addr												
d r e s s t e ~	d ress_si te~	d r e s si t e ~									А			



		А	А											
		lt e	lt e											
		r n	r n											
		a t	a t											
	# A d	e A d	e A d											
	d d	d r	d r											
	r e	e s	e s											
	S	s 1	s 2 (
	s (U S	(U	(U											
	~	S ~	U S ~											
	S t	S t	S t											
	a t	a t	a t											
	e ~ Ci	e ~	e ~											
	t	Ci t	Ci t											
	у ~	У ~	У ~											
	A d d	A d d	A d d											
	r e	r e	r e											
	S	S	s s_											
	s_ e n	s_ e n	e n											
	t	t ~	t ~											
	~ A d d	A d	A d											
	r	d r	d r											
	e s	e s	e s											
	S_ 0	s_ o r	S_ 0											
	r g ~	r g ~	r g ∼											
	ess_org~Add	A d	A d											
	d r	d r	d r											
	e s		e s											
-	e s s_ si	e s s_ si	s_ si											
	t e	t e	t e											
	~ (~	~									Α		



#Address(US~State~City~Address_ent~Address_org~Addr	AlternateAddress1(US~State~City~Address_ent~Address_org~Addr	AlternateAddress2(US~State~City~Address_ent~Address_org~Addr												
d r e s s t e ~	d ress_si te~	d r e s si t e ~									А			



		А	А											
		lt e	lt e											
		r n	r n											
		a t	a t											
	# A d	e A d	e A d											
	d d	d r	d r											
	r e	e s	e s											
	S	s 1	s 2 (
	s (U S	(U	(U											
	~	S ~	Ŭ S ~											
	S t	S t	S t											
	a t	a t	a t											
	e ~ Ci	e ~	e ~											
	t	Ci t	Ci t											
	у ~	У ~	У ~											
	A d d	A d d	A d d											
	r e	r e	r e											
	S	S	s s_											
	s_ e n	s_ e n	e n											
	t	t ~	t ~											
	~ A d d	A d	A d											
	r	d r	d r											
	e s	e s	e s											
	S_ 0	s_ o r	S_ 0											
	r g ~	r g ~	r g ∼											
	ess_org~Add	A d	A d											
	d r	d r	d r											
	e s		e s											
-	e s s_ si	e s s_ si	s_ si											
	t e	t e	t e											
	~ (~	~									Α		



#Address(US~State~City~Address_ent~Address_org~Addr	AlternateAddress1(US~State~City~Address_ent~Address_org~Addr	AlternateAddress2(US~State~City~Address_ent~Address_org~Addr												
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1.12.3.7 Sample Site Data

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

# M a n a g n g E n t N a M e	ManagingOrgName	SiteName	P art n e r N a m e	Description	Ti m e Z o n e ld	Street1	Street2	C it y	S t a t e	Z i p	C o u n t r y	E x t e r n a l R e f N o	R e a s is g n E x t e r n a l R e f N o	l s P l a n t	I s D C	I s s t o r e	I S P u b li c	T i e r	L a t i t u d e	L o n g i t u d e	A c ti v a ti o n D a t e	D e a c ti v a ti o n D a t e	A c t i v e	BarcodePrefixing	B a r C o d e D el i mit e r
H U B 4	H U B 4	Si te 2 3		Si t 2 3	A er ic a/ N e w _Y or k	9 2 ki a n d R o a d	W e rf o r d	M	4 8 2 9	US	S it 2 3	0	1	0	0	0		3 4 0 6	- 1 7 5 1			1	0	Х	



# M a n a g n g E n t N a m e	ManagngOrgName	Si t e N a m e	P art n e r N a m e	Description	Ti m e Z o n e ld	Street1	Street2	C it y	State	Zip	C o u n t r y	ExternalRefNo	R e a s is g n E x t e r n a l R e f N o	l s P l a n t	I S D C	l s S t o r e	l s P u b li c	T i e r	Latitude	L o n g i t u d e	A c ti v a ti o n D a t e	D e a c ti v a ti o n D a t e	A c t i v e	B a r c o d e P r e f i x i n g	E a n O o o e i i n i i i e r
H U B 4	H U B 4	Si te 2 2 A		Si t 2 2 A	A m er ic a/ N	2 0 S u m it	L y n c h b u	V A	2 4 5 0 2	U S	S it 2 2 A	0	1	0	0	0		3 4 0 6	- 1 7 5 1			1	0	Х	

#ManagingEntNaMe	M a n a gi n g O r g N a E e	Site Name	P art n e r N a m e	Description	Ti m e Z o n e Id	Street1	Street2	C it y	State	Z i p	C o u n t r y	ExternalRefNo	R e a s is g n E x t e r n a l R e f N o	l s P l a n t	I s D C	l s S t o r e	I S P u b li c	T i e r	L a t i t u d e	L o n g i t u d e	ActivationDate	D e a c ti v a ti o n D a t e	A c t i v e	BarcodePrefixing	B a r C o d e D el i mit e r
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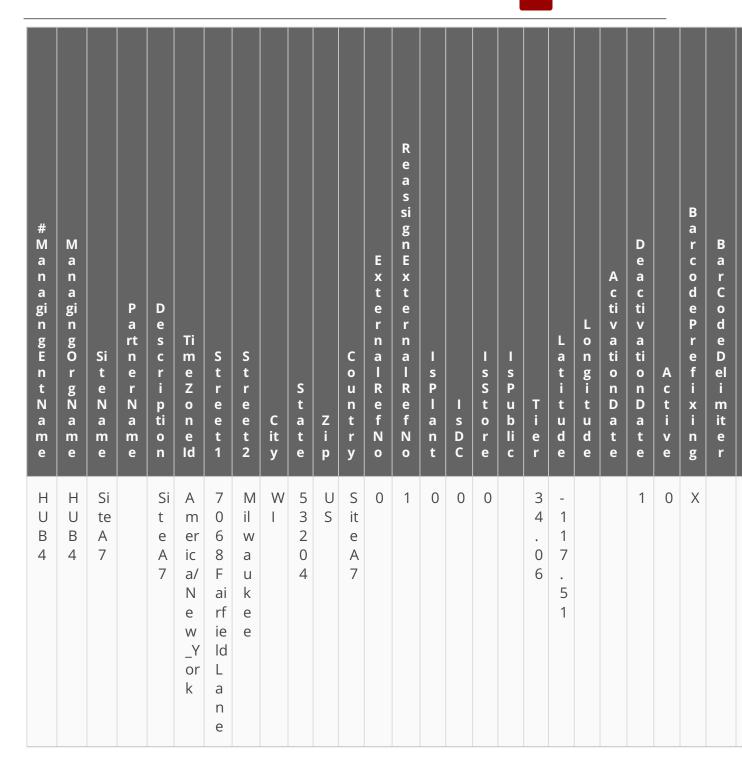
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W e Is li p	Street2
N Y	C it y
1 1 7 9 5	S t a t e
US	Z i p
S it A 5	C o u n t r y
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1	R e a s i g n E x t e r n a l R e f N o
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0	l s S t o r e
	I s P u b li c
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- 1 7 5 1	Latitude
	Longitude
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0	A c t i v e
X	BarcodePrefiXing
	B a r C o d e D el i mit e r



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.



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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.

	Sea	rch Work Ord	ders				* 8 ×	■ HH Vendo	r Supply Chain Admin	
h	Q Filt	ers (edit): None								
		Work Order Number	State	Work Type	Priority	Requested Completion Date	Creation Date	Asset Number	Description	Asset Ite
e		91644	Work Completed	Assemble			May 24, 2022 2:24 AM EDT			
		1951543	In Progress	Assemble	3-Medium		May 23, 2022 2:47 AM EDT	sp_FG_M_0523-01		sp_MfgA
ms		91364	Approved	Assemble			May 20, 2022 3:10 AM EDT			
1115		90924	Work Completed	Kitting			May 6, 2022 5:20 AM EDT			
		90917	Cancelled	Reconfigure			May 6, 2022 3:25 AM EDT			
5		90916	Work Completed	Reconfigure			May 6, 2022 3:19 AM EDT			
		90914	Work Completed	Reconfigure			May 6, 2022 2:58 AM EDT			
		90912	Work Completed	Reconfigure			May 6, 2022 2:16 AM EDT			
		90911	Work Completed	Reconfigure			May 6, 2022 2:09 AM EDT			
8		90909	Work Completed	Reconfigure			May 6, 2022 1:52 AM EDT			
		90908	Work Completed	Reconfigure			May 6, 2022 1:33 AM EDT			
		90907	Work Completed	Reconfigure			May 6, 2022 1:30 AM EDT			
		90906	Work Completed	Reconfigure			May 6, 2022 1:25 AM EDT			
avs		90905	Work Completed	Reconfigure			May 6, 2022 12:58 AM EDT			
		90904	Work Completed	Reconfigure			May 6, 2022 12:22 AM EDT			
		90864	Work Completed	Reconfigure			May 5, 2022 9:07 AM EDT			
		90846	In Progress	Kitting			May 5, 2022 7:37 AM EDT			

- 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.

Oming Organization: HubblingA State: Work Completed Order Number: 5016 Wrich Order Type: Reconfigure Wrich Order Type: Reconfigure Wrich Order Type: Reconfigure Wrich Order Type: Reconfigure Planned Earl Date: Moj: 2022 1119 AM EDT Wrich Subtraction: 50: Might: PLICG Planned Earl Date: Moj: 2022 1119 AM EDT Wrich Subtraction: 50: Might: PLICG Actual Start Date: Moj: 2022 1119 AM EDT New Rent: Actual Start Date: Moj: 2022 1119 AM EDT New Rent: Actual Start Date: Moj: 2022 1119 AM EDT New Rent: Actual Start Date: Moj: 2022 1119 AM EDT New Rent: Actual Start Date: Moj: 2022 1119 AM EDT New Rent: Actual Start Date: Moj: Might: MuBM EdT New Rent: Assigned To User: HubbMight: HubbMig	Order Number: 59316 Work Order Type: Reconfigure Work Stete: 59,016_Part2 * Plannoe fand Deate: Myd. Soz 21119 AM EDT * Assemble Castor: 59,016_Part2 * Plannoe fand Deate: Myd. Soz 21119 AM EDT Werk Sublecation: Actual Stat: Date: Myd. Soz 21119 AM EDT * New Nill Of Materials: 59,012_ * Actual Stat: Date: Myd. Soz 21119 AM EDT * New Nill Of Materials: 59,012_ * Actual Stat: Date: Myd. Soz 21119 AM EDT * New Nill Of Materials: 59,012_ * Actual Stat: Date: Myd. Soz 21119 AM EDT * New Nill Of Materials: 59,012_ * Actual Stat: Date: Myd. Soz 21119 AM EDT * New Nill Of Materials: 59,012_ * Actual Stat: Date: Myd. Soz 21119 AM EDT * Actual Stat: Date: Myd. Soz 20119 AM EDT * Actual Stat: Date: Myd. Soz 21119 AM EDT * New Nill Of Materials: 59,012_ * Actual Stat: Date: Myd. Soz 20119 AM EDT * Actual Stat: Date: Myd. Soz 20119 AM EDT * Actual Stat: Date: Myd. Soz 20119 AM EDT * New Nill Of Materials: 59,012_ * Actual Stat: Date: Myd. Soz 20119 AM EDT * Actual Stat: Date: Myd. Soz 20119 * Actual Stat: Date: Myd. Soz 20119 AM EDT * Actual Stat: Date: Myd. Soz 20119 * Actual Stat: Date: Myd. Soz 20119 * Actual Stat: Date: Myd. Soz 20119 * Actual Stat: Date: Myd. Soz 20119 * Caster State: Myd. Actual Stat: Date: Soz 20119 * Actual Stat: Date: Soz 20119	90916		2 ×	HH Vendor Supp	oly Chain Admin
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*Assembly Location: sp. MgA.P2.Loc3 * Planned Ind Date: MgA 5222 1119 AM EDT Mork Sublexation: sp. MgA.P2.Loc3 ************************************		Order Number: 90916		Work Order Type: Reconfigure		
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*Rem: sp.klc_K Actual End Date: May 5.202.11:19 AM EDT Assigned To User: HubbMfgAdmin, HubbMfgAdmi	* term: sp. JPL_SIX Actual End Date: May 6, 2022 11:19 AMI EDT New Iterm: Actual End Date: May 6, 2022 11:19 AMI EDT * New Iterm: Actual End Date: May 6, 2022 11:19 AMI EDT * New Iterm: Actual End Date: May 6, 2022 11:19 AMI EDT * New Iterm: Actual End Date: May 6, 2022 11:19 AMI EDT * New Iterm: Actual End Date: May 6, 2022 11:19 AMI EDT * Quantity UDM: End Actual End Date: May 6, 2022 11:19 AMI EDT * Authorization: View Fonding Authorizations: Actual End Date: May 6, 2022 11:19 AMI EDT Tasks: Assembled: Holds: _ Prints (end): Holds: Links: _ Oncer: View Fonding Authorizations: End Participation: Comp Sectial					
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		4				
		<u>x</u>				

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.
- 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.
- Click the picker tool. The Packing Resource popup displays.
- 6. Select a value on the popup and click the **OK** button.
- Click the Submit button.
 A green success message appears.

one	Buyer Dashboard	LPNs O			
	LPNs			₽× =	Buyer Supply Chain Admin 🗸
Q Search					
	Explorer	Unique Identifier: -1893765295	Volume:		*
*	Q, Filters (edit): None	* Site: Hub6MainDepot	Parent LPN:		
Home	-1893765295	Location: Current Sublocation:	Outer Container Status: Locked:		
	- b 004	Item Name:	Locked: Active: Yes		
Problems	- B 002 - 003	Description:	* Packing Resource: Box_1kg >	× Q	
	005	L x W x H:			×
	01000				Submit Cancel
Alerts	- 📑 01001 - 📑 01002	Q Filters (edit): None			
	B Show More	Singleton Line Number	Item Description Ext Item Name My It	em Generic Ite	m Generic Item Description Qty UOM S
Chats		No Data			
		TVO Data			
a 😑					
Switch					
=					
Menus/Favs					
		4			•
~					
	New LPN				Pack Actions -
-					

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.

	use Neo Das		Work Orders	5	0					* 8	×	o ,	ssembly Supervisor	and Warehouse Manaj	ger 🗸
	Blocking Holds	Order Number	e: Jun 24, 2022 12 Work Type	Task Number	Progress	Owning Organizati	on Planned Start Date	Planned End Date	Actual Start Date	Actual End Date	Item Name	Planned Actual Quantity Qty	State	Assembly Site	Item De
		94608	Assemble	1	0%6	HUB6	Jun 28, 2022 1:22 AM MDT	Jun 28, 2022 1:22 AM MDT	Jul 6, 2022 5:51 PM MDT		Hub6FGItem1	2	In Progress	Hub6Plant1	FG item
	4													_	
M	wing 1-1 of 1													Export to CSV	V Action

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

ne	Warehouse Neo Dashboard 🔹 Work Orders	© 94608	0				_ 0	-	
-	94608					e ×	3	Assembly Supervisor and Warehouse M	anager
λ									
arch								Assemble Work Or	der Template
*	Owning Organization: HUB6				State: In Progress				
me	Order Number: 94608			Work Orde	r Type: Assemble				
ane	Work Site: Hub6Plant1			* Planned Star	t Date: Jun 28, 2022 1:22 AM MD	т			
	* Assembly Location: Hub6Plant1			* Planned En	d Date: Jun 28, 2022 1:22 AM MD	т			
A blems	Work Sublocation:			Actual Star	t Date: Jul 6, 2022 5:51 PM MDT				
aems	* Item: Hub6FGitem1			Actual En	d Date:				
	* Bill Of Materials: Hub6FGItem1-2			Assigned T	o User: HUB6Admin, HUB6Admi	in .			
•	* Quantity: 2								
erts	* Quantity UOM: Each								
	* Assembly Process Type: Make To Stock								
	Authorization: View Pending Authorizations								
nats	Assembled Holds Links Crossdock								
	Q. Filters (edit): [Work Order: 94608]								
ם ר	Lot Serial Number Item Name	Item Description	Generic Item	Generic Item Description	Comp Lot	Comp Serial	Comp Item	Comp Item Description	Quantity
itch	The second se								
=									
is/Favs									
	4								
									_
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4. Click the **Assemble** button.

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



94608	3								S ×	=0	Assembly Supervisor and Warehouse Manag
											Assemble Work Order 1
	g Organization: HUB6						State: In Pi				
	Order Number: 94608 Work Site: Hub6Plant1					w	rk Order Type: Asse	emble			
* Ass	embly Location: Hub6Plant1		Assem	ble						- ×	
	rk Sublocation:			Work Order: 94608			Rem Qty: 2				
	* Item: Hub6FGItem1			Item: Hub6FGite	ml		* Batch Qty: 1				
*8	ill Of Materials: Hub6FGItem1-2			em Description: FG item 1		0.	Serial Number:		2		
	* Quantity: 2 Quantity UOM: Each			Quantity UOM: EACH			To LPN: Expiry Date:		Q New Compute	LPN	
	ly Process Type: Make To Stock		_					-			
	Authorization: View Pending Authorizations			LL Item	Item Description	Qty UOM	Prom LPN	Lot	Explry Date		
Assemble	d Holds Links Crossdock		×		I1 description	1 Each			_	4	
Q Filters	edit): [Work Order: 94608]		2 .	2 sp_comp_SC 3 sp_comp_LC	serial controlled	1 Each 2 Each		141001	Oct 11, 2021		
Lot		Item Nat	~ ~	3 sp_comp_uc	lot controlled	Z Laich		141001	00011,2021	em	
		_									
		_						Save	& New Batch Savi	& Close	
								3046	u wew backer] 364	a close	

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

94608			8 × =	Assembly Supervisor and Warehouse Manage
Owning Organization: HUB6 Order Number: 94608		sta Work Order Ty	ee: In Progress pe: Assemble	🛱 Assemble Work Order Tr
Work Site: Hub6Plant1	Assemble			- ×
* Assembly Location: Hub/Plant1 Work Sublocation: * Item: Hub/FGitam1 * Bill Of Materials: mub/FGitam1-2 * Quantity: 2	Work Order: 94608 Item: HubbFGitem1 Item Description: Füllem 1 Quantity UDM: EACH	Rem Q * Batch Q • * Serial Numb	er:	
* Quantity UOM: Each		Expiry Da	nte: Compute	
* Assembly Process Type: Make To Stock Authorization: View Pending Authorizations	LL Item Item	n Description Qty UOM C From		
Assembled Holds Links Crossdock	¥ 1 Hub6item1 II d	lescription 1 Each	▲	
Q. Filters (edit): [Work Order: 94608]		ial controlled 1 Each	A	
Loc Serial Number	Item Nat	controlled 2 Each	141001 Oct 11, 2021	em Comp Item Description Qu
10	_		Save & New Batch Save & Close	llose

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



one	Warehouse Neo Dashboard O Work Orders 94608	0 <u>94608 0</u>		Ø×≡ ⁰	Assembly Supervisor and Watehouse Manager
Search Home	Owning Organization: HUBS Order Number: 54008 Work Site: HUBS/Sure1 * Assembly Location: HUBS/Sure1	Assemble	State: In Progress Work Order Type: Assemble	- ×	🕼 Assemble Work Order Template 💌
Problems Alerts	Work Sublocation: * Term Hub/Clarm1 * Bi Of Nerenatic: hub/Clarm1-2 * Quantity: 2 * Quantity: UMX Exh * Assembly Process Type: Mail To Stock	Work Onder: 94038 Rem: HobbGRem1 Rem Description: F3 (cm 1 Quantity UOM: EACH	Rem Qty: 2 * Batch Qty: 1 * Serial Number: To LPN: Expiry Date: Oct 11, 2021		
Chats	Autorization: View Marke 10 3000 Autorization: View Marke 10 3000 Assembled Holds Links Crossdork Q. Fiters (edity, 10/40 Circler 94608) Lot Serial Number Item	L. Rem Hem Description ¥ 1 Hubbittem1 If description ¥ 2 ayormp_SC servid controlled Na 3 sp.comp_LC lot controlled	Qty UOM gy From LPN Lot 1 Each 2 Each 141001	Oct 11, 2021	Comp Item Description Quantity 4
Henus/Favs					
		-	Save	& New Batch Save & Close Close	Refrah
					Assemble Artions +



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.



12	1522						ଥ ×	=° (Buyer Su	pply Chain Admin
13	1522							-	U Udyer Su	ppiy chairrann
								🕒 Standard Te		
Singl	eton							U Standard R	emplate •	
	Enterprise Name:	HUB6			Parent Sin	gleton:	Q			
	Singleton Number:	131522.KitComponent	S1		Current Owni	ng Org: HUB6				
	* Serial Number:	131522			Owner Serial N	umber:				
	Description:				Owner A	ux Key:				
	* Serial Type:	Kit	~		Managi	ng Org:	Q			
	Category:			Q		ng Org: HUB6 🗙	Q			
	Item Name:	KitComponentS1 🗙		Q	Assigned		Q			
	Manufacturing Date:	Aug 10, 2022		Ê		ng Org: HUB6 ×	Q			
	Expiration Date:			Ê		nt Site: EN_Hub6DC1 ×	Q			
Mar	ufacturer Expiration Date:			m	Current A	w, TN 75244	La Ca			
	Manufacturer Lot					US				
	Number:			-		cation: EN_Hub6DC1 ×	Q			
	Lot:			Q	Current Sublo					
	Ext Lot Number: Weight:					Order: 99105 terials: Test4				
			* *			nt Lat:				
	Vol:		* *			nt Lon:				
	Temperature:		× ×			nsions: L V	с н		~	
	Pressure:		~		Dine	ISIOIIS. L	• •			

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.
- 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.



Lo	cation Inven	ntory					* 8	× =	Assembly !	Supervisor	
Explore	r Replace	Inventory	/ Summary Report	_	_	_	_	_	_	- ×	
	Inventory No	🔓 Quantit	ty Qty Diff	Qty UOM	Location	Item	Item Description	Ext Item Name	Generic Item	Generic Item Desc	
	O 244812	•	3	Each	sp_MfgA_P2_Loc4	sp_comp_R	regular				
i i	244812	•	1	Each	sp_MfgA_P2_Loc4	sp_comp_SC	serial controlled				

5					4						

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

Ν	ote

6

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.

Inventory No		🕑 Quantity	Qty Diff	Qty UOM	Location	Item	Item Description	Ext Item Name	Generic Item	Generic Item De
244812	•	0		Each	sp_MfgA_P2_Loc4	sp_comp_R	regular		Generic item	Generic item be
228295	•	3		Each	sp_MfgA_P2_Loc5	sp_comp_R	regular			
244812	•	1		Each	sp_MfgA_P2_Loc4	sp_comp_SC	serial controlled			

 Click the replace inventory icon (¹) to replace the current inventory. A popup displays based on the item type. The example below shows Snap On replacements.



	ers (edit): [ltem Na	me: sp_comp_R]	I	1	1	1	_
	Quantity	Snap On Qty	Qty UOM	Inventory No	LPN	ltem	
 ✓ 	3	3	Each	228295		sp_comp_R	
	6		Each	244773		sp_comp_R	
	8		Each	245073		sp_comp_R	

- 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

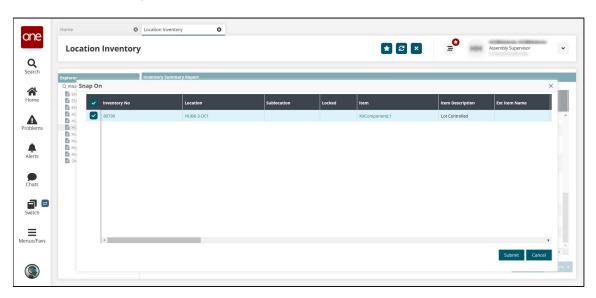
Users can add or remove components from the location inventory using the newly introduced Snap On and Snap Off actions.

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.



Home	ation	Location Inventory	on Inventory			* 8 ×	_ _ _	Assembly Supervisor
LOCA	ation	inventory						Assembly Supervisor
Explorer			ory Summary Report					
Q Filte S		Inventory No	Location	Sublocation	Locked	Item	Item Description	Ext Item Name
B HU			HUB6-3-DC1	Junication	LUCKCU	KitComponent1	Regular 1	
HU HU HU HU HU Sh		80190	HUB6-3-DC1			KitComponent1	Regular 1	
- 🖬 Hu - 🗎 Hu - 🗎 Hu		80190	HUB6-3-DC1			KitComponent1	Regular 1	
Sh								
		4						
								Submit Cano

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.

	Buff	er BOH A	Adjustment Re	eport			* 3	× = ⁰	Buyer Supply Chain Admin	~
h	Q Filter	's (edit) : [BOH Ad	ljust Date: Jun 23, 2022 12:0	0 AM CST - Jul 6, 202	2 11:59 PM CST]					
		Adjustment Qty	Adjustment Qty UOM	State	Item	Item Description	My Item	Site	Failure Reason	Locatio
e		10	Each	Completed	sp_comp_LC	lot controlled	sp_comp_LC-lot controlled	EN_Hub6DC3		EN_Hu
		10	Each	Completed	sp_comp_LC	lot controlled	sp_comp_LC-lot controlled	EN_Hub6DC3		EN_Hu
ns		10	Each	Completed	sp_comp_LC	lot controlled	sp_comp_LC-lot controlled	EN_Hub6DC3		EN_Hu
		10	Each	Completed	sp_comp_LC	lot controlled	sp_comp_LC-lot controlled	EN_Hub6DC3		EN_Hu
		10	Each	Completed	sp_comp_LC	lot controlled	sp_comp_LC-lot controlled	EN_Hub6DC3		EN_Hu
5		10	Each	Completed	sp_comp_LC	lot controlled	sp_comp_LC-lot controlled	EN_Hub6DC3		EN_Hu
		1	Each	Failed	Hub6ltem1	11 description	Hub6ltern1-I1 description	NE_HUB6_Plant15	Buffer is Tracked by Logical Inventory Policy but Customer is missing.	Plant1
		1	Each	Failed	Hub6ltem1	11 description	Hub6Item1-I1 description	NE_HUB6_Plant15	Buffer is Tracked by Logical Inventory Policy but Customer is missing.	Plant1
		50	Each	Failed	Hub6ltem1	11 description	Hub6ltem1-I1 description	NE_HUB6_Plant15	Buffer is Tracked by Logical Inventory Policy but Customer is missing.	NE_HU
avs		20	Each	Failed	Hub6ltem1	11 description	Hub6Item1-I1 description	NE_HUB6_Plant15	Buffer is Tracked by Logical Inventory Policy but Customer is missing.	NE_HU

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.



Q Filters (edit): None								
Details	Owning Enterprise	Tempiate	Grouping Name	Approval Routing Mode	Auto Close	Complete On First Approver	Approval Timeout	Auto Appro Requ
Details	HUB1	CreateASingleton		Serial	Yes	No		No
	Details	Details Owning Enterprise	Details Owning Enterprise Template	Details Owning Enterprise Template Grouping Name	Details Owning Enterprise Template Grouping Name Approval Routing Mode	Details Owning Enterprise Template Grouping Name Approval Routing Mode Auto Close	Details Owning Enterprise Template Grouping Name Approval Routing Mode Auto Close Complete On First Approver	Details Owning Enterprise Template Grouping Name Approval Routing Mode Auto Close Complete On First Approval Timeout

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

Croate Approva	Search Policies	Approval Routing	Create Appro	wal Routing Rule 🛛 🕲	_		ଥ ×	_ 0	Supply C
Create Approva	Routing Rule						ē Č	=	Supply C
Grouping	ame	~							
	olate:	Q							
* Approval Routing	fode: v								
Complete On First App									
Approval Tim									
Auto Skip 1st Approver If Requ Number Of Approvers To App									
Routing Lines									🖉 Broadcast
🕑 * Name	C Description	🛃 Local Org	🖻 * Approver Type	🗷 * Approver	Enumeration Value Context	🕑 Observer	Approval Routing Line Mode	Multi Approvals Required	For Approver
No Data								Required	Field
No Data									
								O Add New Routing	g Rule Line

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 lf 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 lin				
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.				

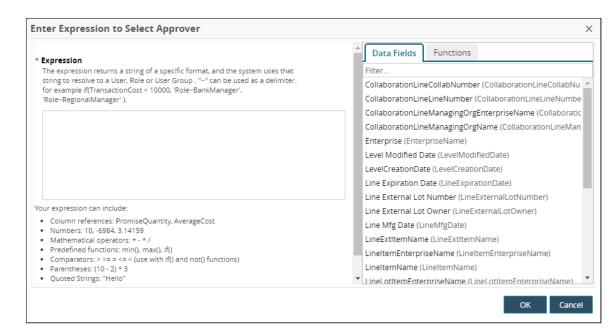


Field	Description
*Approver	Click to display the Select Approver popup screen. Follow steps 3 to 10 below to configure the business rules and expressions to validate them as approvers.
When Line Applies	Select conditions for using the routing line.
Observer	Select Yes from the dropdown to set the routing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

Select Approver		\times
* SubContext: ALL SingletonReqLine		
	ОК	Cancel

- 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.



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.

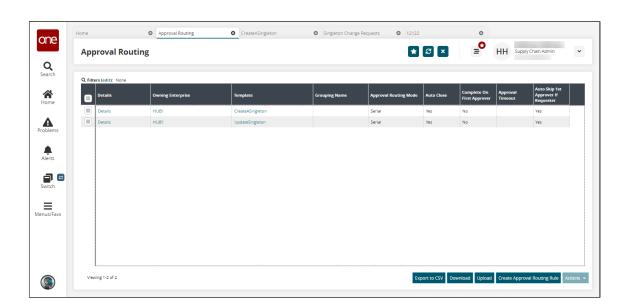
1.14.2 Using the Quorum Approval Routing Mode

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.



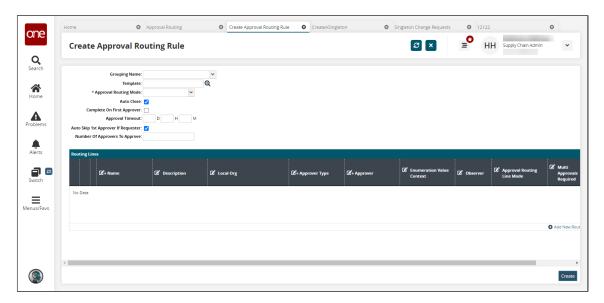


Currently, only two templates are supported, CreateASingleton and UpdateSingleton, and duplicate templates are not allowed. The number of templates is determined by the specific modules that use this feature in the ONE system. If two rows already exist, as found in this current example, one must be deleted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

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.



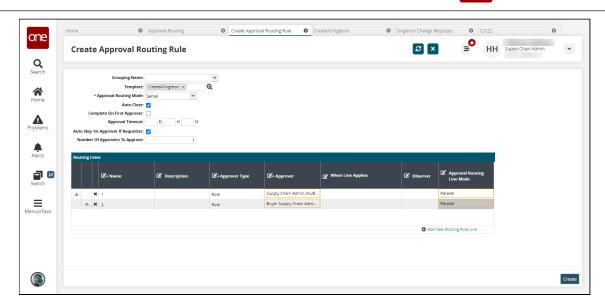
4. Fill out the following fields. Fields with an asterisk (*) are required.



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 lf 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 1 in 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.

Singlet	on Chang	e Requests				ଟ ×	≡ ○ HF	Supply Chain Admin
Q Filters (ed	t): None							
Seria	No	Singleton Description	Item Enterprise	State				
	25MAY22			In Progress				
	ngleton			In Progress				
	n1_18JUL22			In Progress				
	n3_18JUL22			In Progress				
1				In Progress				
July2	-1			In Progress				
3				In Progress				
	ton2_27May22			In Progress				
1				In Progress				
	ton3_27May22			In Progress				
	MAY22			Completed				
2	Sing4_18JUL22			In Progress Completed				
	ton1_31MAY22			Completed				
a 4	Cont_ormAt22			Completed				
				completed				

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



e	Home	Approval Routing	Singleton Change	Requests O Singlet	on Request	0			
	Singleton Request					* 8 ×	≡ ^O HF	Supply Chain Admin	•
h									
	Enterprise:		Parent Singleton		Q				
	Singleton Reg Number:		Current Owning Org		Q				
e	Description:		Owner Serial Number		-				
	Category:		Owner Aux Key						
	Item:		Managing Org		Q				
ns	Manufacture Date:	f	Dessessing Org		Q				
	Manufacturer Expiration Date:		Assigned To Org		Q				
	Manufacturer Lot Number:		Recalling Org		Q				
5	Lot		⊕ Current Site		Ð				
	Condition Code:	~	Current Address						
	Purpose Code:	~							
, -	Owner Code:	~	Current Location		Q				
	Incomplete	~	Current Lat		4				
			Current Lor						
avs			Active						
			Active						
	Lines Plans								
	SingletonReqLine								
	🖉 * Line 🛛 🗭 Item	🗹 Lot	🗹 Lot Number	🗹 Lot Owner	🗭 Quantity	🗭 Quantity UOM	🔊 Split Quantity		
	4		r -						
、 III									
)									Creat

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.
ltem	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.
- Click the Plans tab. The table is populated with information from the approval routing rule created earlier.



12123						* 2 ×	≡О нн	Supply Chain Admin
12125							_	
🧭 Record	was updated	d successfully						
		Lot:	Current Site:					
	Conditio		Current Address:					
		se Code: er Code:	Current Location: Current Lat:					
		mplete:	Current Lon:					
			Active: Yes					
Lines P	lans							
				1	1		1	1
	equence lumber	State	Currently Active?	Assigned To Role	Assigned To User	Approved/Rejected Date	Approved/Rejected User	Reject Comment
		0 Pending	Yes	Supply Chain Admin				
		0 Pending		Buyer Supply Chain Admin				

- 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.

			0	12123	Singleton Change Requests	Approval Routing	c	Home	one
~	HH Supply Chain Admin	3 _ ₽	* 8 ×				3	1212	
									Q Search
××	×		Plan Routing Mode	Approval Comment	Plan Role	Plan User	vthorize	✓ A	A
			Serial		Supply Chain Admin	Pian Oser			•
									Problems
								Line	Alerts
								с	a e
								11	
									Menus/Favs
-	Submit Cancel						I		
Actions -									
									Switch

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).



Home	Approv	val Routing	Singleton Change Requests	12123	0	
12123					★ 🕄 ×	E HH Supply Chain Admin
	Enterprise: HUB1	Parent Singleton:				
Singlet	on Req Number: July21-3	Current Owning Org: HUE	31			
	Description:	Owner Serial Number:				
	Category:	Owner Aux Key:				
	Item:	Managing Org:				
Ma	inufacture Date:	Possessing Org:				
	Expiration Date:	Assigned To Org:				
Manufactu	rer Lot Number:	Recalling Org:				
	Lot: Condition Code:	Current Site: Current Address:				
	Purpose Code:	Current Address: Current Location:				
	Owner Code:	Current Lat:				
	Incomplete:	Current Lon:				
		Active: Yes				
Lines Plans	1					
Q Filters (edit						
Sequer Numbe		Currently Active?	Assigned To Role	Assigned To User	Approved/Rejected Date	Approved/Rejected User Reject Comment
	0 Completed	No	Supply Chain Admin		Jul 21, 2022 11:20 AM	
	0 Bypassed	No	Buyer Supply Chain Admin		Jul 21, 2022 11:20 AM	
4						
Viewing 1-2 o	of 2					Export to CSV Approve Reject Escalate Actio
٠						Ad

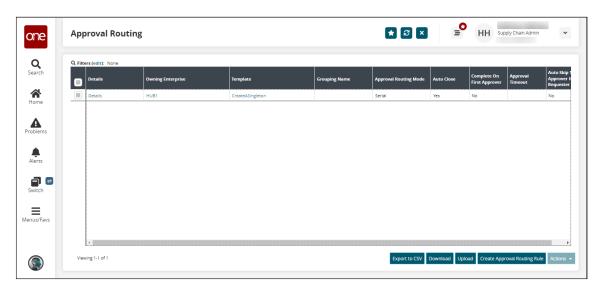
- 11. Click the **Export to CSV** button to export the report to your computer.
- 12. Select a plan and click the **Approve** button to approve the approval plan.
- 13. Select a plan and click the **Reject** button to reject the approval plan.
- 14. Select a plan and click the **Escalate** button to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

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

Working with the Approval Framework 1.14.3

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.

e	CreateASingleton					a ×	
n e	Grouping Name: Tempate * Approval Neutring Mode: Auto Close: Complete On First Approver Approven I meout: Auto Skip 1st Approver IN Requester: Number Of Approvers IN Approver		Q				
	Routing Lines	C Description	🖉 + Approver Type	E [*] ∗ Approver	C When Line Applies	🖉 Observer	Approval Routing Line Mode
			Role Business Rule	Supply Chain Admin if(ValueChainId=249, "U 	5		Sequential Sequential
avs						O Add	New Routing Rule Line

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.

one	Create Approval Routing Rule			ເນ	×	HH Supply Chain A	udmin 🗸
Q Search Home Problems	Grouping Name. Template * Approval Routing Mode: Complete On First Approver: Approval Timeout: Number Of Approver if Requester: Number Of Approvers To Approve:	Q					
Alerts	Routing Lines 2 + Name 2 Description No Data	🕑 Local Org	Ø + Approver Type	Ø* Approver	C Enumeration Value Context	C ^{Observer} C	Approval Routing
Menus/Favs							0
	•						Create



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

Field	Description
	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 lf 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

Ve rsi on	Release Date	Auth or	Comments
1.7	💼 23 Sep 202	2Tech 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	i 09 Sep 202	2Tech 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 202	2Tech Docs	Added the <u>"Appointment Scheduling in the NEO Workbench</u> <u>Ul(see page 24)</u> " section.
1.3	💼 26 Aug 202	2Tech Docs	Added the "Working with Inbound Integration Pipelines" section (plus subsections) and the "Working with the NEO Plasma Pipelines Screen" section.
1.2	i 16 Aug 202	2Tech 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 202	22Tech 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.

For more information, please visit<u>www.onenetwork.com</u>.

