NEO User Interface

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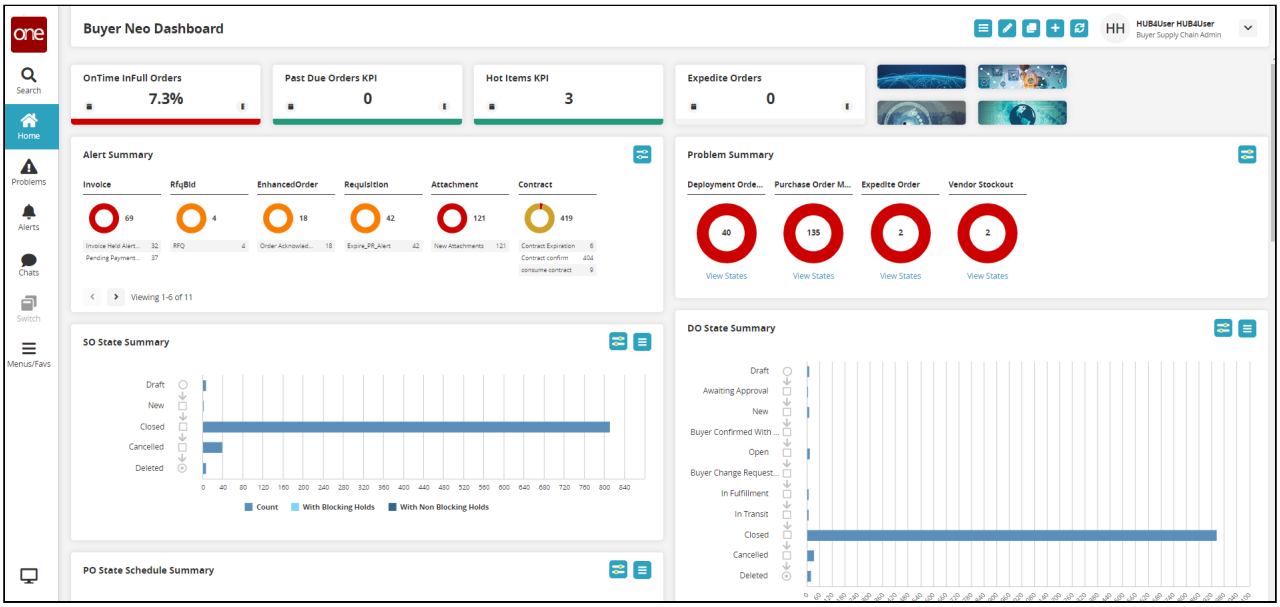
The NEO user interface (UI) modernizes the user experience and makes navigation more natural and intuitive. NEO UI includes the same great features and functions as Command Center UI, with added convenient features. NEO UI allows for more effective data visualization via a redesigned user dashboard and new Widgets (previously portlets). NEO UI enables users to work more quickly, finding the data they need when they need it. Commonly used items, including alerts, favorites, menus, and search, have moved from the top of the screen to the left side navigation panel. The relocation of tabs, now called Perspectives, to the switch menu, provides users with more viewing area for data visualization.

NEO UI includes significant changes to the User Dashboard. The Dashboard is now more configurable and can present more data than before in one, easy-to-read screen. Additionally, users have the option to create multiple dashboards for visualizing different types of data and further reducing on-screen clutter.

Users have the option to use either the legacy Command Center UI or NEO UI by selecting a preferred UI from their user profile settings.

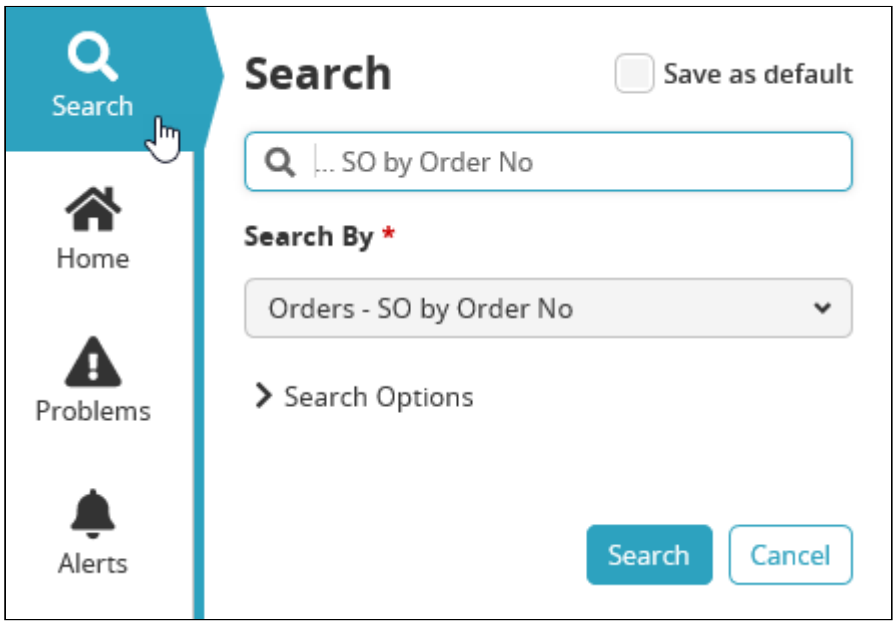


2 Global Search

The NEO global search allows users to search for orders, shipments, appointments, contracts, claims, requisitions, and other items depending on the user role.

Complete the following steps to use the NEO global search:

1. Click on **Search** in the left sidebar.
   The **Search** slide-out displays.



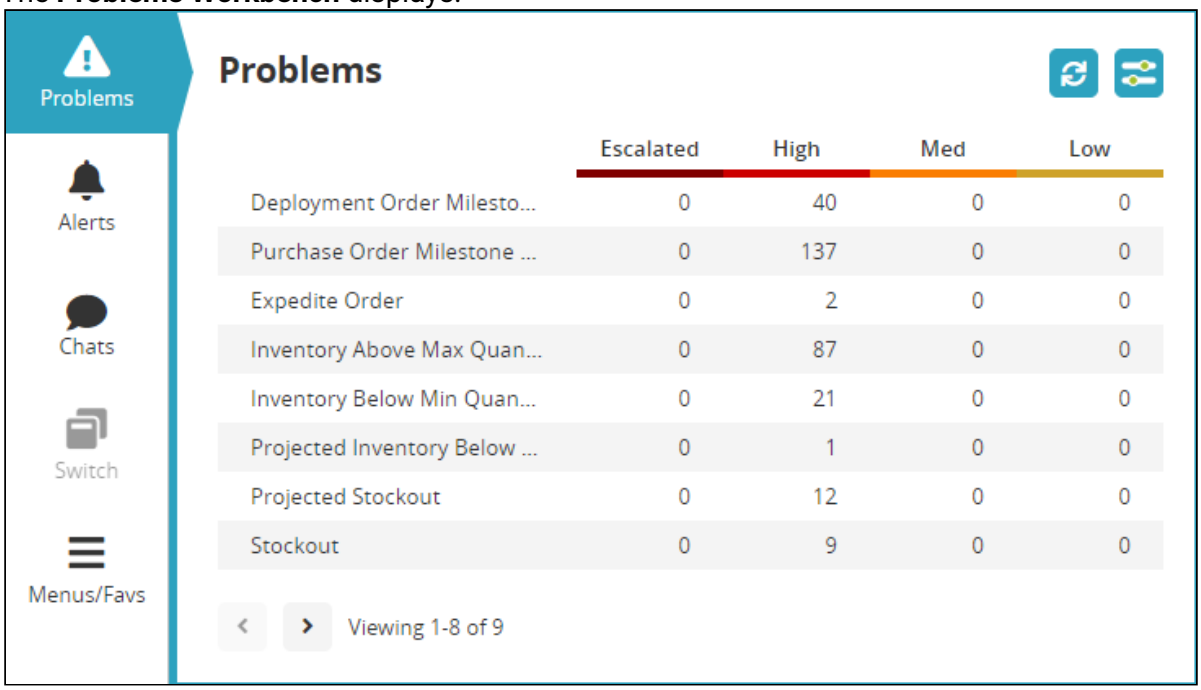
2. Select a search item from the **Search By** drop-down menu.
   The top search field populates with the search criteria.
3. Type in search criteria in the **Search** field.
4. Click the down arrow next to **Search Options**.
5. Select the time period from the **Retrieve For** drop-down menu.
6. Click on **Search**.
   The report for the search criteria specified displays.

3 Using the Problems Workbench

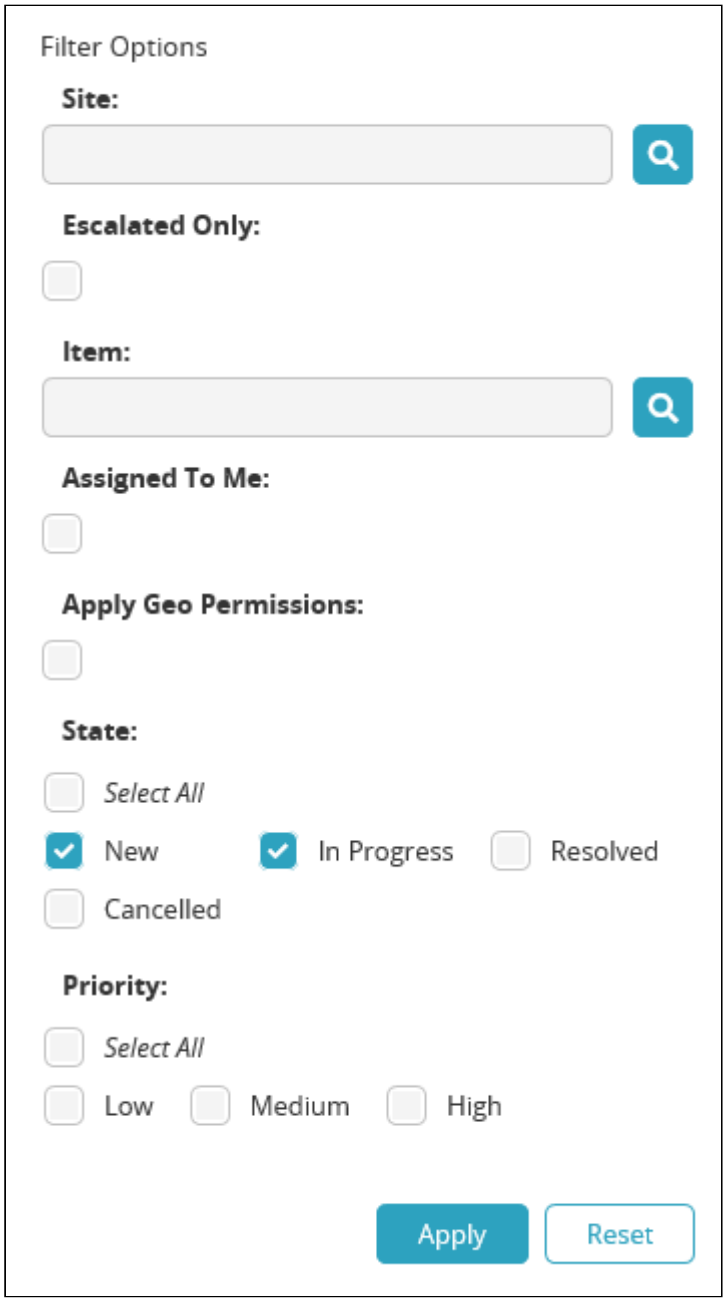
The new **Problems Workbench** slide-out in the NEO UI replaces the Problems portlet from the Command Center UI. The workbench slide-out is located on the left navigation sidebar so that users have quick and immediate access to problems from the NEO UI.

Complete the following steps to use the Problems Workbench:

1. Select **Problems** in the left sidebar of the NEO UI.
   The **Problems Workbench** displays.



2. To configure filters for this slide out, click on the **Filter Options** button.
   The **Filter Options** window displays.



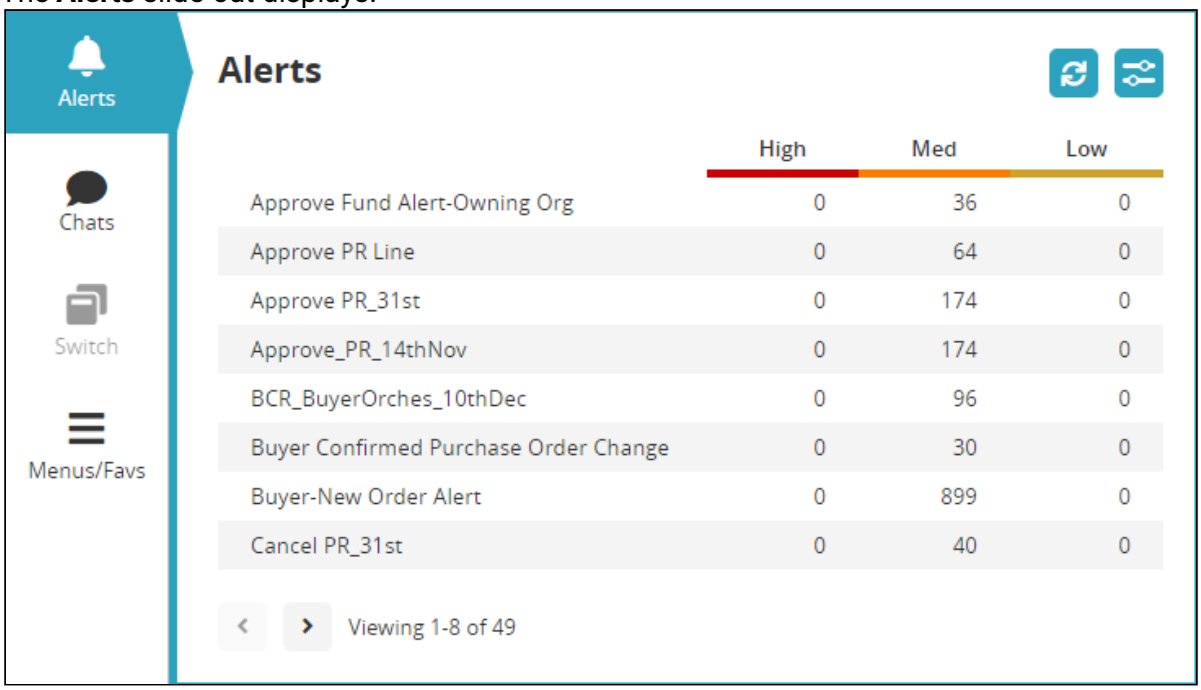
3. Enter the filter information into the available fields.
4. Click on **Apply** to apply the new filter settings.
   The workbench refreshes using the new filter settings.

4 Alerts

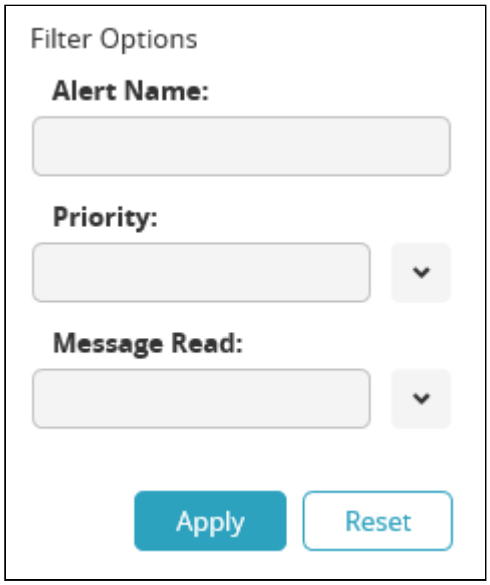
The new Alerts slide-out in NEO UI is the Alerts portlet from the Command Center UI. The slide-out is located on the left navigation sidebar so that users have quick and immediate access to alerts from the NEO UI view.

Complete the following steps to use the Alerts:

1. Click on **Alerts** in the left sidebar of NEO UI.
   The **Alerts** slide-out displays.



2. To configure filters for this slide out, click on the **Filter Options** button.
   The **Filter Options** window displays.

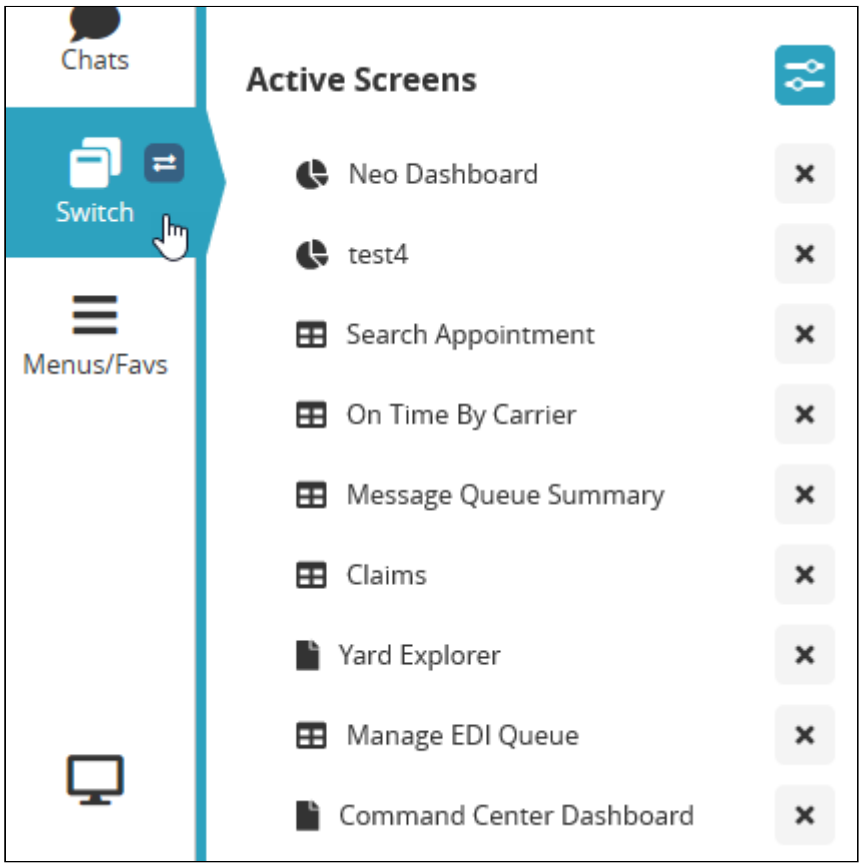


3. Enter the filter information into the available fields: **Alert Name, Priority,** and **Message Read**.
4. Click on **Apply** to apply the new filter settings.
   The slide-out refreshes using the new filter settings.

5 Screen Switching

Complete the following steps to switch between screens (or perspectives):

1. Click on **Switch** in the left sidebar of NEO UI.
   A slide-out menu of **Active Screens** (perspectives) displays. The list of screens is based on the current login session; screens do not save from session to session. If the user has just logged in, the **Switch** menu is cleared, and the icon is grayed out and inactive.



2. Click on the screen name (perspective) from the list.
   The screen (perspective) displays.

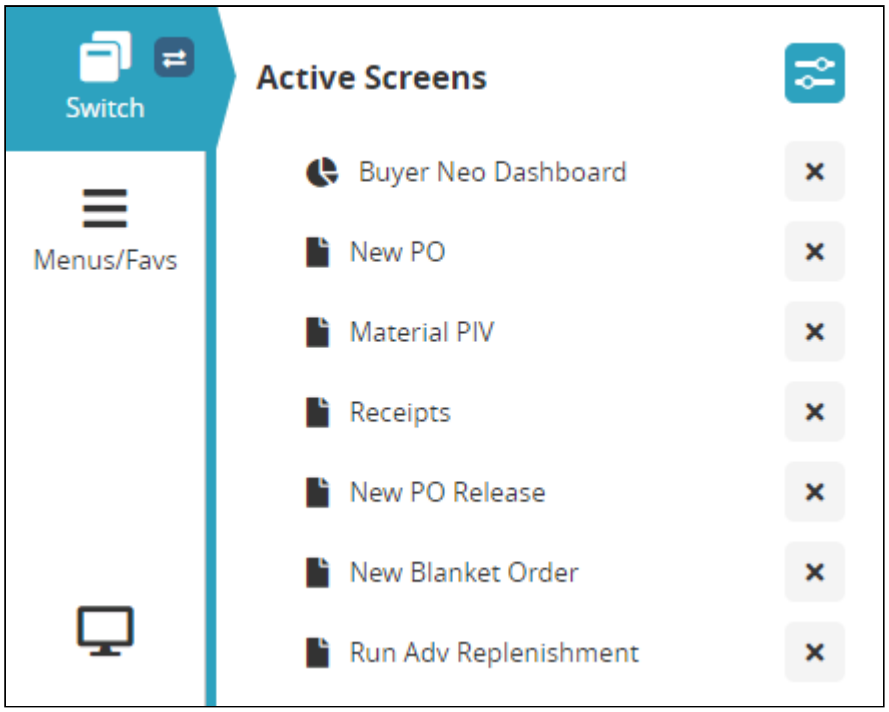
> The number of active screens displayed on the Switch menu is limited to 12. User preferences can be adjusted in User Settings.

5.1 Configuring the Screen Switcher

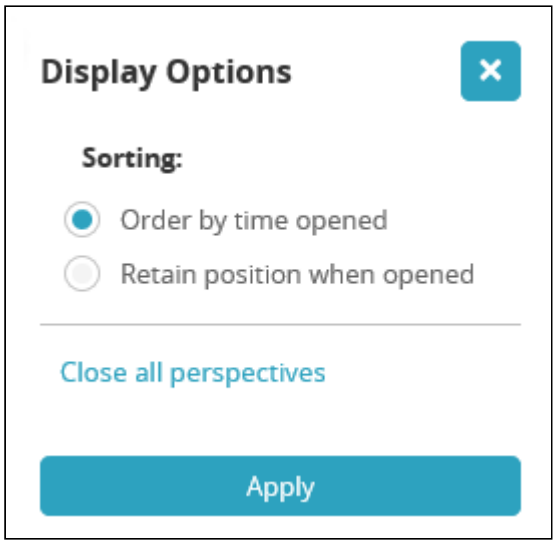
Complete the following steps to configure the Screen Switcher:

1. Click on **Switch** on the left sidebar of NEO.
   The UI displays the slide-out menu of **Active Screens** (perspectives). The list of screens is based on the current login session; screens do not save from session to session. If the user

has just logged in, then the **Switch** menu is cleared, and the icon is grayed out and inactive.



2. Click on the **Filter Options** button.
The UI displays the **Switcher Display Options** dialog box.



Options for displays of the screens include

Order by time opened - the longest opened screen/perspective remains on the top of the list
Retain position when opened - the order is based on what screen/perspective the user

viewed last

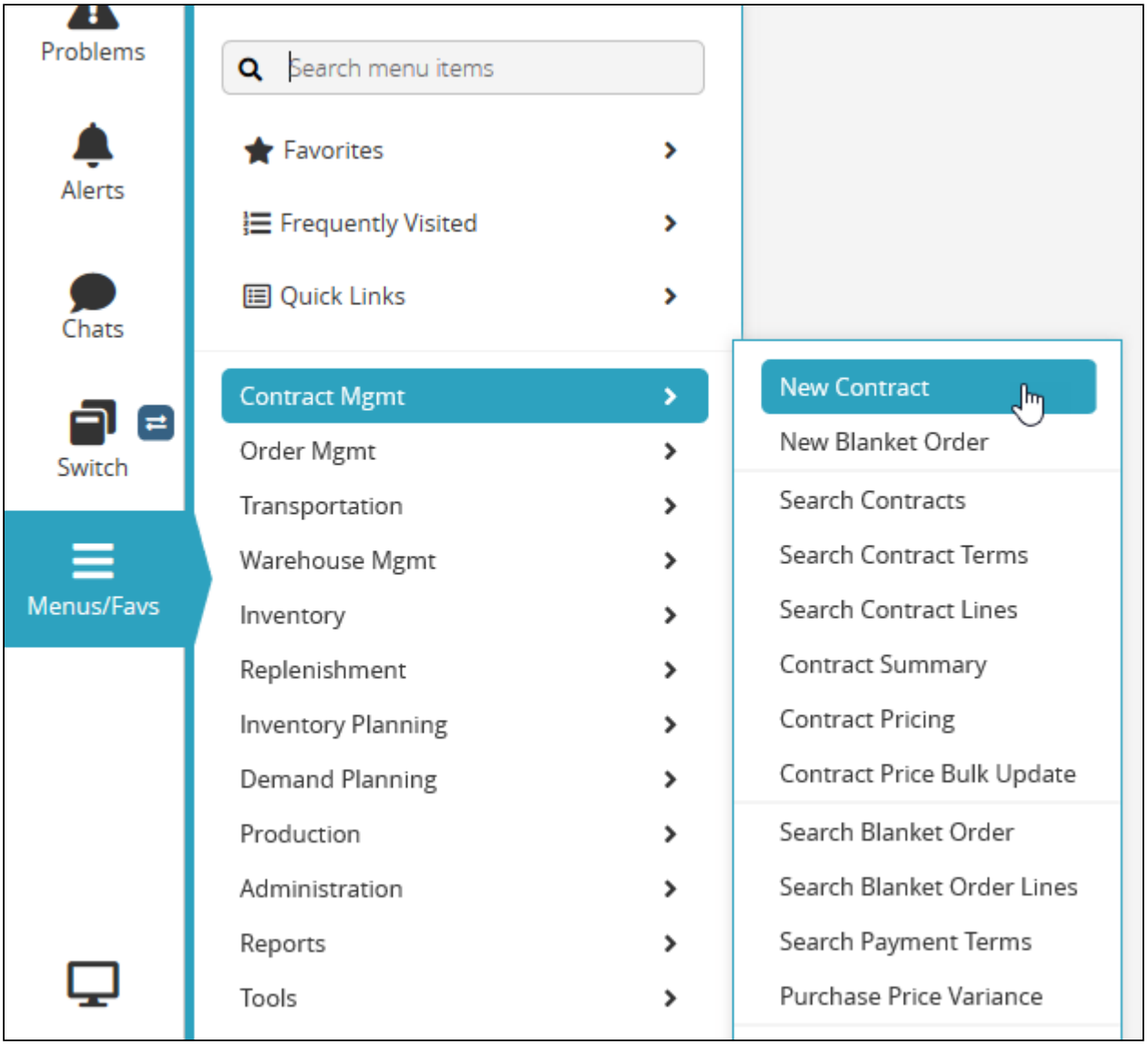
3. Click the radio button in front of the option to select it.
4. Click on **Apply**.
5. Click on **Close all perspectives** to close all screens/perspectives.

> The number of active screens displayed on the Switch menu is limited to 12. User preferences can be adjusted in User Settings.

6 Working with Menus

The menus from the Command Center UI have moved to the left sidebar within the NEO UI.

Select **Menu/Favs** to display the menus. Submenus will slide out to the right.

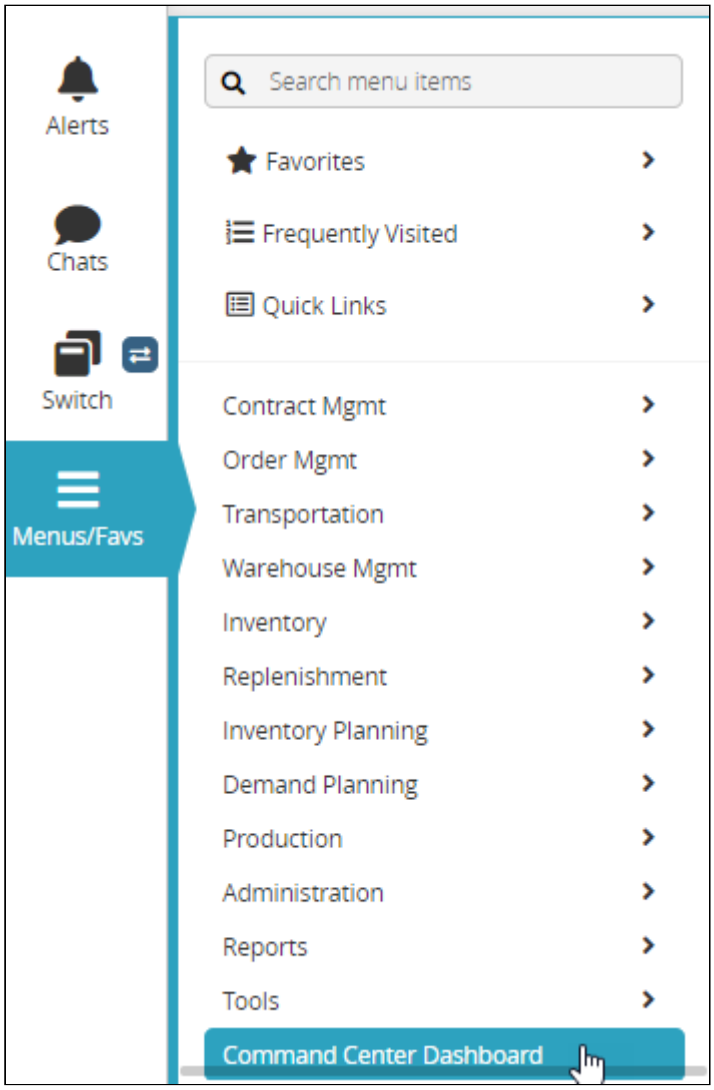


6.1 Command Center Dashboard in NEO UI

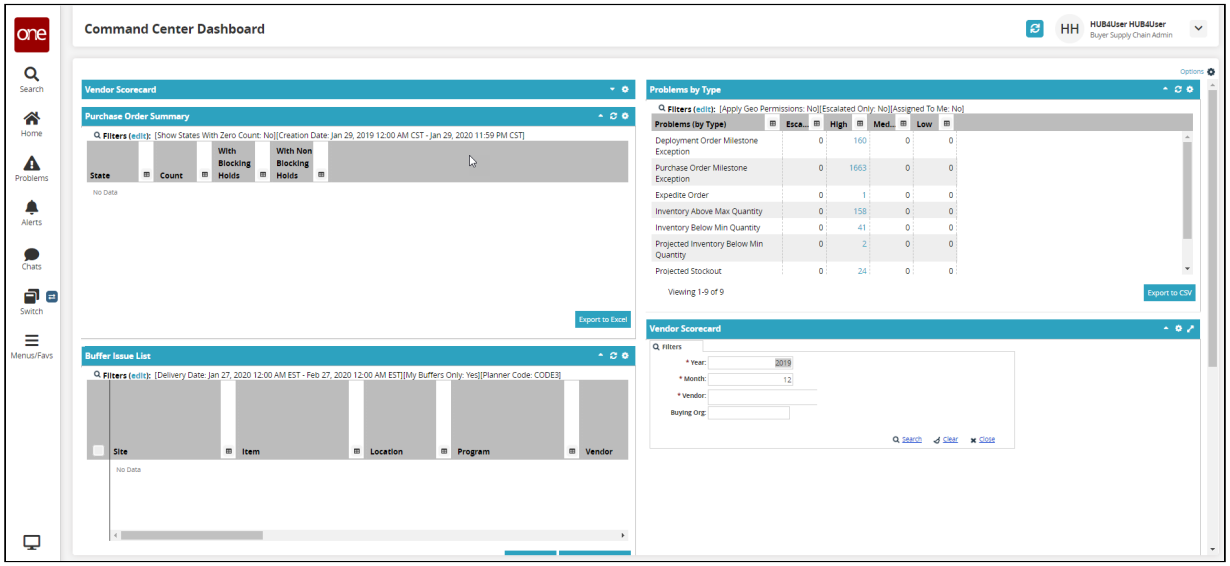
The NEO UI allows you to use the Command Center UI dashboard and portlets in the NEO UI.

Complete the following steps to display the Command Center UI Dashboard in the NEO UI:

1. Select **Menu/Favs** from the left sidebar in the NEO UI.



2. Select **Command Center Dashboard**.
   The Command Center portlets display.

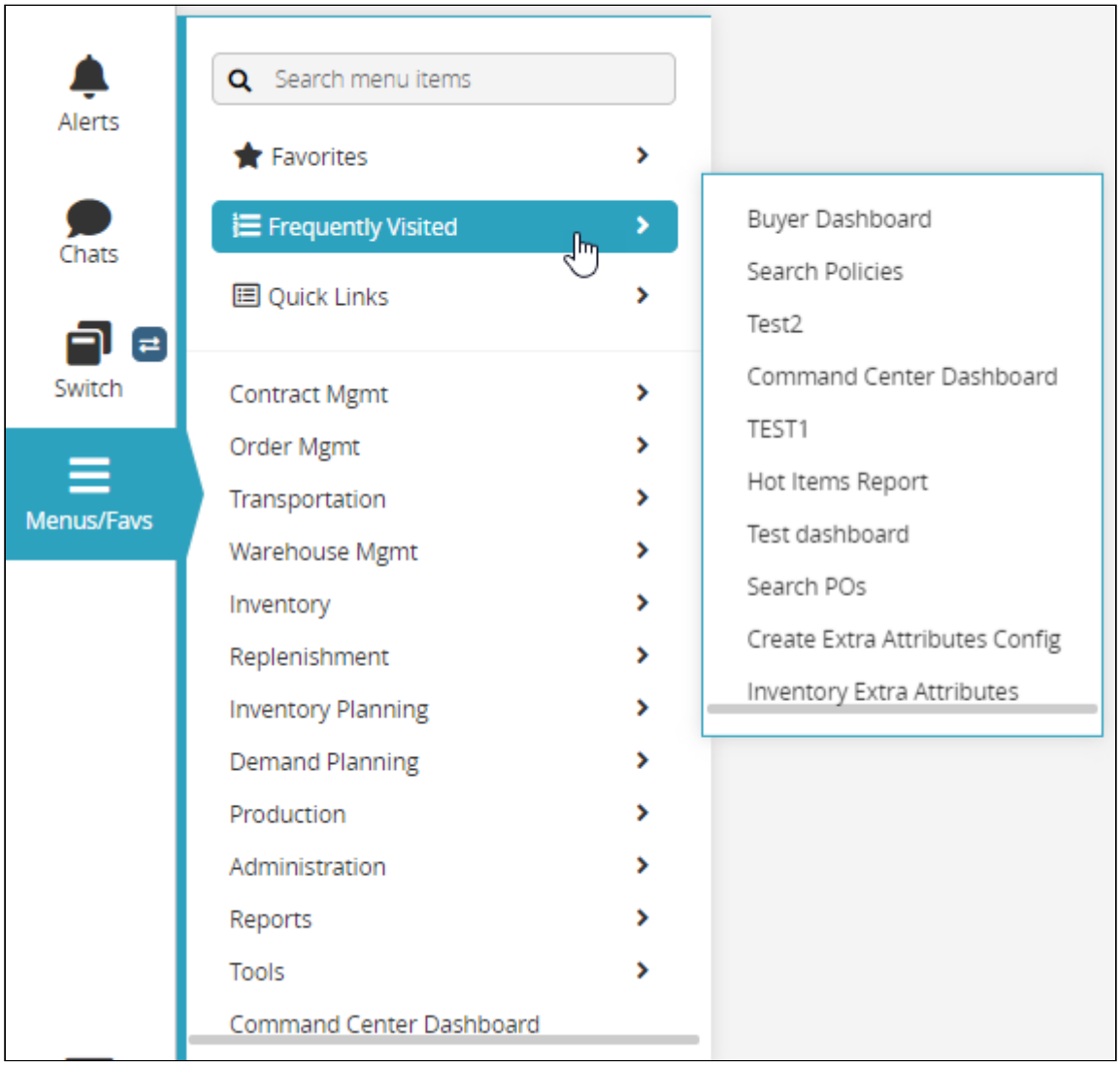


6.2 Frequently Visited

Frequently visited pages and dashboards are compiled in the NEO UI in the **Frequently Visited** menu.

Complete the following steps to find a frequently visited page or dashboard:

1. Select **Menu/Favs > Frequently Visited** in the left sidebar of the NEO UI.
   A list of frequently visited pages or dashboards displays.



3. Click on the link for the page.

6.3 Quick Links

The NEO UI offers the same quick links as the Command Center UI under the **Menu/Favs** sidebar menu.

6.3.1 Using Blipper

Blipper can now be found in the NEO UI from Quick Links.

Complete the following steps to use Blipper from Quick Links:

1. Select **Menu/Favs > Quick Links > Blipper**.
   The **Blipper** window opens.

2. Type in your message in the comment box.
3. Select the distribution list.
4. Click **Blip It**.

6.3.2 Accessing Documentation

Complete the following steps to access NEO documentation and Online Help:

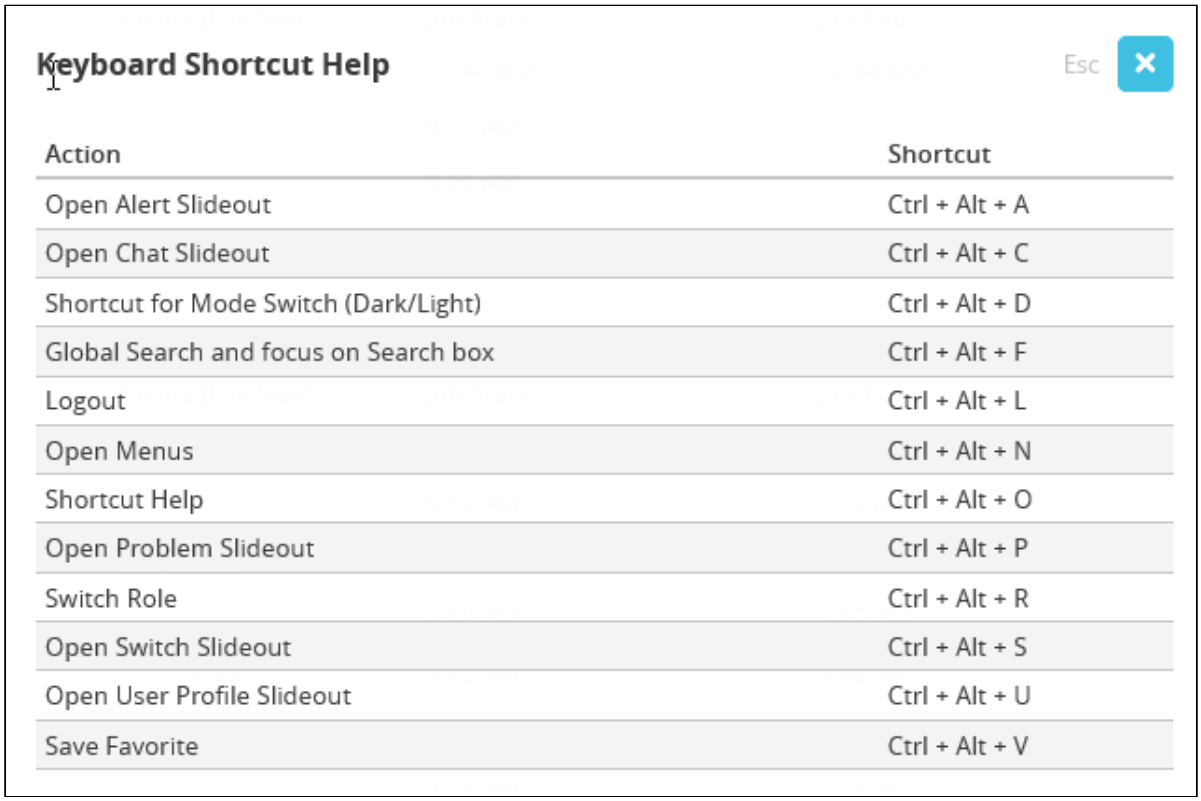
1. Select **Menu/Favs > Quick Links > Documentation**.
   The **Online Help** displays.
2. Use the search embedded in the help to locate the desired content.

6.3.3 Viewing Keyboard Shortcuts

NEO UI comes with keyboard shortcuts to help users work more efficiently.

Complete the following steps to display commonly used keyboard shortcuts:

1. Select **Menu/Favs > Quick Links > Keyboard Shortcuts.**
   The **Keyboard Shortcuts Help** dialog box displays.
2. Click the X or press escape to close the window.



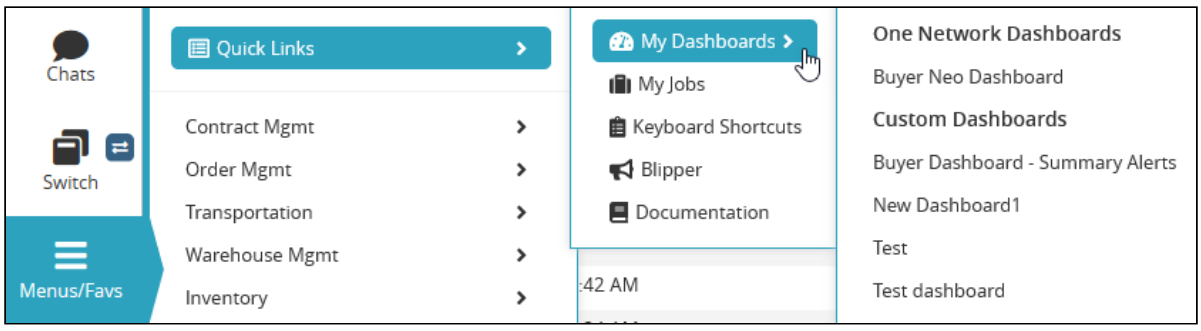
Action	Shortcut
Open Alert Slideout	Ctrl + Alt + A
Open Chat Slideout	Ctrl + Alt + C
Shortcut for Mode Switch (Dark/Light)	Ctrl + Alt + D
Global Search and focus on Search box	Ctrl + Alt + F
Logout	Ctrl + Alt + L
Open Menus	Ctrl + Alt + N
Shortcut Help	Ctrl + Alt + O
Open Problem Slideout	Ctrl + Alt + P
Switch Role	Ctrl + Alt + R
Open Switch Slideout	Ctrl + Alt + S
Open User Profile Slideout	Ctrl + Alt + U
Save Favorite	Ctrl + Alt + V

6.3.4 Using My Dashboards

The Quick Link, **My Dashboards**, is an easy way to see and move to any dashboard.

Complete the following steps to switch to a dashboard:

1. Select **Menu/Favs > Quicklinks > My Dashboards**.
   A current list of available dashboards displays.



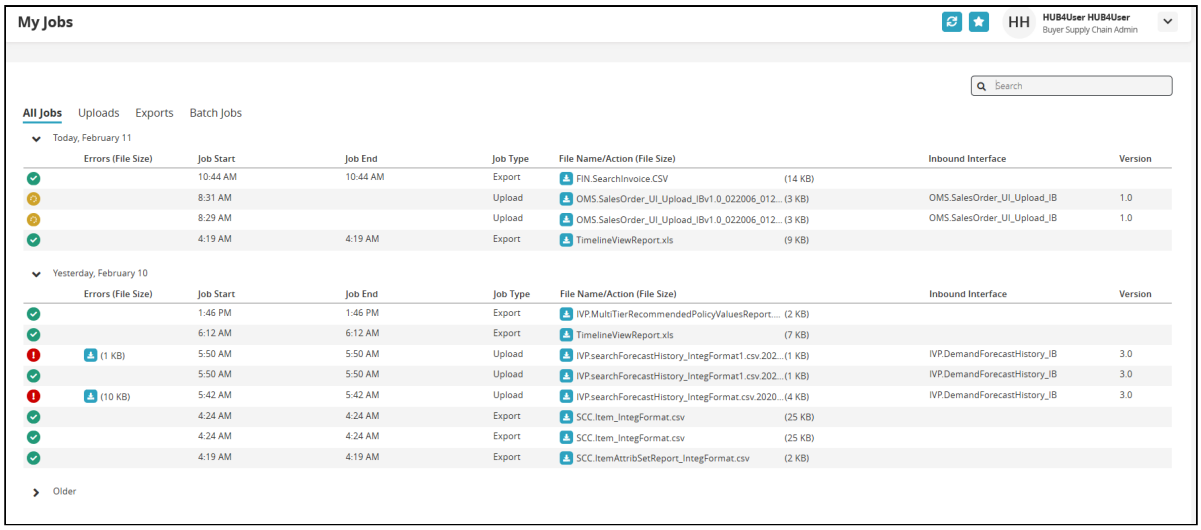
2. Select a dashboard from the list.
   The dashboard displays.

6.3.5 Viewing My Jobs

Users can configure specific transactions to run in the background if they pass certain thresholds. For example, a shipment tender can bet set up to run as a background process if 10 or more shipments are selected, and this will display on the My Jobs page.

Complete the following steps to get to the listing of My Jobs from Quick Links:

1. Select **Menu/Favs > Quick Links > My Jobs.**
   The **My Jobs** screen displays all jobs running as background processes.



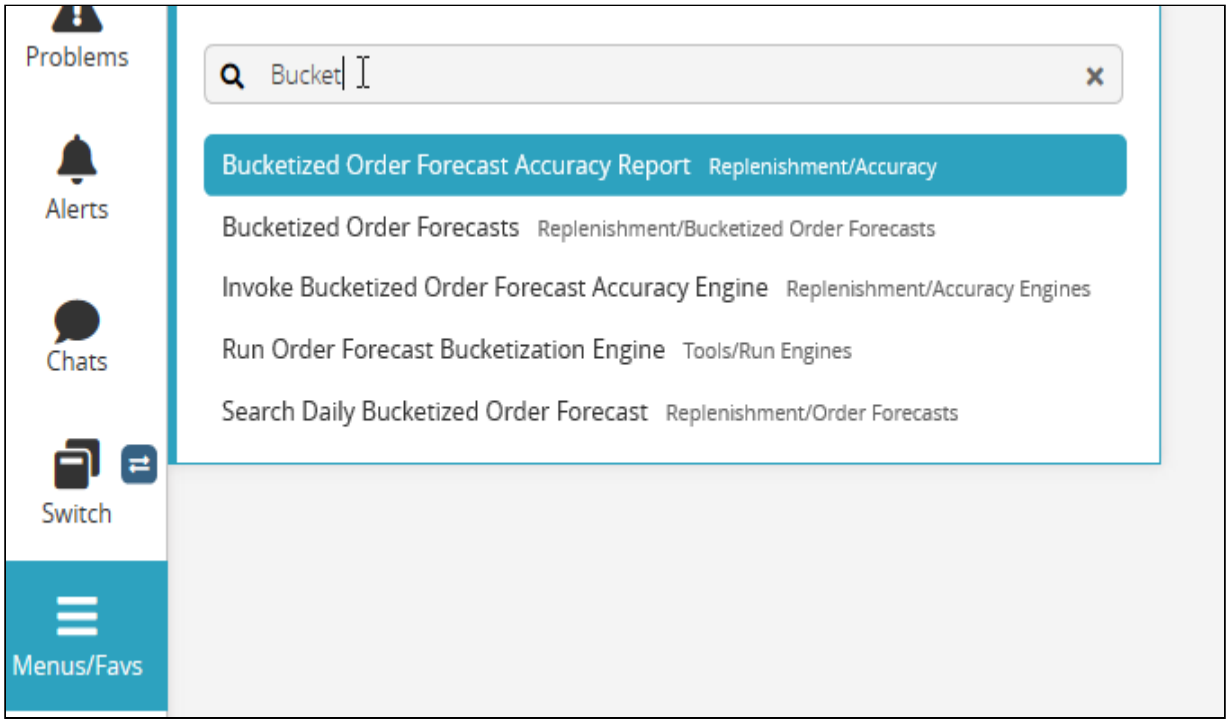
2. Click on **Uploads** to see only upload jobs.
3. Click on **Exports** to see only export jobs.
4. Click on **Batch jobs** to see Batch jobs.

6.4 Using the Menu Search Bar

Users who are familiar with menus in their daily work may find it is easier to use the menu search bar to get to a specific menu.

Complete the following steps to use the menu search bar:

1. Select **Menu/Favs** in the left sidebar of the NEO UI.
2. Click into the **Search Bar** at the top of the slide-out menu.
3. In the Search Bar, type in a menu item name.
   The UI displays a list of menu items matching your entry in the search bar. The Search is reactive, so partial matches will yield results.



4. Select the menu item from the list.

7 Favorites

Favorites are ONE Network's answer to bookmarking screens and searches. The NEO UI offers rich support for working with favorites.

7.1 Adding Favorites

Add a favorite (or bookmark) for a screen or a search that you would like to return to.

Complete the following steps to add a screen or search as a favorite:

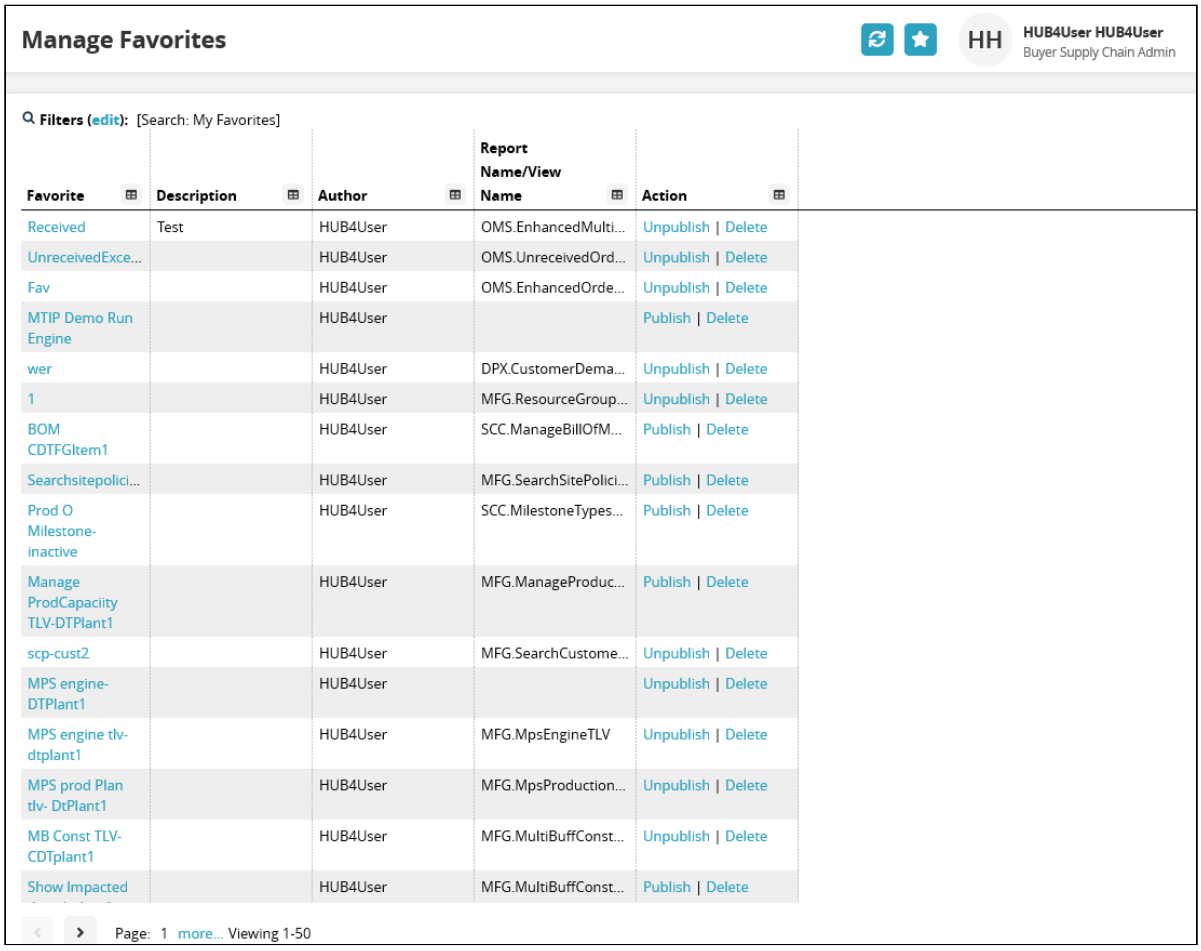
1. Navigate to a screen or perform a search.
2. Click on the **Save As Favorite** button.
   The **Save As Favorite** dialog box appears.

3. Enter a title in the **Favorite Title** field.
4. Enter a description of the page in the **Description** field.
5. Click on **Save**.
   A dialog box displays to notify the user that the favorite was saved.
6. Click on **OK.**

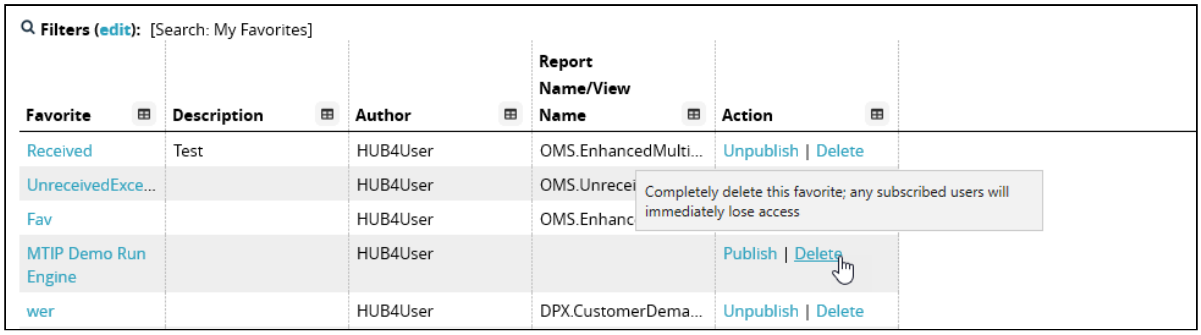
7.2 Deleting Favorites

Complete the following steps to delete a screen or search from favorites:

1. Select **Menu/Favs > Favorites > Manage Favorites.**
   The **Manage Favorites** screen displays with a list of all of your **Favorites**.



2. Locate the favorite to be deleted.
   A mouse roll-over message appears as the cursor hovers over the **Delete** link.



> If you delete a favorite, it will no longer be available to other users who have subscribed to it.

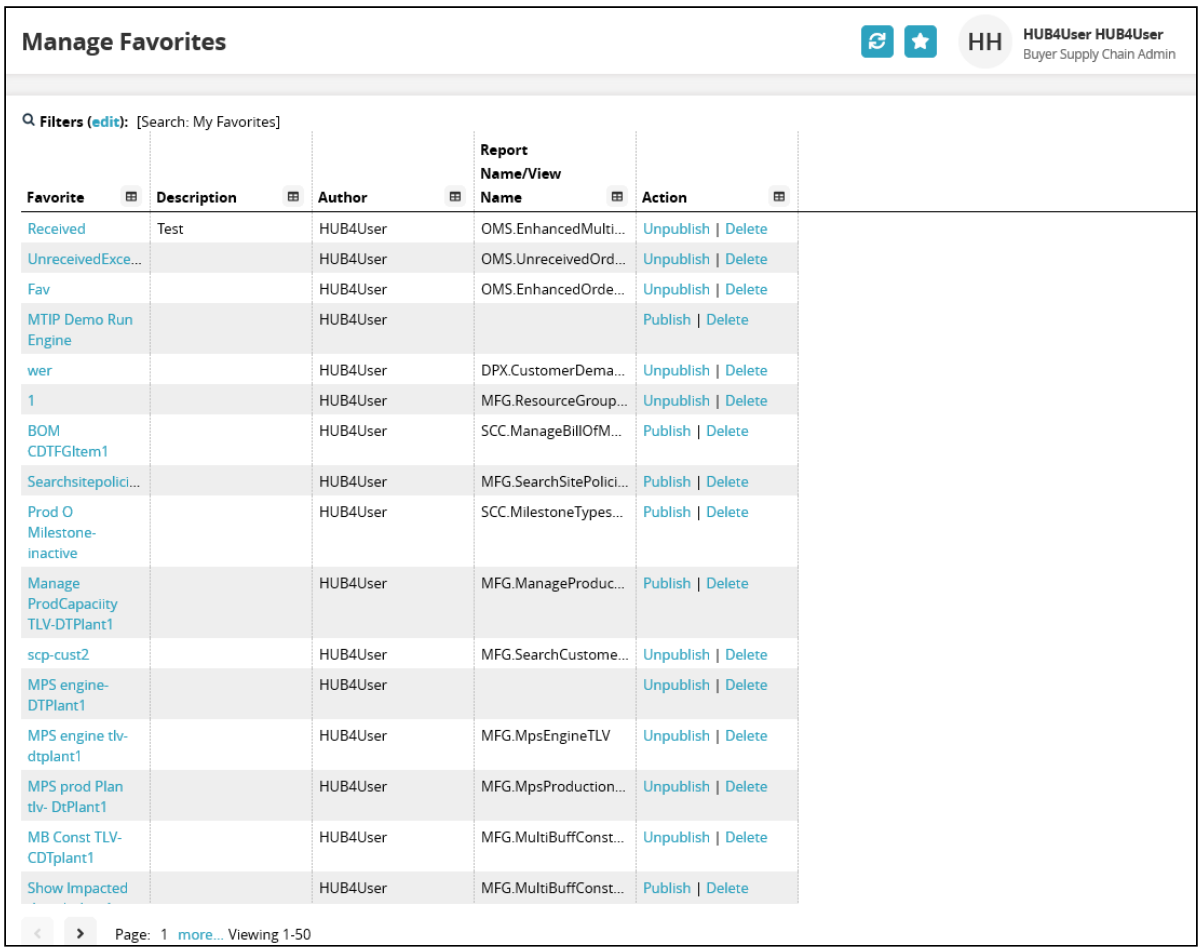
3. Click the **Delete** link.
   A confirmation dialog box appears to ask if you are sure you want to delete the favorite.
4. Click **Yes**.

7.3 Publishing Favorites

When you create and add a favorite, it is private to you as a user. In order to share the favorite with other users, you must publish it.

Complete the following steps to publish a favorite:

1. Select **Menu/Favs > Favorites > Manage Favorites.**
   The **Manage Favorites** screen displays with a list of all **My Favorites**.



2. Locate the favorite to be published.
3. Click the **Publish link under** the **Action** column.
   A confirmation dialog box appears to ask if you are sure you want to publish the favorite.

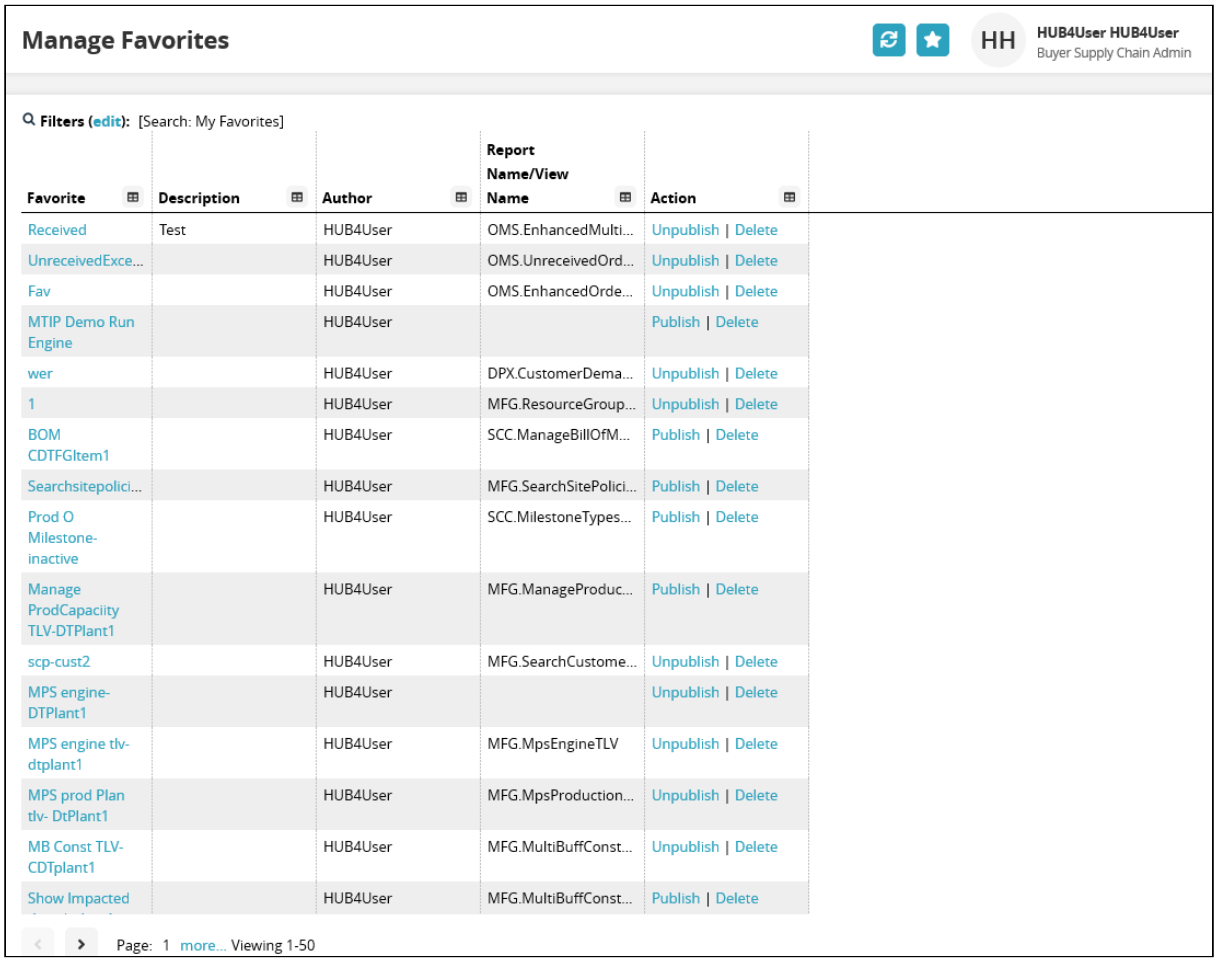
> You can only publish favorites that you have created and added.

4. Click **Yes**.
   Other users in the organization can now search and subscribe to the favorite.

7.4 Searching Favorites

Complete the following steps to search favorites:

1. Select **Menu/Favs > Favorites > Manage Favorites.**
   The **Manage Favorites** screen displays with a list of all **My Favorites**.



2. Click on the **Filters (edit)** link.
   The **Filter** tab displays for searching.

3. Select the **Search** criteria from the drop-down menu.

If you are not getting the search results you expect, confirm you are looking in the correct **Search** drop-down criteria. You will only find your own favorites under **My Favorites.** You will find favorites published by other users under **Favorites.**

4. Type in the required information for the **Favorite**, **Description**, **Report/View Name**, and **Author** fields.

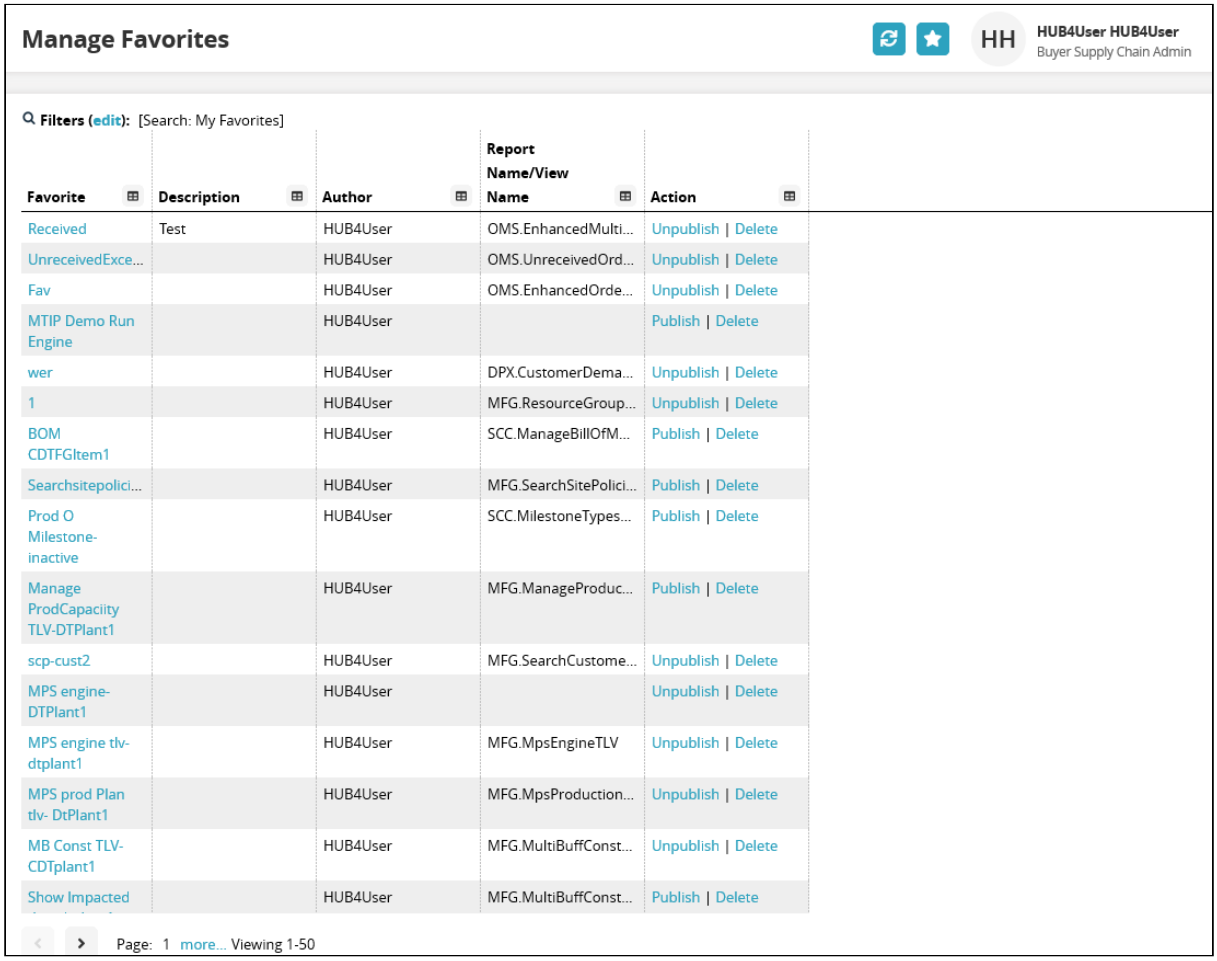
Search fields are case sensitive and require an exact match; wild card characters, such as the asterisk (*) do not work for this search function.

5. Click on the **Search** link.
The favorites that match the search criteria display.

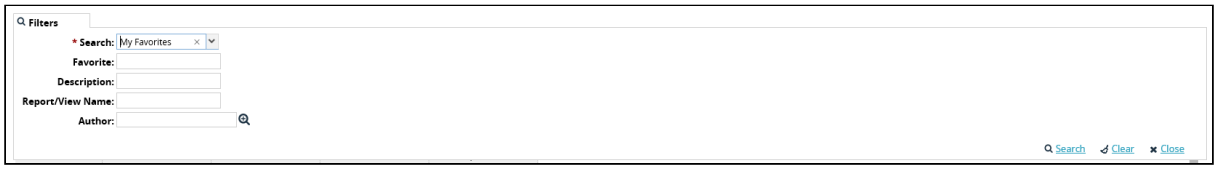
7.5 Subscribing to Favorites

Complete the following steps to search favorites:

1. Select **Menu/Favs > Favorites > Manage Favorites.**
The **Manage Favorites** screen displays with a list of all **My Favorites**.



2. Click on the **Filters (edit)** link.
   The **Filter** tab displays for searching.



3. Select **Favorites** from the **Search** criteria drop-down menu to search for favorites published by other users in your organization.

> If you are not getting the search results that you expect, check the **Search** criteria. **My Favorites** will only search the favorites you have added. Selecting **Favorites** searches favorites from all users in the organization.

4. Type in the search criteria in the **Favorite, Description, Report/View Name,** and **Author** fields.

   > Search criteria fields are case sensitive, and wild cards such as the asterisk (*) do not work in these fields.

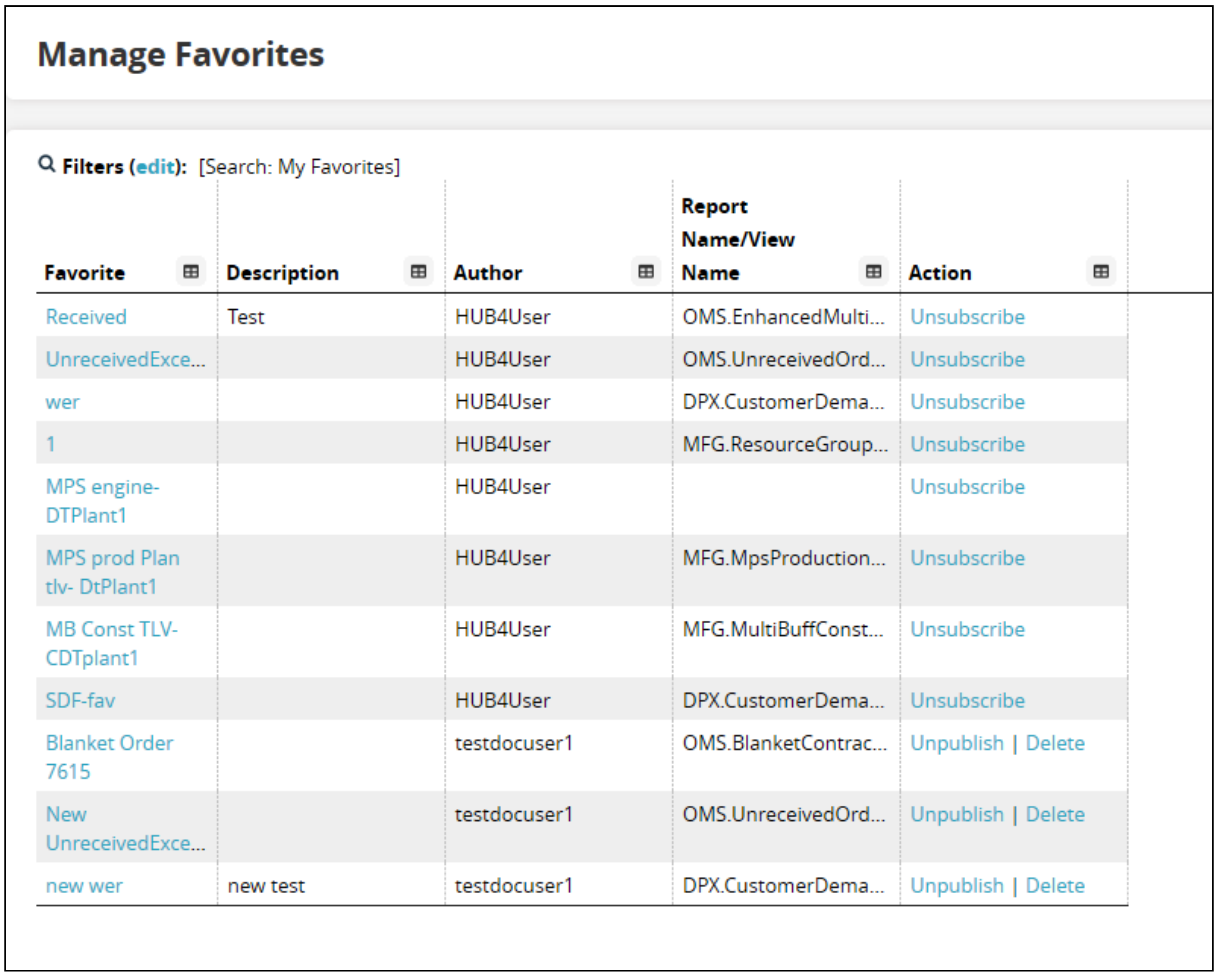
5. Click on the **Search** link.
   The matching results for the search criteria display. Any favorites that were created by other users display a **Subscribe** link under the **Action** column.
6. Click on the **Subscribe** link.
   A confirmation dialog box displays.
7. Click on **Yes.**
   You are now subscribed to the favorite, and it will show in the **Favorites** slideout menu and on the **Managing Favorites** screen under **My Favorites**.

7.6 Unsubscribing from Favorites

Complete the following steps to search favorites:

1. Select **Menu/Favs > Favorites > Manage Favorites.**
   The **Manage Favorites** screen displays with a list of all **My Favorites**.
   The matching results for the search criteria display. Any favorites that were created by other

users display an **Unsubscribe** link under the **Action** column.



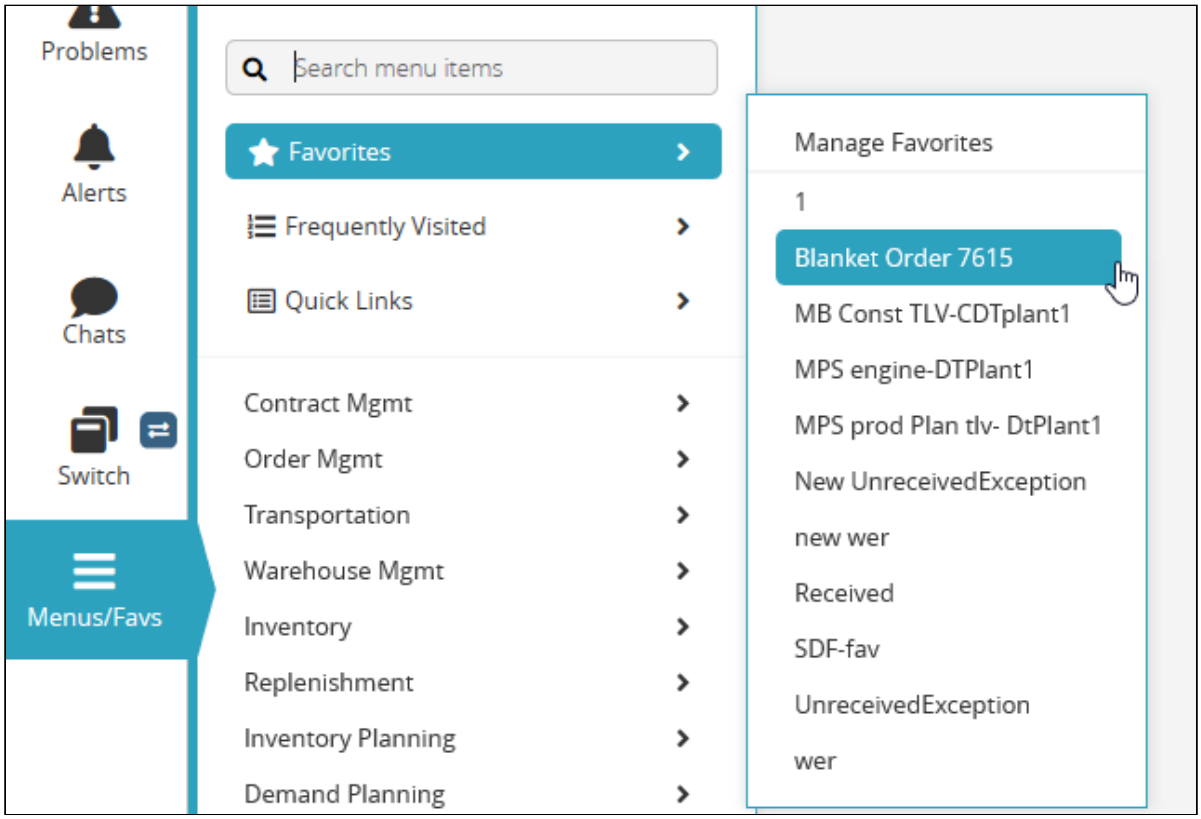
2. Click on the **Unsubscribe** link.
   A confirmation dialog box displays.
3. Click on **Yes.**
   You are now unsubscribed from the favorite, and it will not show in the **Favorites** slideout menu or the **Managed Favorites** display as one of **My Favorites**.

7.7 Using Favorites

Favorites are screens or searches that are saved like bookmarks in the system by users.

Complete the following steps to use favorites from the NEO UI dashboard:

1. Select **Menu/Favs > Favorites.**
   The Favorites slide-out menu displays.

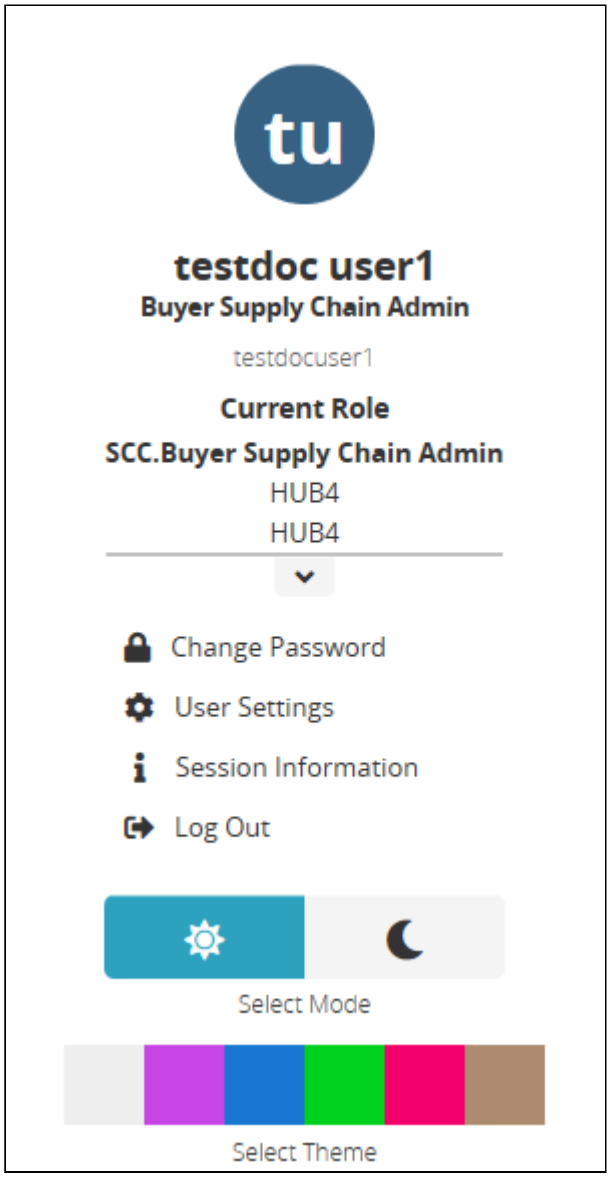


2. Click on a favorite from the list.
   The screen or search favorite displays.

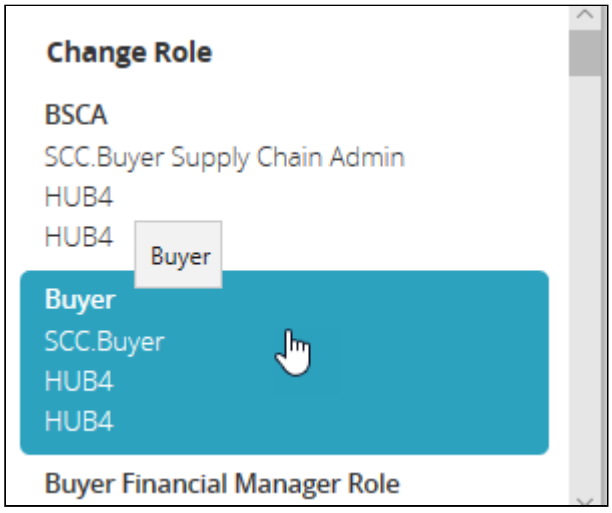
8 Switching Role Types

Complete the following steps to switch role types from the NEO dashboard:

1. Click on the **User Profile** drop-down button on the top right of the NEO dashboard.
   The **User Profile** menu displays.



2. Click on the down arrow under the current user.
   A drop-down menu displays with roles assigned to the user's login.



3. Select the new role from the drop-down list.
   The **NEO UI dashboard** for the new role displays.

9 Switching to Command Center UI

Users can switch from the NEO UI to the Command Center UI.

Complete the following steps to switch to the Command Center UI:

1. Click on the **Switch to Command Center** link on the left sidebar.
   A confirmation dialog box displays, asking if you want to switch to the Command Center.
2. Click on **Yes**.
   The **Command Center** UI displays.

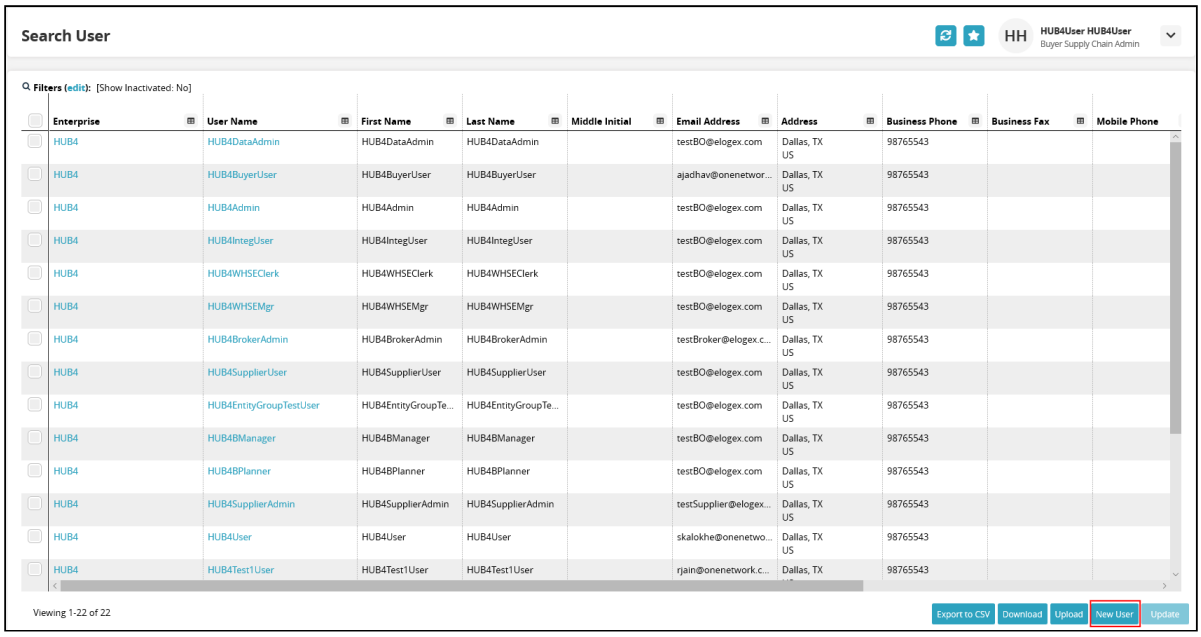
10 User Profile

10.1 Adding Users

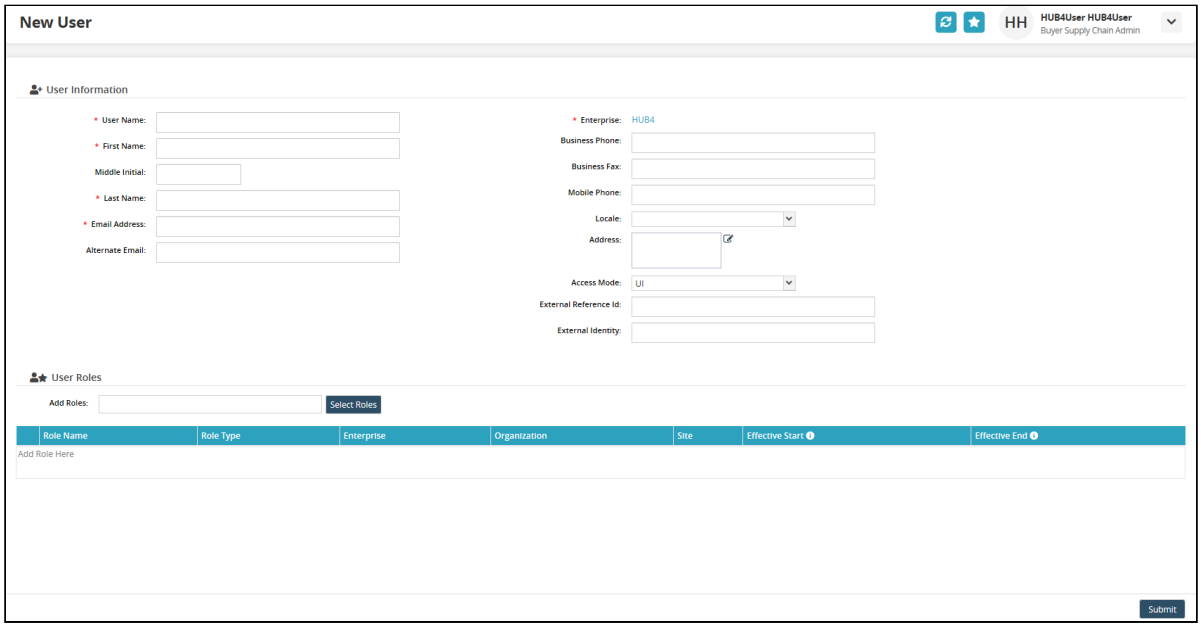
Complete the following steps to add a user through the NEO UI dashboard:

1. Select **Menu/Favs > Administration > User > Search User**.
   The **Search User** screen displays.

   > You must have administrator rights to see the Administration menu and add a new user.



2. Click the **New User** button.
   The **New** User screen displays.



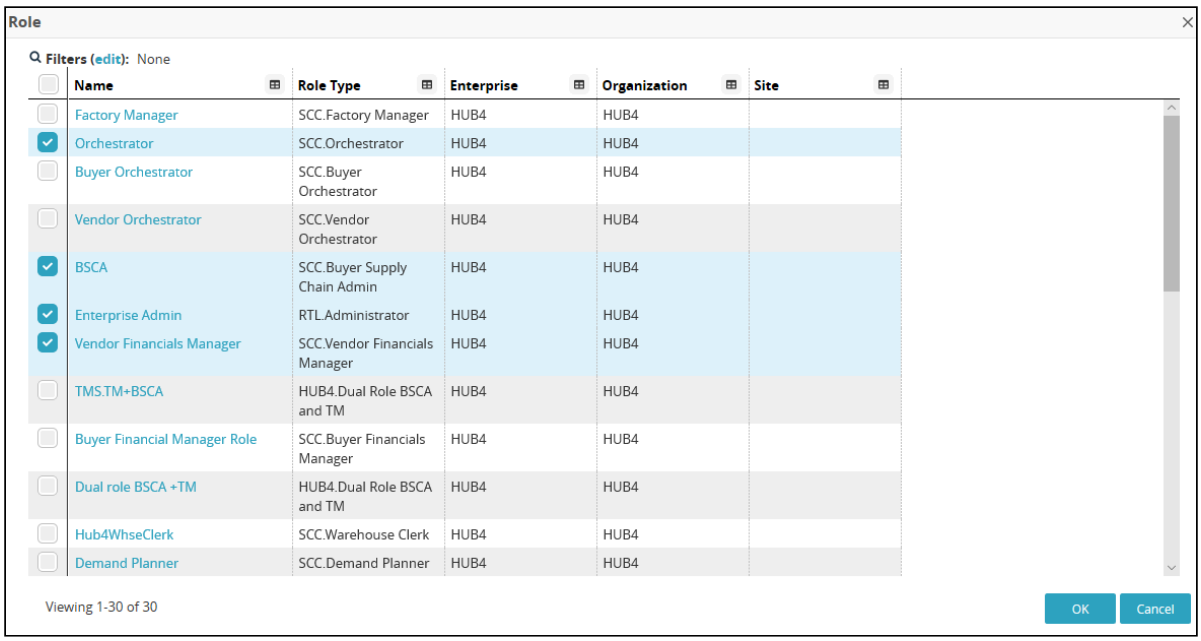
3. Use the table below to fill in the fields. Fields with an asterisk (*) are required.

*User Name	Enter a unique user name.
*First Name	Enter the user's first name.
Middle Initial	Enter the user's middle initial.
*Last Name	Enter the user's last name.
*Email Address	Enter the user's email address.
Alternate Email	Enter an alternate email if one exists.
*Enterprise	The system auto-populates enterprise information based on the administrator role.
Business Phone	Enter the user's business phone number.
Business Fax	Enter the user's fax number.
Mobile Phone	Enter the user's mobile phone number.
Locale	Select the user's language from the drop-down menu.
Address	Click the **Edit** button. A dialog box displays. Enter in the user's address information.

Access Mode	Select the access mode from the drop-down menu.
External Reference Id	Enter the user's external reference identification information.
External Identity	Enter the user's external identity.

4. Select the user's role from the **Add Roles** field. Type in the role and the system will use predictive text to display roles matching the characters typed. Select the role, and the **User Roles** table will populate with the role information.
5. To select multiple roles at once, click on the **Select Roles** button.
   A **Role** dialog box displays.

> A user can be assigned more than one role.

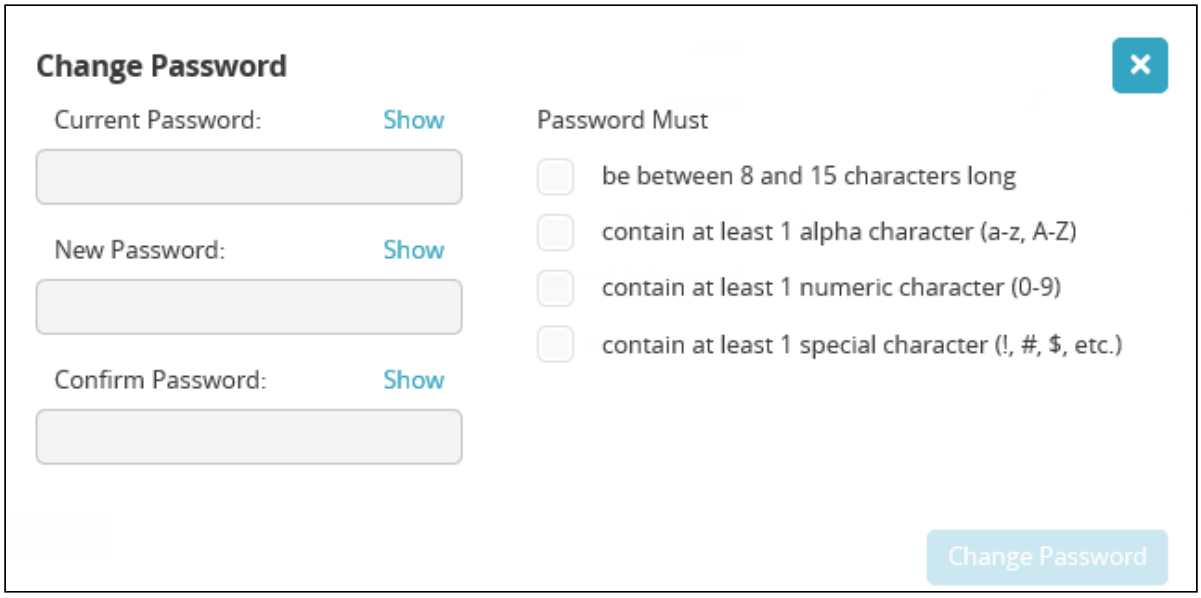


6. Click the checkboxes for the roles assigned to the user.
7. Click **OK**.
   The **User Role** table updates with the roles and associated information.
8. In the **User Role** table, click the calendar picker tool to select the **Effective Start** date.
9. Click on **Submit.**
   A green success bar displays on the screen.

10.2 Changing Your Password

1. Click on the **User Profile** drop-down button on the top right of the NEO UI dashboard.

   The **User Profile** menu displays.
2. Click on the **Change Password** link.
   The **Change Password** dialog box displays.

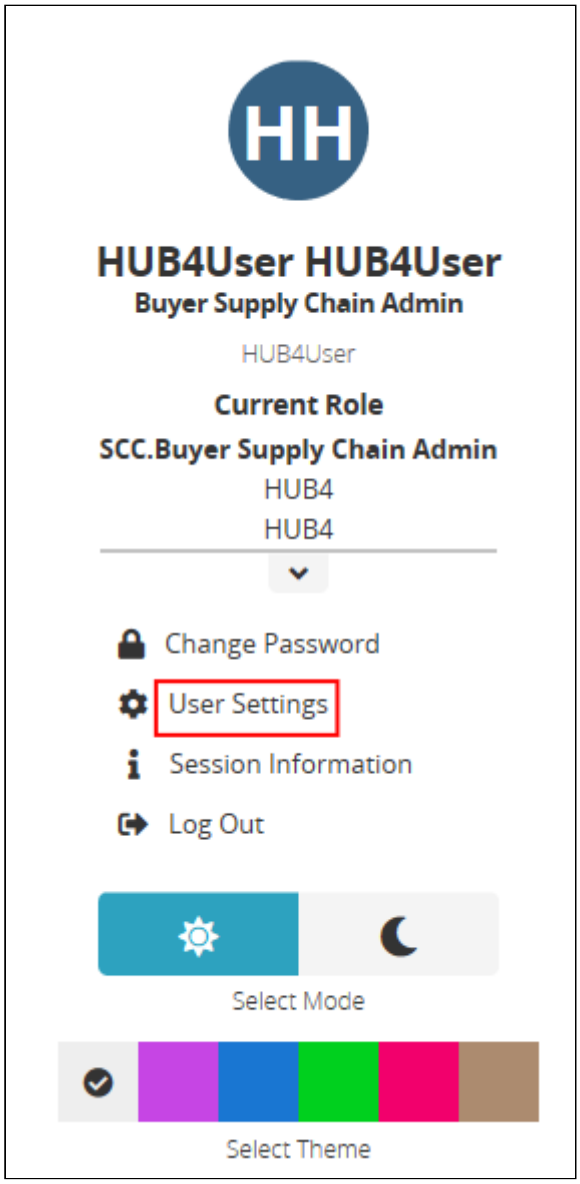


3. Enter the current password. Click on the **Show** link to display the current password.
   Enter a new password that follows the password rules. Checkmarks will display as each rule is met. Click on the **Show** link to display the current password.
4. The **Change Password** button displays when all rules are met.
5. Re-enter the new password.
6. Click on the **Change Password** button.

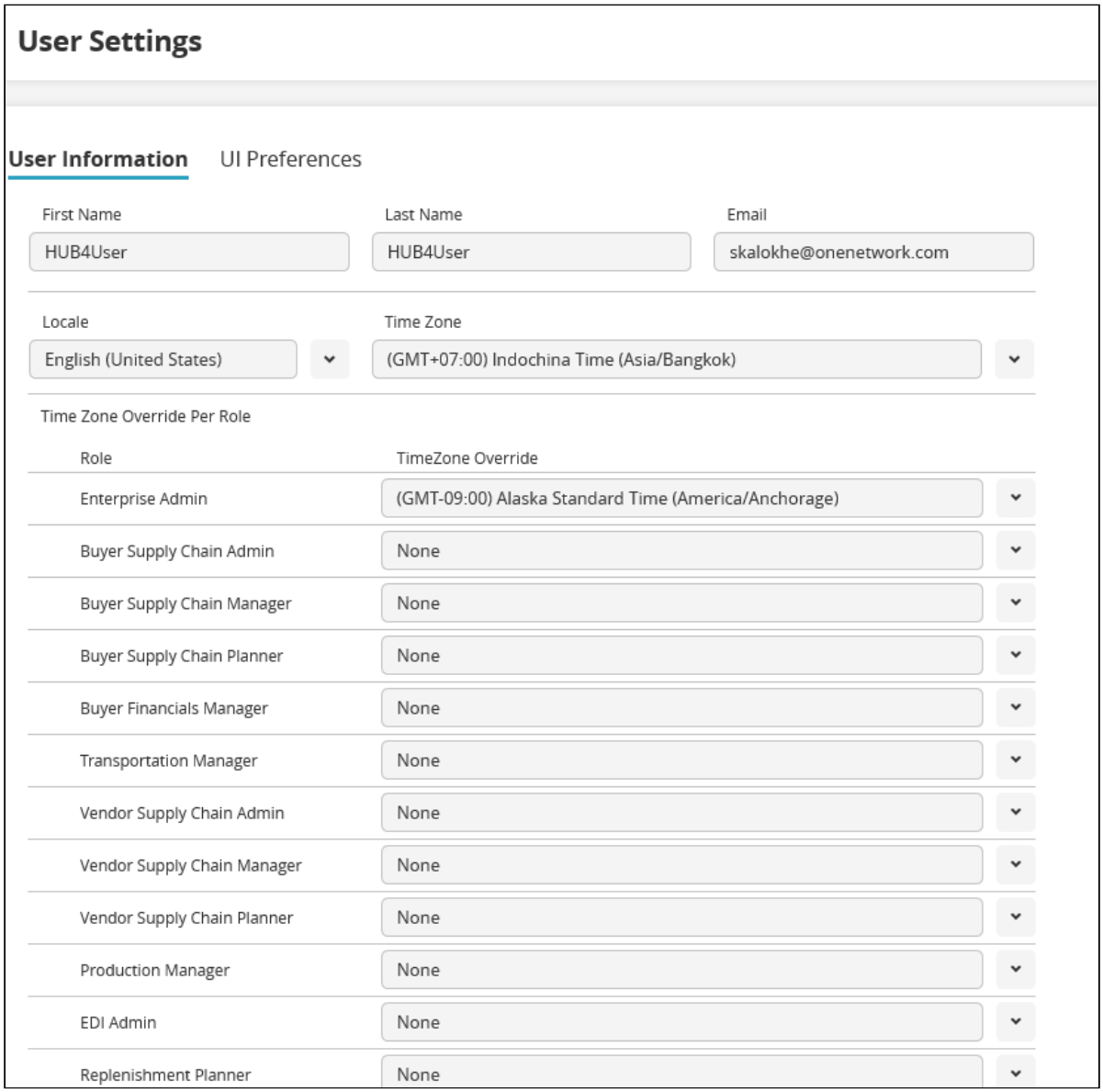
10.3 Editing Regional Settings

Complete the following steps to change the user's regional settings:

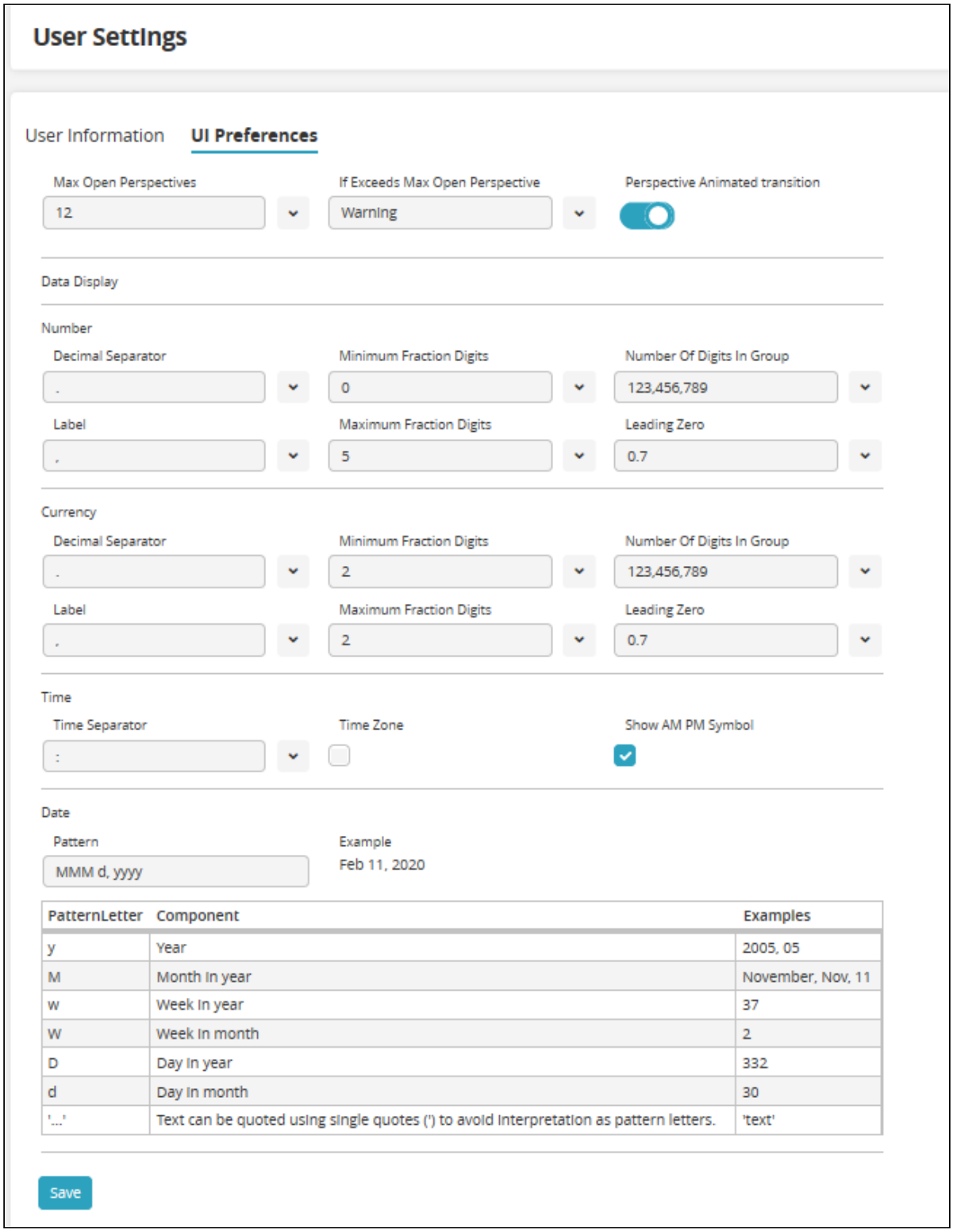
1. Click on the drop-down arrow in the top right of the NEO UI dashboard.
   The **User Profile** menu displays.



2. Click **User Settings.**
   The **User Settings** screen displays with all of the user roles to which the user is assigned.



3. Select the **Locale** from the drop-down list of languages.
4. Select the **Time Zone** from the drop-down menu.
5. Select the **Time Zone Override** from the drop-down menu for each role if that role performs in a different time zone.
6. Click the **Save** button.
7. A **Confirm Changes** dialog box displays.
8. Click **Yes**.
   The page refreshes.
9. Click **UI Preferences.**
   The **UI Preferences** tab displays. See the table below for a list of the preferences and their descriptions.



Max Open Perspectives	Select the maximum number of open perspectives displayed in NEO from the drop-down menu.

IF Exceeds Max Open Perspectives	Select the action NEO performs when the user exceeds the maximum number of open perspectives.
Perspective Animated transition	Toggle on/off animated transitions for the perspective.
Number:	Select the following for preferences in numbers display.
Decimal Separator	Select the decimal separator from the drop-down menu.
Minimum Fraction Digits	Select the minimum number (0-9) of digits as fractions, from the drop-down menu.
Number of Digits in Group	Select the grouping of digits between separators from the drop-down menu.
Label	Select the label punctuation from the drop-down menu.
Maximum Fraction Digits	Select the maximum number (0-9) of digits as fractions from the drop-down menu.
Leading Zero	Select to display or not display a leading zero in numbers from the drop-down menu.
Currency:	Select the following for preferences in currency display.
Decimal Separator	Select the decimal separator from the drop-down menu.
Minimum Fraction Digits	Select the minimum number (0-9) of digits in factions for currency from the drop-down menu.
Number of Digits in Group	Select the grouping of digits between separators from the drop-down menu.
Label	Select the label punctuation from the drop-down menu.
Maximum Fraction Digits	Select the maximum number (0-9) of digits as fractions for currency from the drop-down menu.
Leading Zero	Select to display or not display a leading zero in currency from the drop-down menu.
Time:	Select the following preferences for how time will display:
Time Separator	Select the time separator from the drop-down menu.
Time Zone	Check the box to display the time zone.

Show AM PM Symbol	Check the box to display the AM PM symbol.
Date: Pattern	Use the table provided to format for the display of the date: Enter the pattern letters to configure the date display.

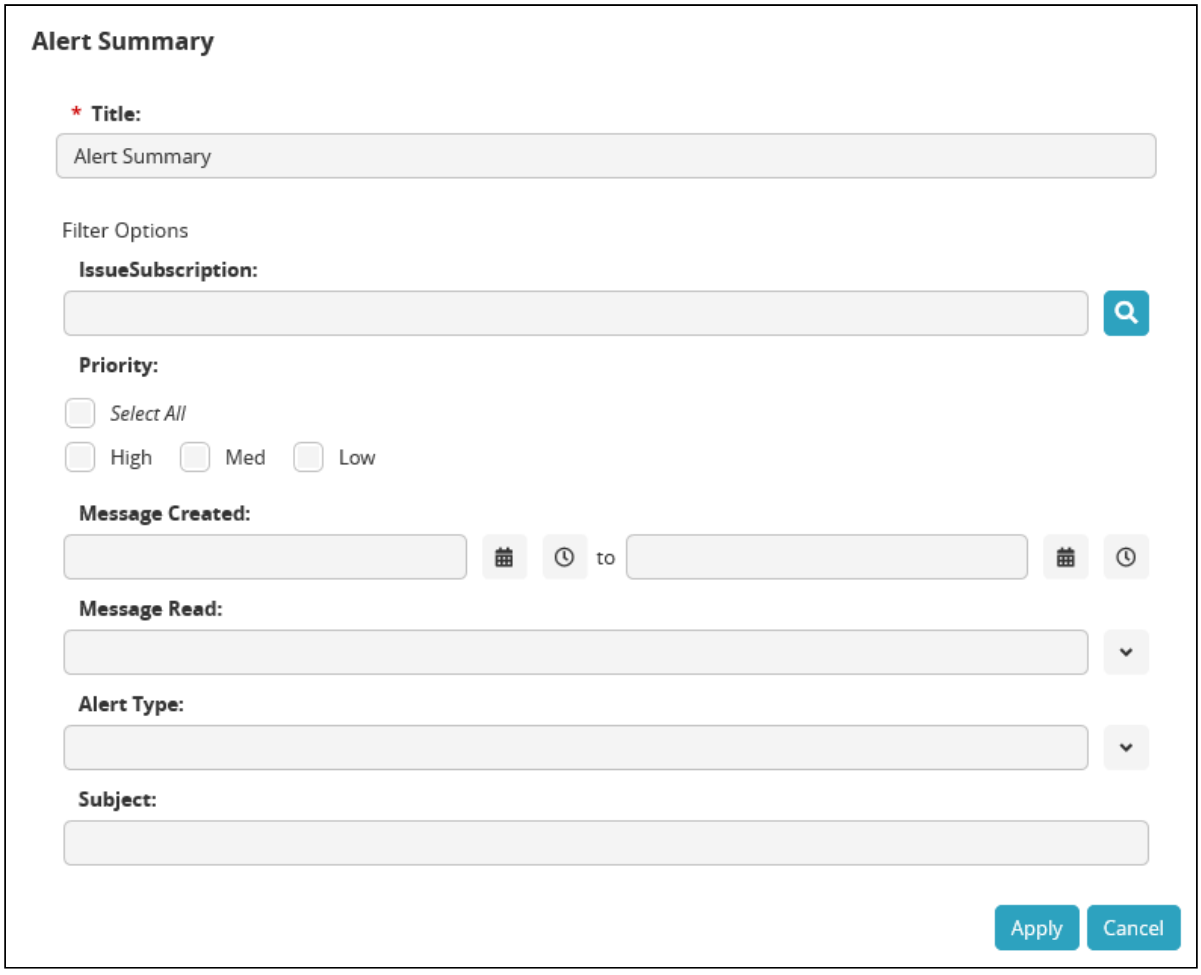
10. Click **Save.**
11. A **Confirm Changes** dialog box displays.
12. Click **Yes**.
    The page refreshes.

11 Using NEO UI Filter Options

On the NEO UI dashboard, users can configure the filter options on displayed widgets, alerts, and problems.

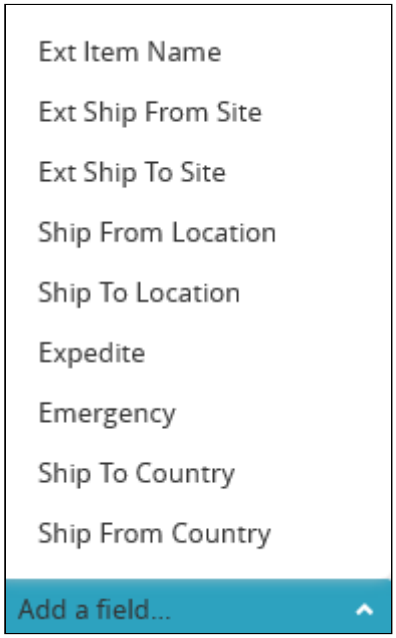
Complete the following steps to use filter options in the NEO UI:

1. Click the **Filter Options** button on a specific widget.
   The filter dialog box displays. Every filter dialog box will be unique to that widget, alert, or problem.



2. Fill in the filter criteria for the data.
3. Click **Apply**.
   The filters apply to the data, the new information displays, and the icon changes to show green inside the sliders.

   Some filters allow the user to add additional fields for filter criteria.


Ext Item Name
Ext Ship From Site
Ext Ship To Site
Ship From Location
Ship To Location
Expedite
Emergency
Ship To Country
Ship From Country
Add a field...

12 Working with Dashboards

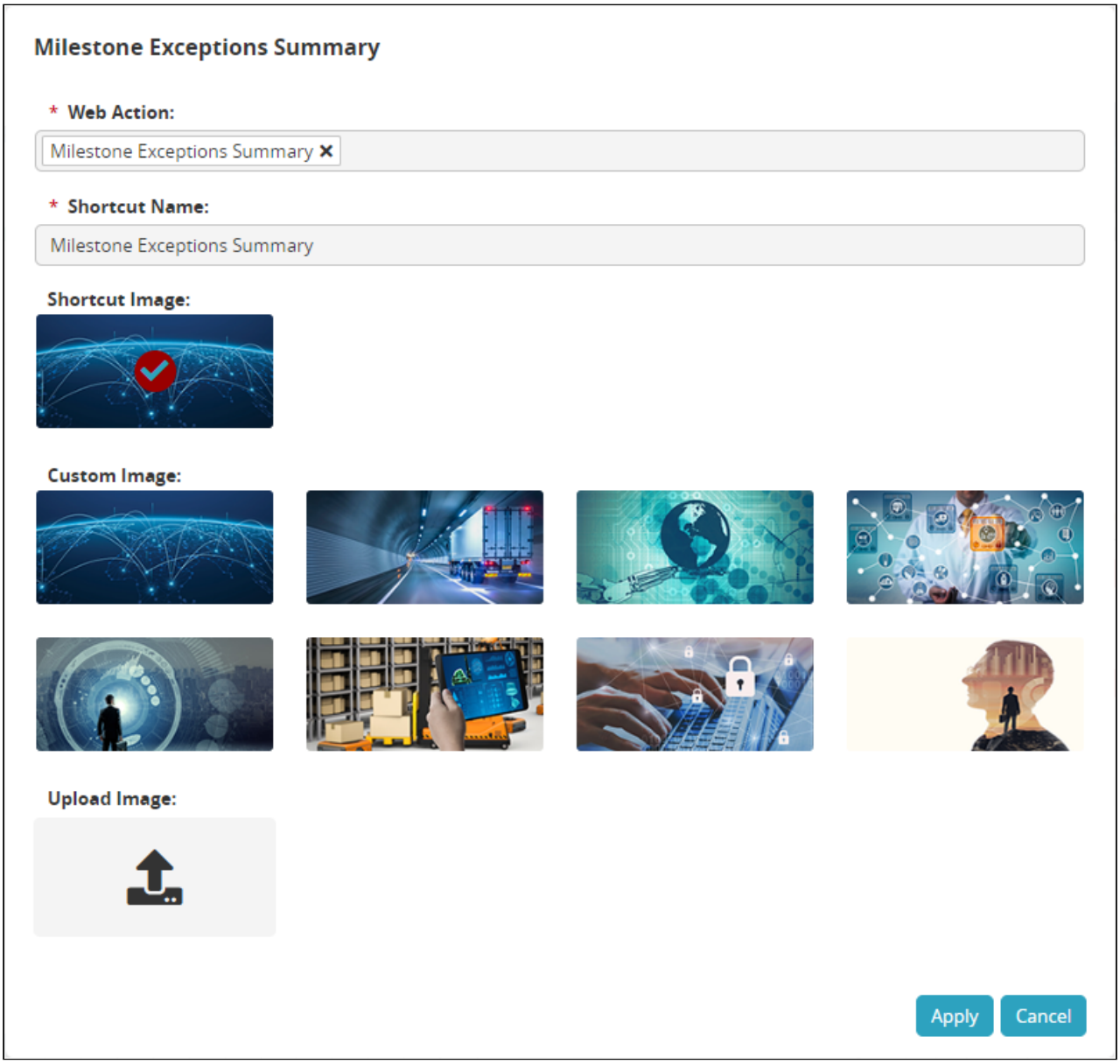
Users can use dashboards to visualize and monitor data in real-time. Each user can define and configure multiple dashboards suited to meet the needs of the different aspects of their daily tasks and workflows.

12.1 About Widgets

The following widgets are currently available in NEO UI.

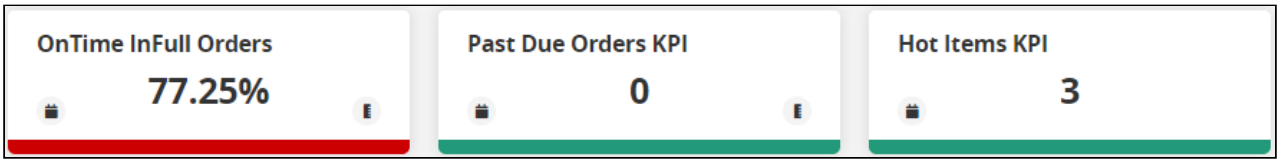
12.1.1 Shortcuts Widget

The Shortcuts Widget allows users to turn any menu item into a shortcut on their dashboard. The configuration process is straight forward: select a favorite, name the shortcut, and select an image. Users can even choose their own images to upload.



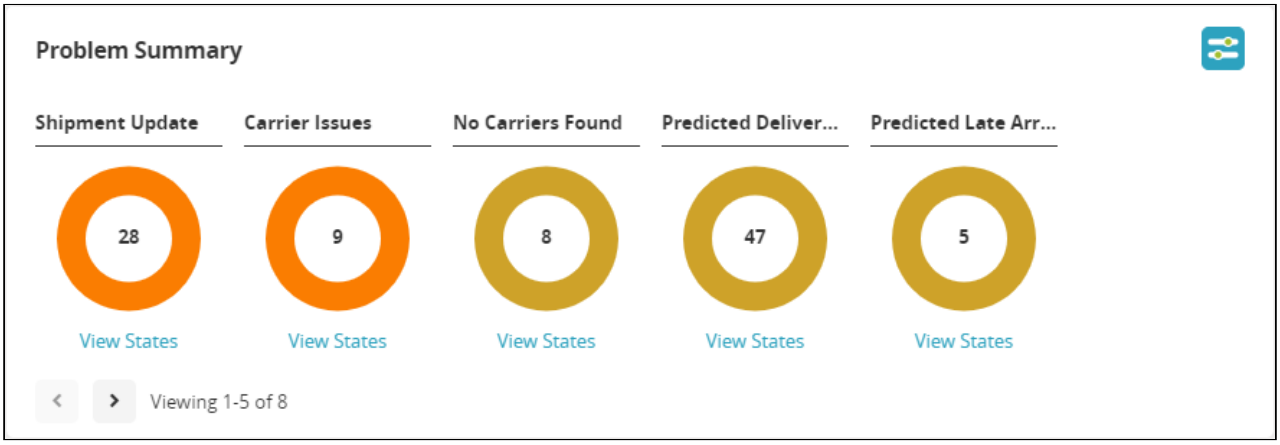
12.1.2 KPI Widget

The KPI Widget provides a way for users to add KPI metrics to their dashboard. KPI Widgets provide visualizations for key performance indicators in the form of charts, graphs, and reports.



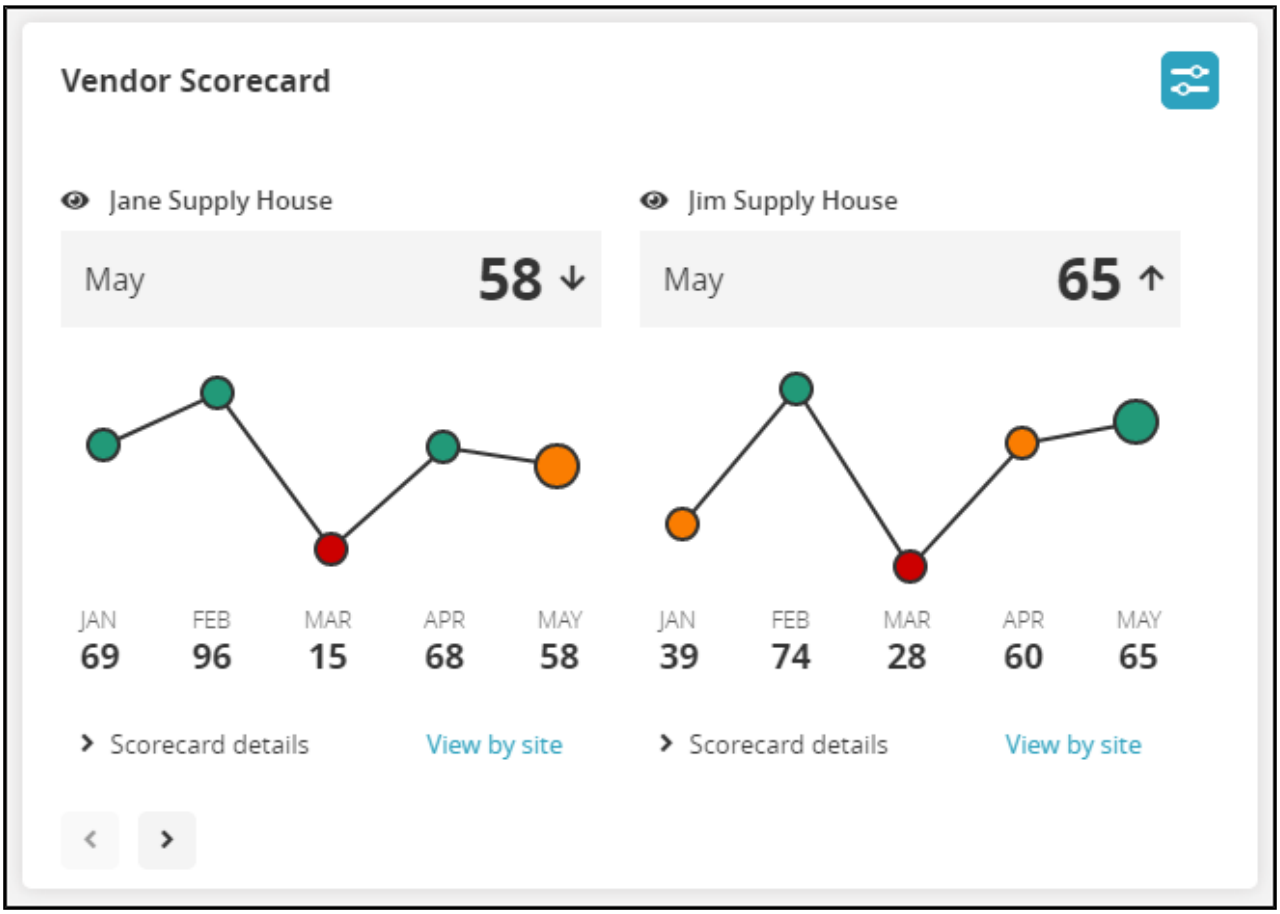
12.1.3 Alerts/Problems Widget

The Alerts & Problems Widget helps users stay on top of issues by highlighting problems and alerts on the user dashboard.



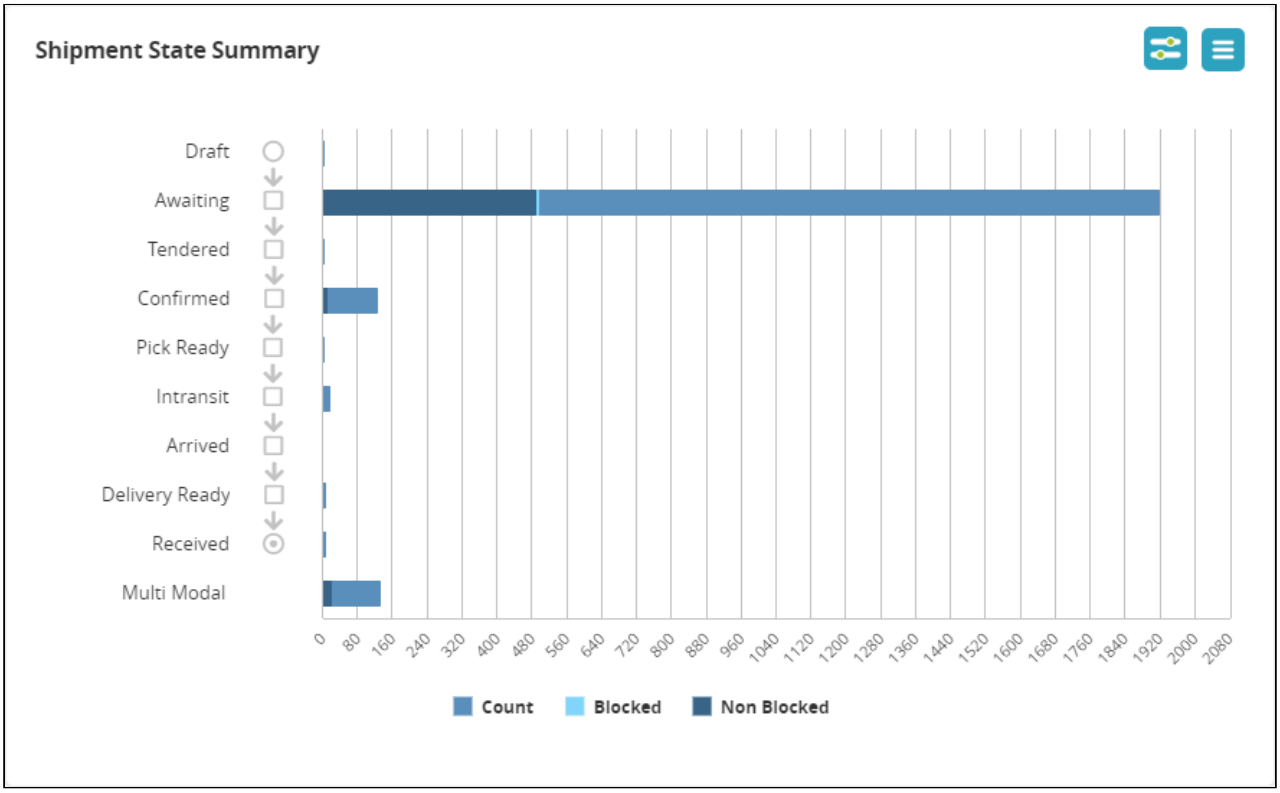
12.1.4 Scorecard Widget

Users can add the Scorecard Widget to their dashboard to track the performance of a partner.



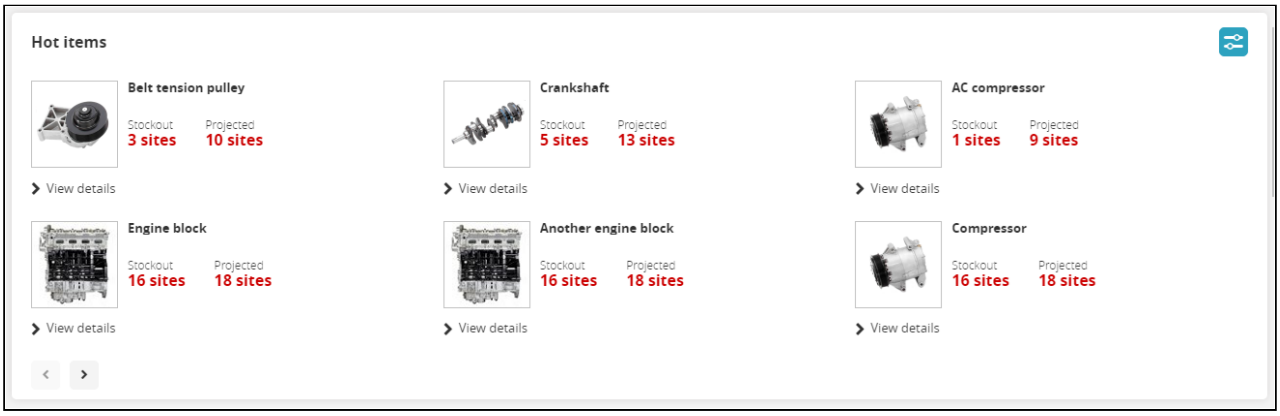
12.1.5 State Summary Widget

This widget shows the lifecycle states for various processes such as shipment states, freight invoice states, and planning states.



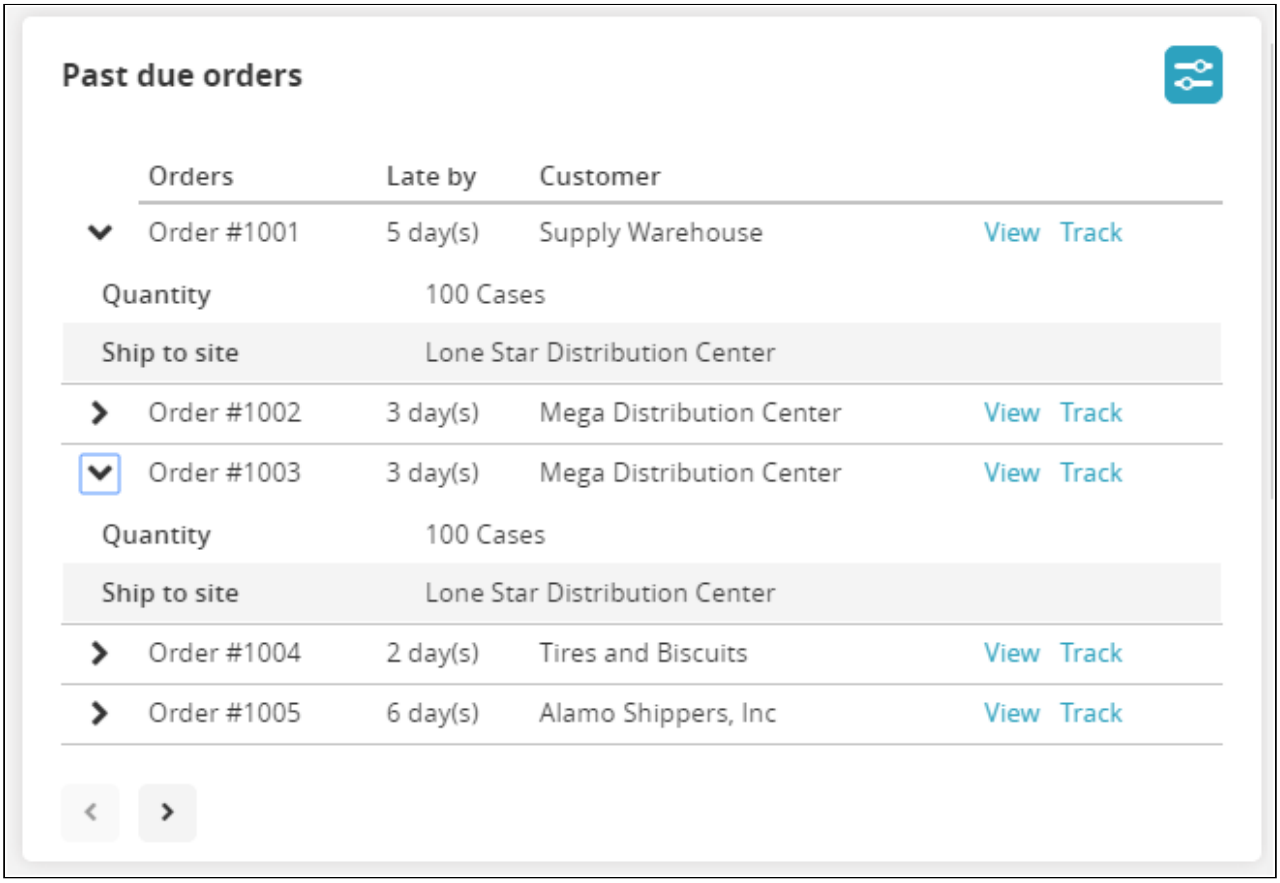
12.1.6 Hot Items Widget

The Hot Items Widget provides quick access to products that are in high demand and products that are stocking out.



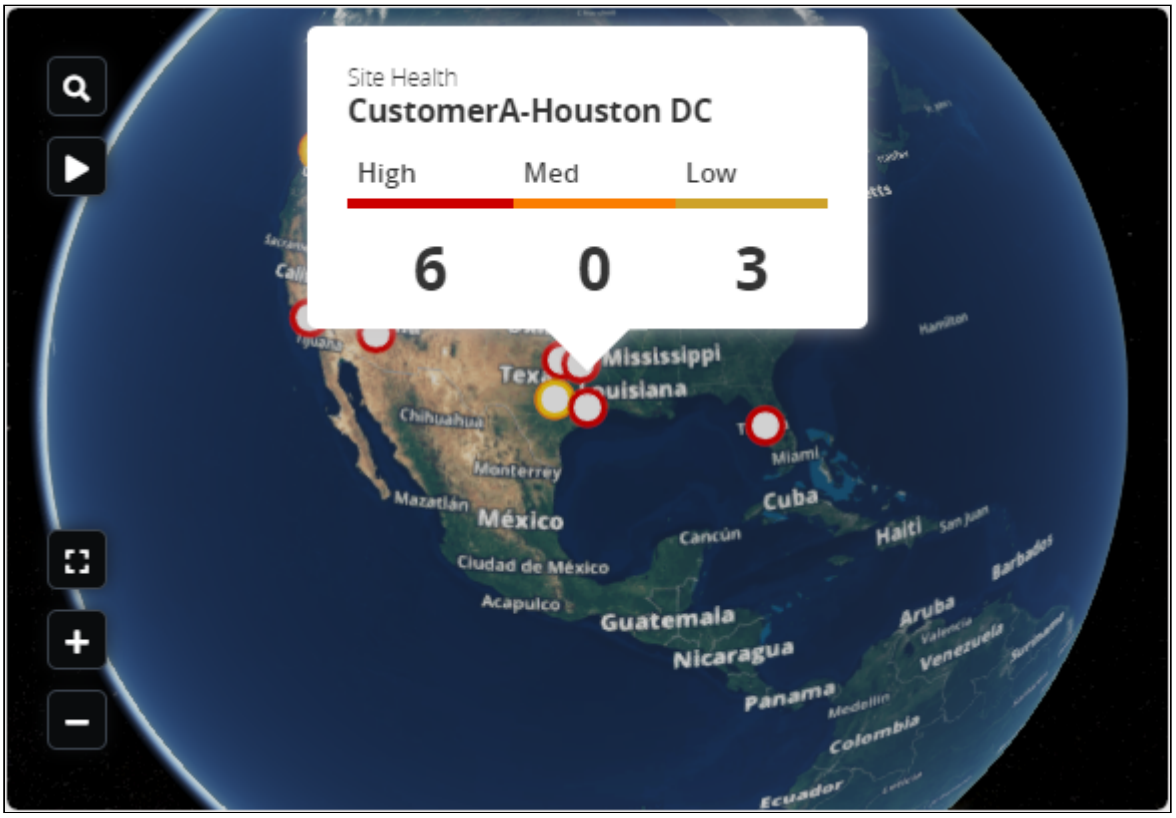
12.1.7 Orders Due Widget

With the Orders Due Widget, users can easily access orders that are past due and open the details of each order so that any issues can be resolved.



12.1.8 Geo Widget

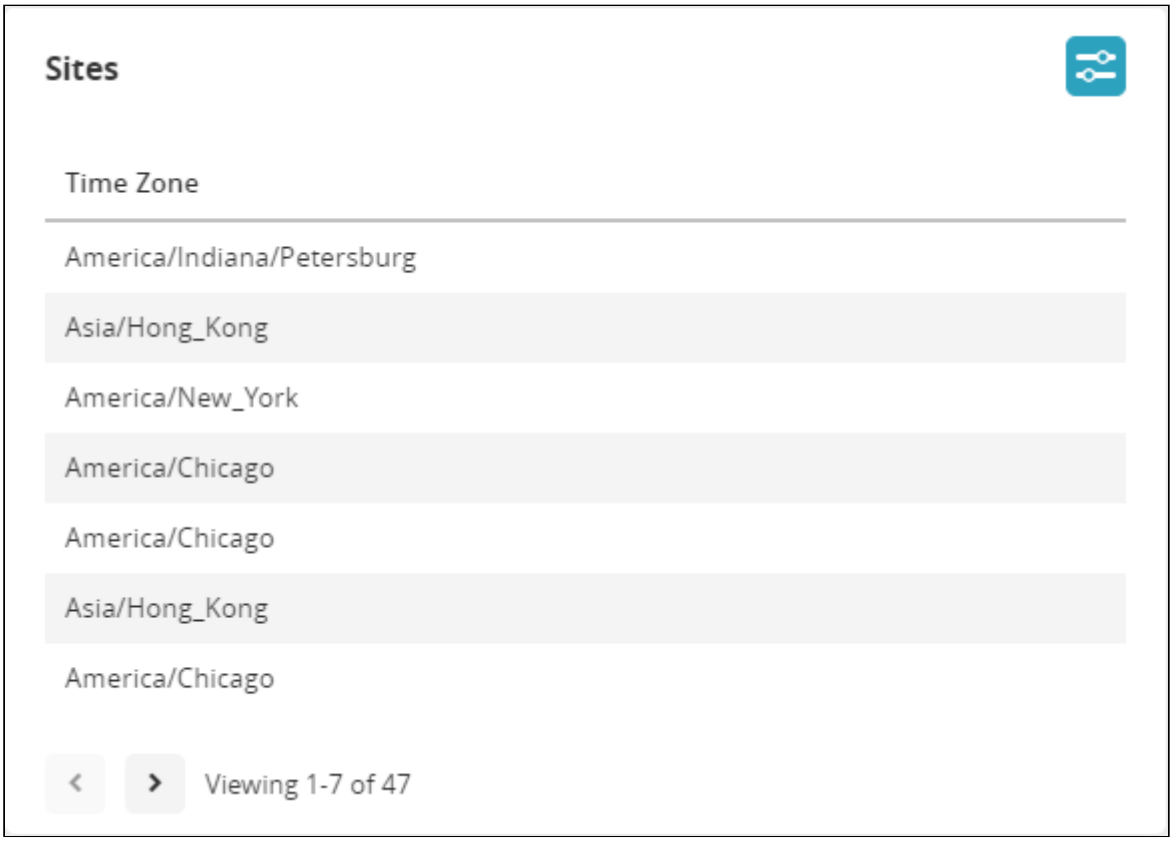
Visualize site-level problems on a globe and view the health of locations across the globe. The globe can be set to rotate on its own, and users can use their mouse pointer to grab and rotate the globe. Click on a location to expand the information for that location.

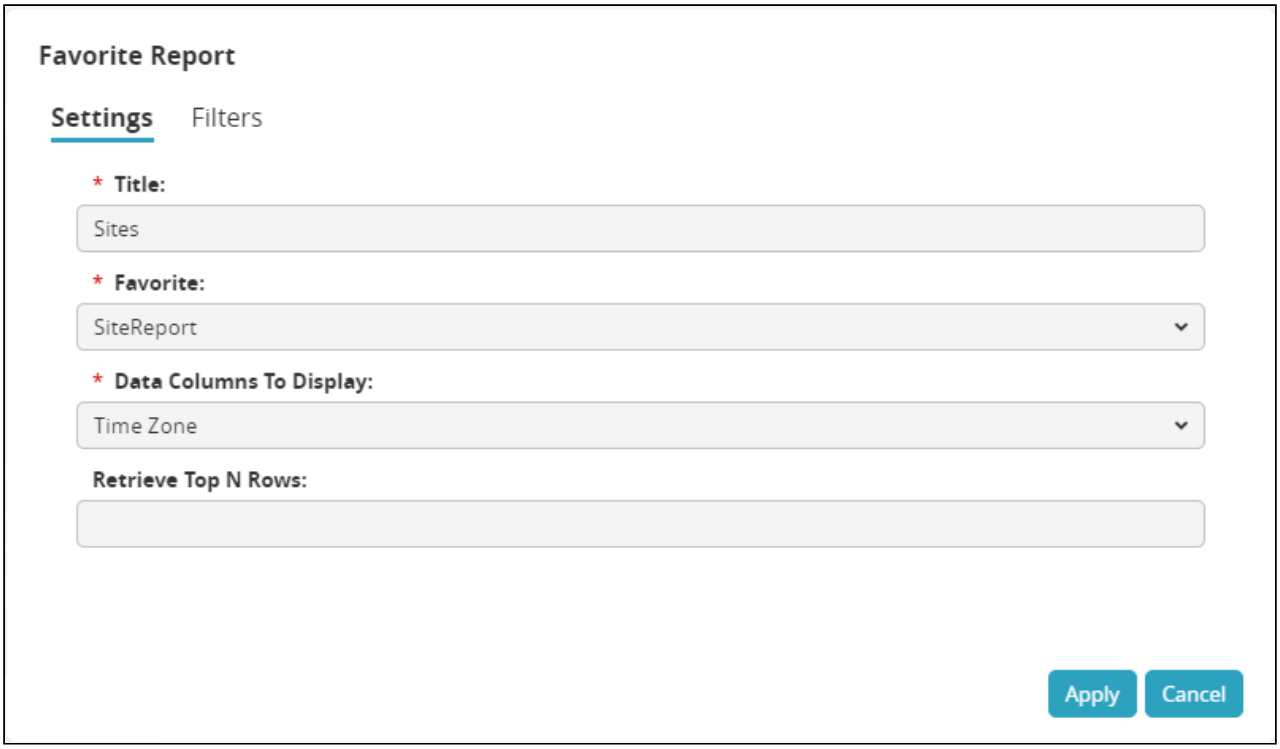


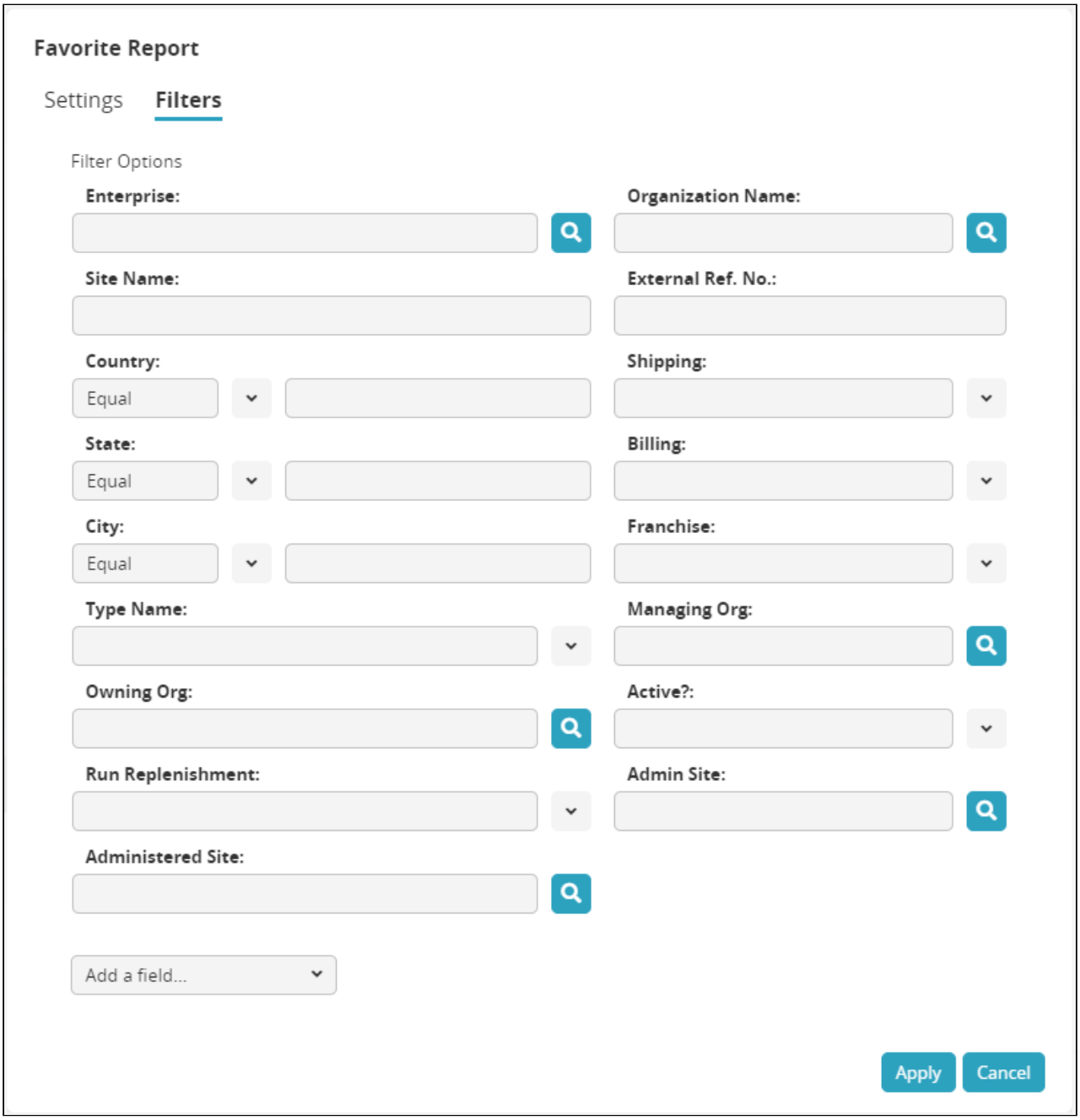
12.1.9 Favorite Report

Using this widget, users can add any of their favorites to their dashboard.

The Favorite Widget has multiple configuration screens: the Widget Settings Screen to control the widget settings, and the Filters Screen to configure the filters for the report.


Sites
Time Zone
America/Indiana/Petersburg
Asia/Hong_Kong
America/New_York
America/Chicago
America/Chicago
Asia/Hong_Kong
America/Chicago
Viewing 1-7 of 47


Favorite Report
Settings
Filters
* Title:
Sites
* Favorite:
SiteReport
* Data Columns To Display:
Time Zone
Retrieve Top N Rows:
Apply
Cancel

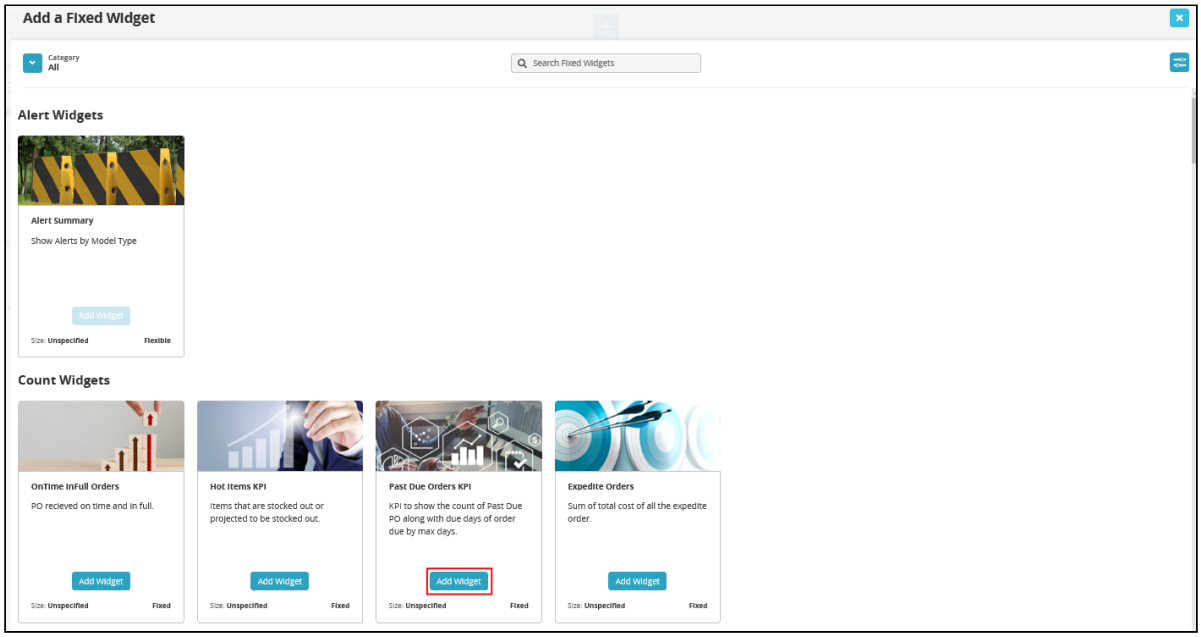


12.2 Adding Widgets

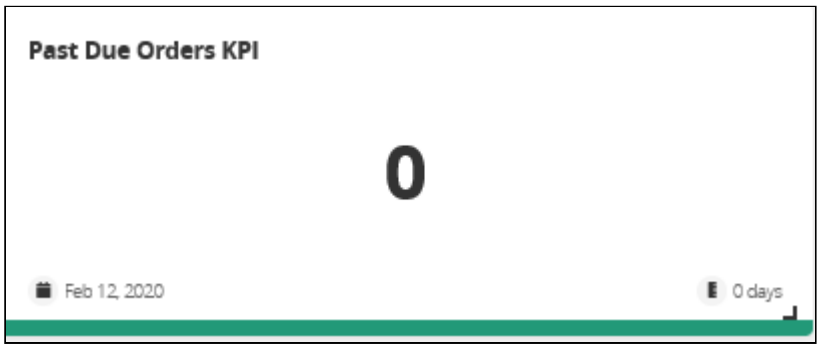
Complete the following steps to add widgets to the NEO dashboard:

1. Click the **Edit Dashboard** button at the top right of the NEO dashboard.
   The **Add a widget** button appears at the top of the dashboard and below widgets, depending on if the widgets are configured for columnar or fixed layout.

2. Click the **Add a widget** button.
The **Add a Fixed Widget** screen appears. Widgets are available depending on if the layout of the section is columnar or fixed.



3. Click on the **Add Widget** button on the widget display. The widget will appear on the NEO dashboard.



4. Drag the widget to the desired location on the NEO dashboard by hovering over the crossed arrows on the header and using the move item cursor.

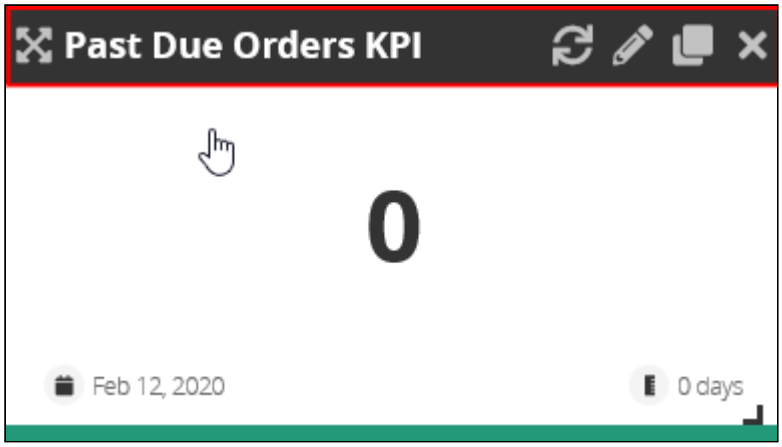
5. Click on the **Save the Dashboard** button to save the widget to the dashboard.
The widget is saved to the dashboard.

12.3 Configuring Widgets

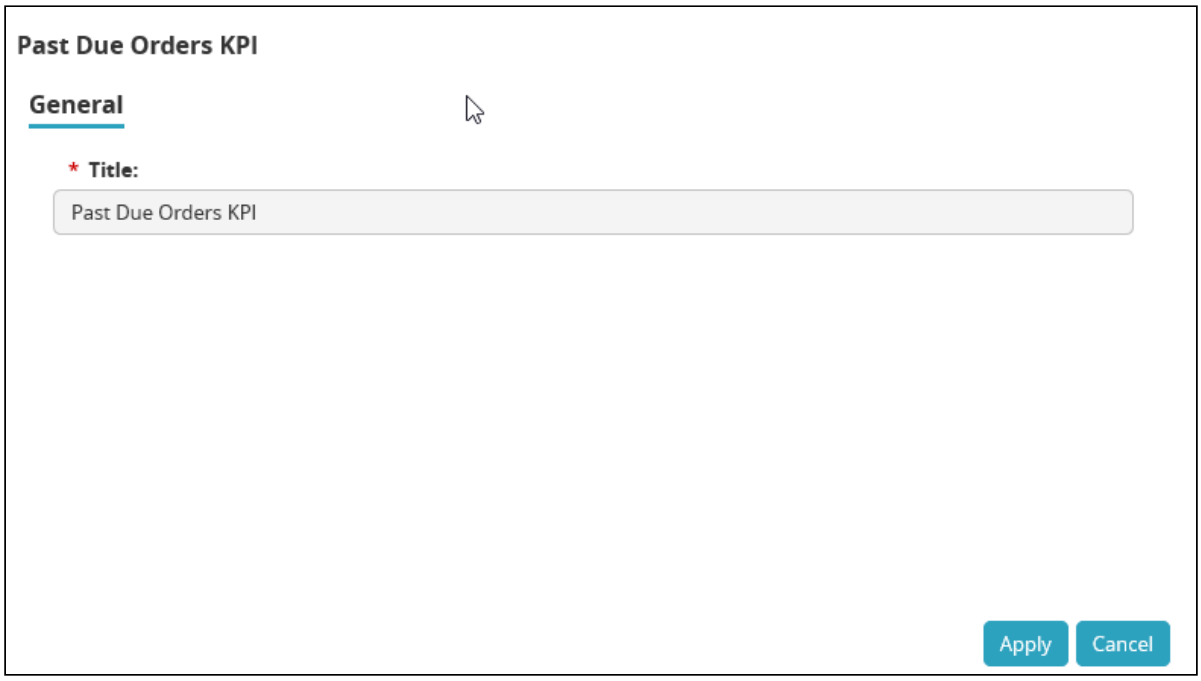
The titles of widgets are configurable from this screen.

Complete the following steps to configure widgets on the NEO UI dashboard:

1. Click the **Edit Dashboard** button at the top right of the NEO UI dashboard.
2. Roll the cursor over the widget. The editing header appears.



3. Click on the **Configure widget** button.
   The widget's configuration screen appears, and the title of the widget is configurable.



4. Change the title of the widget and click on the **Apply** button.
   The title of the widget will update.

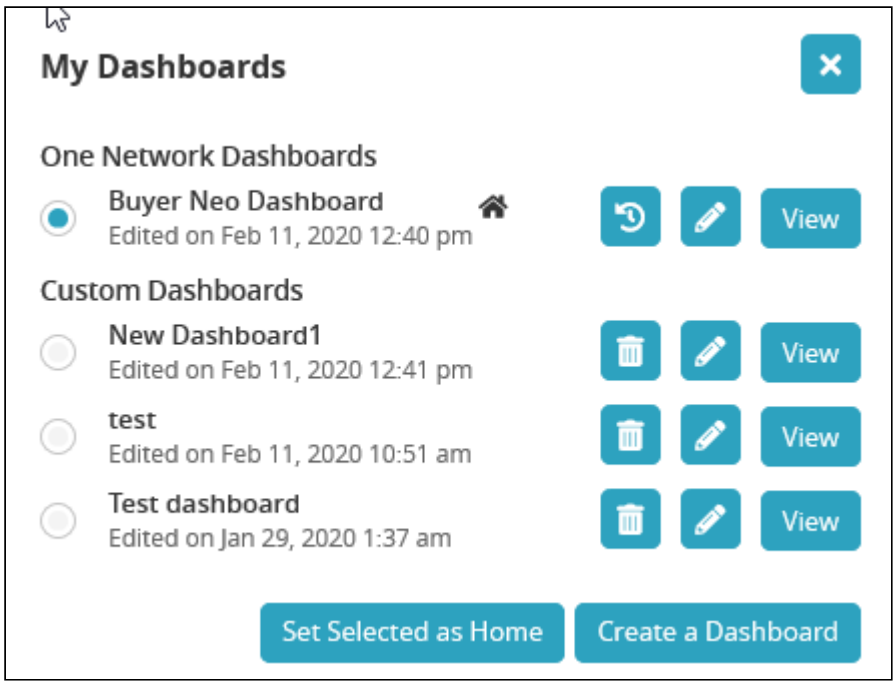
5. Click on the **Save the Dashboard** button to save the widget to the dashboard.
   The widget's title is saved to the dashboard.

12.4 Creating Additional Dashboards

Users can create up to five additional dashboards.

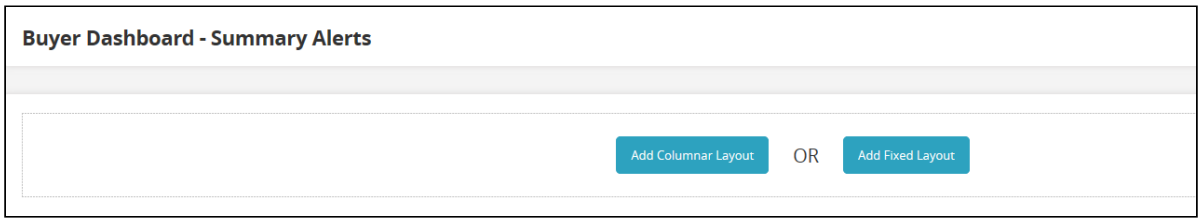
Complete the following steps to create an additional dashboard:

1. From the NEO UI dashboard, click the **My Dashboards** button.
   The **My Dashboards** dialog box displays.



2. Click on the **Create a Dashboard** button.
   The **New Dashboard** dialog box displays.

3. Type in a name for the new dashboard.
4. Click on the **Confirm** button.
   The new dashboard displays and can be configured with widgets.
   See "Customizing Dashboard Layout" and "Adding a Widget" in the *Online Help* for more information.

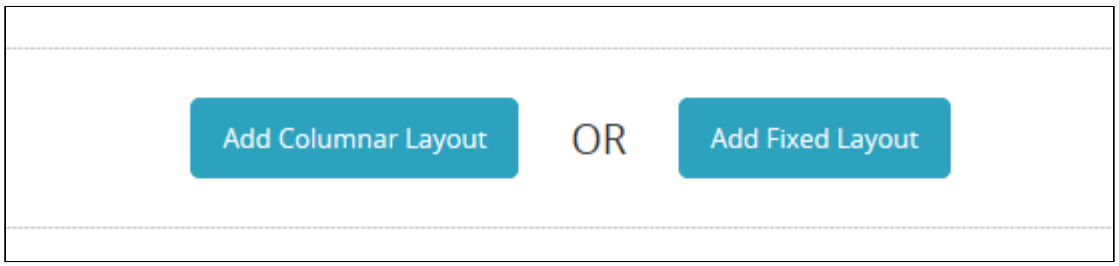


5. Click on the **Save the Dashboard** button.
   The new dashboard displays.
   The new dashboard now also displays in the list of customized dashboards when you click on **My Dashboards**.

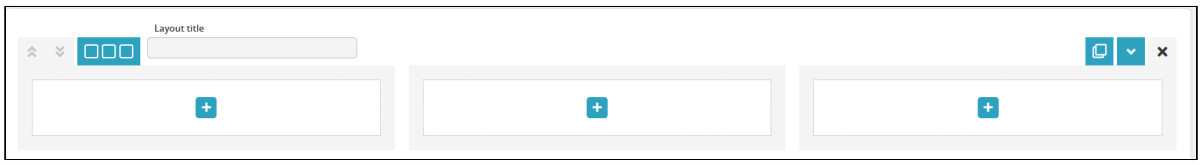
12.5 Customizing Dashboard Layout

Complete the following steps to customize the NEO dashboard layout:

1. To customize the NEO UI dashboard layout, click the **Edit the Dashboard** button.
   The **Add Columnar Layout** and **Add Fixed Layout** buttons appear at the bottom of the screen.



2. To add a columnar layout, click the **Add Columnar Layout** button.
   A new layout section appears. In the example below, this layout has three columns. Each column has an **Add a widget** button.
   See "Adding a Widget" in the *Online Help* for more instructions.



3. Click the double arrows up or down to move the layout section up or down on the dashboard.
   The arrows will be grayed out and inactive if there are no other layout sections.

4. Click the **Column Layout** button to choose a different column layout.
   The button will expand to show all possible columnar layouts. Click on the layout desired.

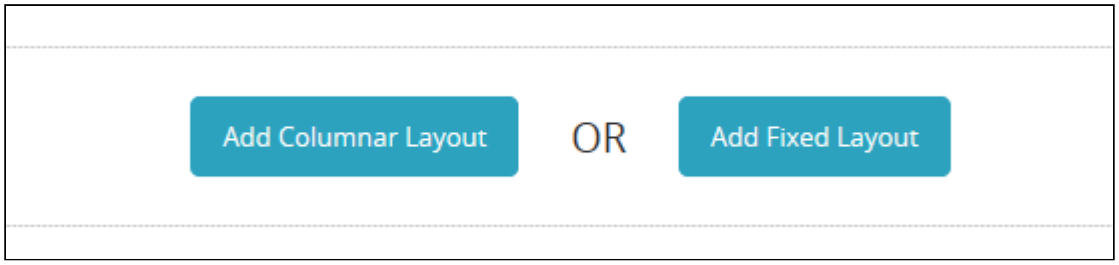
5. Enter a title for the layout section in the **Layout title** field.

6. Click the **Duplicate layout** button to duplicate this layout again on the dashboard.
   A new layout section displays below with the same layout and widgets.

7. Click the **Collapse layout** button to collapse the layout section.
   The section collapses and widgets in that section no longer display.

8. Click the **Delete layout** to remove the layout section from the dashboard.
   A popup box appears to confirm that you want to delete the section. Click on **Yes**.

9. Click on the **Add Fixed Layout** button to add a fixed layout section to the dashboard.



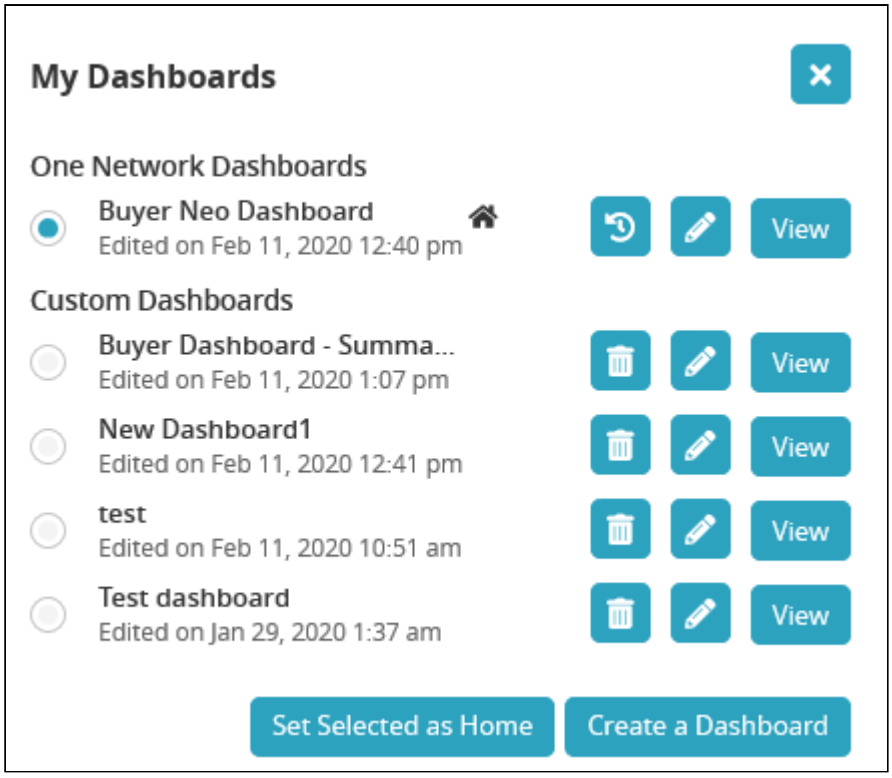
A new layout section appears. Once a widget is added, a grid appears and the widget can be moved into place on the grid.

10. Click on **Save the Dashboard** to save the layout changes.

12.6 Switching Between Dashboards

Complete the following steps to switch between dashboards from the Home screen:

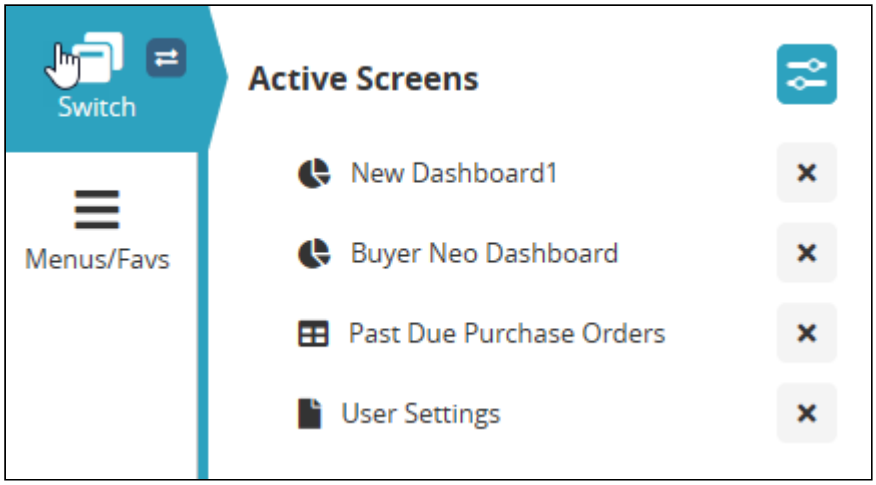
1. From the NEO UI dashboard, click on the **My Dashboards** button.
The **My Dashboard** dialog box displays.



2. Click on the **View** button for the dashboard you wish to view.
The dashboard displays.

Complete the following steps to switch between dashboards if you have viewed a dashboard and then moved to another screen:

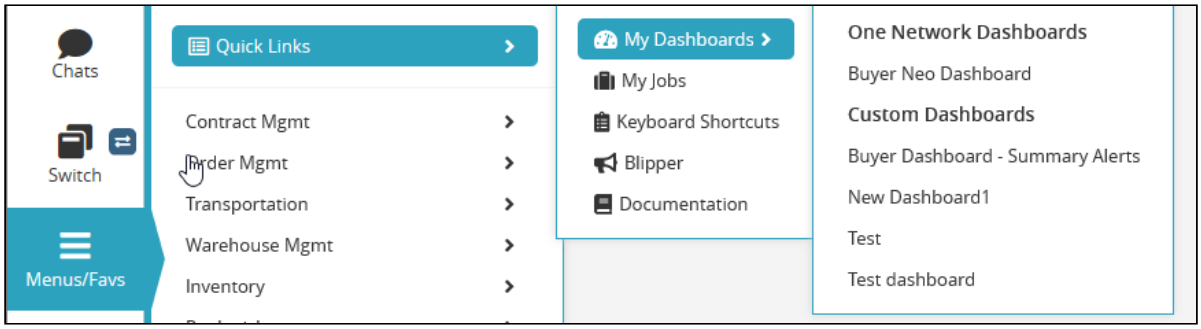
1. Click on **Switch** in the left sidebar of the NEO UI.
   A slide-out menu of **Active Screens** (perspectives) displays.



2. Click on the dashboard name from the list.
   The dashboard displays.

Complete the following steps to switch to different dashboards from the Menu/Favs menu in the left sidebar:

1. Click on **Menu/Favs > Quick Links > My Dashboards** in the left sidebar of the NEO UI.
   A list of the user's dashboards displays.



2. Click on the desired dashboard.
   The dashboard displays.