



One Network Enterprises

NEO 3.7 Release Notes

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1 System And Network Information

1.1 Backward Incompatibility

1.1.1 Name-based Mapping Support for Inbound Interfaces

The following inbound interfaces now support "name-based" mapping. Previously any headers on these files (first row, starting with #) were ignored.

But now, if you provide a header, the header names must match the names of the fields in the published interface.

- IVP.MTIPStatsBufferDetail_IB version 1.0
- IVP.StoreBufferIPData_IB version 1.0
- OMS.CreditMemo_IB version 1.0
- OMS.PaymentTermsCode_IB version 1.0
- TMS.EdiEventMappingInboundInterface version 1.0
- TMS.EdiEventTargetLookupConfigInboundInterface version 1.0
- SCC.LeadTimeReference_IB version 1.0

1.1.2 Field Precision Changed from Float to Double

The following fields' precision has been increased from FLOAT to DOUBLE on the following outbound interfaces.

This means you may receive a decimal number of higher precision than your system is expecting. For information on the precision of FLOAT vs. DOUBLE, please see <https://www.scaler.com/topics/java-float-vs-double/>

- Field ItemPrice in Outbound Interface SCC.Buffer_OB version 1.0
- Field StandardCost in Outbound Interface SCC.Item_OB version 1.0
- Field PurchaseCost in Outbound Interface SCC.Item_OB version 1.0
- Field TotalLandedCost in Outbound Interface SCC.Item_OB version 1.0
- Field PriceAmount in Outbound Interface SCC.Item_OB version 1.0
- Field MSRP in Outbound Interface SCC.Item_OB version 1.0

1.2 System Requirements

Operating System Requirement:

- Windows 10

Browser Requirement:

- Chrome (verified on version 108.0.5359.125)
- Microsoft Edge (verified on version 108.0.1462.54)

Hardware Recommendation:

For optimal performance, ONE recommends

- 4GB of RAM;
- graphics resolution 1366 X 768 or better

For more detailed requirements and support, see: <https://docs.onenetwork.com/NeoHelp/ProductSupportAndRequirements/latest>

2 Enhancements And New Features

2.1 Integrated Business Planning

2.1.1 Business Planning Scenario Comparison Capability

Starting this release, users can compare scenarios for revenue, operating income, and costs. If a plan has multiple scenarios associated with it, you can compare one of them with the baseline scenario. Users can compare two scenarios to see which is more suitable for their use case and then copy the scenario data to the baseline. This enhancement adds a new screen Compare Scenarios, accessible from the Plan Manager screen.

Previously, users could compare only plans but not different scenarios and did not include KPIs and targets. With improved visibility and formatting in addition to the new scenario comparison capability, this enhancement helps the user select the best possible scenario for a given plan.

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

2.1.2 Enhancements to Directional Profit and Loss Timeline View

In the NEO 3.7 release, we have updated the Directional Profit and Loss (PNL) timeline view (TLV) to make it consistent with the NEO design language. The Activities screen now loads only as needed, enhancing loading times, and NEO engine agents are added to allow the replanning of demand and supply parts. Users are now notified when the plan is ready, thus eliminating the need to monitor progress manually. Previously, the PNL TLV screen was a collection of tables, had several performance issues, and gave users less control over replanning. This enhancement brings a faster and more intuitive UI that gives users more control over replanning demand and supply.

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

2.1.3 Enhancements to the Manage Plan Production Capacity Timeline View

In this release, ONE introduces a new Scenario filter on the Manage Plan Production Capacity Timeline View (TLV). The NEO agent reads scenario-specific production capacity for a plan and replans as necessary. Previously, the NEO agent could process production capacity for plans but not for specific scenarios in a plan.

Users also now have the option to edit site resource capacity in daily, weekly, or monthly buckets, making editing easier for the user. Values updated in the monthly or weekly buckets are disaggregated into the daily bucket.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Configuring the Manage Plan Production Capacity Timeline View" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

2.1.4 Enhancements to the Supply Demand Match Report

This release many enhancements to the Supply Demand Match report, including two new filters called Product Group Level and Site Group Level and an updated API to show demand and supply matches. In addition, users can now view site resource capacities and demand constraints. Previously, the Supply Demand Match report showed data for all site and product groups but did not show data about resource constraints. With this enhancement, users can accurately analyze supply and demand by looking at capacity and constraints.

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

2.2 Integration

2.2.1 Importing and Exporting NEO Plasma Pipelines

This release adds the ability to export or import NEO Plasma Pipelines between NEO instances. Import and Export buttons are added to the NEO Plasma Pipelines screen. The Export button becomes active once one or more pipelines are selected on the screen. Clicking the export button downloads pipeline information along with local and global attachments. This information is downloaded as a zip file that includes a CSV file with pipeline details (Name, Version, Owning Org, and Pipeline Type), a JSON file for each pipeline record, and an attachments folder for each pipeline.

The zip archive exported from one instance can be imported into another by clicking the Import button on the NEO Plasma Pipelines screen. The inbound interface accepts only the zip file exported from another NEO instance. If the pipeline or pipeline attachments being imported already exist, the import operation overrides existing records. When initiating an import, the system displays a confirmation message. The import starts only after the user clicks OK.

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

2.3 Logistics And Transportation Management

2.3.1 Carrier Onboarding

2.3.2 Execution

2.3.2.1 Update Shipment Contact Details Through CSV Upload

In this release, ONE provides the inbound-interface capability for users to create and update shipment-contact details by uploading a CSV file. Earlier, users could only update the shipment contact information from the UI. This improvement helps users to upload shipment contact information in bulk, expediting the updating process and saving operational time.

Users can view the uploaded shipment contact information under the Contact tab on the Shipment Details screen.



Note

Users can upload the CSV file from the following navigation menu:
Tools > Upload > Shipment Contact.

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

2.3.2.2 Added a Carrier Cancel Movement Alert

This release adds a new alert subscription called Carrier Cancel Movement Alert. This alert notifies the user when a carrier cancels a movement after confirmation, but before the load is picked up. Previously, users did not know if a carrier had canceled a load unless they searched for the shipment. When creating the new alert subscription, the user can specify the threshold value for the amount of time before pickup that triggers the alert. The alert can be sent via email and is also visible on the user's dashboard. This enhancement ensures users are aware of carrier cancelations and can address the problems sooner.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Subscribing to the Carrier Cancel Movement Alert" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. See the following sections in <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Alerts Subscriptions" • "Alerts Slideout" • "Dashboards and Widgets"

2.3.2.3 Added a Per Container Cost Type for Base Rates and Accessorial Rates on Client Contracts

Beginning in the NEO 3.7 release, Per Container is now an option as a cost type for base rates and accessorial rates on both client and carrier contracts. Previously, users could not calculate the rates for contracts on a per container basis. Now, when a user creates a base rate or accessorial rate for a client or carrier contract and selects Per Container as the Cost Type, the rates are calculated on a per container basis for all equipment types. This enhancement gives the user more flexibility and options in calculating contract costs.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the sections in the current release of the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Creating Carrier Contract Accessorial Rates" • "Creating and Updating Carrier Contract Base Rates" • "Creating Client Contract Site Accessorial Rates" • "Creating Client Contract Base Rates"

2.3.2.4 Added EDI 404, 410, and 417 for Rail Transportation Carriers

This release adds support for 4** rail EDIs for rail transportation carriers, where * is any number. Specifically, the following EDI are added for use with rail transportation:

- EDI 404: used for tendering, similar to EDI 204 for truck/road carriers
- EDI 410: used for invoicing
- EDI 417: used for tender response, similar to EDI 990 for truck/road carriers

With this enhancement, rail carriers can be notified of certain process milestones and respond with the appropriate EDI. There is no UI component of this enhancement.

Analytics Impact	None
Integration Impact	Added EDI 404, 410, and 417 for rail transportation.
Related Functionality	None
Usage and Configuration	None

2.3.2.5 New Policy Allows Reason Code Notes When Re-Rating a Movement

This release allows users to configure an optional or required reason code when re-rating a movement, which is set in the Reason Code Policies screen. Previously, users could set a policy to add an optional or mandatory note when other events occurred, but re-rating a movement was not an existing event option, but now users can set this policy for re-rated movements. Additionally, if any supplemental invoice is created, the same reason code and comments apply to the new invoice as part of invoice creation from re-rating.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the "Setting the Policy to Add a Note When Re-Rating a Movement" section in the current release of the *New Feature Usage and Configuration Guide* for more information.

2.3.2.6 Additional Fields and Updates on Bookings UI

With this release, additional fields are added, and some fields are re-labeled on the Bookings UI. The Bookings screen layout is updated to accommodate different sections for Booking details, Shipment details, Contract details, and so on. A new set of fields are added and relabeled as:

Field	Description
Booking state	Specifies the state of the booking
Carrier Booking Number	The carrier provides this number
Carrier Confirmation date	The carrier provides this date
Place of Receipt	The existing field Origin Site is relabeled as Place of Receipt
Place of Delivery	The existing field Destination Site is relabeled as Place of Delivery
Booking Admin Office Country Code	Specifies the country code of the Booking Admin Office
Master Customer Code	Specifies the External Reference of the Customer
Contract Number	The number is auto-populated based on the existing carrier contract
Contract Party	The field is auto-populated based on the client of the contract
Spot Quotation Number	This field is editable

Field	Description
VGM cut-off date	The carrier adds this field after booking confirmation
SI cut-off	The carrier adds this field after booking confirmation
DG doc cut-off date	The carrier adds this field after booking confirmation
ISF-5 Applicability	The field is applicable only for shipments inbound to the USA
Hot Shipment	The flag is set at the shipment level and is auto-populated on the booking. The flag indicates the priority of the shipment.
State Marine Pollutant	The field is added on shipment lines for DG cargoes and propagated on the booking cargo page. The possible values are solid, liquid, or gas. The checkbox indicates that the cargo contains a marine pollutant.
HS code	The field is added on the shipment line and Booking cargo screen
First Transmission Time Stamp	Provides the time stamp of the first time the data was transmitted to the carrier
Last Transmission Time Stamp	Provides the time stamp of the last time the data was transmitted to the carrier. This time stamp is provided in case of multiple updates and transmissions of the same carrier booking.
Carrier Booking Version	Provides a count of booking amendments
<ul style="list-style-type: none"> • CB Create User • CB Creation Date • CB Update User • CB Last Update Date 	The details are viewed on the audit trail of the booking

Field	Description
Earliest container delivery date	The carrier provides this value
Estimated time of arrival (Gate In)	The carrier provides this value
Limited Quantity	The field is displayed on the Booking Container screen
Reefer delivery cut-off	Specifies the last possible delivery of reefer containers at the export terminal
DG declaration cut-off	Signifies final declaration. No changes are possible after this declaration.
DG delivery cut-off	Specifies the last possible delivery of DG containers at the export terminal
Cargo Ready Date	The field is auto-populated from the Purchase Order if available. Booking cannot be created before the Cargo Ready Date.
Cargo Delivery Date	Specifies the Cargo Delivery Date

This update streamlines the Ocean Booking flow where needed. Also, when users initiate a booking request for an existing shipment, the General tab is displayed, and the following fields are auto-populated from the shipment on the New Bookings UI:

- **Shipment No**
- **Pickup Date for Place of Receipt**
- **Origin Booking Site Delivery Date**
- **Origin Equipment Type**
- **Destination Booking Site Pickup Date**
- **Delivery Date for Place of Delivery**
- **Destination Equipment Type**

When users create a standalone booking request, a separate Shipment Details section is displayed on the New Bookings UI. Previously, the Booking UI did not support the Ocean Booking flow. This enhancement helps users to initiate Bookings for the ocean flow in the system. Users can request Bookings on the Bookings UI.

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

2.3.2.7 Add Shipments Beyond the Confirmed State to Movements

This release adds new filters to the Add Shipment Candidates popup window on the movement detail screen, allowing users to add shipments that are beyond the confirmed state. This enhancement lets users locate and add shipments in states such as Delivered, Pick Ready, Intransit, and so on. After applying the filter, users can invoke the consolidated shipment action from the movement context menu. If the shipment and movement states do not match, the user receives a warning. If the user agrees to continue the consolidation after the warning, the shipment inherits the movement's state and/or carrier. This improvement saves operation time and manual effort.

The following filters are available for selection on the Add Shipment Candidates popup window, accessible on the Load tab of the movement detail screen:

- Show Confirmed Shipments
- Show Delivered Shipments
- Show In-Transit Shipments
- Show Delivery Ready Shipments
- Show Pick Ready Shipments



Note

Before submitting the invoice, users need to calculate the actual cost and price and then update the invoice.

When an independent carrier shipment is added to an independent movement, the movement state remains in its original state, and the consolidated shipment inherits its carrier state.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	See the "Adding Shipments Beyond the Confirmed State to Movements" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

2.3.2.8 Alert Info Popup to Whitelist ONE Emails

In the NEO 3.7 release, certain alert types that support click-through links now have an Info icon popup notification that appears during alert creation. The popup suggests users whitelist One Network email addresses to prevent automated email systems from clicking links within alert emails. The Info popup appears for alerts relating to tendered events for movement alerts and alerts of the Approval Requested type for cost limit alerts. This enhancement was added because some external email systems apply filters to check links for malicious intent; sometimes, these filters click "reject" links, giving the appearance that a tender has been instantaneously rejected. But now, if users whitelist the appropriate ONE email addresses, there should be fewer false clicks, saving time.

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

2.3.2.9 Consolidated Shipments Visible on Movement History

Starting this release, shipment consolidation history is visible on the Message tab of the Movement History screen. The shipment consolidation history is visible only under the following conditions:

- When the movement is created with a static route
- As a part of shipment creation, when the user provides the movement number

Previously, in the case of a static route-based movement with shipment consolidation, the Movement History screen displayed only a movement creation success message. With this enhancement, users can view the shipment consolidation history along with the movement history.

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

2.3.2.10 Static Route Disabling Enhancement for Milk Run Interleaving Pick Drops

The NEO 3.7 release now supports task interleaving for transportation execution, which provides far more efficient workflows. Specifically, this enhancement allows users to disable automatic shipment generation on static routes to selected stops when implementing interleaving pick/drop. Previously, users could disable shipment generation at selected stops when setting up single-pick multi-drop and multi-pick single-drop scenarios, but now, milk runs are included as an option for this shipment customization. This enhancement provides flexibility to users to modify static routes as needed.

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

2.3.2.11 Ability to Generate Multiple Movements with the Same Configuration on a Static Route

Starting this release, users can generate multiple movements on the same day using the same static route configuration. Previously, only a single movement was generated for a static route, forcing users to define new routes for each movement. The ability to generate multiple movements helps users move extra loads from a shipment to the available movements on the same static route. Users set the number of movements for each day of the week in the Schedule Days field on the Create Static Route UI to generate multiple movements with the same configuration.

Analytics Impact	None
Integration Impact	TMS.StaticRouteInboundInterfacev2.0
Related Functionality	None
Usage and Configuration	See the "Generating Multiple Movements with the Same Configuration on a Static Route" section in the current release of the <i>New Feature Usage and Configuration Guide</i> . Also, please see the "Creating Static Routes" and "Managing Static Routes" sections in the current release of the <i>Online Help</i> for more information.

2.3.2.12 Rating Enhancements for Ocean Bookings

The Neo 3.7 release introduces the following rating enhancements for ocean bookings:

- DTD (Door to Door), PTD (Port to Door), PTP (Port to Port), and DTP (Door to Port) are added as system-enabled rating types.
 - When the rating type is DTD, the Ship From and Ship To sites are used for rate calculation.
 - When the rating type is PTD, the Port of Loading and Ship To sites are used for rate calculation.
 - When the rating type is PTP, the Port of Loading and Port of Discharge sites are used for rate calculation.
 - When the rating type is DTP, the Ship From and Port of Discharge sites are used for rate calculation.
- The shipment Routing Group value, CFS (Container Freight Station) and/or CY (Container Yard), auto-populates the Business Type field on the booking details screen.
- For single-leg shipments, the Ship From Org name and Ship From Site address values are auto-populated as the Shipper and Shipper Address, respectively, on bookings, while the Ship To Org name and the Ship To Site address values are used as the Consignee and Consignee Address values on bookings. For multi-leg shipments, the corresponding fields from the parent shipment are used.
- The value in the shipment Rating Type field is auto-populated to the Move Type field on the booking detail screen. In addition, the Rating Type field is added as a column on the Search Shipments report.

For ocean bookings, carrier contracts are generally set between port to port. Previously, since the Ship From Site and Ship To Site differ from port sites used under the Port of Loading and Port of Discharge, it was difficult to find a matching contract to calculate rates. To overcome this scenario, rating types are used to calculate rates, increasing the accuracy of rates. In addition, the auto-populated fields simplify the ocean booking workflow for

users. The customer must provide values for the Rating Type and Routing Group fields on shipments.

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

2.3.2.13 Rearrange Static Route Stops

In the NEO 3.7 release, Transportation Manager users can rearrange stops in static routes by clicking the new up and down arrows in the leftmost column. Clicking an up or down arrow moves a stop one slot up or down in the stop sequence. This feature was previously available but was removed because rearranging the stop sequence did not also update the arrival and departure times, causing a validation error. Now, after stops are rearranged, the system recalculates the arrival and departure times as expected. Previously, users were required to add stops in the desired order during static route creation or create new static routes to update an existing stop sequence, but now stops can be rearranged as desired, saving time.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Rearranging Static Route Stops" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Also, see the "Creating Static Routes" section in the current release of the <i>Online Help</i> for more information.

2.3.2.14 Select Movement During Shipment Creation or Update

This release allows users to specify a movement number when creating a shipment and, for existing shipments, allows users to change the movement the shipment is associated with. Previously, selecting a pre-existing movement during shipment creation was not possible,

and a movement was automatically assigned by the system; in addition, pre-existing shipments could not be switched from one movement to another. When an existing movement is selected, the given shipment is consolidated into the selected movement.

When updating an existing shipment, if a user selects a movement with a state different from the current shipment state, a warning appears stating the shipment will be canceled from its current movement and will be consolidated to the target movement. If the user cancels the warning, the shipment is not consolidated to the target movement. With this enhancement, users can quickly and conveniently associate new or existing shipments with pre-existing movements much easier than before, saving time.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Update Movement for Pre-existing Shipments" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Also, see the "Header Tab" sections in the "Creating Shipments" section of the current release of the <i>Online Help</i> for more information.

2.3.2.15 Specify Rounding Digits When Computing Cost Component Totals

The NEO 3.7 release adds a new execution policy for transportation users: Rounding Decimals For Cost. The new policy specifies how many digits after the decimal point the system should use to round up the cost of components before persisting in the database. This policy accepts integer values between 0 and 5; if left undefined or specified the value 0, the value defaults to 9. For example, if the policy is set to "3" and the database value is 20.12466, then the saved value in the database is 20.125. The value displayed in the UI will be according to user preference settings.

This enhancement is added to enhance cost computation where individual cost components are rounded as per the execution policy setting before saving in the database. Thus, the total cost computation will use rounded cost component values. For example, if the policy value is 2, the cost value is 41.8584, then the value saved in the database will be 41.86; in some summation calculations, a "just right" combination of values produced results that differed by a minimal quantity between the rounding individual cost values before summation and using actual values (without rounding) for summation. This caused invoice processing failures for carriers. The system now persists in the rounded-up values instead of actual values, and total cost summation will be performed on rounded values.

Note that the Rounding Decimals For Cost policy does not affect currency conversions. Before this enhancement, the system used the most precise currency conversion factor available when converting between currencies and then rounded the calculation result; after this enhancement, the system behaves the same.

With the new Rounding Decimals For Cost policy, users can specify the precision for saving cost components in the database. The system uses this level of accuracy during total cost calculations. The system no longer produces mismatches between expected and actual results, eliminating automated failures from carrier invoice processing systems.

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

2.3.2.16 Support for Address-to-Address Distance Calculation Using PC Miler Web Service

Starting in the NEO 3.7 release, ONE now supports address-to-address distance calculations when using the PC Miler Web Service as the distance source when creating a distance policy. Previously, distance was calculated based on longitude and latitude only. With this enhancement, if the address is available for a location, that address is used in calculating the distance when PC Miler is selected as the distance source on the distance policy. If the system is unable to retrieve the address, it defaults to using the latitude and longitude for calculation. This enhancement improves precision and accuracy in distance calculations.

When configuring a distance policy, the user must select PC Miler as the Default Distance Source and select City-State,Zip/Postal,Lat-Long as the Default Location Basis.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Configuring a Distance Policy to Use Address-to-Address Calculation" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Please also see the "Distance Policies" section in <i>Online Help</i> for more information.

2.3.2.17 Support for Tracking Labels in the UI

NEO 3.7 now supports transportation tracking labels as a document type in the NEO UI. Users can upload, download, and generate labels in Serial Shipping Container Code (SSCC)/ Global Standards (GS1) format for shipments. When generated, labels are visible on the shipment's Documents tab. Shipment/movement events in the UI are also updated when the labels are scanned, and singletons can be created as an option when dictated by a policy or external reference. Users select the Print Labels option in the Action menu and input the number of packages that require labels. These enhancements further allow careful tracking to the package level with visibility in the UI.

Analytics Impact	None
Integration Impact	Electronic Product Code Information Services (EPCIS) interfaces for inbound and outbound were created to support the label formatting.
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information:</p> <ul style="list-style-type: none"> • "Creating Singletons Via Packing Labels" • "Generating Packing Labels" <p>See the following sections in the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Viewing and Adding Tracking Events" • "Configuring Tracking Events" • "Viewing Document Types" • "Creating New Document Types" • Any of the Documents Tab sections for shipment templates

2.3.2.18 Update Static Routes in Bulk Via CSV Upload

NEO 3.7 allows Transportation Manager roles to update static routes through CSV using a new download and upload process. Previously, static routes could be updated in the system, but only one at a time using the Update Static Route button on static route detail screens; now static routes can be updated in bulk. To enable this feature, a new field/column called Sys Static Route ID is added to the TMS_STATICROUTE_UPLOAD_STAGING table that is

downloaded when the Download button is selected on the Static Routes report and to the static route template file when uploading static routes. The system populates this new ID number field and uses it to track if an uploaded static route already exists in the system.

Note that the Sys Static Route ID value is not visible in the UI and is only visible through the download process. In addition, it is recommended that users not modify Sys Static Route ID values in downloaded CSV files, as this will prevent the system from updating the desired static routes. Users simply download the desired static routes as a CSV file, modify the desired values, and then upload the CSV file back into the system.

- If a CSV file is uploaded with this ID field populated, the system updates that static route with the provided fields and does not create a new static route.
- If a CSV file is uploaded without this ID field populated, the system behaves as it did before this update and creates a new route with the provided data.

With this new process, users can change various static route fields, such as carrier, date range, and depot, for many static routes simultaneously, saving time over the manual UI process.

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

2.3.3 Financials

2.3.3.1 Rejecting Invoices in Bulk Through the UI or CSV Upload

This release adds the option to reject a group of inbound or outbound invoices through the UI, as well as through CSV upload. Previously, only the approval of invoices could be done in bulk, while rejecting invoices had to be done one at a time. With this enhancement, ONE adds a new Reject Invoice Line column to both the payable and receivable invoice and invoice lines CSV files. Marking the field with a 1 rejects the invoice. If all invoice lines are marked with a 1 in the new field on the invoice lines CSV file, the invoice is rejected upon upload.

In addition, users now have a Reject option on the Actions button on the Payable Invoices and Receivable Invoices screens. To reject multiple invoices at the same time, users select multiple invoices and then click the Reject option after clicking the Action button.

These new reject processes are available for both carrier and client invoices. This enhancement saves the user time by simplifying the bulk rejection of invoices instead of a manual, one-at-a-time process.

Analytics Impact	None
Integration Impact	<ul style="list-style-type: none"> • TMS.InvoiceLineCodesInboundv1.0 • TMS.InvoiceExportReport • TMS.InvoiceLineExportFromLinesListReport
Related Functionality	None
Usage and Configuration	<p>See the "Approving, Rejecting, and Resubmitting Payable Invoices" and "Approving, Rejecting, and Resubmitting Receivable Invoices" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>See the following sections in the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Uploading Files" • "Uploading Carrier Invoices as CSV Files" • "Uploading Client Invoices as CSV Files"

2.3.3.2 Resubmit Rejected Invoices in Bulk

This release allows Carrier roles to resubmit rejected invoices in bulk. Previously, users were required to open each rejected invoice individually, but this enhancement saves time by eliminating repetitive actions. The Resubmit action is added to the Receivable Invoices report, Payable Invoices report, receivable invoices details screens, and payable invoices details screens. This enhancement brings Carrier roles into parity with Shipper roles, which already had similar functionality.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration	See the "Approving, Rejecting, and Resubmitting Payable Invoices" and "Approving, Rejecting, and Resubmitting Receivable Invoices" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.
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2.3.3.3 Added Confirmation Message When Approving Invoice for Unconfirmed Movement

Starting in the NEO 3.7 release, whenever a user tries to approve a payable invoice for a movement that is not yet confirmed, a confirmation popup appears, asking the user if they want to confirm the movement and approve the invoice. If confirmed, the movement is confirmed to a carrier and the invoice is approved in a single transaction. This enhancement is available when Transportation Manager and Financial Manager roles are approving payable invoices in the For Review state and is added to minimize unintended movement confirmation, saving time.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Approving, Rejecting, and Resubmitting Payable Invoices" section in the current release of the <i>Online Help</i> for more information.

2.3.3.4 Enhancements to the Invoice Report Screens

This release adds a Deleted state filter and a Delete action for New state invoices to the payable and receivable invoice report screens. Also, invoices in the Canceled state are visible on the invoice reports for some users who previously could not view invoices in that state.

Previously, shippers could not view any deleted invoices on the invoice reports and could not delete invoices in the New state. This enhancement enables users to view the invoices in the Deleted state and to delete duplicate invoices. Users can now select the Deleted or Canceled state filters to view invoices in those states. For invoices in the New state, users select the checkbox for the invoice record and click the Actions button on the Invoice Report screen to perform the Delete action.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information:</p> <ul style="list-style-type: none"> • "Deleting Invoices in the New State" • "Viewing Receivable Invoices" • "Viewing Payable Invoices"

2.3.4 Global Trade

2.3.4.1 3PL Customs Enhancements

Partner Mapping for Customs (PDS-46504)

The NEO 3.7 release adds partner mapping functionality for customs policies, allowing users additional customization of how some site names and addresses populate. For example, if only a Ship-To partner and Bill-To partner are available, Transportation Manager roles can map these two partners to multiple other fields required for customs, such as Ship-To, Bill-To, Buyer, Consignee, and End User. To support this enhancement, the Partner Mapping column is added to the Customs Policies screen. This column contains a clickable button that opens a popup menu, allowing users to map fields such as Sender, Stuffing Location, and Consolidator to other fields, such as Ship-From, Seller, and Manufacturer. Using this feature, users can quickly map available fields to all required fields when configuring custom policies.

New Actions for Customs Transactions (PDS-56495, PDS-56498)

Users can manually update existing customs transactions without changing the source shipment using the Refresh action on the Transactions List screen. This feature is added because sometimes customs transactions were not updated if the associated shipment was changed, but now users can take the Refresh action and ensure the customs transaction is up to date.

In addition, users can disable and restore customs transactions from the Transactions List screen with the Disable and Restore actions. A disabled transaction does not automatically update and is excluded from processing. Transactions can be re-enabled at any time with the Restore action; restored transactions are not updated until the next automatic update or a manual update.

Updates to Item Customs Codes (PDS-58146)

The NEO 3.7 release enhances item customs codes to comply with Customs and Border Protection (CBP) requirements. By navigating to the Item Master screen, clicking on a Name link, going to the Customs tab, and then clicking on an Item Codes link, users now have many more options when configuring item customs codes. The screen is now split into two tabs: Items and Codes. From the Items tab, the country of origin and description can be updated. From the Codes tab, SPI and PGA codes can be created, acted upon, and exported to CSV files.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Adding New Customs Policies" • "Transactions List" • "Item Customs Tab"

2.3.4.2 Container Fan-In/Fan-Out Track and Trace Improvements

The NEO 3.7 release adds considerable improvements to the Container Fan-In/Fan-Out Track & Trace screen for Transportation Manager roles. The All Containers section name now changes based on your filter criteria.

- Clicking a state button from the Summary tab changes the Containers tab header to match. For example, if the Confirmed state button is clicked from the Summary tab, the Containers tab opens with the Confirmed Containers heading.
- If a state button is clicked from an itinerary group, the header changes to match. For example, if the Awaiting state button is clicked from the Itinerary 1 section, the heading changes to "Itinerary 1 Awaiting Containers."
- If additional filter criteria are entered, the text is changed to "X Matched Containers," where X is the number of containers matched. If all containers part of a booking are displayed, the label defaults back to "All Containers."

In addition, the following changes are made:

- For each container, container state nodes are now color-coded with Awaiting state as grey, Confirmed state as green, and In-Transit state as blue. In addition, when each node is moused over, the state appears.
- The color of the IN/OUT slider button is changed from blue to dark grey for better visibility. Previously, the OUT section was the same color as the bar.
- The Latest Event field for movements is added on the Containers tab. This field contains a link that shows the last milestone event; when clicked, a slideout appears showing all milestone events for the movement with a completion date and time.
- The container status is added next to each container number in the Containers tab.
- Additional movement details are now available on the movement slideout that appears when a movement link is clicked from the Containers tab. Additional details such as carrier, transport name, BTS ID1, BTS ID2, and Europa No are displayed below the movement number on the slideout.
- In the header section, a Direction field is added with values of either Export or Import.

This series of enhancements improves the user experience when managing complex multi-split shipments, saving time.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Container Fan-In/Fan-Out Track & Trace" section in the current release of the <i>Online Help</i> for more information.

2.3.4.3 Create Milestones for Ocean Booking Models

The NEO 3.7 release adds support for ocean bookings as a field model level for lead time references when creating milestones. Previously, only lead time references from shipment and shipment event field models were supported when creating milestones, but now customers can create milestones for shipments with lead time references from ocean bookings.

To support this enhancement, a new option called Ocean Booking is added to the Field Model Level field on the lead time reference creation screen. Transportation Manager roles can use this feature by setting up milestones for the required ocean booking tracking events, selecting Ocean Booking as the Field Model Level for a new lead time reference, and configuring a shipment milestone alert to monitor the milestone progress.

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

2.3.4.4 Enhancements to Lead Logistics Provider Role

Starting this release, global trade operations are enabled for the Lead Logistics Provider (LLP) role. With this enhancement, users with the Lead Logistics Provider (LLP) role can now execute ocean and container management flow transactions with more visibility. However, visibility is limited to transactions related to the enabled shipper. Previously, ocean booking and container management operations were not enabled for the LLP role. The below UI changes are done as part of this enhancement:

UI and Actions	Description
New Bookings screen	The Lead Logistics Provider (LLP) field under the General tab is auto-populated with the LLP org name. This is a read-only field. LLP users can view those bookings where LLP org is populated.
New Shipment screen	The Shipper user must populate the Lead Logistics Provider field under the Header tab while creating a shipment. LLP users can view those shipments where LLP org is populated.
VGM(Verified Gross Mass) screen	The Lead Logistics Provider (LLP) field on the Create screen is auto-populated with the LLP org name. This is a read-only field. LLP users can view those VGM's for Containers where LLP org is populated.
Container Moves action	The Lead Logistics Provider (LLP) field on the Lead Logistics Provider field under the Header tab is auto-populated with the LLP org name.
Initiate Booking Request action	The Lead Logistics Provider (LLP) field on the Lead Logistics Provider field under the Header tab is auto-populated with the LLP org name.

UI and Actions	Description
Carrier Contracts screen	The Lead Logistics Provider (LLP) can view the carrier contracts of the shipper whose shipper service is handled by the LLP org.
Payable Invoices screen	The Lead Logistics Provider (LLP) user can view the invoices against LLP shipments or movements.

This enhancement allows users to manage their non-NVOCC (non-Non-Vessel Operating Common Carrier) and NVOCC (Non-Vessel Operating Common Carrier) operations separately. Users with LLP roles can view shipments, view and initiate bookings, view and assign container moves, view and assign carrier moves, and view invoices for movements or shipments.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the below sections in the current release of the <i>Online Help</i> for more information.</p> <ul style="list-style-type: none"> • "Creating Bookings" • "Creating Shipments Using Standard Templates" • "Submitting VGM (Verified Gross Mass) Information for Containers" • "Linking Containers to a Shipment or Movement" • "Creating Containers" • "Initiating Container Bookings from Multi-Modal Shipments" • "Searching and Viewing Carrier Contracts" • "Viewing Payable Invoices" • "Container View Report"

2.3.4.5 New Global Trade Dashboard and Widgets

This release adds a new Global Trade Dashboard available for the Transportation Manager role when the Global Trade feature is enabled. Previously, there was no ready-made dashboard available that specifically displayed global trade data. This new dashboard shows data for ocean booking-related and container move-related data through a variety of

widgets, including Bookings by State, Container by State, Last Eventwise Container Count, Container Typewise Container Count, Total Bookings, Booked Containers, Containers At POL, and Containers At POD. Users select and configure the widgets and reports displayed on the dashboard according to their needs. This enhancement helps users easily view and analyze global trade data within a specified date range based on selected criteria.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with the Global Trade Dashboard" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Also, please see the "Dashboards and Widgets" section in the current release of <i>Online Help</i> for more information.

2.3.4.6 New Screens and Workflow for Ocean Booking Shipping Instructions

The NEO 3.7 release offers new screens and workflow for ocean bookings and shipping instructions. This enhancement allows users to create, submit, update, and cancel Shipping Instructions. Also, it enables the ocean carriers to confirm the shipping instructions and provide a master bill of lading number.

The new Shipping Instructions screen provides the following:

- General tab with booking, shipment, contact, and voyage details.
- Container tab that includes container details from the shipment and hazard/dangerous goods and reefer information.
- Charges tab with existing charges and the ability to add additional charges and payment terms for charges identified as prepaid, collect, base rate, and accessorial.

Users access new shipping instruction screens from the Action menu on the Bookings screen. However, if shipping instructions exist, users can access them through the Links column under the booking report. . The new screen help expands the available information for users to input for shipping instructions and reduces the need to create and submit instructions from outside systems.

Analytics Impact	None
Integration Impact	Updated Calista SI integration for inbound and outbound files

Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information:</p> <ul style="list-style-type: none"> • "Creating Ocean Booking Shipment Instructions" • "Shipping Instructions - Container Tab" • "Shipping Instructions - Charges Tab"

2.3.4.7 Support for Transportation Forecasting

This release adds user interfaces below to support transportation forecasting in the Transportation Management Service (TMS).

UI	Description
Transportation Forecast Workbench under the Transportation menu	The Transportation Forecast Workbench provides near-term, mid-term, and long-term forecasts based on historical shipments, orders, and order forecasts over a period of time. Users create different forecast scenarios that include data such as To and From regions, origin and destination, equipment, transit time, and so on to the workbench. Based on that input, the forecast is calculated.
Rolling Forecast Report under the Transportation Forecast menu	The Rolling Forecast Report displays the forecast outcome data.
Forecast Timeline Data TLV under the Transportation Forecast menu	The TLV displays the comparison between the forecasted data and the actual booked shipments and open shipments without booking.
Forecast Above Threshold alert subscription	The alert is generated when the actual forecast exceeds the threshold value. This forecast alert is set by selecting Transportation Forecast Outcome in the Category field on the New Subscription screen.

The Transportation Forecast Workbench provides near-term, mid-term, and long-term forecasts based on historical shipments, orders, and order forecasts over a period of time. Users create different forecast scenarios that include data such as to and from regions, origin and destination, equipment, transit time, and so on to the workbench. Based on that input, the forecast is calculated. Previously, transportation forecasting was not available to

deal with issues like the unavailability of containers for booking or high costs. This enhancement helps users to find the number of containers/ equipment required for a month and pre-book containers in advance based on orders, order forecasts, and shipment history.

Users can provide different scenarios on the Transportation Forecast Workbench slide-out and execute them. The forecasts are displayed in a collapsible panel under Projected Forecast. A NEO It button appears on the right, and users can pre-book a container or initiate RFQ from there. Users can view the forecast outcome on the newly added Rolling Forecast Report and compare the forecast data with actual data on the new Forecast Timeline Data timeline view (TLV). Users can set the threshold on the Forecast Above Threshold alert and subscribe to an alert whenever the actual forecast exceeds the threshold value.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <ul style="list-style-type: none"> • "Using the Transportation Forecast Workbench" • "Viewing the Rolling Forecast Report" • "Viewing the Forecast Timeline Data TLV" <p>See the "Creating and Customizing Alert Subscriptions" section in the current release of the <i>Online Help</i> for more information.</p>

2.3.4.8 Validation Added for Ocean Booking Flow

NEO 3.7 adds a validation on booking details screens to restrict users from updating container bookings once shipping instructions are created for the booking. Any changes to requested containers on the booking details screen allow carrier users to accept/confirm booking requests if the container response quantity is less than the requested quantity. Previously, if there was a mismatch between the requested and response quantities, the only option available for shipper users was to cancel the booking and create a new one.

While analyzing the ocean booking flow, carrier users often modify the requested container quantity while sending confirmations for booking requests. ONE added an Active flag affecting deleted container requests. With the Active flag set to False, the container information is still visible after the request is deleted, and the Delete button on the Containers tab deactivates the container row rather than deleting it. When shipping instructions are created for bookings, further updates to bookings are not allowed per the new validation.

Analytics Impact	None
Integration Impact	<ul style="list-style-type: none"> • Modified the EDI 300 outbound interface to export only the containers with the Active flag present. • Modified the EDI 301 inbound interface to populate the Booked Quantity field instead of the Requested Quantity field.
Related Functionality	None
Usage and Configuration	<p>See the "Deactivating Requested Containers" section in the <i>New Feature and Configuration Guide</i>.</p> <p>See the "Creating Bookings" and the "Updating Booking Details" sections in the current release of the <i>Online Help</i> for more information.</p>

2.3.5 Scheduling

2.3.5.1 Added Request Type Filter to the Appointment Requests Screen

In this release, ONE adds a Request Type filter to the Appointment Requests screen. Users can apply the filter by selecting either Pickup or Delivery from the dropdown options in the Request Type filter field. Previously, users could not search for appointment requests based on whether they were for pickup or delivery appointments. This improvement allows users to search for and sort appointment requests by their request type, saving time.



Note

By default, the Request Type filter may not be visible in the Appointment Requests filter window. Users may need to click the Add Filter link to add the Request Type filter.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the "Searching Appointment Requests" section in the *Online Help* for more information.

2.3.5.2 Adding Overrides to the Auto Schedule Freight Type per Partner

The NEO 3.7 release adds the ability to override the Auto Schedule Freight Type on a per-partner basis; however, the existing Auto Schedule Freight Type will continue to function as the default if no override is specified. The enhancement allows customers to specify whether auto-scheduling should apply to controlled shipments for specific partners and non-controlled shipments for other partners, giving users more control over shipping schedules for the same site.

Users select the specific freight type when adding or editing the Site Scheduling Policies UI. A new column, Freight Type Override, displays on the Included Partners grid, which provides the ability to override the Auto Schedule Freight Type on a per-partner basis. Freight Type Override will use the same dropdown to select the freight types for the Auto Schedule Freight Type.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Setting the Auto Schedule Freight Type Override" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>See the following sections in the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Site Policies" • "Site Scheduling Policies Report"

2.3.5.3 Allow Carriers to Cancel In-Progress Appointment Requests

In the NEO 3.7 release, ONE gives users the capability to cancel an appointment request in the In Progress state. Previously, users could only cancel appointment requests that were in the Open state. With the new improvement, carrier users can cancel the in-progress appointment requests that are no longer needed, thus saving time for both carriers and shippers.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Canceling In-Progress Appointment Requests" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Please see the "Canceling Appointment Requests" section in the <i>Online Help</i> for more information.

2.3.5.4 Automatically Confirm Soft Appointments Upon Rescheduling

The NEO 3.7 release allows carrier users to reschedule and automatically confirm suggested soft appointments. Previously, users had to first reschedule the soft appointment and then separately confirm the hard appointment, creating extra steps for carriers. For this enhancement, a new site-level scheduling policy, Confirm Soft Appointment On Carrier Reschedule, is added to the Scheduling Policies screen. The flag for this policy only becomes visible and editable when the Enable Soft Appointments policy is enabled on the screen.

The system computes the rescheduling of soft appointments based on the following logic:

- If the Confirm Soft Appointment On Carrier Reschedule checkbox is not selected, the legacy rescheduling logic applies, and the appointment is rescheduled without being confirmed.
- If the Confirm Soft Appointment On Carrier Reschedule checkbox is selected and the user is not a carrier user, the legacy rescheduling logic applies, and the appointment is rescheduled without being confirmed.
- If the Confirm Soft Appointment On Carrier Reschedule checkbox is selected and the user is a carrier user, the system both reschedules and confirms the appointment when an appointment is rescheduled.

Prerequisites

Users must configure the Enable Soft Appointments policy on the Scheduling Policies screen and select the Confirm Soft Appointment On Carrier Reschedule option.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	See the "Configuring Soft Appointments for Automatic Confirmation on Rescheduling" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

2.3.6 Visibility

2.3.6.1 Enhancements to Shipment History

We have enhanced the History tab on the shipment detail screen to reflect changes to order numbers in shipment lines and to display the reason codes and comments when appointments are canceled or rescheduled. Previously, order number changes and reason codes for canceled/rescheduled appointments were not shown under the History tab.

The View Changes column now displays changes to an order number when a shipment line is added or removed. Reason codes and comments are now available in the Reason Code column for a canceled or rescheduled appointment on the shipment.

With this enhancement, users can more easily track order changes and appointment changes on shipments.

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

2.3.6.2 Highlight Lead Time on Projected Inventory Views

The NEO 3.7 release enhances several projected inventory (PIV) screens by highlighting days based on order, manufacturing, and transportation lead times. The given day, represented by a column, is highlighted with blue borders on the left and right sides of the column; if the lead time matches the forecast to order conversion threshold, then the line color is green.


This update is available on the Material PIV, Plant Finished Goods (FG) PIV, and Distribution Center (DC) PIV screens and is calculated by the system based on transportation lead times and transportation preparation lead times for lanes setup in the system. With this enhancement, users receive more information when reviewing buffer inventory profiles,

improving their ability to monitor existing orders and create new orders with an order lead time, reducing stockouts.

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

2.3.6.3 Single-Click Sorting for the Carrier and Total Distance Columns in Movement Shipment Reports

As part of the NEO 3.7 release, ONE adds single-click sorting to the Carrier and Total Distance columns in the movement shipment and multimodal reports. Previously, these columns only supported advanced sorting. This improvement saves time and makes it convenient to quickly sort data with a single click on the respective columns in an ascending or descending manner. This capability is added to all shipment reports, movement shipment reports, and global search.



Note
The Total Distance column sort only considers the distance value, not the distance unit of measurement (UOM).

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

2.3.6.4 Integration Messages Display on Shipment Details Messages Tab

NEO 3.7 adds a TMS reporting enhancement that captures shipping integration messages from GLG and displays the information on the Messages tab of the shipment details page. Previously, integration messages were available through searching by transactions on different screens in the UI. Adding the messages related to shipments/movements in the details pages helps users view the integration messages related to that shipment. The enhancement also adds additional visibility between GLG and RTVN.

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

2.3.6.5 Save Layout and Reset to Default Options Added to Invoice Lines

This release adds two new options - Save Layout and Reset to Default - to invoice lines. Earlier, users could choose which columns were displayed for the invoice lines on an invoice, but they could not save the layout of the columns and had to readjust them each time for each invoice. The Save Layout option saves column layout so that users don't have to manually adjust which columns are displayed every time. If users need to undo the changes they made, they can use the Reset to Default option to restore the default column layout.

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

2.3.6.6 Delivery Timeline Data Report


Operations users now have a new timeline report, called the Delivery Timeline Data report, to view shipments and statuses using bucketized time frames with visibility at the weekly level and multiple filter options. The previous reports required downloads and manual filtering outside of the ONE system. Users can now easily view and sort data within the system and use the daily status links to dive deeper into shipment data. Users navigate to the Delivery Timeline Data report from the Reports sub-menu.

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

2.3.6.7 Generate Packing Labels for Shipments

With this release, client users and shipper users can generate packing labels for packages in a shipment. The Generate Packing Labels action is available for shipments that allow users to add the number of packages. The number of packing labels generated equals the number of packages the user adds. The system updates the added number of packages on the shipment header. The packing label is generated in an SSCC (GS1) format.

Previously, this action was not available for shipments that have multiple packages. This enhancement helps users track the packages in a shipment. Users can perform the Generate Packing Labels action on the shipment and then view, download, email, or print the packing labels in a PDF format from the Documents tab.



Refer to <https://www.gs1-128.info/sscc-18/> for details on generating labels in the SSCC format

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	See the "Generating Packing Labels for Shipments" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

2.4 Manufacturing

2.4.1 Demand Translation

2.4.1.1 Lead Time Enhancements for Finished Good Items

Beginning in the NEO 3.7 release, several enhancements relating to production lead times for finished goods (FGs) are added. These enhancements are, in general, available to Production Managers, Buyer Supply Chain Admins, Buyer Supply Chain Planners, and Enterprise Admins.

- A new field, Mfg Production Lead Time, is added on the Manufacturing Policy tab of buffer details screens. This field represents the lead time needed to produce an FG and is specified in days, hours, and minutes.
- A new column, Forecast Start Date, is added to the Search Production Order Forecast Report and Production Order Forecast detail screens.
- Lead time calculations for FG items and child items now incorporate the new Mfg Production Lead Time value.

Users can now specify a production lead time for an FG item at the buffer level, and the system includes that value when calculating supply dates, leading to more accurate forecasts and more precise supply-demand planning.

Analytics Impact	None
Integration Impact	Added: <ul style="list-style-type: none"> • MFG_PRODUCTION_LEAD_TIME to MFG.Buffer v4.0 (IB) • MFG_FORECAST_START_DATE to MFG.ProdOrderFcst_Upload v3.0 (IB)
Related Functionality	None

Usage and Configuration

See the "Creating Buffers" section in the current release of the *Online Help* for more information.

2.4.1.2 Added Scenario Support for the Constrained Demand Translation Engine

The NEO 3.7 release adds scenario support for the Constrained Demand Translation (CDT) engine. This enhancement allows the user to run the engine based on a selected scenario by using new scenario-enabled tables that store the transaction data with the scenario ID. Previously, the engine output was only saved in the Manufacturing Planning Data table (BAU). A new flag, Read Real World Data As Input, is added to the scenario creation screen. If this flag is set to true, the real-world manufacturing planning data (from non-scenario tables) is used as input when running the CDT engine. If the flag is set to false, the data from the scenario tables are used as input for the CDT engine.

This enhancement allows the user to run the CDT engine for different demand scenarios and take the appropriate action based on the results.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Running the Constrained Demand Translation Engine Based on a Scenario" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

2.4.2 Manufacturing UI and Integration Enhancements

The following table shows a list of UI enhancements performed for the NEO 3.7 release.

Field Name	Field Type	Screen Name/ CSV File	User Action	Reference
<ul style="list-style-type: none"> • Upload • Download 	Buttons	Search Capacity Contract Report	Click the button to upload or download the capacity contract details from the report.	See the "Uploading and Downloading the Search Capacity Contract Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.
Parent Production Order	Picker list	Create Production Order	Use the picker tool to select the parent production order number.	See the "Creating Production Orders" section and the "Production Order Report" section in the current release of the <i>Online Help</i> for more information.
	Column	<ul style="list-style-type: none"> • Production Order Report • Interface file with the new field: MFG. Production Order_IB 	Click the parent production order number link to view the Production Order details.	

Analytics Impact	None
Integration Impact	See the interface file names in the above table.
Related Functionality	None
Usage and Configuration	See the References column in the above table.

2.4.3 Production Management

2.4.3.1 Added a Site Resource Allocated Capacity Timeline View (TLV)

This release adds a new timeline view (TLV) called Site Resource Allocated Capacity that displays all site resource capacity-related information, such as allocated capacity, required capacity, used capacity, remaining capacity, and so on. The permitted visibility of the various capacity metrics on the TLV differs between contract manufacturers and their original equipment manufacturers (OEMs), with contract manufacturers having visibility to all site resources and capacity measures and OEMs having visibility only to their allocated site resources and the capacity of the allocated resources. Contract manufacturers can model the allocated resources assigned to each OEM. Previously, contract manufacturers with multiple OEMs had no TLV available to view and model the site resources and capacity for each OEM and no way to limit the visibility of OEMs.

With this enhancement, one or more site resources can be linked to a parent site resource, with only contract manufacturers having visibility to the parent site resource. The contract manufacturer can also define production capacity against the parent site resource. If the sum of the capacities of all child site resources exceeds the capacity of the parent resource, the contract manufacturer and OEM receive an alert. Each OEM only has visibility to its allocated site resource and the capacity of the allocated site. Both contract manufacturers and OEMs can assign supply to allocated site resources.

This new TLV gives contract manufacturers and OEMs improved visibility and control over allocated site resources and capacity-related information. From one screen, contract manufacturers can now manage production capacity and validate the capacity for different OEMs against the total capacity.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing the Site Resource Allocated Capacity Timeline View (TLV)" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

2.4.3.2 Added Production Order Purchase Order Association Report

This release adds a new report, Search Production Order Purchase Order Association, that displays production orders created against purchase orders. Users have the option to search by production order number, purchase order number, as well as a number of other filters. The report has links to the production order detail screens and contains additional details for each production order, including the Item Name, Line/Schedule Number, Ship From site, Ship To site, and more. This new report allows users to see all production orders and their linked purchase orders without the need to navigate to different screens.

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

2.4.3.3 Allow Linking Inbound Orders to a Production Order

The NEO 3.7 release links purchase and production orders with Bill of Materials (BOM) components. Earlier, users could link only outbound delivery schedules with production orders; now, users can track inbound delivery schedules as well. This helps users track production orders against purchase orders for BOM components, along with finished good items. In addition, the system validations check that the item or BOM component from the purchase order matches the item from the production order.

Users can view both inbound and outbound orders of a specified item and the item's BOM components on the Order Delivery Schedule tab of the Production Order details page. They can then add delivery schedules which will be linked to the production order.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the "Production Order Order Deliveries Schedule" section (located as a child page under "Creating Production Orders") in the current release of the *Online Help* for more information.

2.4.3.4 Enhancements to Track Production Orders

This release brings the following enhancements to production orders to better track their progress:

- A Production Order Progress Tracker widget is added that enables users to track the production order progress from the NEO home screen.
- A time-based workflow is added to compute the estimated completed quantity of the production order.
- A Production Order Progress Tracking report is added that enables users to track the production order progress via production order parameters like Order Number, Delay Percentage, Cumulative Estimated Quantity, Cumulative Actual Quantity, Item Name, Production Site Name, and so on.
- An alert is added to notify the user that the threshold for the estimated completion quantity versus the actual quantity is exceeded.

Earlier, there was no provision to track the progress of delayed production orders in the system. With this enhancement, users can track production orders that are behind schedule in a widget, a report, and an alert.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing the Production Order Progress Tracking Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. See the "Creating and Customizing Alert Subscriptions" and "Adding Widgets" sections in the current release of the <i>Online Help</i> for more information.

2.4.3.5 Make To Stock Policies for Buffers

NEO 3.7 extends Make To Stock (MTS) policies to all Finished Goods, Work In Progress, and Raw Material items at the buffer level. This enhancement gives users more flexibility, as they can now configure Make to Stock policies at the buffer level and set different MTS policies for different items in a site.

As part of this enhancement, the following new fields are added to the Manufacturing Policy tab of the buffer details screen:

Field	Description
Mfg Order Policy Type	Set the manufacturing policy for the buffer to one of the available options: <ul style="list-style-type: none"> • DYNAMIC_ROP_STATIC_ROQ_AVG_IN_DAYS • DYNAMIC_ROP_STATIC_ROQ_IN_DAYS • STATIC_ROP_ROQ_AS_QUANTITY
Mfg Safety Stock	Visible only for the DYNAMIC_ROP_STATIC_ROQ_AVG_IN_DAYS and DYNAMIC_ROP_STATIC_ROQ_IN_DAYS policy types
Mfg Safety Stock UOM	
Mfg Reorder Target	Visible only for the STATIC_ROP_ROQ_AS_QUANTITY policy type.

Also, the logic to calculate the average is updated so that the same average is displayed when the CDT engine is run and the Multi-Buffer BOM Hierarchy TLV is opened.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Configuring the Make To Stock Policies at the Buffer Level" section in the current release of the <i>New Feature and Configuration Guide</i> . See the "Manufacturing Policy Tab for Buffers" section in the current release of the <i>Online Help</i> for more information.

2.4.3.6 Production Demand Forecast Override Enabled for Constrained Demand Translation (CDT) Scenario Planning

In this release, ONE adds the ability to override the Production Demand Forecast during simulation planning. For this enhancement, the Demand Forecast Override data measure name is changed to Production Demand Forecast Override. Previously, the CDT engine ran in Unconstrained Demand Translation mode along with a planning scenario, the engine generated the Demand Forecast Override data measure for intermediate (IM) items and raw material (RM) items. Now, with the introduction of the Production Demand Forecast, the data measure name is changed from Demand Forecast Override to Production Demand Forecast Override.

The added feature is used to override the Production Demand Forecast during simulation planning. This helps the user plan more easily by running simulations with different production demand forecasts and simulating the outputs by overriding Production Demand Forecasts. Users can run the CDT Engine in Unconstrained Demand Translation mode to obtain the Production Demand Forecast Override data measure.

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

2.4.3.7 Support for Additional UOMs in the Resource Capacity Timeline Views (TLVs)

The NEO 3.7 release adds support for additional units of measurement (UOMs) in the Resource Capacity Review Timeline View (TLV), Resource Group Detail TLV, and Resource Group Aggregated Projected On Hand (POH) TLV. Previously, the resource capacity was only displayed when the UOM in the Production Capacity UOM field for a site resource was listed as hours. With this enhancement, the TLV displays production capacity for a site resource in additional UOMs, giving users information about resource capacity in their preferred UOM. This enhancement provides an improved user experience and more accurate information about resource capacity. No action is required by the user as the UOM for the TLVs is automatically populated from the UOM listed in the Production Capacity UOM field on the site resource.

Analytics Impact	None
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Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Resource Capacity Review TLV" • "Resource Group Detail TLV" • "Resource Group Aggregated Projected On Hand (POH) TLV"

2.4.3.8 Support for Business Calendar and Production Lead Time

This release adds business calendar and production lead time support when production orders are created from purchase orders. Previously, the planned start and planned end dates on a production order did not consider the manufacturing lead time nor the business calendar for the site. Now, when production orders are created from purchase orders, the production order's planned start and planned end dates are set with consideration for holidays and other closed dates, as well as for manufacturing lead time. This enhancement helps users to get more accurate planning dates for the production orders created from purchase orders. Users can set up business calendars for a site, marking holidays and other closed dates, for use in production order planning date calculations.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Creating Production Orders from the PO or DO Workflow" section in the current release of the <i>Online Help</i> for more information.</p>

2.5 Master Data Management

2.5.1 Added Cross-Reference Mapping Support for EDI

The NEO 3.7 release adds cross-reference support for EDI formats, joining the pre-existing CSV cross-reference functionality. This feature is used associate incoming master and transactional data with the correct master data (enterprises, organizations, sites, and so on)

so that data is kept consistent for the user. When data is imported into the ONE system through CSV or EDI, that data is mapped. For example, one external system may call a site "Site A," another may call it "Site A1," and ONE may call it "Site 1." In this case, ONE maintains three separate value mappings in order to import and export data to and from other systems while simultaneously keeping data names consistent and convenient for users when using the ONE system. For configuration information, please contact your ONE representative.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Cross References by External System Report" and "Cross References Report" sections in the current release of the <i>Online Help</i> for more information.

2.6 NEO UI

2.6.1 Enhancements to Alert Subscription UI

In this release, ONE makes several enhancements to the alert subscriptions UI. These enhancements are added to the issue subscription UI as well. Users can now add their WhatsApp numbers to receive system-generated alert notifications. Previously, users could only receive notifications through SMS text messages and email. WhatsApp is now an option in the Mobile field in the Alert Type section of the New Subscription screen but only enabled on instances where we have specifically licensed support for SMS and/or Whatsapp. This option is also available when joining an existing subscription.

In addition, the New Subscription screen and the alert subscription details screen are updated. A new Delivery field in the Alert Type section is added. This field has four checkbox options for users to specify how they want to receive alerts. Users can select multiple checkboxes. The four options are as follows:

- **NEO Alert Inbox:** This option sends the alert email to the Alert Inbox in the NEO UI.
- **My email address:** This option sends the alert to the user's email address. This option has a dropdown list where users can specify whether they want the alert sent to their ONE user email or another email address.
- **Other email addresses:** This option lets users specify other email addresses to receive the alert. This field accepts multiple email addresses separated by commas.

- **Mobile:** This option sends the alert to users via SMS text message or WhatsApp message. Users can select whether they want the alert sent to the mobile number listed in their user settings, or they can enter a different mobile number. Alternatively, they can select WhatsApp and provide their WhatsApp number.

This enhancement simplifies and improves the alert subscription process for users, making delivery options more flexible and increasing the options for delivery methods.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information:</p> <ul style="list-style-type: none"> • "Creating and Customizing Alert Subscriptions" • "Joining Existing Alert Subscriptions" • "Working with Issue Subscriptions" • "Creating New Issue Subscriptions" • "Joining Existing Issue Subscriptions"

2.6.2 Changed the List Report Subscriptions Screen to Integration Subscriptions

This release changes a report name from "List Report Subscriptions" to "Integration Subscriptions" and removes the New Report Subscription option from the Tools menu. These updates were made to maintain naming consistency across menus. The New Report Subscription menu option is removed because the functionality was already available, and is still available, from the Add Subscription button on the Integrations Subscriptions report. Previously, the same UI was loaded from the New Report Subscription screen and from Add Subscription button on the List Report Subscription screen, but with different names.

These changes are visible to all roles with the appropriate permissions to view the report, including:

- Buyer Supply Chain Planner, Manager, and Admin
- Vendor Supply Chain Planner, Manager, and Admin
- Production Manager
- Factory Manager
- Buyer and Vendor Financials Managers
- Warehouse Clerk, Manager, and Admin
- Buyer Orchestrator, Vendor Orchestrator, and Orchestrator

With this update, a redundant menu option is removed and a report name changes to increase naming consistency, increasing ease of use for users.

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

2.6.3 Custom Field Delimiter for CSV Upload and Download

The NEO 3.7 release adds custom field delimiters for uploading and downloading CSV files in the ONE system. Some users have region settings that define list separators as semicolons instead of commas (the default in the ONE system); when those users download CSV files, all information appears in the first cell because their system does not recognize commas as delimiters.

To address this issue, the Field Delimiter field is added to the UI Preferences tab of the User Setting screen. This field is available to all users and roles. With this feature, users can specify the field delimiter used in their region, enabling downloaded CSV files to appear correctly on their system. In addition, the system checks the Field Delimiter field for the active user when CSV files are uploaded, ensuring the ONE system reads uploaded files correctly.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration	See the "Editing Settings in the NEO UI" section in the current release of the <i>Online Help</i> for more information.
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2.6.4 Enhanced Business Rule Details User Interface

In this release, the Create Business Rule screen is updated to match the other NEO screens. This enhancement makes working with business rules more consistent with other parts of the application. There is no new or updated functionality.

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

2.6.5 Enhancements to User Settings Screen

In this release, the NEO User Settings user interface is updated to add a Mobile Phone Number field, and the Time Zone Override Per Role section is renamed to Override Per Role. Also, the Override Per Role section is now collapsible, and a Preferred Country Override column is added to this section. Previously, users could not update their mobile phone numbers, the override section was not collapsible, and users could not select a preferred country override for each role. This enhancement allows users to add or update information in their user profile, toggle the visibility of the Override Per Role section, and add preferred country override information for each role.

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

2.6.6 Improved Support for Instance-wide System Notifications

This release includes enhancements to notifications in NEO. Currently, the ONE system supports system-wide NEO notifications, and the Value Chain (VC) Admin can create notifications for all active users in the instance with at least one role. With this enhancement, VC Admins can better support all system users and manage the notification data. VC Admins can also filter data and review a report for system notifications. The following fields are now available for creating notifications:

- A Message text box
- Expiry Date
- Send To options:
 - All Active Users
 - All Active Users by Enterprise
 - Specific Active Users
- Notification Type options:
 - System Delivery - When set to true, the notification is viewable on the NEO Notification slide-out.
 - Email Delivery - When set to true, the notification is sent to the user's primary email address.
- Preview - Opens a popup window displaying all users who are to receive the notification

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

2.6.7 Label Change Updates for UI Elements

In this release, ONE implements label changes to organize and enhance task-based usability. This improvement promotes consistency across UI elements such as the menu, screen name, policy name, filters, reports, timeline views, and widgets. The label change is performed across the NEO platform in the areas such as Inventory Planning, Transportation

Planning, Demand Planning, Replenishment, and Demand Translation. As part of the enhancement, the Scenario label is changed to the Config.

The following table lists label changes performed across modules. Other screens may be affected as well.

Module	Field Type	Screen Name	Old Label	New Label
Transportation Planning	Policy Name	TOSX Config Policy	TOSX Scenario Policy	TOSX Config Policy
	Report	TOSX Config Policy Report	TOSX Scenario Policy Report	TOSX Config Policy Report
Inventory Planning	Menu	New MEIO Config	New MEIO Scenario	New MEIO Config
		Search MEIO Config	Search MEIO Scenario	Search MEIO Config
		New Multi-Tier Config	New Multi-Tier Scenario	New Multi-Tier Config
		Search Multi-Tier Config	Search Multi-Tier Scenario	Search Multi-Tier Config
		New Multi-Tier Stat Config	New Multi-Tier Stat Scenario	New Multi-Tier Stat Config
Demand Planning	Menu	Create DP Config	Create DP Scenario	Create DP Config
		Search DP Configs	Search Forecasting Scenarios	Search DP Configs
		Search DP Config Algorithm Overrides	Search Scenario Algorithm Overrides	Search DP Config Algorithm Overrides

Module	Field Type	Screen Name	Old Label	New Label
	Filter	Search Additional Algorithm Configuration screen	Scenario Name	Config Name
		Create Additional Algorithm Configuration screen	Scenario Name	Config Name
		Run Forecast Algorithm Competition	Competition Config	Competition Scenario
		Run Autonomous Adjustment	Scenario Name	Config Name
		Consensus Forecast Computation Engine	Scenario Name	Config Name
		Create Algorithm Override	Scenario Name	Config Name
		Create Algorithm Override	Scenario Name	Config Name
Replenishment (All variants of Advanced Replenishment Engine)	Menu	Search Rebalance Config	Search Rebalance Scenario	Search Rebalance Config
		Add Rebalance Config	Add Rebalance Scenario	Add Rebalance Config
		Search Replenishment Config	Search Replenishment Scenario	Search Replenishment Config
	Report	Search Replenishment Config	Search Replenishment Scenario	Search Replenishment Config
		Create Replenishment Config	Create Replenishment Scenario	Create Replenishment Config

Module	Field Type	Screen Name	Old Label	New Label
	Filter	Run Advanced Replenishment Engine Screen	Replenishment Scenario Name	Replenishment Config Name
	Filter	Invoke Advanced Replenishment Engine OMO	Replenishment Scenario Name	Replenishment Config Name
	Filter	Invoke Advanced Replenishment Engine Of Promising	Replenishment Scenario Name	Replenishment Config Name
	Filter	Invoke Rebalance Engine	Rebalance Scenario Name	Rebalance Config Name
Demand Translation	Policy	Search CDT Agent Config	Search CDT Engine Policies Set	Search CDT Agent Config
		Create CDT Agent Config	Create CDT Engine Policy	Create CDT Agent Config
		Upload CDT Agent Config	Upload CDT Engine Policy Set	Upload CDT Agent Config
		Update CDT Agent Config	Update CDT Engine Policy	Update CDT Agent Config
	Filter	CDT Agent Config	CDT Engine Policy Set	CDT Agent Config
	Filter	Constraint Demand Translation Engine	CDT Policy Set	CDT Agent Config

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

2.6.8 Shortcut Widget Supports Favorites in NEO UI

NEO 3.7 enhances the NEO UI by allowing users to set shortcut widgets to open a favorited screen. Previously, users could attach an external link or internal screen to a shortcut widget displayed on dashboards, and now the customization includes favorited items. The enhancement provides additional ease in navigating through the ONE system quickly and efficiently. Users follow the same basic steps to create and customize a shortcut widget.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Setting a Favorite in a Shortcut Widget" section in the current release of the <i>New Feature Usage and Configuration Guide</i> and "Creating Shortcut Widgets" in the <i>Online Help</i> for more information.

2.6.9 Support to Provide Column Configuration for Filtering

You should be able to create a report with 2 columns and then create the widget correct as a workaround.

Added the support to provide column config for filtering

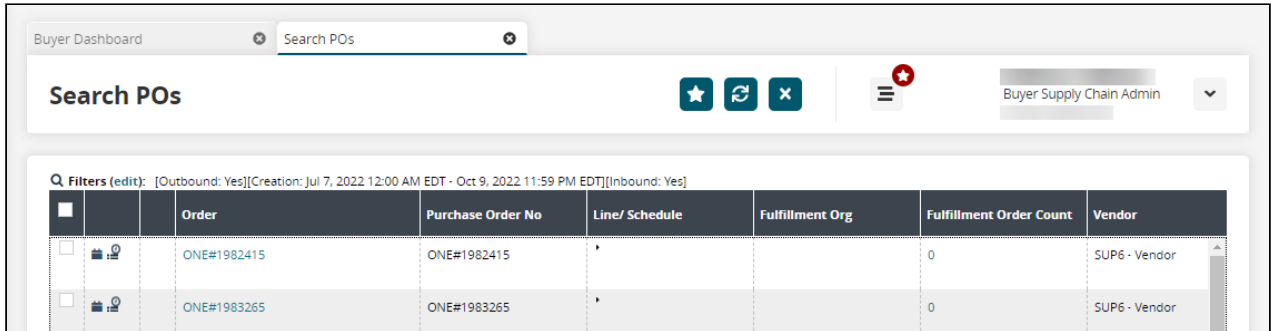
Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Replace with Feature Section Name" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

2.6.10 Toggle High-Contrast Mode for Table Headers

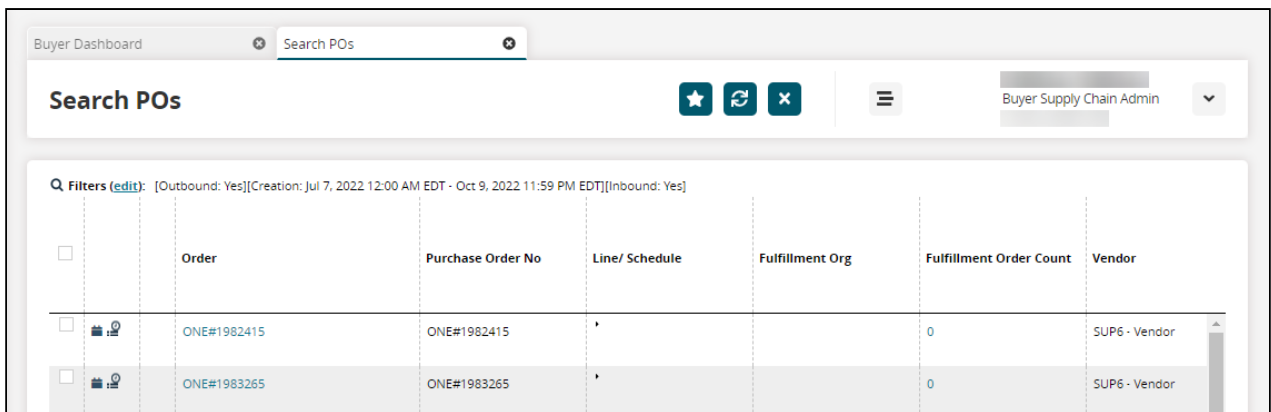
The NEO 3.7 release allows all users to change the style of table headers at the user level. A new Disable High-Contrast Table Headers toggle is available in the User Quick Setting dropdown menu and the User Settings screen. When toggled, the UI reloads with the new

table header styles. By default, the toggle is not enabled and all table headers are high contrast. In addition, because this toggle is at the user level, changes persist between roles for a given user. Note that dark mode does not affect table colors and therefore does not interact with the Disable High-Contrast Table Headers toggle. Please see the following screenshots for reference.

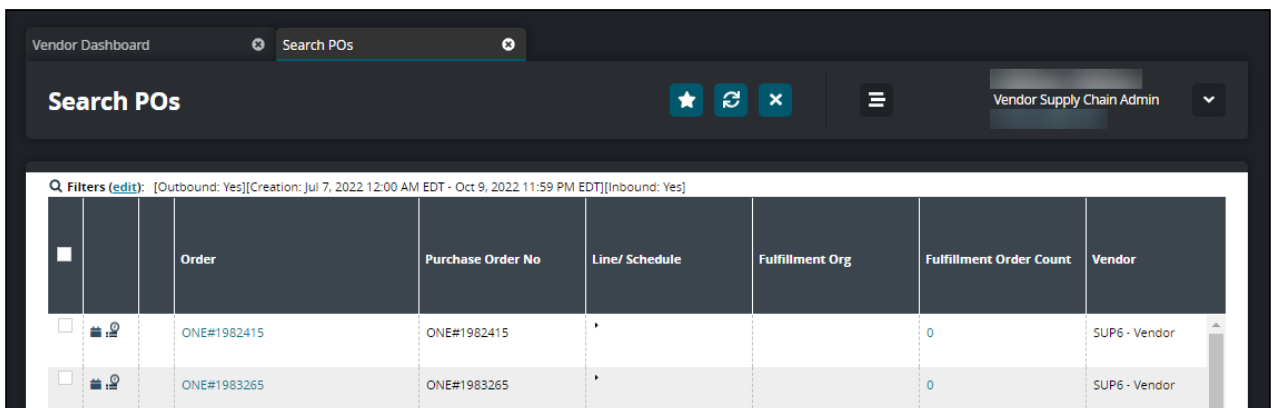
Toggle disabled with light mode:



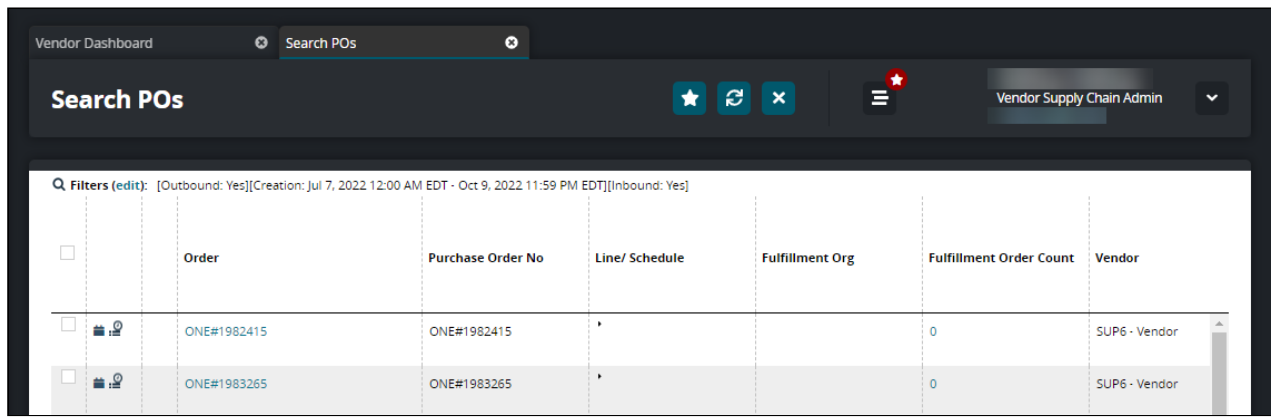
Toggle enabled with light mode:



Toggle disabled with dark mode:



Toggle enabled with dark mode:



This enhancement gives users more choices in how reports are viewed, allowing further customization of the UI.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Using High-Contrast Mode for Table Headers" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

2.6.11 Total Count Options Added to the Neo Widgets

The NEO 3.7 release allows users to display more information in tooltips for visualizations (chart types) that appear in custom analytic and pivot widgets. Total and Grand Total options are now available for the following visualizations:

- Bar
- Column
- Line
- Area
- Stacked Column
- Stacked Bar

Previously, only the current count value was displayed in tooltips when users hovered over bars, lines, or columns. Users can now select Total by X-axis (dynamic value) and/or Grand Total in the Show Total dropdown list; the only exception to this is the Pie Chart, which shows Total by X-axis as an option. The enhancement provides more information to users for analysis and decision-making.

Analytics Impact	The enhancement provides more analytic information in widget chart views.
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing Totals and Grand Totals in Custom Analytic Widgets" section in the current release of the <i>New Feature Usage and Configuration Guide</i> and the "Custom Analytic Widgets" pages in the <i>Online Help</i> for more information.

2.7 Optimization

2.7.1 Demand Planning

2.7.1.1 New Dynamic Data Measure Computation Engine (DDMC)

This release enhancement creates a Dynamic Data Measure Computation (DDMC) engine for demand planning. The engine is a dynamic method of generating any relationship between any type of transactional data where users create and maintain the logic. It supports unit of measure (UOM) transformation for quantity and time bucketization, as well as data aggregation/disaggregation across master data dimensions (ex: Item to Product Group level, Site to Site Group Level).

The UI includes computation scenario management (scenario management, data management, engine flow, and engine variable management), reports for a run summary and engine simulation data, and a UI for engine runs. Users now have a tool that can transform existing data or perform calculations based on existing data without involving the implementation team.

The engine consists of four configurations that support simple functions and data conversion:

- **Computation** - names a distinct piece of work that can be run by DDMC
- **Computation Input Data** - defines each distinct data read from the database and can return multiple records
- **Computation Step** - names specific computation step(s)
- **Computation Variable** - defines constant data used

Analytics Impact	The enhancement creates new analytics for users who can customize and maintain the logic for the engine.
Integration Impact	Inbound interfaces for engine models
Related Functionality	None
Usage and Configuration	See the "Running the Dynamic Data Measure Computation (DDMC) Engine" and the "Viewing Dynamic Data Measure Computation (DDMC) Engine Reports" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

2.7.1.2 Demand Aggregation Engine Enhancements

Overrides on Aggregated Orders and Aggregated Shipments

The NEO 3.7 release adds overrides for aggregated orders and aggregated shipments. An override allows customers to override a quantity on an order or shipment for any reason. Users can now create and manage overrides on aggregate orders and shipments through the following new features.

New Reports

Two new reports are available, the Search Aggregated Order User Overrides and the Search Aggregated Shipment User Overrides reports. From these screens, users can view all visible user overrides for aggregated orders and shipments, respectively, including the original value, overridden value, and difference in quantity numerically and as a percentage, as well as filter records that exceed a specified minimum quantity or percentage difference.

Updated Reports

The Search Aggregated Orders and Search Aggregated Shipments reports are updated with two new columns, Quantity Override and Override Comment. These fields contain the override quantity and, optionally, a comment about the override. In addition, the Update Quantity Override action is added to both reports; this action updates the Quantity Override and Override Comment fields for the selected record(s).

Updated Engine Logic

The Demand Forecast engine, when running against aggregated orders or aggregated shipments, now uses the Override Quantity value if present; otherwise, the engine uses the

original quantity and behaves the same as before this update. When running the engine, the Quantity Override field can override the Request Quantity, Shipped Quantity, and Received Quantity fields for aggregated orders and the Shipped Quantity field for aggregated shipments.

Analytics Impact	None
Integration Impact	<p>The DPX.AggregatedOrders_IB ver 1.0 and DPX.AggregatedShipments_IB ver 1.0 interfaces now have the following optional fields:</p> <ul style="list-style-type: none"> • QuantityOverride • OverrideComment
Related Functionality	None
Usage and Configuration	See the "Aggregated Order Overrides" and "Aggregated Shipment Overrides" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

Support for Aggregated Shipments

The NEO 3.7 release adds support for aggregated shipments similar to the aggregated orders feature. The demand planning engine runs periodically and creates forecasts based on known shipments at that point in time, but new shipments can be loaded into the system at any time. This makes it very difficult to reproduce a forecast and troubleshoot which shipments were used to create a given forecast. The new aggregating shipments enhancement allows users to aggregate shipments, similar to a snapshot, and then perform operations on the aggregation. The following related enhancements are also added to support aggregated shipments:

- Added the Search Aggregated Shipments report to view existing aggregated shipments
- Added the Upload Aggregated Shipments screen where users can upload aggregated shipments
- Aggregated shipments can be displayed on the Forecast Book screen and used as a reference
- The following engines now support aggregated shipments:
 - Demand Aggregation
 - DP Forecast Generation
 - Demand Forecast Accuracy

Using these features in tandem, users can now generate a snapshot of shipments used during a forecast, upload new or search existing aggregated shipments, and use aggregated shipments as history sources when running various demand planning engines.

Analytics Impact	None
Integration Impact	Added the AggregatedShipment (IB) interface.
Related Functionality	None
Usage and Configuration	<p>See the "Working with Aggregated Shipments" and "Demand Aggregation Engine" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>See the "Forecast Accuracy By Site" section in the current release of the <i>Online Help</i> for more information.</p>

2.7.1.3 Forecast Updates

Enhancements and Support for Additional Forecast Types

Support for Additional Forecast Types

With the NEO 3.7 release, ONE makes several enhancements to forecast types, including the addition of sixteen more forecast types and giving users more control over labels and label changes for each forecast type. With this enhancement, users can configure the forecast types per organization. Previously, demand planning only supported four forecast types, and label changes could only be made by a user with server-side access. Now, users can create up to 20 forecast types, and labels for each type can be specified per organization through integration or through the UI. Translations still require server-side access, but each forecast detail screen has both a Name Label column and a corresponding Name Key column. The key column supports translations through server-side actions. If a translation is found based on the key, the translation is used. If a translation is not found, the value in the Name Label column is used.

Engine Updates for Additional Forecast Types

The Disaggregation Engine supports the new forecast types through the existing Engine Custom Config screen, allowing disaggregation of the data in any of the 20 forecast types. The Forecast Generation engine now supports the new forecast types as well, updating all demand planning output. This enhancement limits the values accepted in the Standard Name field on demand planning scenarios, whereas they previously accepted any value. The only values accepted are now SCENARIO1, SCENARIO2, SCENARIO3, and so on. If the values

in the Standard Name field do not match one of these 20 values, the result is an error. This limitation applies to scenario configuration in the UI and on the inbound interface for scenario uploads. Two additional inbound interfaces are added for consensus forecast configuration and consensus forecast configuration overrides.

The Demand Forecast Accuracy engine model adds a new field, SourceForecasts, to capture the new forecast types on statistical forecasts based on orders and also to forecasts based on shipments. These new fields appear on the Demand Forecast Accuracy screens, including Demand Forecast Accuracy By Item screen and the demand forecast accuracy reports. This new field is maintained on the Search Demand Forecast Accuracy screen.

These enhancements give the users the ability to create additional forecast types for their organization and more control over configuring those forecast types, improving the capacity, efficiency, and flexibility of demand planning.

Defining Visibility Permissions for Various Forecast Types with Role Forecast Types

Users can now define which user roles can view and edit which forecast types, data measure types, and history types and then view those on the Partner Site Forecast Book timeline view (TLV). To support this enhancement, the NEO 3.7 release introduces role forecast types. For each role forecast type object, users can specify a role name (such as Buyer Supply Chain Admin) and a list of:

- read-only and read-write forecast types (such as S1, S2, S3, and so on)
- read-only and read-write data measure types
- read-only and read-write history types (such as orders, aggregated orders, shipments, and aggregated shipments)



Please note at this time, the following history types are not supported:

- Sales
- Similar item aggregated orders
- Similar item aggregated shipment
- Similar item enhanced orders
- Similar item shipments
- Similar item sales

Analytics Impact

None

Integration Impact	<ul style="list-style-type: none"> • DPX.ForecastType_IB • DPX.DPScenario_IB • ConsensusForecastConfig_IB • ConsensusForecastConfigOverride_IB • DPX.ForecastTypeRole_IB • DPX.DfAccuracyConfig_IB • DPX.DfAccuracyConfigOverride_IB
Related Functionality	None
Usage and Configuration	See the "Working with Forecast Types" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

Support for Copying Statistical Forecasts to Multiple Forecast Types

In NEO 3.7, users can now copy statistical forecasts from one forecast type to one or more additional forecast types. Previously, users had no way to copy statistical forecasts to different forecast types. Now, users can specify forecast types in a new field, Source Forecasts, on the Create DP Config screen. The values in this field list the forecast types to which the statistical forecasts are copied. This field accepts multiple forecast types, such as S1, S2, and so on, in a comma-separated format. This field is also added to the inbound and outbound functionality for demand planning configurations. When a forecast type is specified in this new field, the statistical forecast from the demand planning configuration is copied to that forecast type. This enhancement saves users time since they no longer have to manually copy the statistical forecast separately for each forecast type.

Analytics Impact	None
Integration Impact	DPX.DPScenario_IB
Related Functionality	None
Usage and Configuration	See the "Copying Statistical Forecasts to Multiple Forecast Types" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Also, please see the "Creating a Demand Planning Engine Configuration" section in the current release of the <i>Online Help</i> .

2.7.1.4 Forecast Book Updates

Viewing Forecasts in Different Timelines

Forecast data measures can now be split and converted to different timelines. Previously, the system supported aggregating weekly forecasts into monthly forecasts; now, users can also disaggregate monthly forecasts into weekly forecasts. To support this enhancement, the following updates are made:

- Added a new Partner Site Forecast Book report for users to view forecasts for partner sites.
- Added the Forecast Bucketization filter to the Forecast Review screen
- Added the Forecast Bucketization filter to the Demand History Review screen
- A new policy, Bucket Transform, defines which PLT bucket transformer is used to view monthly data as weekly data. This policy is added to the DPUIPolicies tab of the Search Policies screen and is available at the enterprise or organization level.

The following user interfaces support the disaggregation of monthly to weekly forecasts:

- Partner Site Forecast Book
- Forecast Review
- Forecast and Demand History Review

When using the above screens, if the Forecast Bucketization filter is set to Monthly and the timeline view is set to Weekly, this enhancement automatically disaggregates the monthly forecasts into multiple weekly forecasts. Users can now customize how monthly forecasts are split and viewable at the weekly level by using the Forecast Bucketization filter and the Bucket Transform policy in tandem.

Creating Events Directly from the Partner Site Forecast Book

In the NEO 3.7 release, users can directly create events from the Partner Site Forecast Book screen with the Create Event button. When clicked, a Create Event form appears prepopulated with settings according to the Partner Site Forecast Book filters. With this enhancement, users can quickly and easily create events directly from the Partner Site Forecast Book screen, saving time.

Defining Visibility Permissions for Various Forecast Types with Role Forecast Types

Users can now define which user roles can view and edit forecast types, data measure types, and history types and then view those on the Partner Site Forecast Book timeline view (TLV). See the "[Enhancements and Support for Additional Forecast Types\(see page 66\)](#)" section for more information.

Display Future Orders as Separate Lines

The Partner Site Forecast Book screen can display future orders as separate lines, allowing users to view forecasts for the next two years in addition to forecasts in the past. Future forecasts use the same logic as the previous year's historical data measures. To enable this, the following data measures are available; no additional configuration is required to enable this feature.

- Next Year Future Orders
- Two Years Future Orders
- Next Year Future Shipments
- Two Years Future Shipments
- Next Year Future Aggregated Orders
- Two Years Future Aggregated Orders
- Next Year Future Aggregated Shipments
- Two Years Future Aggregated Shipments

Custom UOMs

Custom units of measure (UOM) are now available, allowing users to display forecasts or historical quantities using user-defined UOMs. The conversion coefficient between custom UOMs and common UOMs is defined by the user and can be specified by item, site group, or partner site. For example, users can define a "TRUCK" as a certain number of pallets of a specific item when transported to a specific site. Once enabled, the following screens support customer-defined UOMs:

- Partner Site Forecast Book
- Search Demand Forecast
- Search Aggregated Orders
- Search Aggregated Shipments
- Forecast Review
- Demand History Review
- Forecast And Demand History Review

Users can create and manage custom UOMs through the PLT.DynamicEnumerations_IB version 1.0 and DPX.CustomUOM_IB version 1.0 inbound interfaces or through the new Create Custom UOM and Search Custom UOM screens. With this enhancement, users can more perform actions and do work in the system using UOMs that are more intuitive for their use cases.

Analytics Impact	None
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Integration Impact	<ul style="list-style-type: none"> • DPX.CustomUOM_IB v1.0 • PLT.DynamicEnumerations_IB v1.0
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information:</p> <ul style="list-style-type: none"> • "Creating Role Forecast Types" • "Searching Role Forecast Types" • "Working with the Partner Site Forecast Book" • "Creating Custom Units of Measure (UOMs)" • "Searching Custom Units of Measure (UOMs)" <p>See the following sections in the current release of the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Running Forecast Review" • "Forecast and Demand History Review" • "Available Policies from the Search Policies Screen"

Ability to Upload and Update Data Measures

NEO 3.7 allows uploading data related to forecasts and intermediate calculations and viewing them in the system. A new report, Search Data Measure, is added under the Demand Planning menu to display the uploaded data. Each data measure record stores only a single forecast type instead of the 20 forecast types that a Demand Forecast model stores. Users can update details like Quantity, User Override Quantity, and Override Comment, but data measures can only be added via upload.

Analytics Impact	None
Integration Impact	DPX.DataMeasure_IB version 1.0
Related Functionality	None
Usage and Configuration	<p>See the "Working with the Search Data Measure Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. See the "Uploading Files" section in <i>Online Help</i> for more information.</p>

Support for Data Measure Types

The NEO 3.7 release adds support for forecast-type-like data measures for Buyer Supply Chain Admins. These data measures can be created and managed with the new Create Data Measure Type and Search Data Measure Type screens and displayed on the Partner Site Forecast Book screen. The data measure type defines what information displays and how each data measure type (DM1 through DM20) displays on the Partner Site Forecast Book screen, while the role forecast type defines what data measure types (DM1...DM20) a user role is allowed to view. By default user role is not allowed to view any data measures.

Analytics Impact	None
Integration Impact	DPX.DataMeasureType_IB v1.0
Related Functionality	None
Usage and Configuration	See the "Creating Data Measure Types" and "Searching Data Measure Types" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

2.7.1.5 Demand Planning Agents and NEO UI Reports Support SNOP Models

Demand planning agents, engines, and UI reports now support Sales and Operational Planning (SNOP) models. The enhancement includes updates to tables and new inbound interfaces to allow users to upload plans and scenarios, as well as a new report for SNOP-specific scenarios. The SNOP scenario support is applied to the following DP engines:

- Demand Forecast Generation Engines
- Accuracy Engines
- Consensus Forecast Computation Engines
- Alert Computation Engines

If the user provides a scenario, the engine uses scenario-specific tables to read data and save results. If the user does not provide a scenario, then the behavior is the same as before, where both input data and results use normal non-scenario tables.

The following UI screens now have an added filter, Planned Forecast Scenario, to support scenarios. If the user selects a scenario as part of the filter, then the UI screen displays data

from the specified scenario. If the user does not specify a scenario, then non-scenario data is displayed.

- Search SNOP Demand Forecast
- Search SNOP Data Measure
- Search User Forecast Override
- Demand Forecast Override Audit
- Forecast Review
- Forecast and Demand History Review
- Demand Forecast Accuracy by Item
- Demand Forecast Accuracy
- Aggregated Demand Forecast Accuracy
- Partner Site Forecast Book

NOTE: The Search SNOP Demand Forecast and Search SNOP Data Measure screens are created specifically for scenario data. For non-scenario data, users need to use the Search Demand Forecast and Search Data Measure screens.

Analytics Impact	Yes. Demand planning engines provide analytical functions and provide data accordingly.
Integration Impact	<ul style="list-style-type: none"> • DPX.SNOPDEmandForecast_IB • DPX.SNOPDataMeasure_IB
Related Functionality	Many updates in the Demand Planning module
Usage and Configuration	<p>See the following sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information:</p> <ul style="list-style-type: none"> • "Demand Planning Support for SNOP Models" • "Viewing the Search SNOP Demand Forecast Report" • "Viewing the Search SNOP Data Measure Report" <p>See the <i>Online Help</i> sections for the engines and UI listed in the enhancement description above.</p>

2.7.1.6 Forecast Source Support

Copy Forecast Data Between Sources and Models

Starting in the NEO 3.7 release, users can copy forecasts from one source to another source within the same model or from one model to another. This enhancement is added to address scenarios where users want to save previously generated forecasts in a different source for reference purposes. Previously, users could not copy forecasts and were required to manually recreate forecasts if they wanted a copy. To support this enhancement, a new screen called Copy Forecast Data is available in the Demand Planning menu, where users can specify a model, bucketization, and copy type, among other options.

Users can copy forecast data from and to the following combinations:

- From Demand Forecast to Demand Forecast (Within Demand Forecast)
- From SNOP Demand Forecast to SNOP Demand Forecast (Within SNOP Demand Forecast)
- From Demand Forecast to SNOP Demand Forecast
- From SNOP Demand Forecast to Demand Forecast
- From Demand Forecast to Data Measure
- From Data Measure to SNOP Data Measure

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

New Forecast Plan High Deviation Report, Widget, and Alert

This release adds a Forecast Plan High Deviation report and a Forecast Plan High Deviation widget to the Demand Planning module. The report and the widget display consensus exceptions. These exceptions result from the deviation between the current and previous forecast plans. The new report and widget display models with any of the forecast values (statistical forecast, consensus forecast, and other forecast types) deviating more than 20 percent from the previous consensus forecast. Users can configure the deviation threshold and can also set a dollar value below which a model is excluded from the report.

A new Demand Planning (DP) Engine alert, Forecast Plan High Deviation Alert, is created to flag the exceptions. The Forecast Plan High Deviation Alert uses the Alert Computation Engine - Item Subnet to compare the forecast values for high deviation. Users can configure the parameters for the prior forecasts and current forecasts used for comparison.

This enhancement helps users to compare the current forecast plans with the prior forecast plans and identify the deviation. Users can run the Alert Computation Engine to identify forecast exceptions and then view them in the Forecast Plan High Deviation report and widget.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <ul style="list-style-type: none"> • "Viewing the Forecast Plan High Deviation Report" <p>See the following sections in the current release of the <i>Online Help</i> for more information.</p> <ul style="list-style-type: none"> • "Alert Computations" • "Configuring the Demand Planning Alert Engine" • "Working with Widgets"

2.7.1.7 Forecast Accuracy Updates

Support Multiple Actual Sources

In the NEO 3.7 release, the forecast accuracy engines now support multiple actual sources simultaneously. Previously, the forecast accuracy engines could only store only one actual quantity and could not calculate accuracy for both orders and shipments simultaneously. To support this enhancement, a new boolean field called Populate Actual is available when configuring forecast accuracy engines. When the field is selected, the forecast accuracy engine checks for "ActualSources" in the accuracy configuration; if an ActualSource is an Order, AggregatedOrder, Shipment, or AggregatedShipment, then the new fields are updated instead of the default fields.

In addition, a new policy called PopulateActualInDistinctFields is added to the Engine Policies tab of the Search Policies screen. If the policy is set to True, then the forecast accuracy engine saves actual values based on orders (or aggregated orders) and actual values based

on shipments (or aggregated shipments) into separate fields. If the policy is undefined or set to False, the system behaves as it did before this update and the actual values are saved into the same field, producing only a single actual value.

The Demand Forecast Accuracy by Item screen is also updated with a new optional filter, ActualSource, with possible values of Order and Shipment. If either Order or Shipment is selected, the respective actual fields are used; if no selection is made for this filter, the default Actual fields are used for accuracy computation. In addition, three new columns are available for the screen: Actual Order Qty, Actual Shipment Qty, and Actual Unknown Source Qty.

With this enhancement to forecast accuracy engines, users can compute multiple, simultaneous actual sources for orders, shipments, aggregated orders, and aggregated shipments and then compare those actual values side by side in a report and compare the actuals to their respective forecasts.

New Report for Forecast Accuracy of Aggregated Demand

A new report titled Aggregated Demand Forecast Accuracy is added in this release that allows users to see forecast accuracy data aggregated by different levels, such as at the product group level, site group level, or partner level. This report displays the performance of each of the forecast strategies (statistical forecast, consensus forecast, and additional forecast types) expressed as MAPE (Mean Absolute Percentage Error). Users can analyze across any time horizon window and display data in dollars or in units of measure (UOM)s. With this enhancement, users can more easily analyze the performance of forecast accuracy data at different levels of aggregation.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Forecast Accuracy Engines" • "Demand Forecast Accuracy By Item" • "Consensus Forecast" • "Working with the Run Accuracy Engine for Partner Site Config Screen" • "Aggregated Demand Forecast Accuracy Report"

Support for Partner Site Forecasting

The NEO 3.7 release adds support for partner sites in various demand planning forecasting engines. The system now supports forecasting scenarios where a user may have multiple customer locations (sites) per customer partner. The demand planning engines can now create very granular forecasts, such as for Item-ShipFromSite-Customer-PartnerSite combinations. The partner site forecasting support is added to the following engines, interfaces, and reports:

Updated Engine, Interface, or Report	Description
Demand Forecasting Engine	Demand Planning Scenario supports an additional disaggregation mode: PARTNER-SITE.
Forecast Accuracy Engine	<p>A new forecast accuracy engine screen called Run Accuracy Engine for Partner Site Config is added to support partner site forecasting. This engine behaves similarly to the other forecast accuracy engines except that it can populate snapshots and actuals for item, site, partner, and partner-site forecast combinations. The following history sources are supported in this engine:</p> <ul style="list-style-type: none"> • Enhanced orders • Aggregated orders • Shipments • Aggregated shipments
DPX.DemandForecast_IB ver 3.0	<p>New fields for partner site support:</p> <ul style="list-style-type: none"> • Partner Site Enterprise Name • Partner Site Organization Name • Partner Site Name
Demand Forecast Accuracy By Item Report	<p>New filters and retrieval fields:</p> <ul style="list-style-type: none"> • Partner • Partner Site <p>Increased the number of reference forecasts from three to 20.</p>

Updated Engine, Interface, or Report	Description
Aggregated Demand Forecast Accuracy	A new report where users can select a product group or site group to view aggregated forecasts for the entire product or site group. The report can be filtered by the Product Group, Site Group, Partner, or Partner Site fields.
Run Demand Planning	Added the Primary Scenario field.
Search Demand Forecast Report	<p>New filters and retrieval fields:</p> <ul style="list-style-type: none"> • Partner • Partner Site <p>The Download and Upload buttons on the Search Demand Forecast screen now use the DPX.DemandForecast_IB v3.0 format.</p>
Data Upload/Upload Demand Forecast	The Download and Upload buttons on the Data Upload/Upload Demand Forecast screen now use the DPX.DemandForecast_IB v3.0 format.
Consensus Forecast Engine	<p>Supports partner site consensus forecasts if the DP scenario in question is configured for PartnerSite forecasting. The following partner-site-specific parameters are added to the IXM engine UI and are only visible if the DP scenario selected is configured for Channel or Partner Site disaggregation:</p> <ul style="list-style-type: none"> • Partner Enterprise • Partner Hierarchy • Partner Level • Partner Name • Partner Site
Consensus Forecast Output Report	<p>New filters:</p> <ul style="list-style-type: none"> • Partner • Partner Site

Currently, Prod-Geo forecasting supports only the CHANNEL disaggregation mode that creates forecasts for Prod-Geo-Channel combinations. This enhancement helps businesses that have multiple customer locations/sites per customer partner to predict demand forecast for Item-ShipFromSite-Customer-PartnerSite combinations using orders and shipments.

Analytics Impact	None
Integration Impact	<p>Added DPX.DemandForecast_IB ver 3.0 and the following fields to support partner sites:</p> <ul style="list-style-type: none"> • PartnerSiteEnterpriseName • PartnerSiteOrganizationName • PartnerSiteName
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <ul style="list-style-type: none"> • "Working with the Run Accuracy Engine for Partner Site Config Screen" • Aggregated Demand Forecast Accuracy Report <p>See the following sections in the current release of the <i>Online Help</i> for more information.</p> <ul style="list-style-type: none"> • "Run Demand Planning" • "Creating a Demand Planning Engine Configuration" • "View Demand Planning Engine Output" • "Forecast Accuracy Engines" • "Demand Forecast Accuracy By Item" • "Search Store Demand Forecasts Report" • "Running the Consensus Forecast Computation Engine" • "Consensus Forecast Output"

2.7.1.8 Events Updates

Enhanced User Overrides for Forecast Books

NEO 3.7 enhances user overrides for the Partner Site Forecast Book by adding support for

- Partner site forecasting
- Forecast types S1 through S20
- Overrides at the aggregate level without the need for a split ratio
- Delta override (+/- quantity)

In addition, users can now copy overrides from last month's forecast to the current month's forecast. Users have more flexibility than previously, as only the S1 forecast type, absolute quantity overrides, and percent (%) overrides were supported. Users can now override forecast quantities for different forecast types at any level of aggregation and view them in the UI.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with Enhanced Overrides" and "Copying Overrides to Different Forecasts" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

2.7.1.9 Enhanced Item Price Model

The NEO 3.7 release enhances the item price model in a variety of ways. Previously, in demand planning forecasts, the total value of items was one-dimensional and was simply calculated by multiplying the quantity by the item price. But with this update, users can create and manage multi-dimensional item prices that apply to item-site group-partner site combinations. In addition, user overrides can now be created for item prices based on date and time intervals. Multi-dimensional item prices and item price overrides can be created in the UI or by uploading a CSV file through the DPX.ItemPrice_IB v1.0 and DPX.ItemPriceOverride_IB v1.0 interfaces, respectively.

A new organization-level policy called UseMultiDimensionItemPrice must be enabled on the DPUIPolicies tab of the Search Policies screen for this feature to function. This policy is disabled by default.

To support these enhancements, the following UI screens are added:

- Create Item Price
- Search Item Price
- Create Item Price Override

- Search Item Price Override

Multi-dimensional item prices are supported on the following demand planning screens:

- Partner Site Forecast Book
- Search Demand Forecast
- Search Aggregated Orders
- Search Aggregated Shipments
- Forecast Review
- Demand History Review
- Forecast And Demand History Review

This enhancement greatly expands users' ability to specify item prices based on site groups and partner sites, and even override those item prices based on date and/or time windows, increasing flexibility.

Analytics Impact	None
Integration Impact	<ul style="list-style-type: none"> • DPX.ItemPrice_IB v1.0 • DPX.ItemPriceOverride_IB v1.0
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information:</p> <ul style="list-style-type: none"> • "Creating Item Prices" • "Searching Item Prices" • "Creating Item Price Overrides" • "Searching Item Price Overrides" <p>See the "Available Policies from the Search Policies Screen" section in the current release of the <i>Online Help</i> for more information.</p>

2.7.1.10 Support for Partner Site Absolute Split Ratio Generation

With this release, support for partner sites is added to the split ratio engine. The following changes support this enhancement:

- The Disaggregation Mode field on the Generate Split Ratios screen now has an additional option called PARTNER-SITE, which causes the engine to create absolute split ratios with the partner site.

- The Split Ratio By Dimension report and the Daily Split Ratio report now have Partner Site as an additional filter and column.

Previously, the split ratio engine did not support partner sites as a parameter. This enhancement helps generate split ratios for forecasts required for disaggregation purposes. Users can select PARTNER SITE as the disaggregation mode and select the Calculate Absolute Ratios flag on the Generate Split Ratios screen to generate partner site absolute ratios.

Analytics Impact	None
Integration Impact	Yes. A new version of the DPX.SplitRatioByDimension_IB interface is created with Partner Site support.
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Split Ratio Processing" • "Generating Split Ratios" • "Viewing the Split Ratio By Dimension Report" • "Viewing the Daily Split Ratio Report"

2.7.1.11 High MAPE Alert Enhancements

The NEO 3.7 release adds support for partner site forecasting, forecast types, and Sales and Operational Planning (SNOP) scenarios to the High Mean Absolute Percentage Error (MAPE) Alert widget and report. High MAPE alerts can be configured in the Search Alert Config screen and the following new configuration settings are available in the Additional Config field on the Search Alert Config and Alert Config Detail screens:

- SourceForecast: S1-S20
- SupportPartnerSites: A true/false value to enable or disable the use of partner sites
- AccuracyActualsSource: The source for actual accuracy (order, aggregated order, shipment, aggregated shipment). Empty by default for non-specific sources.
- UseSnop: A true/false value to enable or disable the use of SNOP scenarios
- SnopScenarioName
- SnopPlanName
- SnopPlanType
- SnopPlanStartDateFrom: Beginning of the SNOP planned start date range
- SnopPlanStartDateTo: End of the SNOP planned start date range

In addition, Partner Site and Forecast Type filters are added to the Forecast High MAPE Alert report and widget. With these enhancements, users can now further customize the High MAPE Alert widget and report to display partner site forecasting, forecast type, and SNOP scenario data. To take advantage of these enhancements, the user must adjust the alert configuration to include new configuration setting values.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Customizing the High MAPE Alert Widget and Report" and "Working with Alert Configurations" sections in the current release of the <i>Online Help</i> for more information.

2.7.1.12 Consensus Forecast Updates

Enhancements to Consensus Forecast Engine

NEO 3.7 brings the following updates to the Create Consensus Forecast Config screen and the Search Consensus Forecast Config report:

- The Create Consensus Forecast Config screen is divided into header and lines.
- The Destination Forecast field, where users can select a forecast as the consensus forecast, is added on the header of the Create Consensus Forecast Config screen. This field is added as a column on the Search Consensus Forecast Config report.
- The following new options are added to the Type field:
 - Average: Average of the specified source forecasts.
 - Copy: Selected source forecast is copied to the destination forecast.
 - Weighted Average: While calculating the average of all specified source forecasts, the system takes a percentage of each source forecast according to the weightage specified by the user in the Weight column.

The system considers forecast types while calculating the consensus forecast in order as the lines are added. Also, a new field, Primary Scenario, is added to the Consensus Forecast Computation and Demand Planning engines. This new field lets users select an Integrated Business Planning (IBP) scenario for demand planning.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	<p>See the "Creating Consensus Forecast Configs" and "Searching Consensus Forecast Configs" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>Also, see the following sections in the current release of the <i>Online Help</i>:</p> <ul style="list-style-type: none"> • "Searching Consensus Forecast Configuration Overrides" • "Creating a Demand Planning Engine Configuration" • "Running the Consensus Forecast Computation Engine"

2.7.2 Inventory Planning

2.7.2.1 Support for Site Capacity Constraints for the MEIO (Multi-Echelon Inventory Optimization) Engine

This release adds site capacity constraints to the MEIO engine when the engine calculates safety stock optimization. The site capacity is defined in terms of the following:

- Weight Capacity
- Volume Capacity
- Space Capacity
- Quantity Capacity

Previously, the MEIO engine did not consider site constraints in its inventory optimization recommendations. With this enhancement, the engine no longer recommends safety stock values that exceed site capacity.

A new report called the Search Site Constraints report is added as part of this enhancement. Users can view and update site capacity constraints from this report. In addition, the following columns are added to the MEIO Recommended Policy Report screen:

- Stocking Volume Capacity
- Stocking Space Capacity
- Stocking Weight Capacity
- Stocking Qty Capacity

A new Site Capacity Constraint field is added to the Search MEIO Config and New MEIO Config screens, where a site capacity constraint can be viewed or selected.

The Search MEIO Objectives and New MEIO Objectives screens now have the following fields/columns:

- Site Weight Capacity Percentage
- Site Volume Capacity Percentage
- Site Space Capacity Percentage
- Site Quantity Capacity Percentage

Prerequisites to enable site capacity constraints before running the MEIO engine:

1. Users must specify the site constraints on the Search Site Constraints UI.
2. Users must specify the site constraints for the MEIO Objectives. If the MEIO engine subnet is split into multiple MEIO objectives, every objective must have the Site Capacity Percentage setting populated.
3. Users must decide and specify which constraint to apply on the MEIO Config UI.

After completing the prerequisites, users run the MEIO engine and view the capacity constraint results on the MEIO Recommended Policy Report.

Analytics Impact	None
Integration Impact	<p>Yes. Columns for the new fields are added to the CSV files for uploading MEIO Configs and MEIO Objectives.</p> <ul style="list-style-type: none"> • IVP.MEIOObjectives_IB • IVP.MEIOScenario_IB
Related Functionality	None
Usage and Configuration	<p>See the "Working with Site Constraints for the MEIO Engine" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>See the following sections in the current release of the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Creating and Working with MEIO Objectives" • "Creating and Working with MEIO Configs" (previously called "Creating and Working with MEIO Scenarios") • "Working with the MEIO Recommended Policy Report" • "Running the MEIO Engine"

2.7.2.2 Support for Alternate Methods to Calculate Demand Distribution

Starting this release, users can select between Normal and Gamma probability as the method for backorder calculation for Safety Stock optimization. A new field, Demand Distribution, is added to the New MEIO Config screen. The normal distribution method that MEIO used by default for calculating backorders and effective fill rate is not always suitable as some demand may be outside the regular distribution pattern. Users can now select Auto, Normal, or Gamma in the Demand Distribution field. Selecting Auto allows the engine to detect which probability function better fits the data, and the default selection is Auto. This enhancement enables the MEIO engine to produce a higher service level by more accurately calculating demand distribution.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Creating and Working with MEIO Scenarios" • "Working with the MEIO Recommended Policy Report"

2.7.3 Transportation Planning

2.7.3.1 Load Consolidation TOSX Engine Considers Accessorial Rates to Calculate Movement Cost

With this release, the TOSX Engine considers accessorial and site accessorial rates when calculating movement costs. The accessorial and site accessorial rates include:

- **Per Stop:** Added to include stop charges
- **Per Shipping Unit:** Added to include any site handling charges for each container
- **Per Operation:** Added to account for costs associated with operations
- **Percentage of Base:** Added to account for the comparison of different equipment rates when the base may be per weight (LTL) and per distance (TL)

TOSX Engine currently considers Flat/Fixed, Per Distance, Per Transit Time, Per Weight, Per Volume, and Per Spaces base rates for cost calculations. This enhancement allows users to include operational costs like driver allowance, toll tax, vehicle maintenance cost, and so on when calculating the total movement cost. Users can set the accessorial rate for a shipment in the carrier contract and run the TOSX engine for cost calculations.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with the Load Consolidation TOSX Engine" and "Creating Carrier Contract Base Rates" sections in the current release of the <i>Online Help</i> for more information.

2.7.3.2 New Solution Summary Report

The NEO 3.7 release adds a new report for Transportation Manager roles called the Solution Summary Report. This report is intended to compare load consolidation run summaries for different runs. After running the Load Consolidation TOSX engine, users can compare engine runs by opening the Solution Summary report or clicking the Solution Summary link in the Engine Results section of the Load Consolidation TOSX screen. With this enhancement, users can easily compare the quality and performance of different load consolidation runs, saving time and allowing quicker engine iterations.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Solution Summary Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Please also see the "Working with the Load Consolidation TOSX Engine" section in the current release of the <i>Online Help</i> .

2.7.3.3 Added Commodity Code Filter to Load Consolidation TOSX Screen

In this release, ONE introduces the Pickup Commodity Code and the Delivery Commodity Code filters to the Shipments tab on the Load Consolidation TOSX screen. The filters support the selection of multiple commodity codes if desired. This improvement enables users to quickly view, analyze, and sort shipments based on their commodity codes. The added filter helps users identify and, if required, select shipments to plan the engine execution activity.

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

2.7.3.4 Added TOSX Config Policy Support with User-Configurable Objective Sequencing for the Load Consolidation TOSX Engine

With this release, users can now configure the Load Consolidation TOSX engine to run based on a scenario called the TOSX Config Policy. Users define the TOSX Config Policy and then select it on the Load Consolidation TOSX engine screen. The TOSX Config Policy changes or overrides the execution flow or constraint when the engine is run. Users can specify the objective sequencing and strategy sequencing for movement optimization through the TOSX Config Policy screen. The Load Consolidation TOSX engine uses the defined sequencing to optimize movements. The sequencing considers parameters such as minimum costs and deadhead, maximum throughput, and vehicle utilization.

Previously, the engine could not be run based on scenarios. The sequencing logic for the engine was hard-coded, and users had no control over it. With this enhancement, users can specify the parameters to consider, rank their order of consideration, and then view different engine results based on the parameters specified. The TOSX Config Policy screen and TOSX Config Policy report are added as part of this enhancement, and a TOSX Config Policy field is added to the Load Consolidation TOSX screen.

Analytics Impact	None
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Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the following sections in the <i>New Feature Usage and Configuration Guide</i> for more information:</p> <ul style="list-style-type: none"> • "Working with the TOSX Config Policy Report" • "Creating a New TOSX Config Policy" • "Running the Load Consolidation TOSX Engine Based on a TOSX Config Policy"

2.7.4 Replenishment

2.7.4.1 Audit History Support for Replenishment Scenarios

The NEO 3.7 release adds an audit history for replenishment scenarios. Previously, updates and changes were not recorded. After executing the engine, any value changes and further executions are recorded and tracked in an audit report. The report captures the following information:

- Date and time of the changes
- Type of change
- User and role making the changes
- Field
- Old value
- New value

With this enhancement, users can track any changes made to replenishment scenarios in a convenient audit report, thus saving time.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the "Viewing the Replenishment Engine Audit History" section in the current release of the *New Feature Usage and Configuration Guide* and the "Searching and Updating Replenishment Scenarios" section in the *Online Help* for more information.

2.7.4.2 Bulk Update Buffers from Template

In NEO 3.7, Replenishment Planner roles can associate buffers with buffer templates using template associations. When properly configured, any update made to the template can be propagated to all associated buffers. Users can update specific buffer fields by creating buffer templates with the required values and then associating the buffer templates to a set of filters. After applying the buffer template, the system updates all buffers matching the associated filters with the values set on the buffer template. This enhancement can save time by no longer requiring users to enter information in multiple locations repeatedly.

This process supports buffers, buffer lanes, site lanes, store buffers, and rebalance buffer lanes. In addition, the following fields are added to the following templates types:

Buffer Template

- ExcludeStoreOrderInForecastConsumption
- ForecastConsumptionType
- ExcludeDeploymentOrderInForecastConsumption
- ExcludePurchaseOrderInForecastConsumption
- ExcludeSalesOrderInForecastConsumption
- EndSafetyReplenishmentAsOfDate
- BeginSafetyReplenishmentAsOfDate
- RunRebalance
- ItemSupplyType

Store Buffer Template

- ForecastConsumptionType
- EndSafetyReplenishmentAsOfDate
- BeginSafetyReplenishmentAsOfDate
- RunRebalance

Buffer Lane Template

- DefaultEquipmentSettings

Site Lane Template

- DefaultEquipmentSetting
- VirtualLane

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Bulk Updating Buffers from a Template" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>See the following sections in the current release of the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Creating Buffer Templates" • "Creating Store Buffer Templates" • "Creating Buffer Lane Templates" • "Creating Site Lane Templates" • "Creating Rebalance Buffer Lane Templates"

2.7.4.3 Multiple Ship-To Sites on BOF Collaboration TLV

The NEO 3.7 release improves the Order Forecast Collaboration screen for bucketized order forecasts (BOFs). Previously, the Order Forecast Collaboration screen only supported viewing a single ship-to site at a time in the timeline view (TLV); users could not load multiple ship-to sites at the same time in a single TLV. This update allows multiple ship-to sites to be visible simultaneously.

To support this enhancement, a new Boolean filter called All Ship To Site is added to the Orders Forecast Collaboration screen for vendor roles. When set to Yes, all ship-to sites associated with the selected ship-from site are included in the TLV. When the new filter is set to Yes, the Ship-From Site filter must be populated. Vendor users can now see BOF data for all buyer sites, saving time.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the "Order Forecast Collaboration" section in the current release of the *Online Help* for more information.

2.7.4.4 New Alerts for Bucketized Order Forecast Collaboration

NEO 3.7 adds two new alerts to support bucketized order forecast (BOF) collaboration:

- **BOF Available for Collaboration:** Notifies vendors about newly created BOFs available for collaboration. This alert returns BOFs in the New state and is available for Vendor Supply Chain Admin roles.
- **BOF Vendor Promised Full Quantities:** Notifies buyers that vendors have promised the full quantity. This alert returns BOFs in the Open state and is available for Buyer Supply Chain Admin roles.

Previously, buyers and vendors could not be automatically notified when BOFs hit important milestones, but this enhancement ensures both buyers and vendors receive real-time notifications and are aware of the current state of BOFs and fully promised quantities, streamlining collaboration.

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

2.7.4.5 Scenario Support for the Advance Replenishment Engine

The NEO 3.7 release adds scenario support to the Advanced Replenishment Engine and related timeline views (TLVs) and reports. Users can execute the engines for what-if scenarios and compare the results of these scenarios, which supports analyzing different conditions, i.e. running engines in sandbox mode. Additionally, Plan and Scenario scenarios are moved to the Platform level and are supported across products. Previously, ONE supported Sales and Operational Planning (SNOP) scenarios but not via replenishment engines. Users select a scenario in the new Primary Scenario field on the Invoke Advanced Replenishment Engine screen.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>New Feature and Configuration Guide</i> for more information:</p> <ul style="list-style-type: none"> • "Viewing the Search Scenario Order Forecast" • "Viewing the Replenishment Analysis Projected Inventory View Mixed Bucketization" <p>See the following sections in the current release of the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Running the Advanced Replenishment Engine" • "Viewing the Replenishment Analysis Projected Inventory View "

2.7.4.6 Support Variable Item Dimensions in Order Aggregation Engines

The NEO 3.7 release improves all Order Aggregation engines by accommodating variations in item dimensions and weight based on the item supplier. Previously, item dimensions and weight were static for a specific item and were not subject to change based on the site from which the item was supplied. With this enhancement, users can now set item dimensions by item (previous functionality) or by buffer lane. This can be useful when, for example, an item may weigh one pound sourced from vendor site 1, but due to packaging differences, the same item may weigh two pounds when sourced from vendor site 2.

To support this enhancement, replenishment users can now create item supplier dimensions from the new Search Item Supplier Dimension report. In addition, a new Boolean engine parameter called Use Item Supplier Dimension is added to all Order Aggregation engines. When this field is set to True, relevant item supplier dimensions are used instead of traditional item dimensions. If False, the system behaves as it did before this update, using item dimensions as expected.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	See the "Working with Item Supplier Dimensions" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Also, see the "Order Aggregation Engines" section in the current release of the <i>Online Help</i> for more information.

2.7.4.7 Bucketized Order Forecast (BOF) Engine Enhancements

The Bucketized Order Forecast engine is enhanced to include the following new features:

Fiscal Monthly and Fiscal Monthly Calendar Support in Bucketized Order Forecast Engine

The Bucketized Order Forecast (BOF) engine is enhanced to generate fiscal monthly and fiscal weekly calendar-based bucketized order forecasts. Currently, the Bucketized Order Forecast engine generates weekly and monthly bucketized order forecasts. This feature helps users to generate bucketized order forecasts and view aggregated forecast quantities as per their fiscal calendars.

Additional Engine-Run Parameters Added to the Bucketized Order Forecast Engine

The following parameters are added to the Bucketized Order Forecast (BOF) engine:

- To Site Enterprise
- To Site Organization
- From Site Enterprise
- From Site Organization
- Make Item
- From Site
- To Site

These additional parameters will help users to run the engine for a subset of data and aggregate order forecasts to bucketized order forecasts.

Currently, for example, if the BOF engine is run with the To Site parameter, the engine aggregates the order forecast to the bucketized order forecast with only the provided To Site parameter. Also, currently the engine is available only under Tools menu. The new parameters, To Site Enterprise and To Site Organization, help planners to aggregate order forecasts to bucketized order forecasts for all sites of the selected organization or enterprise. This feature provides flexibility to run the BOF engine on different subsets of data. Users can run the Order Forecast Bucketization engine with the new parameters from the Replenishment menu and Tools menu. The new parameters are also supported in chain engine invocation.

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

2.7.5 Chain Engine and Grid Enhancements

NEO 3.7 includes several optimization chain engine and grid enhancements, including the following:

Chain Engine Condition Notifications

Previously, chain engine conditions didn't provide notifications when a set condition was not met. This enhancement includes notifications via email when the condition fails. Users subscribe to the Issue Type: Chain Engine Condition Failure alert.

Chain Engine Condition Override

When running a chain engine from the UI (regular or JMX) or API, there was previously no option to override ignored conditions. A new checkbox, Ignore Conditions, in the engine parameters section of the Invoke Chain Engine screen allows users to set an override that bypasses conditions. This helps Production Support teams perform reruns.

Engine and Chain Summary Statistics

Before this release, engine runs did not capture summary statistics for long-term storage outside the system grid table. The metrics gathered during each engine run contribute to historical analysis over longer periods, data security and protection, and more efficient system performance. The Chain Engine Run Summary and Chain Engine Run Details reports are added, which display the chain engine runs and all the jobs and dependent jobs. Job ID links open a list of all the tasks within that job.

Chain Engine Configuration Line Execution Checks

This release provides an optional set of execution checks that can be configured on each engine run within a chain. The execution checks include thresholds, notifications, and abort initiation. The enhancement provides configuration flexibility and monitoring.

Enhance Grid with an Abort State and Reason

Previously, errors only displayed a Failed state, but this release adds an Abort state and a reason code for the abort. Aborted transactions can be executed by the user or for other

logic conditions. The additional information helps users analyze true errors and aborted transactions.

Chain Engine Reports

The Chain Engine Search report now shows the entries part of the Chain Engine configuration with a name hyperlink that opens a Chain Engine Config detail screen. Users can filter by any enterprises they are associated with and the chain engine name. The report displays the chain name, enterprise, module prefix, engine name, config name, and run order. From this screen, users can create a new chain engine, and Enterprise Admin users can delete chains.

Analytics Impact	None
Integration Impact	PLT.ChainEngineConfig_IB
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information:</p> <ul style="list-style-type: none"> • "Viewing the Chain Engine Run Summary and Associated Reports" • "Viewing the Chain Engine Config Report and Line Details" • "Creating a Chain Engine Notification Alert" <p>See the following sections in the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Creating and Customizing Alert Subscriptions" • "Working with the Chain Engine"

2.7.6 Enhancements to the Dynamic Depth Computation Engine

NEO 3.7 release introduces islands and island buffers to efficiently manage buffers and associated items. An island is a logical grouping of related buffers and associated items. Previously, the system updated each buffer individually for each associated item. When a new island is created with the same parameters, the existing island is marked inactive. The system runs a scheduler job daily to delete all inactive islands.

As part of this enhancement, a new field, Primary Scenario, is added to the Invoke Run Dynamic Depth Data Measure Computation Neo Agent screen along with the following new reports:

- **Island Report:** This report shows the island number and the number of buffers present.
- **Island Buffer Report:** This report shows details of each buffer present in the island.

Also, items that belong to the same site resources are added to the same island. Previously, only the items with a common bill of material (BOM) or those with a buffer lane created between them were grouped together.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information:</p> <ul style="list-style-type: none"> • "Invoking the Dynamic Depth Computation Neo Agent" • "Viewing the Island Report" • "Viewing the Island Buffer Search Report"

2.8 Order Management System

2.8.1 Contracts

2.8.1.1 Owning Site Field Support Added on AVL, Contract Line, and Blanket Order

This release adds the Owning Site field to the following:

- AVL (Approved Vendor List) header
- Purchase Contract line
- Blanket Order line
- AVL (Approved Vendor List) Search Report
- Search Contract Report
- Search Contract Line Report
- Search Blanket Order Report

- **Search Blanket Order Line Report**

The system now auto-populates the owning site details on Purchase Order and Deployment Order screens from AVL, Purchase Contract, or Blanket Order data. Previously, users had to manually enter the owning site details on the Order header. With this enhancement, users can define the owning site details in the master data, and the system will auto-populate it on the order screens.

Analytics Impact	None
Integration Impact	<p>Fields like Owing Site Enterprise Name, Owing Site Name, and Owing Site Organization Name are added to the following CSV files:</p> <ul style="list-style-type: none"> • OMS.AVL_IB.csv version 4.0 • OMS.BlanketContract_IB.csv version 2.0 • OMS.PurchaseContract_IB.csv version 4.0
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>Online Help</i> for more information.</p> <ul style="list-style-type: none"> • "Approved Vendor Lists" • "Creating Purchase Orders" • "Creating Blanket Orders" • "Searching Contracts"

2.8.1.2 Creating Blanket Orders using Records Exported from the AVL Report

Create Blanket Orders from CSV Files

With the NEO 3.7 release, users can create blanket orders from CSV records exported from the AVLs (approved vendor list) report. After exporting, the CSV file can be uploaded to process the file and generate blanket orders. Each unique vendor-ship-to-site pair generates a blanket order, regardless of the item; for example, if there are multiple lines in the exported CSV containing different items but with the same vendor and ship to site, then those lines are aggregated, and only a single blanket order is created for those lines.

Note that only blanket order creation is currently supported with the enhancement; attempting to update/overwrite an existing blanket order using this method will throw an

error. In addition, if the user manually modifies fields in the CSV file before uploading, blanket orders will not be created; the CSV data must match the data in the system. This enhancement allows users to quickly create blanket orders from AVLs, saving time.

New Action for Blanket Order Integration

As a part of this enhancement, a new action, `OMS.CreateAndConfirm` is added to the `OMS.BlanketContract v2.0` interface. Previously, users could create and confirm blanket orders through integrations as two separate actions, `OMS.Create` and `OMS.Confirm`; but the new `OMS.CreateAndConfirm` can now be used instead as a single action. This feature was added to streamline common, repetitive operations.

Analytics Impact	None
Integration Impact	Added the <code>OMS.CreateAndConfirm</code> action to <code>OMS.BlanketContract_IB v2.0</code> .
Related Functionality	<p>New Columns in AVLs Report</p> <p>The following columns are added to the AVLs report:</p> <ul style="list-style-type: none"> • Managing Org Ent Name • Managing Organization • Price
Usage and Configuration	See the "Approved Vendor Lists (AVLs)" section in the current release of the <i>Online Help</i> for more information.

2.8.1.3 New KPIs and Problems for Contracts and Blanket Orders

This enhancement introduces a variety of new key performance indicators (KPIs), problems, and prescriptions for buyer roles relating to the tracking of contract lines and blanket orders. With this collection of features, users can better track and manage contract lines and blanket orders that are above a consumption threshold and close to expiration, saving time.

New KPIs

The following KPIs are available:

- **Contract Line Above Consumption Threshold**
- **Blanket Order Line Above Consumption Threshold**
- **Contract Terms Expiring Soon**
- **Blanket Orders Expiring Soon**

The Contract Line Above Consumption Threshold and Blanket Order Line Above Consumption Threshold KPIs are count KPIs that show the total number of contract lines or blanket orders lines, respectively, with a total ordered quantity above the consumption threshold. When clicked, the KPIs open the Contract Line Above Consumption Threshold report and the Blanket Order Line Above Consumption Threshold report, respectively.

A line is considered above the consumption threshold if:

- It is not already over-consumed, meaning if the total ordered quantity is equal to or greater than the maximum quantity.
- Total ordered quantity > (consumption threshold % * max quantity). This consumption threshold value is taken from the `ContractLineExhaustingSoonThresholdPercent` or the `BOLineExhaustingSoonThresholdPercent` organization-level policy, respectively. The default value is 90% if no value is present.

The Contract Terms Expiring Soon and Blanket Orders Expiring Soon KPIs are count KPIs that show the total number of contract terms or blanket orders, respectively, that will expire soon. When clicked, the KPIs open the Terms Expiring Soon report and the Blanket Orders Expiring Soon report.

Terms and blanket orders are considered expired if:

- The Contract Terms are not already expired
- The effective end date is earlier than the current date plus the "expiring threshold in days." This threshold value is taken from the `ContractTermExpiringSoonThreshold` or the `B0ExpiringSoonThreshold` organization-level policy. The default value is 30 days if no value is present.

New Problems

The following problems are available:

- Contract Line Above Consumption Threshold
- Blanket Order Line Above Consumption Threshold
- Contract Term Expiring Soon
- Blanket Order Expiring Soon

The Contract Line Above Consumption Threshold and Blanket Order Above Consumption Threshold problems are created if the total ordered quantity of a standard contract or blanket order, respectively, is above the consumption threshold value. The consumption threshold percentage value is taken from the organization-level policy `ContractLineExhaustingSoonThresholdPercent` or `BOLineExhaustingSoonThresholdPercent`, respectively. The default value is 90% if no value is present. Both problems use the following logic:

Total ordered quantity > (maximum quantity * consumption threshold percentage)

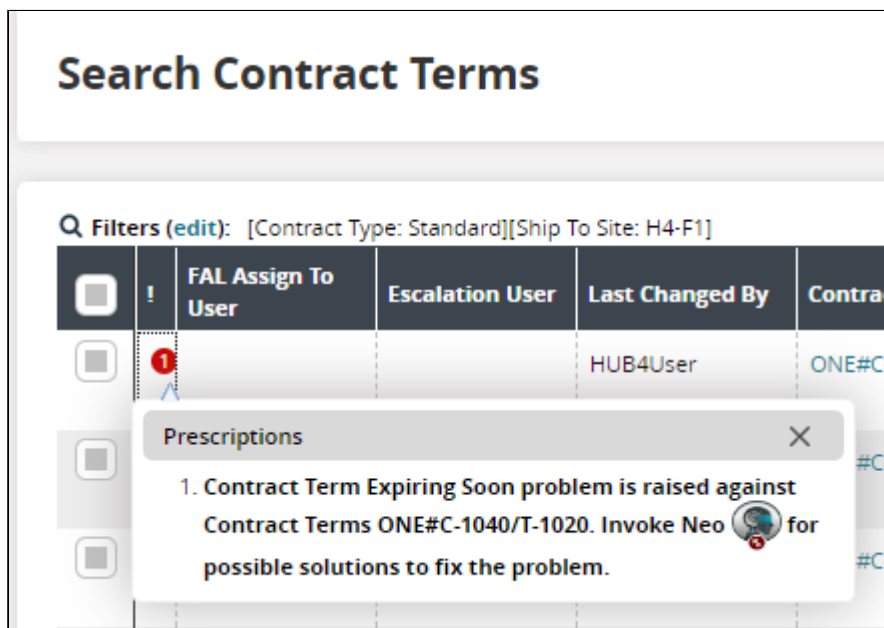
The Contract Term Expiring Soon and Blanket Order Expiring Soon problems are created if the effective end date of a standard contract term or blanket order, respectively, crosses the date threshold value. The date threshold value is taken from the organization-level policy ContractTermExpiringSoonThreshold or BOLineExhaustingSoonThresholdPercent, respectively. The default value is 30 days if no value is present. Both problems use the following logic:

Term effective end date < current date + date threshold

UI Changes

The following reports now show problems in the warning column (!) on rollover.

- Search Contract Terms
- Search Contract Lines
- Search Blanket Order
- Search Blanket Order Lines



New Prescriptions

The following prescriptions are available for all of the new problems:

- Create RFQ: Allows users to create RFQs using the current vendor and line items/terms. This takes the expiry date as input.
- Alternate Terms/Lines: This shows the top three alternate terms or lines the user can use instead.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • ".Searching Contract Terms vNEO_3.7" • ".Searching Contract Lines vNEO_3.7" • "Searching Blanket Orders" • "Searching Blanket Order Lines"

2.8.2 Databot

2.8.2.1 Initiate Databot Icon Added on the Order Details Screen

This release allows users to initiate a databot from the Order Details screen. Users can click the new Initiate Databot icon to view a list of existing databots related to the order. If there are no existing databots, clicking the icon takes users to the Databot Builder screen to create a new databot.

Earlier, the databot functionality was not available on the order details screen and users had to create and view databots from the Databot Builder and Databot Explorer screens respectively. With this enhancement, users can create order-specific databots to create surveys, collect data related to the order and also invite external, non-network participants to view details of the order from the order details screen.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Initiating a Databot from the Order Details Screen" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p>

2.8.2.2 Databots Support E-signatures

The NEO 3.7 release includes support for e-signature requests and responses for databots. Previously, users could not set up databots to request an e-signature from the participants. For this enhancement, databots now have a new question type called e-Signature. When a databot initiator adds this question type and publishes the databot, the databot participants are shown a signature pad/canvas field for that question, where they can add an e-signature. Once the signature is added by the participant, the databot initiator can preview the signature and can also view whether the participant has signed on the Response Summary grid. Once signed, the Answer field on the Response Summary grid shows Signed as the value. When databot responses are exported to a PDF, the signature is visible.

E-signature questions are not supported as reviewer questions and are not included in insights.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating a Databot with an E-signature Request" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. See the "Creating Databots with the Databot Builder" section in the <i>Online Help</i> for more information.

2.8.3 Invoice Changes

2.8.3.1 Active Flag Added on Payment Terms Screen

Beginning with NEO 3.7, a new Is Active flag is added to the Add Payment Terms screen and the payment terms detail screen. In addition, a new filter, Show Inactivated, is added to the Search Payment Terms screens. Previously, there was no Is Active flag, and users could not deactivate a payment term. With this enhancement, users can deactivate payment terms that are no longer in use by deselecting the flag. This feature makes it easier for users to filter for and view active payment terms. Now, users can mark a payment term as active when it is created or when updating a payment term, and those payment terms are then displayed on screens where payment terms are added, such as contracts and orders. Users also have the option to select the Show Inactivated flag to display inactive payment terms. This enhancement improves the payment terms process for the user by making it easier to select from payment terms that are active. **All payment terms in the system before this release will be flagged as active.**

Analytics Impact	None
Integration Impact	<ul style="list-style-type: none"> • OMS.PaymentTermsCode_IB • OMS.PaymentTermsCode_OB
Related Functionality	None
Usage and Configuration	See the "Searching and Updating Payment Terms" and "Adding Payment Terms" sections in the current release of the <i>Online Help</i> for more information.

2.8.3.2 Ability to Auto-populate the HS Code/HTS Code on Invoices

In this release, the ONE system now auto-populates the HS Code/HTS Code on invoiced items. These codes are sometimes required on invoices as they may be a mandatory requirement for the customs process. Previously, the system did not capture the HS Code/HTS Code of items on invoices. This enhancement adds a new non-editable field, Item HS Code, at the invoice line level. This field is auto-populated based on the item, the Ship To country, and the Ship From country. The new field is displayed on the lines tab of the new invoice creation screen and the invoice details screen and appears as a column on the Search Invoice and Search Invoice Lines reports.



Note

The HS Code is a six-digit classification code used by U.S. Customs and other members of the World Customs Organization (WCO). Additionally, the HTS Code is a 7-10 digit classification code administered by the U.S. International Trade Commission (USITC) and is used mostly when items are imported into the U.S.

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

2.8.3.3 Added Bill To-Address Information on Invoices

With the NEO 3.7 release, the ONE system auto-populates the Bill To address information directly on the Remit/Bill To Info tab on the invoice detail screen. This improvement benefits users by automatically providing relevant billing information on invoices. Previously, there was no provision to view this information on the invoice detail screen. A hold is created if all invoice lines do not have the same Bill To address. The non-editable Bill To Address field is populated from the address defined for the invoicee management organization. The field is populated from the order if the Bill To address is not specified for the invoicee management organization. If an order is not linked to the invoice, the Bill To Address field is left blank.

Analytics Impact	None
Integration Impact	<p>Users can set the Bill To address on invoices through integration. A Bill To Address column is provided on:</p> <ul style="list-style-type: none"> • OMS.Invoice_IB • OMS.CreditMemo • OMS.InvoiceAndCreditMemo
Related Functionality	None
Usage and Configuration	See the "Creating New Invoices" section in the current release of the <i>Online Help</i> for more information.

2.8.3.4 Added Order-Related Quantity Columns for Invoice Lines

The NEO 3.7 release adds three new read-only columns for invoice lines: Ordered Quantity, Shipped Quantity, and Received Quantity. These columns are added to the Invoice Lines, Search Invoice, Search Invoice Line, and Credit Memo screens. The Ordered Quantity field shows either the Agreed Quantity, Promised Quantity, or Requested Quantity. The new fields are available based on the state of the associated order:

Order State	Ordered Quantity	Shipped Quantity	Received Quantity
Open	X		
In Fulfillment	X		
Partially Shipped	X	X	
In Transit	X	X	

Order State	Ordered Quantity	Shipped Quantity	Received Quantity
Partially Received	X	X	X
Received	X	X	X
Closed	X	X	X

Previously, users needed to look at two separate screens for order and shipment-related quantities, and now all the information is available on a single screen.

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

2.8.3.5 Added Ship-To Site Address to Invoices

The NEO 3.7 release updates ship-to sites for invoices for Financial Manager roles. This update allows users to add new addresses when creating or updating invoices and is primarily intended to let users more easily modify invoice ship-to addresses. Previously invoices only supported ship-to sites with an address and the address field was system-populated and uneditable. Now, users can use temporary addresses for ship-to sites for the address field by manually editing the field. The field was renamed from **Ship-to site** to **Ship To**: on the invoice screen. The Ship To field includes a drop-down to select whether the address is manually entered or pulled from the system.

The drop-down options include the following:

- **My Site:** When this option is selected, the system behaves as before this update, allowing users to select an existing site saved in the system.
- **Address:** Allows users to enter new addresses in the text box. When this option is selected, an additional field called Ext Ship To Site Name appears where users can enter a reference name for the address site. Users may update the Ship To Address and Ext Ship To Site Name when invoices are in the New or DiscrepancyHold states.

In addition, if an address is entered that does not match the order's ship-to address, a hold is generated.

Analytics Impact	None
Integration Impact	OMS.Invoice IB 4.0
Related Functionality	None
Usage and Configuration	See the "Creating New Invoices" section in the current release of the <i>Online Help</i> for more information.

2.8.3.6 Original Invoice Number Is Not Mandatory for Credit Memo Creation

With this release, the Original Invoice Number field is no longer a prerequisite to creating credit memos. Previously, users had to specify the original invoice number to attach a credit memo to the invoice. Users can now keep the Original Invoice Number field blank on the New Credit Memo UI and when uploading the credit memo via CSV files.

Analytics Impact	None
Integration Impact	<ul style="list-style-type: none"> • OMS_CreditMemo_IB.csv • OMS_InvoiceAndCreditMemo_IB.csv
Related Functionality	None
Usage and Configuration	See the "Creating Credit Memos" section in the current release of the <i>Online Help</i> for more information.

2.8.3.7 State Filter Added to the Add Orders Popup Window on Invoice Screens

As part of this release, ONE introduces the State filter on the Add Orders popup window, the Search Invoice screen, and the invoice detail screen. Previously, users could not filter orders by state when searching for orders to add to an invoice. Now, users can limit their search to orders in a specific state(s) when they search for orders to add to an invoice. This new option helps users refine their search and more easily locate the order(s) they want to add to an invoice.

The enhancement includes the following list of state filter options:

- Open
- In Fulfillment
- Partially Shipped
- In Transit
- Partially Received
- Received
- Closed

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

2.8.3.8 Rearranged Filters on Search Invoice and Search Invoice Line Reports

The NEO 3.7 release updates the filter order on the Invoice Search and Invoice Line Search reports. In addition, some filters are now dynamic and moved to the Add Filter link. The following describes the default filters, and their order, before and after this update. This enhancement is added to streamline the user experience by hiding less frequently used filters.

Before:

Order Number	Vendor
Voucher No	Invoice No
AP Code	Credit Memo
Invoice Type	Order Type
Item	BOL#
Last Modified Date	Contract Number

Due Date	Contract Line No
Contract Term No	Ship To Site
Invoice Submit Date	Ship From Site
OK to Pay Date	Pending
Payment Date	
Invoice Date	

After:

Invoice No	Vendor
Voucher No	Reference Invoice No
Item	Order Number
Ship From	Ship To Site
Invoice Date	Due Date
Invoice Submit Date	OK to Pay Date
Last Modified Date	Payment Date

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

2.8.4 Order Analytics

2.8.4.1 Customer Scorecards for Sales Orders

The NEO 3.7 release adds customer scorecards for sales orders. ONE already supports scorecards for purchase and deployment orders. Vendors can now score and rank the performance of buyers for sales orders. Similar to other scorecards, it can also be computed at the corporate or site-level using either a fiscal or Gregorian calendar. The enhancement includes adding sales orders as an order type when setting KPI weightage and ranking policy on the Performance Scorecard Config page. Users select Sales Order from the Order Type dropdown in the Order Type filter field for the Customer Scorecard report or in the configuration options in the Customer Scorecard widget.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Viewing and Configuring Customer Scorecards" • "Configuring Widgets"

2.8.4.2 Support Environmental Social Governance for Orders

In this release, ONE extends the support for the previously introduced Environmental Social Governance (ESG) by including carbon emission calculations and details for orders. This enhancement enables users to gain more flexibility by segregating carbon-related items. The improvement calculates the carbon emission rate at the delivery schedule level and captures the total emission at the order header level.

An Environmental Social Governance tab is added to the buffer and item detail pages, where the buy- and sell-side emissions are auto-populated. If the emission rate is not provided in the buffer details, then the value from the item master is used to calculate the emission rate for the item.



Note

The formula illustrates the total carbon emission calculated based on the sum of the buying organization and selling organization multiplied by the request quantity mentioned in the order line:

Total Emission per Delivery Schedule (DS) = (Buy-side emission + sell-side emission)*coalesce (AgreedQty, PromiseQty, RequestQty)

By default, the conversion UOM is Pound.

The formula illustrates the Total Emission calculated at the header level: Total Emission= Sum of emission amount of all lines (converted to pounds)

In addition, this release allows users to rank vendors based on their carbon emissions. Two new fields, Total Emission Amount and Emission UOM, are added to the Purchase Order Analytics Report, the Deployment Order Analytics Report, and the Order Analytics Detail report; these fields display the sum of emissions on the delivery schedule and the unit of measure (UOM) of emissions, respectively. Values in the Total Emission Amount column are clickable and open the Order Analytics Detail report to explicitly list the emission amount of each order. With these changes, users can easily rank and compare vendors by their emissions and select more environmentally friendly business partners when desired.



Note

The Total Emission Amount and Emission UOM are introduced as dynamic performance indicators and available in the Vendor Scorecard and Customer Scorecard, respectively.

Analytics Impact	None
Integration Impact	OMS Buffer IB
Related Functionality	None
Usage and Configuration	See the "Ranking Vendors by Carbon Emissions" and "Carbon Emission Information on Buffers and Items" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Please also see the "Customer Scorecarding" section in the current release of the <i>Online Help</i> .

2.8.5 Order Changes

2.8.5.1 Purchase Order Numbers Entered Manually on Cloned Orders

This release allows users to manually enter purchase order numbers on cloned orders if the **Accept UI Order Number** policy is enabled. Previously, users were limited to pre-generated purchase order numbers when an order was cloned, even when the policy was enabled. When the policy is enabled, and an order is cloned, a Show Order Numbers button appears on the Clone Orders popup window. A grid containing all cloned orders is shown with the pre-generated order numbers populated. The Order Number field is now editable, allowing the user to enter a purchase order number manually. A button next to each order number allows the user to revert the manually entered number to the pre-generated number if desired.

This enhancement gives the user more flexibility and control over cloned orders, allowing them to manipulate the order numbers on new purchase orders if necessary. This new feature is available for both purchase orders and spot purchase orders.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Entering Purchase Orders Manually When Cloning POs" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Also, please see the "Cloning Purchase Orders" section in <i>Online Help</i> for more information.

2.8.5.2 Add Multiple Items to Purchase Orders

This release allows users to add multiple items at a time to purchase orders (POs). When creating new POs or updating existing POs, users can click the new Add Selected button in the Add Line(s) popup to multi-select any number of items. Clicking the Add Selected button adds all currently selected items to the order but does not close the popup, allowing users to perform multiple multi-selects without reopening the popup. Previously, items could only be added one at a time, which was tedious when hundreds of items needed to be added, but users can now efficiently add items much more quickly.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Adding Multiple Items to Purchase Orders" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Please also see the "Entering Purchase Order Details" section in the <i>Online Help</i> for more information.

2.8.5.3 Support for Consolidation/Crossdock Orders

The Neo 3.7 release supports order delivery schedules that are cross-docked or have a consolidation point. The following fields are added as filters and columns to Search POs, Search DOs, and Search SOs screens:

- **Consolidation Site:** The site where consolidation or cross-docking of goods occurs. This field includes a dropdown list where users can indicate whether it is a vendor's site or a vendor's partner site.
- **Consolidation Delivery Date:** The date by which the goods must arrive at the consolidation site
- **Consolidation Pickup Date:** The date by which the goods must depart from the consolidation site

This enhancement helps users track delivery schedules for orders that are cross-docked or require consolidation. While these fields are visible on the Search POs, Search DOs, and Search SOs screens, buyers and vendors can edit these newly added fields at the delivery schedule level (on the Schedules tab on the line details screen).

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the following sections in the current release of the *Online Help* for more information:

- "Searching Purchase Orders"
- "Searching Deployment Orders"
- "Searching Sales Orders"

2.8.5.4 Show the Request Schedule Trans Mode Field on the Return Order Screen

In the NEO 3.7 release, ONE adds the Request Schedule (RS) Trans Mode field at the line level on return orders. Earlier, the Trans Mode field was available for all order types but only available at the header level for return orders. Now, with the addition of the Trans Mode field at the line level for return orders, users can set different values for the field per return line.

This enhancement ensures better support for return orders, as the users can set and view the RS Trans Mode value at the line level.

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

2.8.5.5 Display Complete Product Group Level Hierarchies in Search

The Product Group Level filter on the search screens for purchase orders (POs), deployment orders (DOs), sales orders (SOs), and return orders (ROs) is enhanced to display all sub-levels of a product group. Previously, the Product Group Level filter on a search screen displayed only one level. This enhancement allows filtering the search report by product group level to display all relevant product group levels.

This enhancement makes searching by product group level more accurate and efficient. The filter is available on the PO, DO, SO, and RO search and schedule reports. There is no user action or configuration required.

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

2.8.5.6 Enhancement to Deviation Reason Code Functionality

With this enhancement, if vendor users deviate from the tolerance level for quantity or date, the system prompts them to set the Deviation Reason Code each time. Previously, vendors could only set the Deviation Reason Code for the first round of collaboration. This enhancement helps customers specify the Deviation Reason Code whenever the vendor deviates from the tolerance level for quantity or date for each order collaboration. Users can set the deviation reason code from the Deviation Reason Code popup window on the purchase order or deployment order details screen.

Prerequisite:

Users must set the **Enforce Vendor Tolerance Deviation Code** policy to implement this functionality.

Analytics Impact	None
Integration Impact	Yes. This enhancement applies to purchase orders and deployment orders created via CSV files.
Related Functionality	None
Usage and Configuration	See the "Setting Deviation Reason Code on Orders" and "Searching Policies" sections in the current release of the <i>Online Help</i> for more information.

2.8.5.7 Paging and Search Added to Related Orders Tab for Purchase Orders Screen

The NEO 3.7 release adds usability improvements via paging and new search functions on the Related Orders Tab on the Purchase Order Details Screen. Purchase orders have a Related Orders section on the Links tab of the purchase order details screen. Previously, this section could only show 50 orders linked to a single purchase order; any additional orders were not shown. With this enhancement, the Related Orders section of the Links tab now supports many related orders using pages and filters. The pages on the Related Order tab function similarly to other screens in the system, showing a certain number of related orders with arrow buttons to go to the next page; item and order number filters can also be used to narrow down the visible orders. This enhancement allows users to see all related orders for a purchase order or use filters to find a specific order efficiently.

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

2.8.5.8 New Deviation Code Report for Buyer, Vendor, and Orchestrator Roles

In NEO 3.7, ONE introduces a new Deviation Code Report for buyer, vendor, and orchestrator roles. This report shows a list of deviation reason codes and the number of orders currently associated with each deviation reason code. Buyers can filter by vendor, while vendors can filter by customer.

The filters available on this report are:

- Deviation Code
- Creation Date
- Delivery Date
- Order Type
- Ship Date
- Item
- Vendor (for buyer and orchestrator roles)

- Customer (for vendor and orchestrator roles)

The columns shown on the report include:

- Vendor (for buyer and orchestrator roles)/Customer (for vendor and orchestrator roles)
- Reason Code
- Reason Description
- Count

The links in the Count column on the report open a report that displays the relevant orders with that deviation reason code.

Previously, users had no way to locate all orders with deviation codes in one location. This enhancement helps users quickly view and address orders that have deviations.

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

2.8.5.9 Added Default State Filters to the Order-Shipment Schedule Dashboard

NEO 3.7 adds default filtering by state in the Order-Shipment Schedule Dashboard to improve the performance of the report. This dashboard displays purchase orders and their corresponding shipments, and before this release, the report was not tied to specific states and showed data for orders that did not have shipments. With this release, the report defaults to display orders in states that are related to order execution (shipments) with default filtering for the following states:

- Open
- In Fulfillment
- In Transit
- Partially Shipped
- Partially Received

This release also adds a new filter called Include Orders Without Shipment that enables the inclusion of orders without shipments in the dashboard. When users open the dashboard report, only orders with shipments display by default. Users who want to view other

purchase orders must explicitly select other states as filters and/or enable the Include Orders Without Shipment flag.

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

2.8.5.10 Line-Level Order Failure Option for Order Integration

This release includes an option to fail only certain lines on an order received via integration instead of failing the entire order. Previously, when the system received an order through external systems with many lines and one line failed, the system rejected the entire order and rolled back all the changes.

Analytics Impact	None
Integration Impact	OMS.Purchase_Order_IB version 5.0
Related Functionality	See the "Uploading Purchase Orders" section in the current release of the <i>Online Help</i> for more information.
Usage and Configuration	Contact your One Network representative to enable this feature.

2.8.5.11 Added Order Schedule Templates for Orders

In this release, ONE introduces the order schedule standard templates to support all types of orders. Previously, the order schedule template was available only for the Approved Vendor List (AVL) purchase orders.

The order schedules template is supported for the following types of orders:-

- Standard DO Schedules Template for deployment orders
- Standard VMIPO Schedules Template for vendor-managed inventory (VMI) purchase orders

- Standard Spot PO Schedules Template for spot purchase orders
- Standard SO Schedules Order Template for sales orders

These order schedule templates are available for selection when the user creates the respective type of order.



Note

The order schedule template is not included for contract-based order types.

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

2.8.6 Requisitions

2.8.6.1 Ability to Convert Requisition Lines into Orders

Users can convert requisition lines that are in the Approved or Partially Approved state into different types of purchase, deployment, or sales orders. If a requisition has both Request and Requisition lines, then the header-level Request Type field is hidden. Users can select one or more requisition lines and select the type of order to create from the Actions menu.

Also, this release adds a new inbound interface that allows users to convert requisitions to orders in bulk. This enhancement gives users more options, control, and flexibility in converting requisitions to orders.

Analytics Impact	None
Integration Impact	OMS Requisition Convert to Order IB.csv
Related Functionality	None

Usage and Configuration

See the "Converting Requisition Lines to Orders" section in the current release of the *New Feature Usage and Configuration Guide* and the "Uploading Files" section in the current release of the *Online Help* for more information.

2.8.6.2 Added Currency Conversion Fields to the Requisition Line Level

In NEO 3.7, ONE adds new currency fields to requisitions at the line level. The new fields include Target Currency, Converted Target Currency, Converted Target Line Amount, and Currency Conversion Rate. Previously, different currencies were not supported at the requisition line level, so users were restricted to the header-level currency. With the addition of these new fields, users can select a different currency at the line level, and that currency is converted to the requisition header-level currency via the currency converter. The header currency is considered the settlement currency, regardless of which currency is selected for the line level.

The Target Currency value is populated from the Item Master when the item is selected, but this value can also be updated by the user if required. The Converted Target Currency field populates from the requisition header's Currency field. The total amount for the requisition is calculated by adding the Converted Target Line Amount values for each line. These new fields are also added to the `OMS.Requisition_IB` and `OMS.Requisition_Approve_IB` integration interfaces appear as columns on the Search Requisition, and Search Requisition Line reports. This enhancement saves time by preventing manual currency conversion and gives the user increased accuracy and flexibility in calculating costs on requisitions.

Analytics Impact	None
Integration Impact	<ul style="list-style-type: none"> • <code>OMS.Requisition_IB</code> • <code>OMS.Requisition_Approve_IB</code>
Related Functionality	None
Usage and Configuration	See the "Entering Requisition Order Details" section in the current release of the <i>Online Help</i> for more information.

2.8.6.3 Enhancements to Purchase Requisitions

The NEO 3.7 release supports splitting a purchase requisition into several purchase requisition lines and assigning those lines to separate users. This enhancement is intended to address scenarios where, for example, a purchase requisition is submitted by an outside entity requesting many different items; the purchase requisition can then be divided into

multiple requisitions, allowing each to be assigned a user with expertise on that product type. For every split, the child requisition saves a reference to the parent and vice-versa. In addition, users can also create Split Requisition alerts to receive email notifications when a requisition is split and assigned to a user. Before this release, there was no ability to split Purchase Requisition lines.

In addition, purpose codes are now supported and preserved when a purchase requisition is split and converted to a purchase order or deployment order. A purpose code is used to identify the reason for procurement of a product (such as redistribution or consumption). To support these enhancements, the following UI changes are made:

Screen	Description
Lines tab of the New Requisition screen	Added the Planner Code field/column. This field represents which users the requisition line is assigned to. Only planner codes belonging to the purchasing organization are available.
Search Requisition Lines report	<ul style="list-style-type: none"> • Added the Split Requisition action. All selected records must belong to the same purchase requisition and planner code and must be in the Pending state. When successfully split, the user is directed to the newly created requisition details screen. • Added the Bulk Update action to allow the assignment of a single planner user to multiple lines at once. • Added the View Pivot button to allow users to aggregate data across multiple dimensions and measures. • Added the Planner Code filter and column. • Added the Purpose Code field in the Lines tab. • Added the Parent PR Number filter.
Search Requisitions report	<ul style="list-style-type: none"> • Added the Planner Code filter and column. • Added the Parent PR Number filter.
Linked Requisition section of the Links tab of the requisition details screen	Each parent requisition now shows links to its child requisitions.
Lines tab of the requisition details screen	Each child requisition line now stores its parent requisition in the Parent Requisition field/column.

With these updates, users can easily split requisitions into separate lines and assign those lines to individual users to match their area of expertise, saving time and improving work quality and accuracy.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Creating Split Requisition Alerts" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>See the following sections in the current release of the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Searching Requisition Orders" • "Searching Requisition Lines"

2.8.6.4 Item Catalog Visibility for 3PL Partners and Approved Vendor Lists (AVLs)

The NEO 3.7 release enables users to limit the ability of 3PL partners to view item catalogs. One Network introduces a new field, Allow Catalog Visibility, at the customer master level. When this field is set to true, items that have Approved Customer Lists (ACLs) configured are visible to customers in the Item Catalog Report. This field is also configurable on the Add AVL screen and the AVL Details screen.

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

2.8.7 RFX Enhancements

The NEO 3.7 release brings many enhancements to requests for quotes (RFQs). Users can now create RFQs from the Item Catalog screen and add buyer and vendor notes to RFQs, as well as various improvements to the RFX creation process.

2.8.7.1 Added Buyer and Vendor Notes to RFQs

Notes for buyers and vendors are now available for RFQs and are found on the RFQ Details tab of the RFQ details UI. Buyer notes on a given RFQ are read-write text fields for buyer roles and read-only for vendor roles, while the inverse is true for vendor notes. Notes are intended for casual communication between buyers and vendors and allow users to conveniently aggregate information about specific RFQs.

2.8.7.2 General RFQ Enhancements to the New RFX Process

- On the Ranking Factors screen of the New RFX popup, the following ranking factors are added: Total Landed Cost and Risk Score.
- On the Items for RFX screen of the New RFX popup, an AVL filter is added, similar to the existing All Items and Contracted Items Only filters. When selected, only AVL items are shown. If an AVL item is selected, then on the vendor page, the vendor corresponding to that AVL item is selected by default.
- On the Item Details screen of the New RFX popup, the Quantity field is updated with a link that, when clicked, opens a popup that shows the demand for the given item for the last three months and the projected demand for the next three months.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Using Buyer and Vendor Notes on RFQs" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. See the "Item Catalog" and "Creating an RFX" sections in the current release of the <i>Online Help</i> for more information.

2.8.8 ASN

2.8.8.1 Prevent the Creation of an ASN for Orders with Multiple Request Schedule (RS) Transportation Modes

With this release, the system displays an error message whenever users attempt to create an ASN for an order with multiple lines and two different RS transportation (trans) modes (such as ocean and trucks) on a request schedule. Previously, no check-in places prevented users from creating orders with different trans modes. This enhancement prevents planners from mixing orders like ocean and truck orders and helps users to combine similar multiple orders into shipments, grouping them according to trans mode. Users now get the error message on the Create ASN action for orders with different RS trans modes.

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

2.8.9 OMS Workbench

2.8.9.1 Auto-populate a List of Vendors for POs and Site Lanes for DOs on the Order Brokering Workbench

With the NEO 3.7 release, updates to the Order Brokering Workbench allow users to pick up to five vendors from an auto-populated list. This improves usability by providing a list of vendors instead of having users manually enter a vendor and the vendor's allocation.

Users can also choose to auto-populate a list of up to five shippers from active buffer lanes or site lanes to allocate deployment orders. With this enhancement, users are provided with a checkbox labeled "Use AVL(s) split" on the purchase order section and "Use Site Lane" on the deployment order sections of the Create Manual Orders for the Schedule popup window. When the checkbox is selected, the system auto-populates a list of vendors from the AVL for purchase orders and/or a list of shippers from available sites/lanes for deployment orders. The vendors' percentages are auto-populated based on the split percentage field and are sorted based on priority. Shipper records are sorted based on the sourcing priority. During the shipper population, preference is given to the buffer lane. If no matching rows are found,

site lanes are checked. Users still have the option to add vendors and shippers manually if they prefer.

In addition, users can choose to view a graphical representation of the allocated percentages. Icons are added to switch between the table showing the allocated percentages and the new graphical representation. When the graph is displayed, the buttons for adding vendors and shippers are hidden.

This feature requires the following policies to be set to true:

- Allow Order Fulfillment For Deployment Order
- Allow Fulfillment Order to Create New DS
- Allow Fulfillment Order to Auto Sync

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Allocating Vendors for POs and Site Lanes for DOs Using Auto-Populated Lists" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>Also, see the "Order Brokering Workbench" section in the <i>Online Help</i> for more information.</p>

2.8.9.2 Multi-tier-based Prescription for Expedite Order Workbench

The NEO 3.7 release introduces a new prescription for the Expedite Order Workbench, which includes multi-tier checks across the network on suppliers' projected on-hand quantities. Previously, the workbench only checked the buffer rather than performing multi-tier checks. The extra checks implemented in this enhancement increase the number of buffers considered, ensuring the prescriptions generated are more likely to be fulfilled as a supplier's inventory is expected to have the capacity to accommodate the request. This policy activation is a one-time setup completed on the Order Policies screen. This enhancement gives users greater confidence in the prescriptions generated and provides users with more realistic expectations for what a supplier can provide, helping users resolve shortages and stockouts.

This enhancement includes two new elements for New Order prescriptions:

- Full vs. Reduced Prescriptions

- A full prescription means the request values are the complete values necessary to solve the issue that generated the problem.
- A reduced prescription is one where some constraint has caused the requested quantity to be smaller than what the system thinks is necessary to solve the issue.
- Strong vs. Weak Prescriptions
 - A strong prescription means the system has checked against the constraints and thinks the request value presented in the prescription is likely to be fulfilled.
 - A weak prescription is one where the system either has not or cannot do checks against certain constraints, and the value presented in the prescription is a "best guess" and may be less likely to be fulfilled by the supplier.

In the New Order prescriptions UI, a full/strong prescription has a check icon next to it, indicating the system has high confidence in this prescription and its ability to solve the issue. A reduced quantity prescription has a triangle warning icon next to it, indicating the prescription has a reduced quantity and may not fully solve an issue.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Enabling Multi-Tier Checks for the Expedite Order Workbench" section in the current release of the <i>New Feature and Configuration Guide</i>.</p> <p>Also, for more information, please see the "Using the NEO Order Expedite Workbench" section in the current release of the Online Help.</p>

2.9 Supply Chain Administration

2.9.1 Tracking Event Attributes Change According to Event Type

In this release, when adding a tracking event, the options for the Event Attributes and Event Related To Info fields change based on the event type chosen. In addition, through integration, admin users can configure the attributes for those fields for each event type. Previously, all tracking events had the same options displayed regardless of whether that information was applicable for the specified event type and sometimes necessary attributes

were not shown. Now, admin users can upload a CSV file (SCC_TrackingEventScopedDynaFieldDef_IB) that sets the configuration for which attributes are displayed for each event type. This enhancement improves the tracking event process and makes the information about each tracking event type more accurate.

Analytics Impact	None
Integration Impact	SCC_TrackingEventScopedDynaFieldDef_IB
Related Functionality	None
Usage and Configuration	See the "Adding Order Tracking Events" and "Viewing Singleton Hierarchy" sections in <i>Online Help</i> for more information.

2.9.2 Assistance Requests Across Enterprises

In the NEO 3.7 release, users can now make assistance requests across different enterprises. Previously, the assistance request feature was limited to users within the same enterprise. Now, a user in one enterprise can request a change to the data that is controlled by another enterprise. For example, a customer's supplier might request a change to the customer's item data. The customer can approve or reject the request.

For this enhancement, ONE adds a new model, SiteReq, and the CreateASite template to the approval routing framework. Two new screens, the Site Change Request screen and the Site Request screen, allow users to search and view site change requests and add a new site request. The request process is available for Supply Chain Admin roles via approval routing. Three new dashboard widgets are available to show the status of the requests:

- **Requests Awaiting My Response:** This widget can be filtered based on username, role, and so on.
- **Requests I'm Observing:** If the user is an observer in the approval routing flow, the request appears in the widget.
- **Change Request Summary:** This widget displays all change requests and has filters as well.

This enhancement expands the approval routing process, improves communication between enterprises, and increases accuracy in master data management.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the "Working with Site Requests Across Enterprises" section in the current release of the *New Feature Usage and Configuration Guide*. See the "Working with Approval Routing Frameworks" section in the current release of the *Online Help* for more information.

2.9.3 Enhanced Bill of Materials Creation

Users can now add components to a bill of materials (BOM) while creating a new BOM without saving it first. Previously, users had to create a new bill of materials, enter header-level details, save it and then add BOM components individually. An Add BOM Component button is added to the BOM Component tab on the New Bill of Material screen. Previously, this button was only visible once a BOM was created. This enhancement saves time and additional steps in creating new BOMs.

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

2.10 Warehouse Management System

2.10.1 Added Crossdock Inbound Interface

The NEO 3.7 release adds an inbound interface for crossdock support, improving integration with external systems and allowing users to more efficiently send crossdock information to the ONE system. Crossdocks loaded through this interface appear in the system in the Pending Receipt state. Existing crossdocks can also be updated through this interface with the InsertOrUpdateCrossDock action. No additional steps are required in the UI.

Analytics Impact	None
Integration Impact	WMS.CrossDockInbound v1.0 (IB)
Related Functionality	None

Usage and Configuration	None
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2.10.2 Added Header and Line-Level Dimensions to Packing Lists

The NEO 3.7 release adds many new fields for packing lists at the header and line levels, including linear dimensions, weight, and volume information. This enhancement improves the pallet/container building experience during packing by allowing users to view line-level and shipment-level weight and volume totals. A new policy called Sync Packing List Dimensions To Shipment is added to the Packing tab of the Search Policies screen. When set to true, packing list totals are automatically copied to the relevant shipments.

To support this enhancement, the following fields are added at the header level on the Content tab of packing lists:

- Packed Qty 1: Amount, UOM, and Compute link
- Packed Qty 2: Amount, UOM, and Compute link
- Weight: Amount, UOM, and Compute link
- Volume: Amount, UOM, and Compute link
- Length, Width, Height, and linear UOM
- No of Packages

The following fields are added at the line level on the Content tab of packing lists:

- Weight: Amount and UOM
- Volume: Amount and UOM
- Dimension field: Width, Length, Height, and linear UOM

In addition, the total weight, volume, or quantity of a shipment can be computed directly from the packing list if all items have their respective dimension fields populated; all totals are automatically computed when the packing list is saved, submitted, or changes states except for the length-width-height combined field and the number of packages field.

Analytics Impact	None
Integration Impact	<ul style="list-style-type: none"> • WMS.PackingList_OB v1.0 and v2.0 • WMS.PackingListInbound • WMS.PackingListUpload
Related Functionality	None

Usage and Configuration

See the "Available Policies from the Search Policies Screen" and "Creating Packing Lists" sections in the current release of the *Online Help* for more information.

2.10.3 Added Print PDF Option for Goods Receipt Notes and Checklists

In this release, ONE introduces the PDF printing option for the goods receipt notes and checklist items. Previously, there was no provision to print the PDF files of good receipt notes and checklist items. The Print PDF action button is available on the Receipt Lists Report screen or Receipt lines tab screen.

The improvement helps warehouse users view and inspect the goods received from suppliers and perform tasks based on that receipt note. Using this option, a PDF file is printed and downloaded to the user's computer, enabling warehouse users to organize, facilitate, and manage their tasks effectively.

Prerequisite:

Users must configure the Initial Receiving Check policy on the Check List Policies screen.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Printing Goods Receipt Notes and Checklists" section in the current release of the <i>New Feature Usage and Configuration Guide</i> . See the "Searching Receipts" and "Check List Policies" sections in the current release of the <i>Online Help</i> for more information.

2.10.4 Added Support for Warehouse Location Tracking Events

This release gives users the ability to add tracking events to locations. These tracking events capture various parameters such as inside and outside temperature, door open, door closed, and lock status. Tracking events can be added in the UI on the location details screen or via CSV upload. Once added, they are visible on the Tracking tab on the location details screen. Users can create a new alert subscription to receive notifications for the location tracking events by selecting Tracking Event as the alert category and selecting one of the newly added

parameters in the Event Type field. This enhancement gives users increased visibility to information about locations.

Analytics Impact	None
Integration Impact	The tracking events for locations are uploaded using the SCC.TrackingEvent_IB integration file.
Related Functionality	None
Usage and Configuration	<p>See the "Adding Tracking Events to Locations" and "Configuring Location Tracking Event Alerts" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>See the following sections in the current release of the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Updating Locations" • "Creating Locations" • "Uploading Files"

2.10.5 Added Weighted Average Cost to Warehouse Management

This release adds the weighted average cost (WAC) accounting method to warehouse management in the ONE system. WAC is an accounting method of inventory valuation that uses a weighted average to determine the cost of goods sold and inventory. The weighted average cost method divides the cost of goods available for sale by the number of units available for sale. The Weighted Average Cost and Weighted Average Cost Currency fields/columns are added to all warehouse management detail screens and reports, excluding summary reports. This includes the following reports and data objects:

- Buffer BOH Adjustment
- Cycle Count
- Inventory Adjust
- Inventory Discrepancy
- Inventory History
- Inventory Move Order
- Inventory Operation
- Inventory Transfer
- Inventory Replace
- Issue Inventory
- Packing List

- Pick List
- Putaway List
- Receipt

This enhancement improves the visibility of item costs for all warehouse management roles.

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

2.10.6 Allow Over and Under Receipt within Tolerances

NEO 3.7 adds over and under-receiving hold tolerances to improve the WMS receiving process and reduce potential errors. Inbound shipment quantities can be over and under-received within the warehouse management workflow. When users create, update, or attempt to close receipts or receipt lines that have a link to a shipment and/or enhanced deployment, purchase, or sales order types, the system checks if the total quantity on all related receipt lines exceeds the transaction's quantity (the shipment's shipped quantity and/or the order's shipped/agreed/promised/requested quantity).

In the case of over-receiving, it is essential to avoid additional financial implications before formal receipt (receipt closure) and to warn the user about over-receiving. Over-receiving tolerance defines the amount as a percentage by which the total receipt quantity can exceed the transaction's quantity without causing a hold. In the case of under-receiving, another receipt or delivery can be received without additional financial implications. Under-receiving tolerance defines the amount as a percentage by which the total receipt quantity can be less than the transaction's quantity without causing a hold.

The enhancement includes new issue computations, subscribable email alerts, fields for setting tolerance percentages, and allowance policies. The new policies can be set for hierarchy levels, receiving levels, and specific order types.

Prerequisite:

The Overreceiving and Underreceiving policies must be set to Allow With Reason Code on the Receiving tab of the Search Policies screen for the desired hierarchy level before you can set a receiving tolerance percentage.

Analytics Impact	None
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Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Setting Over and Under Receipt Tolerance Policies" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>See the following sections in the current release of the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Creating and Customizing Alert Subscriptions" • "Creating Approved Vendor Lists (AVLs)" • "Updating Approved Vendor Lists (AVLs)" • "On-Holds Receipts"

2.10.7 Auto-create Serial Numbers for Packing Lists

This release adds a feature to auto-create serial numbers for items that do not exist in the inventory during the packing list uploading process. This feature simplifies the integration process for creating packing lists, reducing time and effort. A new site-level policy, Auto Create Serial Number For Packing List Inbound Integration, is added to the Packing tab of the Search Policies screen to enable the feature. For inbound files, users must provide serial numbers in the CSV files for serialized inventory tracking.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Available Policies from the Search Policies Screen" and the "Uploading Files" sections in the current release of the <i>Online Help</i> for more information.</p>

2.10.8 Automatically Transition Orders to Previous State on Closing Negative Receipt

Starting this release, orders and shipments automatically transition to the previous state if a user closes a negative receipt when the auto-receiving policy is enabled. This feature simplifies the auto-receiving policy processing when a negative receipt is created against the

corresponding order and shipment. It eliminates the need to switch screens and helps avoid human errors while processing negative receipts. Users can set the policy for Purchase Orders, Sales Orders, Deployment Orders, and Return Orders.

Prerequisite

Users must set the Auto Pick/Consume policy on the Inventory Policy tab of the site details screen.

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

2.10.9 Enable Crossdocking for Supply and Demand Orders with Different Quantities and UOMs

Starting this release, crossdocking can be performed even if the supply and demand orders have different quantities and units of measurement (UOMs). This feature increases crossdock options between orders by supporting different UOMs, thus improving supported crossdock variability. When the inbound and outbound orders have different quantities and UOMs, the ONE system applies the pre-configured conversion logic to perform the conversion between UOMs and creates a crossdock based on the demand quantity UOM. No user action is required.

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

2.10.10 New Kitting and Warehouse Manager Role

The NEO 3.7 release adds a new role type for warehouse users called the Kitting and Warehouse Manager, which is a combination of two existing roles: Assembly Supervisor and

Warehouse Manager. This role is intended to be used in a combined warehouse environment with no clear distinction between pick/pack/receive operations and kitting task creation, planning, and execution. With this enhancement, organizations with warehouses providing value-added services can save time by eliminating frequent role-switching for common operations in the system.

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

2.10.11 Packing Resource Field Added to the New License Plate Number (LPN) Popup and the LPN Inbound Interface

This release adds a Packing Resource field to the New LPN popup window. Previously, LPNs supported packing resources, but the packing resource could not be selected while creating the LPN. This enhancement simplifies the LPN creation routine and improves the visibility of LPNs for packages.

Users can generate a new LPN and add the packing resource via the following screens:

- Issue Inventory details screen
- Pick List details screen
- Packing List details screen (on the Content tab)
- Add Container popup that appears after clicking the Add Container link on the Package Explorer tab of the Packing List details screen
- Receipt details screen
- Inventory Move Orders details screen
- Assembly Work Orders details screen
- LPN Report screen
- LPNs screen

When users auto-generate a new LPN, the packing resource field is empty.

Analytics Impact	None
Integration Impact	Yes. The Packing Resource field is added to the WMS_LPNIboundv1.0_01.csv file.

Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>Online Help</i> for more information.</p> <ul style="list-style-type: none"> • "Creating LPNs" • "Viewing Issue Inventory" • "Searching and Updating Pick Lists" • "Searching Packing Lists" • "Updating Receipts" • "Viewing an Inventory Move Order" • "Searching Assembly Work Orders" • "Updating LPNs"

2.10.12 Enhancements to Putaway Algorithm

This release adds two constraints, Package Type and Capacity Constraints, to the putaway algorithm. These two constraints improve target location suggestions by the system for the putaway process. Users must set the Storage UOM and Storage Capacity fields on the Location details screen and the Qty UOM field on the LPN details screen. As a part of this enhancement, the following widget and report are added:

- Warehouse Capacity By Location report
- Warehouse Capacity by Location widget

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration	<p>See the "Viewing the Warehouse Capacity by Location Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>See the following sections in the current release of the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Creating LPNs" • "Adding Widgets" • "Creating Locations"
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2.10.13 Removed Productions Orders from Issue Inventory UI

This release removes production orders from the Issue Inventory UI and process. Production orders can no longer be selected in the Requisition Source field on the Issue Inventory tab of the New Issue Inventory UI or from the Add Line button on the New Issue Inventory UI. This deprecation delineates a clear distinction between planning (production order) and execution (production work order) transactions used for inventory issues and reservations. ONE recommends that, as a one-time measure, users convert existing production orders intended for inventory issuing to production work orders. Going forward, production work orders should be used for inventory issues and reservations.

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

2.10.14 Support Crossdocking for External (Non-Catalogued) Items

Starting this release, the ONE system supports crossdocking for shipments with external (non-catalogued) items. This feature is developed for third-party and other warehouses that do not control or maintain item master catalogs. This feature extends the integration capabilities of ONE with external systems. Users can provide the external item name on the Create Crossdock screen.

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

2.10.15 Support Crossdocking for Inbound and Outbound Shipments Not Linked to Orders

Starting this release, the ONE system supports crossdocking for inbound and outbound shipments with no orders linked to them. This feature is developed for third-party and other warehouses that do not control or provide orders but rather deal with logistics. This feature extends the integration with external systems. Users select the Shipment Line option for the Supply Source and Demand Source fields to enable this feature on the Create Crossdock screen.

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

2.10.16 Support for Holds on Pick Lists and Packing Lists

This release adds support for holds to the Pick List and Packing List detail screens. Previously, users could not create manual holds for pick lists and packing lists in the system. This enhancement improves visibility and accountability in picking and packing processes and helps users identify issues in process execution. Users can view the Holds tab on the pick list details and packing list details screens. Users can create, assign, close, reopen, and localize manual holds for pick lists and packing lists from the Holds tab on the detail screen.

Analytics Impact	None
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Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <ul style="list-style-type: none"> • "Working with Holds on Pick Lists" • "Working with Holds on Packing Lists"

2.10.17 Support Inventory Status as Logical Inventory Attribute

The NEO 3.7 release adds inventory status as a logical inventory attribute. The Is Inventory Status Tracked field is added to the Create Logical Inventory Policy screen and added as a column to the Search Logical Inventory Policy screen. Selecting this field means inventory status is being tracked for the given item-site inventory policy. With this enhancement, users can track logical inventory by status and have improved inventory visibility.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Searching Logical Inventory Policy" and "Creating Logical Inventory Policy" sections in the current release of the <i>Online Help</i> for more information.</p>

2.10.18 Support LPN Label and Barcode Printing

The NEO 3.7 release adds the label and barcode printing for license plate numbers (LPNs) and packing lists. The enhancement allows users to print labels from the ONE system directly to industry standard warehouse labels for packaging represented by LPNs and outbound packing lists and to print packaging Serial Shipment Container Code (SSCC) labels to PDFs from packing list details. These options were not available previously. Both enhancements simplify warehouse operations. Users can use their ZPL-compatible printers to print LPN labels by selecting the Print Barcode option on the LPNs Report or the Print Labels option on the Packing List details screen.

Analytics Impact	None
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Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Printing LPN Labels and Barcodes" section in the current release of the <i>New Feature Usage and Configuration Guide</i>.</p> <p>See the following sections in the current release of the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Searching Packing Lists" • "Updating LPNs"

2.10.19 Warehouse Planner Workbench

This release introduces a Planner Workbench to allow warehouse users to choose how to work with demand orders. The new workbench gives users a guided process to decide how they want to work with demand orders: by inventory reservation, by creating new cross-docks, or by marking the order as backordered. The workbench makes the warehouse management experience more consistent with the NEO design, improves visibility in the warehouse operations, and enhances the fulfillment process.

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

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

2.11.1 Ability to Pick Singleton as an Internal Component When Assembling an Asset

In this release, ONE gives users the capability to pick internal components as singletons from the internal inventory when assembling an asset. A newly added Maintenance Repair Overhaul (MRO) policy, Disable Multi Inventory Put Back, allows users to select internal components that are unavailable in the Warehouse Management System (WMS) inventory. This policy enables asset admins to select components as internal singletons while assembling a particular asset. This policy is located on the MRO Generic tab on the Search Policies screen.

This enhancement allows users to pick components that are available on the soft floor but not in the WMS inventory. It also gives users the flexibility to choose components from internal, external, or both inventories to assemble an asset. A new filter, From Internal, is added to the Inventory Summary Picker Report, allowing asset admins to pick the internal components.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Picking Internal Components When Assembling an Asset" section in the current release of the <i>New Feature Usage and Configuration Guide</i>.</p> <p>Also, the following sections in the current release of the <i>Online Help</i>:</p> <ul style="list-style-type: none"> • "Creating and Searching Assets" • "Working with Location Inventory" • "Searching Policies" (as well as the additional links on that page)

2.11.2 Added Functionalities from Field Service Management (FISM) and Transportation Management (TMS)

This release incorporates the Field Service Management (FISM) feature to enable users to select skilled personnel during work order planning. Maintenance Planners can select relevant labour on the Work Order Task line from the FISM skills, if available, or from the core skills. The default selection is the SMRO-mapped user if no skills are mapped.

To support TMS functionalities, ONE adds a new policy, Auto Create Shipment In Transit. In addition, a new In Transit asset state and a new Put In Transit action are now available. When the new policy is enabled, the system automatically creates shipments when:

- the Put In Transit action is selected, and the asset state changes from New to In Transit.
- an asset is marked for movement from one location to the next location.

These enhancements are helpful for:

- selecting skilled labour for work order tasks according to location and skill,
- improving the visibility of in-transit assets, and
- tracking shipments by creating and closing them via a policy.

Users must set the Auto Create Shipment In Transit policy and ask ONE to add the In Transit state and Put In Transit action in the configurable state machine as a part of master data integration. The In Transit and Put In Transit actions are visible under Actions on the asset details screen and work orders screen. The assets in Awaiting, In Transit, and Closed state can be viewed on the Shipment Summary Report and on the Asset State Summary widget.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Working with the MRO policies", "Putting Assets in Transit", "Transiting Assets from Work Orders", and "Viewing the Shipment Summary Report" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>See the "Adding Widgets" section in the current release of the <i>Online Help</i> for more information.</p>

2.11.3 Added Metering History and Attributes History to the Asset Details Screen

In this release, ONE introduces an enhancement that allows asset admins to view historical information for asset metering and attributes. The asset details screen now includes the following:

- A **Meter History** hyperlink at the bottom of the **Meters** tab
- An **Attribute History** hyperlink at the bottom of the **Attributes** tab

The hyperlinks open a new popup window that displays historical information about meters and attributes.

In addition, two new reports, **Asset Attribute History** and **Asset Meter History**, are added to the **Asset Management** menu. These reports allow users to view attribute and meter history for all assets. These reports can be filtered by date.

This enhancement ensures precise tracking of meter and attribute history to determine the asset usage and assists in predictive analytics based on data. Each meter and attribute record is time-stamped and can be audited and tracked for future reference.



Note

Users can integrate the metering and attribute values from the **Search Asset Meter Config** report and the **Search Asset Attribute Config** report.

Analytics Impact	None
Integration Impact	<p>Inbound integration files are added for Asset Meter History and Asset Attribute History:</p> <ul style="list-style-type: none"> • AssetMeterHistory_IB • AssetAttributeHistory_IB
Related Functionality	None

Usage and Configuration	<p>See the following sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information:</p> <ul style="list-style-type: none"> • "Viewing the Meter History and the Attribute History from the Asset Details Screen" • "Viewing the Asset Attribute History Report" • "Viewing the Asset Meter History Report" <p>Also, please see the "Creating and Searching Assets" section in the current release of the <i>Online Help</i> for information.</p>
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2.11.4 Added Sublocation Field to the Asset Detail Screen

In this release, ONE adds a Current Sublocation field to the Location tab on the asset detail screen. This enhancement lets users view and verify the asset's sublocation in the warehouse. The sublocation field is available on the Current Location pane, the Next Location pane, and the Previous Location pane, all located on the Locations tab of the asset details screen. This improvement brings more flexibility to search and track the asset inventory at a granular level.

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

2.11.5 Enhanced Asset State Machine

With this release, the asset state machine is enhanced to associate different asset types with different state machines. This allows organizations holding multiple assets to configure different states and sub-states for asset categories and types. This enhancement makes the state machine configurable and gives users more control of the state or sub-state based on the types of assets. Users must provide additional data, including asset category and type, and ONE will load the information to master data.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	Please contact your ONE administrator to configure this enhancement.

2.11.6 Enhancements to MRO Policies


In this release, ONE improves the usability of Maintenance Repair Overhaul (MRO) policies by rearranging and renaming the policies. The user can select appropriate policies that enable specific activity tasks by Enterprise or by Organization. The capability benefits improve the usability and reach of MRO policies and help users to execute asset action items and work order management efficiently.

The following table lists the policies available on each MRO tab on the Search Policies screen:

MRO Policies		
MRO Generic tab	MRO Asset Management tab	MRO Work Order tab
Asset Repair State Config	Assembly Asset Initial Status	Assign Assemble Work Initial State
Auto Create Shipment In Transit	Asset Assembly Process Status	Assign Repair Work Initial State
Disable Multi Inventory Put Back	Asset Repair Process Status	Auto Approve Child Work Order
Generic Work Order State Config	Asset Status On Complete Work	Auto Complete Task On ChildWorkComplete
Initial State For Work Order	Disassembly Asset Final Status	Auto Save Tasks On State
State For View Only Asset	Disassembly Asset Initial Status	Close Assemble Work After State
Subassembly State On Asset Available		Close Repair Work After State
		Complete Repair Tasks On Work Complete

MRO Policies		
MRO Generic tab	MRO Asset Management tab	MRO Work Order tab
		Enable Auto Child Work Orders
		Enable Auto Work Order Tasks
		Start Assemble Work After State
		Start Repair Tasks On Start Work
		Start Repair Work After State

As part of the enhancement, ONE introduces a new policy, State For View Only Asset, on the MRO Generic tab on the Search Policies screen. Based on the selected policy value, the system does not allow any operation when the asset resides in that state.



Note
Users can select and configure the policies from Administration > Search Policies.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Working with the MRO Policies" section in the current release of the <i>New Feature Usage and Configuration Guide</i> . Also, please see the "Searching Policies" section (as well as the additional links on that page) in the current release of the <i>Online Help</i> for more information.

2.11.7 Enhancements to Asset Maintenance Schedules

With this release, the New Maintenance Schedule screen and the maintenance schedule detail screen are updated to add the following fields:

Field Name	Description
Asset Category	Use this field to select the asset category.
Asset Type	Use this field to select the asset type.
Asset Condition	Use this field to select the asset condition.
Is Override MTBF (Checkbox)	If the checkbox is selected, the scheduled maintenance overrides the mean time between failures (MTBF).
Meters and Attributes section	A new Meters and Attributes section is added under the Maintenance Schedule header, which accommodates the values for multiple metering and attributes.

The Asset Maintenance Schedule screen is updated to automatically create work orders and auto-populate the maintenance schedule data under the asset detail screen's Maintenance & Repairs tab. The previous Maintenance Schedule screen did not have fields to view assets while creating a Maintenance Schedule. There was no provision to perform scheduled preventive maintenance. The enhancement helps users automatically create the required work orders once the maintenance schedule is reached and perform the maintenance based on the asset types and categories. Users can access the new Maintenance Schedule screen to schedule maintenance.

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

2.11.8 Enhancements to the Asset History and Asset Details Screen

This release adds the following enhancements to the asset details screen:

Placement on UI	Fields Added	Additional Enhancements and the Impact on Functionality
Location tab	<ul style="list-style-type: none"> • Current Location • Previous Location • Next Location 	These fields help in asset tracking when there is asset movement from one location to another.
Manufacturing & Life tab	<ul style="list-style-type: none"> • Expiration Warning Tolerance 	The field helps to verify if the expiration can be extended or stretched.
Maintenance & Repair tab	<ul style="list-style-type: none"> • Mean Time Between Failure • Mean Time Failure • Schedule Maintenance Date • Expected Failure Date • Last Calibration Date • Next Calibration Date 	These fields help in asset analysis.
Additional Info tab	<ul style="list-style-type: none"> • Unique ID • RFID • Current Emission • Unit Of Measurement (UOM) 	These fields help users obtain additional information about the asset.

Placement on UI	Fields Added	Additional Enhancements and the Impact on Functionality
Warranty tab	<ul style="list-style-type: none"> • Warranty Category • Full Entitlement checkbox • Active checkbox • Services icon 	<p>The Warranty Category, Full Entitlement, and Active fields help set the asset disposition rules. The Services icon is enabled when a warranty record is saved. When clicked, this icon opens a popup window that displays the warranties associated with every asset according to the category and type of asset.</p> <p>In addition, the Warranty Start Date and Warranty Expiry Date fields are now mandatory.</p>
Structure tab	<ul style="list-style-type: none"> • Inventory Item • Inventory Item Enterprise • Allowed Repairs • Remaining Repairs • Health 	<p>These fields help users identify inventory items and the enterprise for better visibility while picking. Allowed Repairs, Remaining Repairs, and Health provide users with additional information.</p>
History tab	See information below	

In addition, this release enhances the information available on the History tab of the asset details screen. On the History tab, the system now populates data from the information recorded on the Location tab, the Maintenance & Repair tab, and the Additional Info tab, including many of the newly added fields displayed in the table above.

This enhancement helps users have better visibility of the assets in the system. Users can view the added fields on the asset details screen and view related updates to the asset on the History tab.

Analytics Impact	None
Integration Impact	Yes. A new CSV file is added to upload warranty service data: AMS.WarrantyService_IB
Related Functionality	None
Usage and Configuration	See the "Creating and Searching Assets" section in the current release of the <i>Online Help</i> for more information.

2.11.9 Enhancement to the Item Picker field to Support Partner Enterprise level Items

This release enhances the Item(Make & Model) picker field to support and display partner enterprise-level items while assembling the asset. Previously, while creating a new asset, the user could only select and fetch the items for logged partnership organization. The improvement helps users to view all partner enterprise-level items with matching asset types.

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

2.11.10 NEO Prescription Enhancements for Assets

This enhancement adds the following NEO Prescriptions for problems with assets:

Neo Prescription	Description
Asset Warranty Expiry Prescription	A NEO IT and NEO IT SOLUTION is added for asset warranty expiration. The NEO IT option allows users to extend the warranty of an asset by a week. The NEO IT SOLUTION enables users to select the asset's warranty end date, type, and category. Currently, the warranty expiration prescription is visible for only those assets whose warranty is about to end. This enhancement allows configuring the asset warranties according to the asset type, category, and type of warranty.
Asset Failure Found Prescription	The resolution for the Asset Failure Found Prescription is updated. The Create Repair WO (Work Order) is the resolution for Asset Failure Found. The Create Repair WO is assigned a task type of Repair or Replaceable. Previously, the Asset Failure Found prescription was visible for end-level assets whose child assets would fail in the next five days. The Inactive Assets and Create Repair WO were the two options for resolving the problem.

Neo Prescription	Description
Insufficient Parts Prescription	The problem is visible against parts that are not available after the completed plan. The system checks for parts whose items have substitute items available. The Help NEO Out displays the substitute item.
Schedule Maintenance	The problem creates a preventative work order and allows the option to reschedule meter dates and delay maintenance.

Users can subscribe to the prescriptions and resolve the problems associated with the assets. Users can also set below mentioned alerts to get notifications about the problems.

- Awaiting Milestone Alert
- Delayed Milestone Completion Alert
- Failed Milestone Alert
- Schedule Maintenance Alert

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Working with NEO Prescriptions for Assets" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>See the "Creating and Customizing Alert Subscriptions" section in the current release of the <i>Online Help</i> for more information.</p>

2.11.11 Inspection Tab Added to the Asset Details Screen

This release adds a new tab, Inspection, to the Asset details screen. The inspection tab has fields such as Inspection No, State, Inspection Line Number, Status, Result Number, Inspection Result Status, Creation Date, and Planned Inspection Type. Previously, there was no visibility for the external inspections carried out for an asset. This enhancement helps users view or add details for inspections done internally or externally for the end item and its associated serialized and repairable components. Users can view the historic inspection details carried out for an asset under the Inspection tab on the asset details screen. Users can create an inspection via the Create Transaction icon under the History tab when the asset status is in In Operation status.

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

3 Bug Fixes

This content is still in development and will be added prior to Customer UAT for this release.

3.1 Data Warehousing

3.1.1 Currency Conversion Date Lookup Failure Tender Fact Records

Problem:	Wrong date computed during currency conversion.
Cause:	The error was caused by faulty NULL strings generating in the conversion_rate column which is used for currency conversions.
Resolution:	Updated the query for handling currency conversions.

3.2 Logistics And Transportation Management

3.2.1 Error When Deleting Additional Charges on Prices

Problem:	When a user attempts to delete a charge of the type Additional Charge on a price, it deletes all added charges with the same accessorial code.
Cause:	Issue with the validation of cost limits
Resolution:	When deleting additional charges, the validation of cost limits is not required. Now, only the selected additional charge is deleted from the price.

3.2.2 Inconsistent Event Date Fields in Reports

Problem:	The event dates in the Movement Audit Trail report and the Shipment Audit Trail report are inconsistent.
Cause:	The event date used in the Movement Audit Trail report is the creation_date, while the event date used in the Shipment Audit Trail report is the last_modified_date.
Resolution:	The creation date is added to the Shipment Audit Trail report.

3.2.3 LoadConsolidationPolicyAccessor has Memory Leak

Problem:	A memory leak exists in TMS.LoadConsolidationPolicyAccessor that eventually causes an out-of-memory error.
Cause:	The memory leak is caused by TMS.LoadConsolidationPolicyAccessor being called thousands of times, and each time a different orgPolicycache instance is created and different equipment setting instances are used.
Resolution:	Replaced TMS.LoadCoonsolidationAccessor with TOSX.LoadConsolidationAccessor.

3.2.4 Movements Associated with Multi-Modal Shipment Not Displayed Correctly

Problem:	The movement number is not hyperlinked correctly for parent shipments when a standard shipment is converted to a multi-modal shipment using the Explore Itinerary option.
Cause:	This issue was caused by a code error.
Resolution:	Movement numbers now display correctly with hyperlinks in the given scenario.

3.2.5 Retrieve For Filter Not Working on the Milestone Report

Problem:	The Milestones report displays all records regardless of the value set in the Retrieve For filter.
Cause:	Error in the retrieval of data.
Resolution:	Data is now retrieved per the value set on the Retrieve For filter.

3.2.6 Search Invoice Report Timing Out With Filter Range Over One Year

Problem:	If a customer tries to view data with a date range larger than one year, the Search Invoice report times out.
Cause:	The system is unable to fetch all data before timing out.
Resolution:	The Invoice Date Range filter on the Search Invoice report is now limited to a one-year span.

3.2.7 Show States with Empty Values Checkbox on Widget Is Not Visible for Some Roles

Problem:	The Show States with Empty Values checkbox is not visible on the Shipment State Summary widget for Buyer Orchestrator and Control Tower roles.
Cause:	Coding error caused this checkbox to not load on the widget for these roles
Resolution:	The Show States with Empty Values checkbox is now visible for Buyer Orchestrator and Control Tower roles when they view the Shipment State Summary widget.

3.2.8 Slow Global Search

Problem:	The first couple global searches every day are slower than subsequent searches.
Cause:	This issue was caused by a suboptimal search implementation.
Resolution:	The global search functionality now returns results in a reasonable time frame with every search.

3.2.9 Special Instructions Field Does Not Match Instructions Field for Movements

Problem:	On movement detail screens, if users enter a line break in the Instructions field the line break does not appear in the Special Instructions field as expected. The Special Instructions field ignores line breaks.
Cause:	This issue was caused by a code error.
Resolution:	The Special Instructions field shows line breaks as expected.

3.2.10 Spot Bid Accept Alert Not Working Correctly

Problem:	For some users, Spot Bid Accept alerts generate alerts of other types.
Cause:	This issue was caused by a code error.
Resolution:	The Spot Bid Accept alert now behaves as expected.

3.2.11 Users Can Update Static Routes Without All Required Fields

Problem:	When users update a non-interleave static route (static routes with an empty Shipment Generation Scheme field), the system accepts the update even if the Arrival Day Offset field is blank.
Cause:	This issue was caused by a code error.
Resolution:	The Arrival Day Offset and Departure Day Offset fields are now required when the Shipment Generation Scheme field is empty.

3.3 NEO Platform

3.3.1 ArrayIndexOutOfBoundsException in Message Detail in RTVN 9002 Environment

Problem:	An ArrayIndexOutOfBoundsException appears in some scenarios in the RTVN 9002 production environment.
Cause:	The exception is caused by the code attempting to reference an empty line.
Resolution:	Added a check to ensure the line causing the error is not empty.

3.3.2 Cannot Create Enterprise Role Types for Enterprises with Apostrophe (')

Problem:	Users cannot create enterprise role types for enterprises with an apostrophe character (').
Cause:	The apostrophe was an invalid character in this context.
Resolution:	Updated the code so users can now create enterprise role types for enterprises with apostrophes.

3.3.3 Integration Message Monitor Generates Alerts with Incorrect Times

Problem:	On the Alert details page, users were receiving alerts from the Integration Message Monitor with a message generation time that did not match the actual time the check was run.
Cause:	The system was using the GMT timezone for all messages and not displaying this to the users.
Resolution:	The system now uses and displays the user's timezone in the message alerts.

3.3.4 Internal Error Message Showing on Some Reports

Problem:	On some reports, in some scenarios, an internal Oracle error message appears directly to the user.
Cause:	This issue was caused by developer oversight.
Resolution:	Replaced the internal error message with a generic message stating "An unexpected error occurred. Please contact your System Administrator for assistance."

3.3.5 JDK Version 11.0.15 Update Caused Outbound Failure

Problem:	An outbound exception is sometimes produced in the production environment.
Cause:	Updates from JDK v11.0.15 caused the exception.
Resolution:	The production environment will use a JDK version earlier than 11.0.15 until a permanent solution is implemented.

3.3.6 Performance Issues with Pagination on Widgets, Reports, and Picker Reports

Problem:	The page/record count format at the bottom of widgets and picker reports is causing performance issues when loading the dashboard or opening picker reports.
Cause:	The previous format resulted in too many calls, causing a slow response time when loading the dashboard or opening picker reports.

Resolution:	<p>None of the widgets now show total page/record counts by default.</p> <p>The page/record counts are updated as follows:</p> <ul style="list-style-type: none"> • Widgets <ul style="list-style-type: none"> ◦ The previous page/record count format on widgets listed the total number of pages/records by default. Example: Viewing 1-7 of 10907 ◦ Now, the total number of records is not automatically displayed but can be displayed by clicking a link. Example: Viewing 1-7+ (with <u>7+</u> being a clickable link to display the total count) • Reports (React reports only for this release) <ul style="list-style-type: none"> ◦ The previous page/record count format on reports included a "view more" link. Example: Viewing 1-50 of 50+ <u>view more</u> ◦ Now, the "view more" link is removed and the format changed to the following. Example: Viewing 1-50 of <u>50+</u> (with <u>50+</u> now a clickable link to display the full count) • Picker Reports (React picker reports only for this release) <ul style="list-style-type: none"> ◦ The previous page/record count format on picker reports did not contain a clickable link to view the full count. Example: Viewing 1-10 of 50+ ◦ Now, the format contains a clickable link to view the full count. Example: Viewing 1-10 of <u>50+</u> (with <u>50+</u> now a clickable link) <p>These changes result in a performance improvement when loading the dashboard and opening picker reports.</p>
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3.3.7 Poor Performance Due to Cachekey Implementation

Problem:	Due to how the cachekey parameter was implemented to control cache behavior, users are re downloading the same data over and over again with different cache keys.
Cause:	This behavior is caused by the way the cachekey parameter was originally structured. The old approach made sense for single appserver scenarios but not for multi-node clusters.

Resolution:	<p>Added new columns for lists of HPAs and cacheKeyOverride in the VERSION table.</p> <p>If the platform build or HPA changes, the cacheKeyOverride is nullified and the HPAs in the VERSION table are updated.</p> <p>Added a JMX entry to explicitly capture an external cacheKeyOverride.</p>
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3.3.8 Session Timeout Longer than Expected

Problem:	The system times out and makes users log in again after a period of inactivity. This timeout period was supposed to be 16 minutes, but for some users was up to 20 minutes.
Cause:	<p>A timer begins after every user action in the system; when that timer reaches 15 minutes, the session times out. A second timer then begins, after which the screen updates and loads the login page.</p> <p>This second timer was supposed to be set to one minute but was erroneously set to five minutes, producing a total time of 20 minutes instead of 16 minutes.</p>
Resolution:	Added a new external reference so users can configure the duration of the second timer. Values less than one minute are not recommended because of increased server load.

3.3.9 Unexpected Server Error Appears when Attempting to Access Archived Files

Problem:	An Unexpected Server Error message appears when users attempt to access archived files in the system.
Cause:	This bug was caused by developer oversight.
Resolution:	Added an alert popup with a message if the file does not exist or the user does not have permission to view the file.

3.3.10 Users Receiving Error Message When Attempting to Login Again After Delay

Problem:	When users attempt to log in and the system cannot find the user's app ID, usually after letting their session timeout, they sometimes get an "Unexpected Server Error" message and cannot log in again successfully.
Cause:	When the system cannot find the user's app ID it redirected the user to an incorrect page.
Resolution:	The system now redirects users to the correct page when the app ID is not found.

3.4 NEO UI

3.4.1 Invalid Email Address Error

Problem:	Users receive an invalid email address error when updating vendor contacts in the vendor master data.
Cause:	Error in regular expression (regex)
Resolution:	Corrected regex, using the same regex used in ExtJS code.

3.5 Order Management System

3.5.1 Inco Terms Field in Search PO Schedules Report is Null

Problem:	The Inco Terms column is empty on the Search PO Schedules report, but the field is populated on individual purchase orders detail screens.
Cause:	This issue was caused by a code error.
Resolution:	The Inco Terms field now displays as expected on the Search PO Schedules report.

3.5.2 OMS.DeleteDeadStateOrders Not Working Correctly

Problem:	OMS.DeleteDeadStateOrders is not deleting any orders in the Canceled, Deleted, or Closed states from the OMS_PURCHASE_ORDER_FACT, OMS_DEPLOYMENT_ORDER_FACT, and OMS_SALES_ORDER_FACT tables.
Cause:	This issue was caused by a code error.
Resolution:	OMS.DeleteDeadStateOrders now deletes the correct order states as expected.

3.6 Warehouse Management




3.6.1 Cycle Count Status Report Fails to Open Under Certain Circumstances

Problem:	The Cycle Count Status report fails to open when Bulk Inventory Discrepancies is used in advanced sorting.
Cause:	The report failed when Bulk Inventory Discrepancies is chosen in the sort clause because it was not generating the group by clause.
Resolution:	The Cycle Count Status report now loads as expected when Bulk Inventory Discrepancies is used in advanced sorting.


3.6.2 Wrong Inventory Sets Reserves When Performing Reserve Inventory Action



Problem:	When users select inventory lines for reservation, other lines are sometimes reserved instead.
Cause:	The picking algorithm used to select appropriate inventories had a code error.
Resolution:	The system now behaves as expected when reserving inventory lines.

4 Revision History

Version	Release Date	Author	Comments
1.1	 27 Jun 2023	Tech Docs	Fixed issue with missing Table of Contents.
1.0	 27 Feb 2023	Tech Docs	Release Version.
0.5	 24 Feb 2023	Tech Docs	Edits and Updates: <ul style="list-style-type: none"> • "Support for Tracking Labels in the UI" • "Enhancements to Lead Logistics Provider Role" • "Updates to Bucketized Order Forecast Engine" • "Added Functionalities from Field Service Management (FISM) and Transportation Management (TMS)" • "Backward Incompatibility"

Version	Release Date	Author	Comments
0.4	📅 07 Feb 2023	Tech Docs	<p>Added Sections:</p> <ul style="list-style-type: none"> • Added backward compatibility issues section. <p>Edits and Updates:</p> <ul style="list-style-type: none"> • "Enhancements to Alert Subscription UI" • "Added Functionalities from Field Service Management (FISM) and Transportation Management (TMS)" • "Enhancements to Putaway Algorithm" • "Add Shipments Beyond the Confirmed State to Movements" • "Ability to Pick Singleton as an Internal Component When Assembling an Asset" • "Enhancements to the Alert Subscription UI" • "Item Catalog Visibility for 3PL Partners and Approved Vendor Lists (AVLs)" • "Added Functionalities from Field Service Management (FISM) and Transportation Management (TMS)" • "Enhancements to MRO Policies"

Version	Release Date	Author	Comments
0.3	 27 Jan 2023	Tech Docs	<p>Added Sections:</p> <ul style="list-style-type: none"> • "Ability to Convert Requisition Lines into Orders" • "Enhanced Bill of Materials Creation" • "Databots Support E-signatures" <p>Edits and Updates:</p> <ul style="list-style-type: none"> • "Enhancements to Invoices" • "Enhancements to the Asset History and Asset Details Screen" • "Enhancements to MRO Policies" • "Added Print PDF Option for Goods Receipt Notes and Checklists"

Version	Release Date	Author	Comments
0.2	 23 Jan 2023	Tech Docs	<p>Initial Customer Draft Release for UAT.</p> <p>Added Sections:</p> <ul style="list-style-type: none"> • "Highlight Lead Time on Projected Inventory Views(see page 39)" • "Adding Overrides to the Auto Schedule Freight Type per Partner(see page 37)" • "Chain Engine and Grid Enhancements(see page 95)" • "Support Variable Item Dimensions in Order Aggregation Engines(see page 93)" • "Validation Added for Ocean Booking Flow(see page 35)" • "Support for Tracking Labels in the UI(see page 24)" <p>Edits and Updates:</p> <ul style="list-style-type: none"> • "Adding Overrides to the Auto Schedule Freight Type per Partner(see page 37)" • "Demand Planning Agents and NEO UI Reports Support SNOP Models(see page 72)" • "Scenario Support for the Advance Replenishment Engine(see page 92)"
0.1	 19 Dec 2022	Tech Docs	Initial Draft Release for Stakeholder Review



About One Network

One Network is the intelligent business platform for autonomous supply chain management. Powered by NEO, One Network's machine learning and intelligent agent technology, this multi-party digital platform delivers rapid results at a fraction of the cost of legacy solutions. The platform includes modular, adaptable industry solutions for multi-party business that help companies lower costs, improve service levels and run more efficiently, with less waste. This SaaS and aPaaS platform enables leading global organizations to achieve dramatic supply chain network benefits and efficiencies across their ecosystem of business partners. One Network offers developer tools that allow organizations to design, build and run multi-party applications. Leading global organizations have joined One Network, helping to transform industries like Retail, Food Service, Consumer Goods, Automotive, Healthcare, Public Sector, Defense and Logistics. To date, more than 75,000 companies have joined One Network's Real Time Value Network™ (RTVN™). Headquartered in Dallas, One Network also has offices in Japan, Europe, and India.

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