



One Network Enterprises

NEO 3.8 Release Notes

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Table of Contents

1	Important Announcements	7
1.1	Windows 11 Support in NEO 3.8	7
2	System and Network Information	8
2.1	System Requirements	8
3	Enhancements and New Features	9
3.1	Supply Chain Administration	9
3.1.1	Audit Trail for Policies	9
3.1.2	Deactivating Unused Approval Routes	9
3.1.3	Descriptions for Product Group Levels	10
3.1.4	Enhanced Approval and Rejection Workflow for Approval Plans	10
3.1.5	Managing Item Substitutions for Partners	11
3.1.6	Restrict Visibility of Approval Plans and Approval Routes	12
3.2	IBP & S&OP	12
3.2.1	Add Price and Cost to S&OP Scenarios	12
3.3	Integration	13
3.3.1	Message Auditing for CSV, XML, JSON, and EDI Messages	13
3.3.2	File Naming Convention Update	14
3.4	Logistics and Transportation Management	15
3.4.1	Execution	15
3.4.2	Financials	25
3.4.3	Global Trade	27
3.4.4	Scheduling	34
3.4.5	Visibility	39
3.5	Manufacturing	48
3.5.1	Demand Translation	48
3.5.2	Production Management	49
3.6	Master Data Management (MDM)	50
3.6.1	Uploading Files Using Pipelines	50
3.7	NEO Platform	51
3.7.1	Enhancement to Managing Favorites	51
3.7.2	Disable Site-Site Group Association	52
3.7.3	Download Product Group Levels from the UI	53
3.7.4	Gauge Chart Added to Pivot Widget and Workbench	53
3.7.5	New Node Types and Enhancements for NEO Plasma Pipelines	54
3.7.6	Login and Page Load Performance Enhancements	55

3.7.7	Documentation of Facts and Attributes for Custom Analytic Widgets	55
3.7.8	New Deleted Document Alert	56
3.7.9	New Export File Format for Reports and Views	57
3.7.10	OAuth Support on HTTP Destination and OAuth2 Support on HTTPS Outbound	57
3.7.11	Support for Global Attachments in Integration Pipelines	58
3.8	NEO UI	60
3.8.1	Popup Appears When Exporting to CSV From Dashboard Widget	60
3.8.2	Relative Date Display Improvements	60
3.8.3	Updated Partner Invitation UI	62
3.8.4	User-Selectable Colors for Table Headers	62
3.9	Optimization	63
3.9.1	Demand Planning	63
3.9.2	Inventory Planning	68
3.9.3	Replenishment	71
3.9.4	Transportation Planning	73
3.10	Order Management System (OMS)	78
3.10.1	Approval Routing	78
3.10.2	ASNs	78
3.10.3	Blanket Orders	79
3.10.4	Contracts	80
3.10.5	Invoice Changes	82
3.10.6	Master Data	84
3.10.7	OMS Workbench	85
3.10.8	Purchase Orders	87
3.10.9	Requisitions	107
3.10.10	Return Orders	107
3.11	Spares, Maintenance, Repair, and Overhaul (SMRO)	108
3.11.1	Activate or Deactivate an Asset Type	108
3.11.2	Associate the Asset Category and Type by Asset Make and Model	109
3.11.3	Added Policies to Freeze an Asset Based on Asset State	109
3.11.4	Asset Status Changes to In-Transit or In-Stock State When the Shipment Is Shipped or Received	110
3.11.5	Creation User and Date Columns Added on Search Asset Meter and Attribute Configuration Reports	111
3.11.6	Enable Work Orders to Build Partial Asset Assembly and Rework	112
3.11.7	Enhancements to Work Order and Asset Alerts	113
3.11.8	Enhancements to the Work Order Report	114
3.11.9	Enhancement to the Maintenance Summary Report	114
3.11.10	Enhancement to Asset Meter and Asset Attribute Configuration Reports	115

3.11.11	Support for Configuring Due Days and Percentage for Asset Alerts	116
3.11.12	Restrict Role-Based Transaction on the Asset History	116
3.11.13	Support for Maintenance Calendar	117
3.11.14	Support for Work Order Problem Code and Resolution Code	118
3.11.15	Create Contracts for Preventive and Repair Work Orders	118
3.11.16	Support Versioning for Bill of Materials Selection	119
3.12	Warehouse Management System (WMS)	120
3.12.1	Added Filters to the Work Report	120
3.12.2	New InventoryMoveOrderInbound Interface	121
3.12.3	New Allow Inventory Management Policy Change Policy	121
3.12.4	Asynchronous Close Action for Pick Lists and Receipts	122
3.12.5	Generate Receipts for External Delivery Locations	122
3.12.6	New Integration Subscription: Inventory Inconsistency Outbound	123
3.12.7	Reason Code Field Added to Pick Lists, Packing Lists, and the Inventory Discrepancies Report	123
4	Bug Fixes	125
4.1	Integration	125
4.1.1	Enterprise Identification Number and Number Type Fields Marked as Mandatory – SCC-6874	125
4.1.2	Integration Pipeline Sort Node Table Does Not Have a Blanks First/Last Column – PLT-28008	125
4.1.3	SCC.InventoryBOH_IB Is Not Updating the On Hand Quantity – SCC-6835	125
4.2	Logistics and Transportation Management	126
4.2.1	Dates Are Blank after In-Transit Shipments are Updated – LN-97186/PDS-70622	126
4.2.2	Insufficient Error Message When GPS ID Is Already Assigned to a Vehicle – LN-94794/PDS-67084	126
4.2.3	Additional Charge Cost not Present in Charge Details in XML Tender Notifications – PDS-67522	126
4.2.4	Daily Appointments Inaccurate When Viewed in a Browser – LN-93932/PDS-66012	127
4.2.5	Exported Invoices Don't Show Actual Values – LN-96706/PDS-69619	127
4.2.6	Inconsistent Event Date Fields on Shipment and Movement Reports – LN-88035/PDS-61118	127
4.2.7	Issues with Load Consolidation Planning Engine - PDS-69713	128
4.2.8	Milestone Missed Alert Subscription Not Considering Milestone Type – PDS-71843	128
4.2.9	Non-interleave Static Routes Can Be Updated with Empty Arrival Day Offset Field – LN-85270/PDS-57265	128
4.2.10	Null Pointer Exception when Movement is Manually Rerated – LN-97432/PDS-71198	129
4.2.11	Performance Issues on the TMS Message Queue Summary Messages Report – PDS-67680	129
4.2.12	Memory Constraint Error on Shipment Creation – PDS-61913	129

4.2.13	Shipper Unable to Delete a Movement in the 'Canceled By Carrier' State – LN-95845/ PDS-68646	130
4.2.14	System is Including Deleted Shipments in Consolidated Movements – LN-97293/ PDS-70560	130
4.2.15	Time Zone Issues in Static Route Definitions – LN-94112/PDS-66265	131
4.2.16	Tracking Events not Generated for Shipments after Cargo Response – PDS-68367	131
4.2.17	Unable to Find Resource Error when Processing Shipment Alerts – PDS-69831	131
4.2.18	Unable to Sort Columns on Select Reports – LN-89059/PDS-60712	132
4.2.19	Vendor Roles Don't Have All Features after Onboarding – LN-67968/PDS-71661	132
4.2.20	Weekly PCV Search Does Not Load when Accessed via Favorites – LN-93768/ PDS-66026	132
4.3	Manufacturing	133
4.3.1	Extra Fields on the File Exported from the 'Production Order Failed Milestone Summary' Widget – PDS-69515	133
4.4	NEO Platform	133
4.4.1	Enterprise-specific Translations Fail to be Honored if the Enterprise Name Contains Special Characters – PLT-30325	133
4.4.2	Custom Tracking Event Names Adding Undesired Space – PLT-31133	133
4.4.3	EDI Issue Alert Does Not Have Complete Data – PLT-30831	134
4.4.4	Error on Updating Inactive User Details - SCC-6850	134
4.4.5	Exported CSV Files Do Not Show Which Columns Are Mandatory Fields - PLT-30111	134
4.4.6	Full Name of Uploaded Files Not Visible – LN-79790/PLT-27445	135
4.4.7	Leading and Trailing spaces in Master Data – PLT-29558	135
4.4.8	Milestone Report CSV File Row Limit Is 50,000 – LN-94074/PLT-30655	135
4.4.9	Number -128 Not Displaying on Reports – PLT-30612	136
4.4.10	Integration Files Processing to a Message Queue – LN-95173/PLT-30543	136
4.4.11	Purchase Order Integration Errored Out – LN-97868/PLT-31551	137
4.4.12	Transactions Processed Even Though the Role Is out of Effective Date Range - PLT-30340	137
4.5	NEO UI	137
4.5.1	Progress and Job Status Not Displayed When Exporting from Widgets - PLT-29924	137
4.5.2	Advanced Sorting Menu Does Not Work when Opened from Favorites – LN-96784 / PLT-31348	138
4.5.3	Bar Chart Widgets Not Clickable in Certain Situations – PLT-30458	138
4.5.4	Date and Time Fields Work Incorrectly for Spanish Language – LN-96322/ PLT-30979	138
4.6	Optimization	139
4.6.1	Multiple Values Cannot Be Selected for Filters on Bucketized Order Forecast Alert Subscriptions – PDS-68807	139
4.6.2	Replenishment Generates a New PO When the Same Item Has an Existing PO with a Future Delivery Date – PDS-65503	139
4.7	Order Management	139

4.7.1	Blank Screen Appears When Opening a Purchase Order Detail Screen – PDS-65419	139
4.7.2	Commodity Code Not Populating When Requisition Converts to a Deployment Order – LN-96300/PDS-69277	140
4.7.3	Commodity Codes Not Visible on the Search Item Report – PDS-69402	140
4.7.4	Error Message when Creating ASN for Purchase Order – PDS-66215	140
4.7.5	Inconsistent Requisition Sync Behavior When a Purchase Order Line Is Canceled – PDS-70745	141
4.7.6	Performance Issues in Shipment Integration - PDS-66833	141
4.7.7	Price Cannot Be Updated to Zero on Requisitions – LN-97460/PDS-70767	141
4.7.8	Unpredictable Order Visibility for Supplier Roles - PDS-65156	142
4.7.9	Unable to Save Changes Made in Purchase Order Template – LN-93283/PDS-66226	142
5	Revision History	143

1 Important Announcements

1.1 Windows 11 Support In NEO 3.8

Starting with NEO 3.8, Windows 11 is supported. Windows 10 will continue to be supported.

2 System And Network Information

2.1 System Requirements

Operating System Requirement:

- Windows 10
- Windows 11

Browser Requirement:

- Chrome (verified on version 113.0.5672.127)
- Microsoft Edge (verified on version 113.0.1774.57)

Hardware Recommendation:

For optimal performance, ONE recommends

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

Internet Connection:

For optimal performance, ONE recommends that users have a bandwidth of no less than 30mbps (download) with no greater than 10ms latency. ONE leverages a CDN (Akamai) with edge caching to reduce latencies globally. The application is still functional with reduced speed of as low as 10mpbs (download) and latency as high as 20ms - however this results in significantly degraded performance. Speeds slower than these thresholds are not recommended.

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

3 Enhancements And New Features

3.1 Supply Chain Administration

3.1.1 Audit Trail for Policies

The NEO 3.8 release supports an audit trail for policies. This feature allows users to view and track data changes made to a policy. Previously, the system did not keep track of audit records for policies. The new capability helps users view and track all changes for any policy, including the date the change was made, the user who made the change, and the old and new values for the changed field. A new column with an Audit Trail button is added to the Search Policies screen. Clicking the Audit Trail button for a policy on the Search Policies screen displays the change history for the policy in a separate tab.

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

3.1.2 Deactivating Unused Approval Routes

Users can now deactivate an approval route while creating a new route or editing an existing one. A new option, Active, is added to the Create Approval Routing Rule screen, the Approval Route details screen, and the Approval Routes tab of the Approval screen. Previously, if an approval route existed with a specific model-action combination, users could not create another approval route with the same combination even if the route was no longer used. This enhancement allows the deactivation of an approval route that is no longer needed and allows the creation of a new one using the same model-action combination. This frees up model-action combinations used in existing routes and allows for creating approval route templates with specific combinations. Note that approval routes can only be used if marked Active, and approval plans for a model are not generated if the approval route is not marked Active.

For this enhancement, the Route Name field is also added to the Create Approval Routing Rule screen, the Approval Route details screen, and the Approval Routes tab of the Approval screen. This field is required.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Deactivating Unused Approval Routes" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Also, please see the "Working with Approval Routing Frameworks" section in the current release of the <i>Online Help</i> for more information.

3.1.3 Descriptions for Product Group Levels

Users can now add a description while adding new product group levels. Descriptions can be added for each product level in the product hierarchy. This enhancement allows users to add context to different product levels, such as what they mean or why they were added.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Adding Descriptions to Product Group Levels" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Also, see the "Adding Product Group Levels to Product Hierarchies" section in the current release of <i>Online Help</i> .

3.1.4 Enhanced Approval and Rejection Workflow for Approval Plans

Starting this release, users in an Approver role can view the details of and approve or reject an approval plan from the Approval Plans tab on the Approval screen. Users in an Observer role can also view plan details from this location.

The following UI changes are performed as a part of this enhancement:

- A new icon is added next to the Delete button for Update approvals on the Approval Plans tab on the Approval Screen. When users click this icon, a slideout opens with existing field values and proposed changes to let the approver verify the changes by comparing the existing field values with the proposed changes before approving or rejecting the plan. This icon is enabled only for update approval requests.
- Each approval plan visually represents the approval flow, with each approver shown with a checkmark icon. When users click the checkmark icon, another slideout opens with plan details, a text box for comments, and Approve and Reject buttons. The buttons and comment fields are inactive for users not in the approver role. When a user approves a plan, the checkmark icon turns green.
- The Approvals tab is removed from the model details screen.

Previously, users could only view the approval flow and actions log from the Approval screen. Users had to then navigate to the model details screen to approve or reject a plan. With this enhancement, users can view and take action on an approval plan on a single screen.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing, Approving, or Rejecting Approval Plans" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.1.5 Managing Item Substitutions for Partners

Starting this release, managing organizations are authorized to perform item substitutions for their partners. Master data management for partners in ONE allows managing organizations to manage a partner's master data through the UI or integration. This feature is useful when a partner organization cannot access the ONE system. In such cases, a designated managing organization can perform item substitution tasks for them. The managing enterprise and managing organization must be uploaded using the Item Substitution inbound interface to enable them to manage item substitutions for partners.

As part of this enhancement, two new fields, Managing Enterprise and Managing Org, are added as filters on the Search Item Substitution screen and as columns on the Search Item Substitution report. These new columns are also added to the Item Substitution inbound interface 3.0.

Analytics Impact	None
Integration Impact	SCC.ItemSubstitution_IB.csv v3.0

Related Functionality	None
Usage and Configuration	See the "Uploading Files Using Pipelines" section in the current release of the <i>New Feature Usage and Configuration Guide</i> . Also, please see the "Searching Item Substitutions" sections in the current release of the <i>Online Help</i> for more information.

3.1.6 Restrict Visibility of Approval Plans and Approval Routes

The visibility of approval plans and routes can now be restricted to users, user groups, or role levels specified in the Approval Route builder or added as observers. The plan is not visible to any other user, user groups, or role levels, including the route creator, if not listed in the builder or added as an observer.

Previously, approval plans and routes were visible to all the users under the same enterprise. This posed a data privacy threat and defeated the purpose of adding an observer for the route and its routing lines. This feature helps to restrict the visibility of approval plans to specific users, groups, or roles, enhancing privacy and security.

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

3.2 IBP & S&OP

3.2.1 Add Price and Cost to S&OP Scenarios

In this update, we have made significant improvements to the SNOP (Sales and Operations Planning) price and cost model. The previous static model has been replaced with a more dynamic scenario-based model.

Key Changes:

1. **CRUD Functionality:** Users can now easily modify the base price by a percentage or absolute change.
2. **Override Capability:** Users can override prices and costs for specific durations.
3. **Scenario-specific:** Prices and costs are specific to each scenario, allowing for better what-if analysis.
4. **Enhanced Revenue Queries:** Revenue queries now consider scenario-based prices and costs.

These changes allow users to test different scenarios and variations without any additional steps. The new model enables better decision-making by storing scenario-specific prices and costs. Users can also override prices and costs as needed for specific durations.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Using Price and Cost with S&OP Scenarios" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.3 Integration

3.3.1 Message Auditing for CSV, XML, JSON, and EDI Messages

Starting this release, users can audit CSV, XML, JSON, and EDI payload messages. The audit function captures each time users view, modify, or delete messages, allowing administrators to review which actions users performed and when. By default, this feature is disabled unless explicitly enabled using the new `PLT.SensitiveActionAudit` external reference. Contact your ONE representative for assistance.

A new report called Security Events is added for Value Chain Admin and Enterprise Admin roles to support this enhancement. This report lists all audited security events in a convenient list that can be exported to CSV. No other actions are available, and the report is read-only. In addition, the pre-existing Messages report is updated to support two new audit entries: Downloaded Payload and View Payload; these audit events capture each time a user downloads or views a payload message. This feature is added to better protect sensitive information by recording all access to the information.

Analytics Impact	None
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Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Security Events Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>See the "Messages Report" section in the current release of the <i>Online Help</i> for more information.</p> <p>See the "System Configuration" section in the current release of the <i>Developer Network Documentation</i> for more information.</p>

3.3.2 File Naming Convention Update

The ONE system now uses an updated file naming convention for generating integration files. This naming convention uses an opaque GUID instead of an IP/Port/Timestamp. This improvement promotes an ability to identify file details without revealing any sensitive information, thus ensuring consistency in the naming convention without compromising security.

If your organization has a dependency on the old file naming pattern, please contact your ONE representative for assistance in modifying your instance to use the old naming convention.

- Example of old pattern: MyFile.csv_10.1.2.3_8099_20230216190617136
- Example of new pattern: MyFile.csv_5d78c46d-2591-4513-a4f8-89b86d89c4f5

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	Contact your ONE representative for assistance.

3.4 Logistics And Transportation Management

3.4.1 Execution

3.4.1.1 Enable Vendors to Update Shipments in the In-Transit State

In the NEO 3.8 release, ONE enables vendors to update shipments in the In-Transit state if the user configures the Allow Vendor Update Shipment policy on the Transportation Policies screen. Previously, the vendors could only update the shipment state up to the Pick Ready state. This improvement enables vendors or suppliers to make necessary changes to a particular shipment even if the vendor is not a Transportation Controlling Organization (TCO) for that shipment. The capability helps vendors to view and track respective shipment details and take appropriate actions.

Prerequisite: If the Allow Vendor Update Shipment policy is not enabled, vendor or supplier users cannot update the shipment details.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Enabling the Allow Vendor Update Shipment Policy" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.4.1.2 Bulk Upload Shipment Milestone Processes

In the NEO 3.8 release, the system provides a dedicated upload interface where users can add new milestone processes. This enhancement allows Transportation Managers to bulk upload the shipment milestone processes using CSV files. Users can use this feature to create new shipment milestone processes and update existing ones.

Previously, users needed to add the shipment milestone process one at a time which took a lot of time and effort. This improvement helps users to manage shipment milestones across organizations more efficiently.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Bulk Uploading Shipment Milestone Processes" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Also, please see the "Uploading Files" and "Working with Shipment Milestones" sections in the current release of the <i>Online Help</i> for more information.

3.4.1.3 Added a Return Flag at the Stop Level for Special Case Workflows

In the NEO 3.8 release, we have included a return shipment flag for use in a special case workflow. The workflow allows users to create return shipments at the line level for static routes with the following parameters:

- Directionality = Outbound
- Shipment Generation Scheme = Daily
- Operation = Single Pick Multi Drop

At the stop level, a stop on the route requires a Return shipment type, and the next stop requires an Empty Box Pickup shipment type (or any other equipment type that is not an actual shipment delivery). Both stops must have No set for the Disable Auto Shipment Generation field, and the last stop is the depot. The enhancement provides a workflow for drivers to pick up items at a stop that need to be returned to a depot, which helps return equipment while keeping to the route. The option to flag a stop for a return in a static route was not previously offered, so carriers had to create other means to get equipment back to a depot.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the "Creating a Return Shipment for Special Case Workflows" section in the current release of the *New Feature Usage and Configuration Guide* for more information.

3.4.1.4 Added Commercial Invoice Support for DHL International Shipments

Starting this release, users can view and verify the commercial invoice in the document tab for international DHL shipments. Previously, users could not view commercial invoices for international DHL shipments. This improvement enables the system to insert the shipment line-specific information such as shipped quantity, unit price, and other details into the commercial invoice document. The commercial invoice document is then generated and available on the shipment details screen under the Documents tab in the Global Trade pane. Users can click the Commercial Invoice link to download the invoice as a PDF file. This enhancement helps enable paperless invoicing and makes viewing invoices more convenient for users.

A commercial invoice document format may contain the following fields:

- Sender information
- Receiver information
- Date
- Waybill Number
- Invoice Number
- Bill To information
- Bank Details
- Exporter information
- Description of Goods
- Commodity Code
- Unit Quantity
- Unit Value
- Net and Gross Weight
- Country of Origin

Prerequisite:

Users must define Commercial Invoice as a document type before creating an international DHL shipment, or the commercial invoice for a DHL shipment will not be available under the Global Trade pane.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	See the "Viewing Commercial Invoices for DHL International Shipments" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Also, please see the "Creating New Document Types" section in the <i>Online Help</i> for further information.

3.4.1.5 Added the Movement Number Column to the Copy Shipment Popup Window

In the NEO 3.8 release, ONE adds the Movement Number column to the Copy Shipment popup window to view and access the movement details. Users click the respective movement number link to navigate the movement details screen. Previously, users were required to search for movement information separately. This enhancement eliminates that extra step and allows users to easily access the movement from the popup window when copying a shipment.

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

3.4.1.6 Added the Special Instructions Field to the Appointment Screen

In this release, ONE introduces a Special Instructions field on the Reservation tab of the appointment creation screen. The field displays customer-centric transportation instructions for a site that can be used for both live and drop appointment types. The Special Instructions field displays the instructions, an ellipsis (three dots) in case of multiline instructions, and a View link. Upon clicking the View link, the Special Instructions popup window displays the full special instructions for the site associated with the appointment. Previously, the user needed to navigate to the site details screen to view the special instructions for the site. This improvement ensures better visibility to the carrier and trading partners and saves users time with minimal clicks to view the instructions.



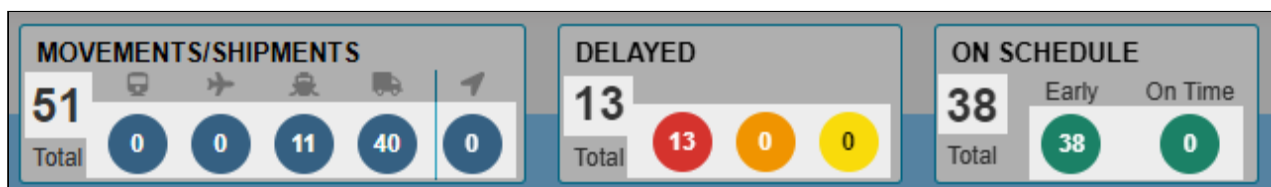
Note

The Special Instructions field is not displayed on the appointment screen if the transportation instructions are not defined for a site.

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

3.4.1.7 Clickable Movement Detail Badges on RTTEP Screen

This release improves the Real-time Transportation Execution Perspective (RTTEP) screen for Transportation Manager roles by making the count badges at the top of the screen clickable. These badges show the number of movements and shipments by transit type, delayed status, and on-schedule status; when clicked, a filtered report shows all movements and shipments with the selected characteristics. Note that any badges with a count of zero are not clickable. In addition, the Total numbers are clickable and open a filtered report of all movements and shipments in the category. Previously, the count badges only showed a page-wide count rather than a count of total movements, and the counts were not clickable.



This enhancement allows users to easily view movements and shipments with specific attributes directly from the RTTEP screen, saving time. After clicking the badges, users can export the results to a CSV file, view routes, and perform various actions on movements and shipments. No additional setup is required of the user; this feature is enabled by default.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the "Viewing Movements Details on the RTTEP Screen Using Badges" section in the current release of the *New Feature Usage and Configuration Guide* and the "Movement Shipment Reports" section in the current release of the *Online Help* for more information.

3.4.1.8 Added Size Field to Equipment Settings

Starting this release, a new field, Size, is added to the Equipment Settings detail screen, where users can specify equipment size while creating or updating equipment settings. When users create a new shipment or update a shipment or movement, the Size field on the shipment header auto-populates with the value specified in the new Size field on the Equipment Settings detail screen for the selected equipment. In addition, the Transportation Mode field auto-populates with the Transit Mode value specified on the Equipment Settings screen for the selected equipment. Previously, users had to enter the equipment size manually for a shipment or movement. This enhancement automates this process by auto-populating the size field on the shipment creation and shipment update screens. This feature is also supported in EDI 204 equipment size segment and the 204 XML generated during shipment tendering.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Specifying the Size on Equipment Settings" 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"> • "Adding New Equipment Settings" • "Updating Equipment Settings" • "Header Tab" under "Creating Shipments Using Standard Template"

3.4.1.9 Mid-week and Mid-month Shipment Generation for Static Routes

In the NEO 3.8 release, shipments can be generated mid-week or mid-month for static routes with weekly or monthly shipment generation schemes as long as the scheduled date is within the effective date range. Previously, if a static route was configured for weekly or monthly shipment generation, shipment generation only occurred at the beginning of the week or month unless the user manually adjusted the effective dates or shipment generation days. With this enhancement, newly created static routes beginning mid-week or mid-month automatically generate shipments mid-week or mid-month as long as the scheduled date is within the effective date range for the static route.

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

3.4.1.10 Multiple Carrier Quotes for Conditionally Accepted Spot Bid Tenders

With this release, carriers can submit multiple quotes in response to a spot bid tender. Quotes may vary based on cost, service level, transit time, etc. The quotes must include the following details:

- **Cost** - the price of transportation service
- **Transit Time** - the amount of time required to transport the movement from origin to destination
- **Service Level** - service level of the movement (standard delivery, same-day delivery, and so on)
- **Description** - carrier remarks

When the carrier submits multiple quotes, the system selects the first quote and displays the charges mentioned as spot costs for the tender. When the Transportation Controlling Organization (TCO) accepts a quote, the quote charges reflect the tender cost, and the movement is confirmed to the carrier with the service level specified in the accepted quote. A new link, Q, is added in the Links column on the Tender details screen as part of this enhancement. Users can click this link to view all quotes in a table, compare them, and select the best quote.

Users can apply the existing Review Response filter on the Tendered shipment report to filter out the conditionally accepted movements. Customers and carrier users can configure the existing Movement Event alerts to receive updates. Previously, the system allowed carriers to submit only one response. This enhancement gives both the TCO and carriers more options to complete a movement.

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

3.4.1.11 Extend Service Levels to Different Shipment Legs

Starting this release, the service levels configured for a shipment can be extended to different legs from the UI. Extending service levels to different legs of multi-modal shipments is essential to keep service levels for individual legs in sync with the parent shipments. Previously, users had to manually set the service level for each shipment leg through an external reference. As part of this enhancement, a new flag, Propagate to Legs, is added to the New Service Level and Service Level details screens and as a column to the Service Levels screen. When this flag is enabled, users do not need to manually set service levels for each shipment leg since the service level is automatically extended to the individual shipment legs. Users can still change the service level for a specific shipment leg if required.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Extending Service Levels to Different Shipment Legs" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. See the "Service Levels" section in the current release of the <i>Online Help</i> .

3.4.1.12 Reason Code and Comment for Approving or Rejecting Additional Charge Requests

Starting this release, the shipper user can select a reason code and add comments while approving or rejecting an additional charge. As part of this enhancement, two new fields, Reason Code and Reason Code Comment, are added to the Approve and Reject popup windows and the Additional Charge Requests report. The reason code and comment are visible on the Movement History details screen when the additional charge request is approved or rejected. This enhancement gives the shipper an efficient way to communicate why an additional charge request was approved or rejected.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Approving or Rejecting Additional Charge Requests" section in the current release of the <i>New Feature Usage and Configuration Guide</i> and the "Viewing Movement History" section in the current release of the <i>Online Help</i> for more information.

3.4.1.13 Split Ocean Bookings with Multiple Containers

Starting this release, users can split ocean bookings with multiple containers into additional bookings. A Split Booking action and a Split Booking Number column are added to the Bookings report screen. The Split Booking action is only visible for confirmed bookings with multiple containers. Users can view the split bookings by clicking the triangle in the Split Booking Number column on the Bookings screen; the split bookings are shown as child bookings of the original parent booking. The newly created bookings can be split further, but the new bookings are still created as child bookings of the original parent booking. This enhancement helps users efficiently manage containers for bookings.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the "Splitting Ocean Bookings" section in the current release of the *New Feature Usage and Configuration Guide* for more information.

3.4.1.14 New Number Rounding Option

This release expands how rounded numbers are calculated in the system for transportation users. To support this enhancement, a new boolean policy called Rounding to Next Decimal is added to the Execution Policies screen. This policy is intended to function as a sub-policy of the pre-existing Rounding Decimals For Cost policy and is only accessible when the Rounding Decimals For Cost policy is enabled. Previously, when only the Rounding Decimals For Cost policy was enabled with an integer N, then only N+1 digits after the decimal point were considered for rounding. But now, when the new Rounding To Next Decimal policy is also enabled, N+1 and N+2 digits after the decimal point are considered for rounding.

This enhancement is added to address edge cases when unintuitive rounded numbers appear in the system; this is best illustrated with the following examples:

- **Scenario 1:** If the Rounding Decimals For Cost and Rounding to Next Decimal policies are undefined, then the system defaults to considering all digits for rounding and rounds to two decimal points.
Raw number = 1.234467
1.234467 → 1.23447
1.23447 → 1.2345
1.2345 → 1.235
1.235 → 1.24
Rounded number = 1.24
- **Scenario 2:** If the Rounding Decimals For Cost policy is enabled (in this example, set to N=2) and the Rounding to Next Decimal policy is False, then the system considers N+1 digits (3 in this example) after the decimal point for rounding and rounds to N decimal points.
Raw number = 389.72499999997
389.72499999997 → 389.724
389.724 → 389.72
Rounded number = 389.72
- **Scenario 3:** If the Rounding Decimals For Cost policy is enabled (in this example, set to N=2) and the Rounding to Next Decimal policy is True, then the system considers N+1 and N+2 digits (4 in this example) after the decimal points for rounding and rounds to N decimal points.
Raw number = 389.72499999997
389.72499999997 → 389.7249
389.7249 → 389.725
389.725 → 389.73
Rounded number = 389.73

Using the new Rounding to Next Decimal policy with the Rounding Decimals For Cost policy (Scenario 3) produces more predictable and usable rounded numbers.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Using the Rounding to Next Decimal Policy" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.4.2 Financials

3.4.2.1 Added Financials Tab to the Shipment Details Screen

In the NEO 3.8 release, ONE introduces the Financials tab on the shipment details screen. This improvement allows users to access the costs associated with the particular shipment. The incurred costs are collectively grouped and displayed under the Financials tab in the Receivable Invoice pane and Payable Invoice pane.

This financial information is arranged and displayed under columns, including Invoice Line, State, Contracted Cost, Invoiced Cost, Approved Cost, Invoice Line Type, and Accessorial columns. This enhancement brings relevant financial information on the same page and helps enhance users' efficacy and visibility.



A shipment can have multiple invoice lines. Each invoice line displays financial details separately.

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

3.4.2.2 Create a Supplementary Invoice with User-Selected Invoice Lines from an Existing Invoice

Beginning in the NEO 3.8 release, users can create a supplementary invoice with user-selected invoice lines from an existing invoice. Previously, invoice lines could not be split from the existing invoice into a new invoice. With this enhancement, users can create a replica of the original invoice that only includes selected invoice lines. On the original invoice, those selected lines are canceled. The supplementary invoice has a link to the original invoice through the Related Invoice field on the invoice detail screen.

For this enhancement, ONE adds a Create Supplementary Invoice button on the detail screen for payable invoices in the For Review state. This button opens a popup window with a customized report containing invoice lines in the For Review states, where users can select the lines to be included in the supplementary invoice. This enhancement makes the invoicing process more flexible since invoices no longer have to be held until all lines are ready for payment.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Creating a Supplementary Invoice from an Existing Invoice" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. See the "Searching and Viewing Payable Invoices" section in the current release of the <i>Online Help</i> for additional information.

3.4.2.3 Support for Searching Invoice Lines Using Multiple Invoice Numbers

Starting this release, multiple invoice numbers can be entered in the Invoice Number filter on the Invoice Lines report screen. Users can enter multiple invoice numbers separated by a semicolon (;) in the Invoice Number filter. Previously, users could add only one invoice number and download one invoice line report per invoice on the Invoice Lines report. This enhancement improves users' ability to search for, filter, view, and download invoice line reports.

Analytics Impact	None
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Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Searching the Receivable or Payable Invoice Lines Report Using Multiple Invoice Numbers" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.4.2.4 Warning Message When Approving an Invoice on a Movement with Existing Approved Invoices

Starting this release, the ONE system displays a popup notification if the user approves an invoice on a movement that carries an existing approved invoice. The popup message indicates the invoice number, existing approved invoice details, and the associated approved amount. The user clicks Yes on the popup message to continue with invoice approval or clicks No to cancel the action. Previously, if the carrier sent duplicate invoices, the user had to fetch details and verify if the respective movement had an existing approved invoice. This was a time-consuming activity. The added improvement enhances and expedites the invoice approval process and also helps prevent the accidental payment of duplicate invoices.

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

3.4.3 Global Trade

3.4.3.1 Reorganized Transshipment Fields to Allow Multiple Transshipment Ports

This release moves the individual Transshipment fields (Transshipment, Transshipment Port, ETD Transshipment Port, ETA Transshipment Port, and Vessel Name) on the Shipment details screen and places them in a table, providing the capability to add multiple transshipment ports (up to five) to the shipment. Previously, only one set of Transshipment fields was available for input, and thus details for only one transshipment port could be added. This enhancement helps users add and configure multiple transshipment ports as required. Users can click the new Add link to add transshipment ports to the Transshipment field table

under the Header tab on the Shipment Details UI. Columns are added to CSV interface for transshipment ports in the shipment CSV inbound interface to create multiple transshipment ports for a shipment.

Analytics Impact	None
Integration Impact	Yes. The 315 EDI interface is enhanced to identify the proper shipment leg when events occur at the transshipment ports. The CSV interface is updated to support multiple transshipment ports.
Related Functionality	None
Usage and Configuration	See the "Adding Multiple Transshipment Ports to a Shipment" section in the <i>New Feature Usage and Configuration Guide</i> . See the "Header Tab" subsection under the "Creating Shipments Using Standard Template" section in the current release of the <i>Online Help</i> for more information.

3.4.3.2 Added Support for IMO and MMSI Numbers For Shipments

The Vehicle Number field on the Shipment Header tab is updated to support International Maritime Organization (IMO) and Maritime Mobile Service Identity (MMSI) numbers. Users can find a vessel's IMO or MMSI number using Vessel Finder. The ONE system validates the IMO/MMSI number entered using the Vessel Finder API and provides vessel details, enabling the user to track the vessel and get details without entering the vessel's name. This enhancement is only applicable to shipments created using the Standard template. The Vehicle Number field on shipment upload CSV files also accepts IMO and MMSI numbers.



Note

If the value entered in the Vehicle Number field is a seven-digit number, the system recognizes it as an IMO number, and if the value is nine digits long, it is recognized as an MMSI number.

IMO is a unique seven-digit reference number assigned to each ship for identification purposes. The IMO number is mandatory for all propelled seagoing vessels with a gross tonnage of 100 tons and above. The IMO number is permanent, meaning it remains unchanged throughout the vessel's life cycle irrespective of changes in ownership, country of registration, name, or flag.

MMSI is a nine-digit number used with marine traffic monitoring systems to identify a vessel. The rules for assigning MMSI are set by International Telecommunications Union (ITU). Unlike the IMO number, MMSI changes when the vessel's flag changes.

The Control Tower Workbench screen is updated to support vessel search using IMO/MMSI numbers, showing a more accurate vessel position on the map view. With this enhancement, users can more easily track vessels using their IMO/MMSI numbers instead of entering the vessel name.

Analytics Impact	None
Integration Impact	TMS.ShipmentInboundInterfacev1
Related Functionality	None
Usage and Configuration	<p>See the "Adding IMO or MMSI Numbers to Shipments" 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>:</p> <ul style="list-style-type: none"> • "Header Tab" section under "Creating Shipments Using Standard Template" • "Vessel Tracking" under "Working with the Control Tower Workbench"

3.4.3.3 New Standard JSON Inbound Interface for Updating and Tracking Shipments

NEO 3.8 adds a new JSON inbound interface that supports operations involving booking/shipment updates, container assignments, container packing list creation, packing list information, and tracking event creation. Previously, interfaces were available to perform all of the above operations, but they were separate. Freight forwarder users often uploaded this information in a single integration file, which had to be split to be uploaded to the ONE system. To support this enhancement, the following fields are added to shipment detail screens:

- Empty Pick-up Site
- Empty Pick-up Address
- Empty Pick-up Date
- Empty Return Site
- Empty Return Address
- Empty Return Date

This enhancement is added to allow users to perform a variety of shipment and container-based tasks from a single interface. Integration teams at ONE can also use this interface to take inputs from customer-specific formats and convert them to this format, allowing the interface to be used generically for any customer.

Analytics Impact	None
Integration Impact	<p>Added the following fields to the pre-existing ShipmentInboundInterface:</p> <ul style="list-style-type: none"> • EmptyPickUpSiteName • EmptyPickUpSiteOrganizationName • EmptyPickUpSiteEnterpriseName • EmptyPickupDate • EmptyReturnSiteName • EmptyReturnSiteOrganizationName • EmptyReturnSiteEnterpriseName • EmptyReturnDate
Related Functionality	None
Usage and Configuration	Contact your ONE administrator for additional information.

3.4.3.4 LCL Shipments Cannot be Added or Removed from Movements with Active Booking Requests

Starting in the NEO 3.8 release, less-than-cargo-load (LCL) shipments cannot be added or removed from movements with active booking requests. LCL shipments are a method of shipping smaller shipments instead of a full container load by ocean; they are similar to less-than-truckload (LTL) shipments, which are by truck. With this validation, users can no longer change the structure of movements when those movements have active booking requests associated with them, reducing container load planning failures. If users attempt to consolidate or unconsolidate shipments from such a movement, an error message appears. If users must change the movement structure, the booking must be canceled, the load unconsolidated, the correct consolidation chosen, and the book initiated again.

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

3.4.3.5 Added the Shipment Log Report

In the NEO 3.8 release, ONE introduces the Shipment Log report for Transportation Managers. The report provides a simplified view of the planned, confirmed, and actual values defined for various shipment fields. This report displays the values in the Planned Value, Confirm Value, and Actual Value columns. Users can configure these values on the Tracking Event Policies screen under the Shipment Events tab. The value defined for an event type is displayed under the Target Log Category column. Previously, there was no option to capture the planned, booked, and actual values in a single row. Users had to search through the entire log report to view these details. The newly added report helps users to view, streamline, and track values defined for the shipment fields.

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

3.4.3.6 Support TEUs for Carrier Commitments

The NEO 3.8 release adds a new option called Twenty-foot Equivalent Units (TEU) for carrier commitment criteria. In multi-modal transportation, carriers often measure their capacity in TEUs, a loosely-defined standard where one 20-foot container equals one TEU and one 40-foot container equals two TEUs. This option is available for Transportation Manager roles and is added to the Commitment Criteria field available when creating new or modifying existing carrier commitments. Previously the Commitment Criteria field only supported Count and Distance as options. This enhancement is added to enable the system to support a widely used industry unit, allowing users to specify the number of TEUs as a carrier commitment per lane and equipment.

Analytics Impact	None
Integration Impact	None

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

3.4.3.7 Enhancements to the Lead Logistics Provider Role

In the NEO 3.8 release, the Lead Logistics Provider (LLP) role receives several updates to enhance the user experience. Previously, LLP users could only view alert information and problem summary details. The enhancement gives users an intuitive experience with real-time informational widgets, reports, and activity menus, providing better visibility to view, analyze, and track operational data.

The following elements are added as part of the enhancement:

- Intuitive and user-friendly dashboard with the following useful widgets:
 - Unplanned Shipments, Delayed Movements, and Failed Milestones count widgets
 - Shipment State Summary, Container State Summary, Booking Request State Summary, and Activity Stream widgets
- Added Shipment Tracking Event report under the Reports menu
- Added Message Queue Summary report, Manage EDI Queue report, and Message Status report under the Tools menu
- Added the Control Tower Workbench to the Transportation menu

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"> • "Shipment Tracking Event Report" • "Message Queue Summary Report" • "Managing EDI Queues" • "Working with the Control Tower Workbench"

3.4.3.8 Carrier Prescriptions for Shipments Based on Requested Container or Shipment Weight

In NEO 3.8 release, the system displays prescriptions to recommend carriers offering the lowest per-container price for an ocean shipment based on the requested container information or the shipment weight. These prescriptions are displayed as a NEO icon on the Search Shipment report and the shipment details screen.

The prescriptions are generated only when the transportation mode is Ocean. Users can click the NEO icon in the prescription message to go to the relevant screen for the subsequent actions:

- If the requested container information is present on the shipment, clicking the NEO icon takes users to the New Booking screen. The carrier and container details are prepopulated under the General and Containers tabs.
- If the requested container information is not available, but the weight is specified, then the system calculates the container size and the number of containers required for the shipment and recommends the carrier offering the lowest per-container rates. Clicking the NEO icon takes users to the New Booking screen. The carrier and container details are prepopulated under the General and Containers tabs.
- If the requested container information or the shipment weight is specified, but there are no per-container rates configured in the system for any available route carriers, the system does not display any prescription.

Prerequisites

- Either requested container information or weight details must be present on the shipment.
- Per-container rate must be configured in the system for route carriers.

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

3.4.4 Scheduling

3.4.4.1 System Saves the Preferred Calendar View

Beginning with this release, the zoom level from the user's last login is saved and displayed when a user views a site calendar. Previously, a user had to zoom in or out on the calendar to achieve the desired view each time they logged in. With this improvement, the system opens the calendar view based on the latest saved user preference. This enhancement saves time and requires no further action by the user.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Scheduling Appointments for Dock Door Groups" and "Searching Dock Door Groups" sections in the current release of the <i>Online Help</i> for more information.

3.4.4.2 Added an Alert for Soft Appointments Not Confirmed

NEO 3.8 adds a new alert subscription for soft appointments not yet confirmed. The enhancement alerts schedulers that soft appointments will expire soon and helps them manage appointment capacity. Users subscribe to the new alert using the standard alert subscription and selecting Reservation in the Category field and Soft Appt Not Confirmed Alert as the alert type.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Subscribing to an Alert for Soft Appointments Not Confirmed" section in the <i>New Feature Usage and Configuration Guide</i> for more information.

3.4.4.3 Disabling Appointment Links for Trading Partners Using Exclusion Rules

In the NEO 3.8 release, ONE enhances the exclusion rules to exclude the respective partner(s) from accessing the appointment links to schedule, cancel, or update an appointment for a shipment.

As part of the enhancement, the appointment links are disabled for partner users on the Schedule tab of the Shipment details screen and Movement Shipment report when exclusion rules are applied for that partner. The partner user cannot access the links but can view the appointment number and type of schedule. This is a consistent change for enforcing appointment links based on applicable exclusion rules on the movement shipment report.

The exclusion rules are aligned with the Scheduling Policies to help users exclude the partner/partner profiles. This enhancement ensures that users will gain complete control and visibility over scheduling, rescheduling, and appointment cancellation with the ability to exclude partners.

Users must set the following values in the Applicable to Org field/column dropdown list on the Exclusion Rules pane on the Scheduling Policies screen:

- **All:** The appointment link is not visible for Partner Organization and Controlling Organization if the shipment is created with that specific trading partner. If an appointment is created by another option, such as auto-scheduling, the Controlling Organization still has access to the appointment if they need to reschedule, cancel, or update without requiring manual intervention from the NOC.
- **Partner Organization:** The appointment link is not visible for Partner Organization if the shipment is created with that specific trading partner but will be visible to the Controlling organizations like site owners.
- **Controlling Organization:** The appointment link is not visible for Controlling Organization if the shipment is created with that specific trading partner but will be visible to partner organizations like carriers or suppliers. Once the appointment is scheduled via the partner or another option, such as auto-scheduling, the trading partner can view/access the appointment to reschedule, cancel, or update. The Controlling Organization will also have access to the appointment if they need to reschedule, cancel, or update without requiring manual intervention from the NOC.

Prerequisite:

The trading partner must be defined on the Scheduling Policies screen in the Exclusion Rules pane by selecting the Applicable to Orgs field.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	See the "Disabling Appointment Links for Trading Partners" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.4.4.4 Multi-Select Filter Support

The NEO 3.8 release updates several filters on appointment detail screens. The Shipment No, Movement No, and Order Ref No filters now support multi-select, allowing users to add multiple search queries in each field using a semicolon as a delimiter. Previously, these three filters could only accept a single argument, limiting the complexity and usefulness of search queries; but by using these new multi-select filters, users can save time and generate more useful search results. These filters are available when creating or updating appointments (pickup/delivery) by clicking the plus icon next to the Shipment field.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Using the Multi-Select Filters When Creating Appointments" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.4.4.5 Reason Code Added for Soft Appointment Expiration

This release adds a new reason code, SOFT_APPT_EXPIRED, to indicate that a soft appointment expired. Previously, the system displayed the reason code as Canceled for Other when an appointment was canceled because a soft appointment expired. Now, when a carrier fails to confirm an appointment and the soft appointment is canceled, the SOFT_APPT_EXPIRED reason code displays in the Reason Code column, along with the following comment: Soft Appointment expired before being confirmed by Carrier

This enhancement helps to track the carriers that are non-compliant in confirming the soft appointments in the allotted time. Users can view the soft appointment expired reason code on the Shipment Tracking, Movement Tracking, and Shipment History screens.

Analytics Impact	None
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Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Viewing the Movement History, Movement Tracking, Shipment Tracking, and Shipment History" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>See the "Searching Shipments" section in the current release of the <i>Online Help</i> for more information.</p>

3.4.4.6 Soft Appointments Revalidated When Related Shipments Updated

Starting this release, soft appointments are revalidated when several important shipment fields are modified. Previously, if a site had soft appointments and an Auto Schedule policy setup and a partner was updated, the current soft appointments remained and were not canceled. Now, when the Resize Appointment on Shipment Change policy is enabled at the customer level on the Basic Policies tab of the Scheduling Policies screen, then soft appointments for a site are revalidated when changes are made to any of the following fields on related shipments:

- Weight
- Delivery Appointment Code
- Delivery Date Range
- Earliest Delivery Target Date
- Total Shipped Quantity
- Total Shipped Quantity2
- related Quantity UOM values
- Partner
- Partner Profile
- Load Type

In addition, when any of these fields are changed, the system also validates if the partner on the shipment is defined on the Auto Scheduling policies of the site. If the partner is not defined, the validation fails, and the appointment is canceled, regardless of whether the Cancel on Validation Failure policy is enabled. This enhancement is added to help Transportation Manager users cancel and relieve unnecessary capacity occupied by soft appointments for partners no longer eligible for auto-scheduling.

Analytics Impact	None
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Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "About Soft Appointments," "Organization Policies," and "Site Policies" sections in the current release of the <i>Online Help</i> for more information.

3.4.4.7 Automatically Reschedule Soft Appointments if Shipment Target Delivery Date Is Updated

The 3.8 release adds a new external reference called TMS.RESCCHEDULE_SOFT_APPT_ON_TARGET_DATE_CHANGE to support the rescheduling of soft appointments when a target delivery date is changed. When set to TRUE, if the target delivery date on the primary shipment for an Auto-Scheduled Soft Appointment is changed and the shipment state is earlier than the In Transit state, then the system attempts to reschedule the shipment based on the modified target delivery date. The highest-ranking time slot is chosen based on the new target delivery date; if a reschedule is unavailable due to various policies or a lack of available time slots, the existing appointment is left in place and a reason code is provided detailing why the system was unable to modify the appointment.

Note that soft appointments are not allowed to be scheduled when the appointment time is within the expiration time period, found on the Basic Policies tab of the Scheduling Policies screen; the auto-scheduler will only reschedule on a date and time earlier than this duration. In addition, when this external reference is used with multi-shipment appointments, the system does not recalculate which shipment is the primary shipment to minimize computational complexity. Previously, neither soft nor confirmed appointments were modified if the target delivery date for the related shipment was updated. But with this update, users can configure the system to behave intuitively and automatically reschedule soft appointments based on the underlying shipment's target delivery date. Please contact your ONE representative for assistance in using this feature.

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

3.4.5 Visibility

3.4.5.1 View the ETA for Transports under Next Stop ETA field on the Shipment Report

Starting this release, the system considers the Port Of Loading (POL), Port Of Discharge (POD), and transshipments (transports) as stops like other movement/shipment stops to compute the Next and Final Stop details. The POL, POD, and transports are stops that occur between the origin and destination locations. Previously, these stops were not considered while computing the estimated time of arrival (ETA) for the next and final stop details. This resulted in displaying incorrect next/final stop details on the shipment report when the vessel was assigned for the shipment. With this enhancement, the system computes the correct ETA and displays the relevant details as the site name and address under the Next and Final Stop ETA field on the shipment report. This feature helps users to gain better visibility of a large number of multi-stop shipments and for tracking individual shipments.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing the ETA for Transports Under the Next Stop ETA on the Shipment Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.4.5.2 Added Audit Trail for Sites and Partner Sites

In the NEO 3.8 release, ONE introduces an audit trail page for sites and partner sites. This addition allows users to view and track audit records for the specific site. Previously, the system did not support tracking audit records for the partner sites. The new capability ensures users can view and capture all changes at the respective site.

A history column is added to the Partner Sites report with an "H" hyperlink for each partner site. Users click the link, and the system displays that specific partner site's audit trail screen, which contains the record of all changes at the site. This improvement provides better visibility for users to identify and track historical information.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	See the "Viewing the Audit Trail for Partner Sites" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.4.5.3 Added Machine-Learning Model to Analyze Shipment Events

The NEO 3.8 release adds a machine-learning model to analyze shipment events. Using this new model, the NEO system extracts and analyzes useful information from shipment events. Examples of data fields that can be automatically extracted include:

- loading and unloading dates
- pickup- and delivery-related dates
- gate-in and gate-out dates
- delay information
- event location
- reason code
- comments

With the machine learning-based NEO analysis, users can then optimize business operations, streamline for increased efficiency, and resolve potential and actual issues discovered by the system. In future NEO releases, this framework can be used to embed this information in prescriptions, allowing the NEO system to provide guided resolutions to the customers.

No new actions are required of users to utilize this enhancement. Widgets will be made available (by ONE) to transportation end users to add to dashboards; these widgets will show various data points in a visual format.

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

3.4.5.4 Added Movement Number Link to Shipment Tracking Events

The NEO 3.8 release adds movement number links to shipment tracking events for Transportation Manager roles. To support this enhancement, a Movement Number column is now available on the Shipment Tracking Event Report screen and the Tracking tabs of shipment details screens; this column contains a link to related movements if they exist. Information in the Movement Number column is updated when shipment tracking events are created or updated.

This update is added to allow quicker access to movement information when viewing shipment tracking data; previously, users were required to search for movement information separately. If the Movement Number column does not appear by default, users can add the column by clicking the column edit icon available on any column header cell.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Viewing Movement Details from the Shipment Tracking Event Report and the Shipment Details Screen" section in the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>Also, please see the "Adding and Removing Columns in Reports" section in the current release of the <i>Online Help</i> for more information.</p>

3.4.5.5 Added Tracking and History Links to the Movement Details Screen

In the NEO 3.8 release, ONE adds movement history and tracking event hyperlinks to the movement details screen. The history and movement tracking links are displayed as H and T, respectively, on the header tab of the screen. Previously, without the links, users had to navigate to the global search to locate the tracking details and historical information for a particular movement. This improvement provides better visibility and quicker access to the history and tracking details, helping users save time. Users can obtain relevant event information for the specific movement directly from the same screen with a single click.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	See the "Viewing the Tracking and History Details from the Movement Details Screen" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Also, please see the "Searching Movements" section in the <i>Online Help</i> for more information.

3.4.5.6 Compute Carbon Emissions at Shipment and Shipment Line Levels

The NEO 3.8 release adds visibility of carbon emissions at the shipment and shipment line levels for transportation users. Previously, carbon emissions were only calculated at the movement level. To support this enhancement, a new Carbon field is added to all movement shipment reports and to the shipment lines on the Content tab of shipment detail screens. Now transportation users can easily view the carbon cost of individual shipments and shipment lines, allowing decisions to be made based on environmental concerns.

Analytics Impact	None
Integration Impact	Added the Carbon field to TMS.ShipmentOutbound v1.0 and v2.0.
Related Functionality	None
Usage and Configuration	See the "Using the Carbon Field on Movements and Shipments" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. See the "Environmental Social Governance Policies" section in the current release of the <i>Online Help</i> for more information on configuring carbon calculations.

3.4.5.7 Empty or Not Empty Static Route Filter for Shipments

The NEO 3.8 release adds new field options for the Static Route filter on various shipment state reports, such as Awaiting, Confirmed, and so on. The new field options are Empty and Not Empty; selecting Empty shows all shipments without static routes, and selecting Not Empty shows all shipments with static routes. Previously, users had no way to find all static routes that were either empty or not empty and had to search for specific static routes. But with this enhancement, users can efficiently find shipments with no static routes assigned.

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

3.4.5.8 Enhancements to Temperature Exceeded Alert Generation

The NEO 3.8 release includes several enhancements that improve how and when users receive Temperature Exceeded alerts for movements. Previously, users could subscribe to the Temperature Exceeded alert and receive a notification when the recorded temperature of a movement exceeded the acceptable temperature, but the alert could not be configured to read temperature feeds from sources such as weather forecast data and outside temperature at movement stops. Now, when users create or edit a Temperature Exceeded alert subscription, they can configure the alert using the newly added filters: Temperature Range, Temperature UOM (unit of measurement), Use Outside Temperature, and Consider Weather Forecast. These filters allow the system to use information from those sources on movements when triggering temperature alerts for a movement's current position or stops. To facilitate this enhancement, temperature range and temperature range UOM fields are also added to the Transportation Policies screen. This feature improves the accuracy and amount of information provided to users when a Temperature Exceeded alert is generated.

To use the enhanced features of the Temperature Exceeded alert, users must first configure acceptable temperature ranges and temperature UOM fields under the Alert Filters section when subscribing to the alert or on the Transportation Policies screen.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Configuring the Temperature Exceeded Alert Subscription" and "Configuring the Temperature Range on Transportation Policies" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Also, please see the "Transportation Policies" and "Creating and Customizing Alert Subscriptions" sections in the <i>Online Help</i> for more information.

3.4.5.9 Message Added When Update Current Position Tracking Event Generates for Pickup or Delivery

In the NEO 3.8 release, ONE adds an automatic comment in the Message column on the Tracking tab of a shipment when the system creates an Update Current Position tracking event for pickup or delivery of the shipment. The comment notes whether the current position update occurred due to pickup or delivery. Previously, when a shipment was picked up or delivered, an Update Current Position tracking event was created, but users could not see if the event was created because of a pickup or delivery event. With this enhancement, when a user performs a pickup or delivery action on a shipment, an Update Current Position tracking event is generated with Pickup or Delivery noted in the Message column on the Tracking tab of the shipment detail screen. This new, automatically added message prevents confusion about why the current position was updated and provides more visibility to the shipment status.

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

3.4.5.10 New Action Added to Load Master Data During Onboarding

The NEO 3.8 release introduces a new action, TMS.OnboardTemplateViaInteg, to load master data through the shipment CSV file upload. Previously, users had to input a large amount of master data, in multiple files, during customer onboarding. The newly added action creates master data for enterprises, organizations, partners, sites, partner sites, commodity codes, appointment codes, and items. Now, users can load the master data by using a single CSV file instead of multiple files for different master data sets. Users can upload the shipment CSV file using the Upload menu with the newly added action; no shipments are created from the CSV file; only master data is uploaded. This feature simplifies the initial onboarding process by enhancing the user experience and making it user-friendly and efficient for customers.

Analytics Impact	None
Integration Impact	Use the TMS.ShipmentInboundInterfacev1.0 file to upload data.

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

3.4.5.11 New Machine Learning-Based Transit Time Policy

The NEO 3.8 release includes a new machine learning-based transit time policy as an optional method for calculating the transit time for a shipment. This new method calculates transit time based on machine learning configurations using trained models created from the user's historical transit time data. Previously, machine learning was not available as a method for calculating transit time. To enable this calculation method, users rank the Transit Time By Machine Learning option on the Transit Time Policies screen as the first choice calculation method. If this policy is selected, but no machine learning configuration exists, or if the machine learning configuration is not returning results within 1-2 seconds, transit time is calculated by the next ranked source on the Transit Time Policy screen. This enhancement uses machine learning to provide more realistic and accurate data in calculating the transit time between a shipment's origin and destination.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Configuring the Machine Learning-Based Transit Time Policy" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Also, please see the "Transit Time Policies" section in the current release of the <i>Online Help</i> for more information.

3.4.5.12 NEO Prescriptions and Hyperbots Added to Update Equipment and Carrier

In the NEO 3.8 release, NEO Prescriptions and Hyperbots are added to update equipment and carrier for lanes. Based on the prescriptions, users can create hyperbots to update equipment and carrier needed during transportation automatically. Previously, the system could not suggest the most suitable equipment and carrier for a specific lane based on the user's historical preferences. This enhancement automates a lane's equipment and carrier application process and ensures that the most suitable options are suggested according to the user's transportation needs. Users can view the prescriptions on the Movement Shipment Report and the Movement Details screen. Users select prescriptions and create

hyperbots to automatically update equipment and confirm carriers as per the recommendations provided by the prescriptions.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Using NEO Prescriptions and Hyperbots from the Movement Shipment Report" and "Using the NEO Prescriptions and Hyperbots from the Movement Details Screen" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.4.5.13 Reports Added for Client Manager Role

This release adds the following new reports to the Reports menu for the Client Manager role:

Report Name	Functionality
Milestones	Client Managers can view the report to find shipment numbers, milestone types attached to the shipments, and other milestone-related details.
Shipment Tracking Event Report	Client Managers can view the report to track shipment events.
Network Analysis	Client Managers can view the report to find network-related data for client enterprises and organizations.

Before this release, the Client Manager role had access to shipment tracking events and milestones on the UI at the individual shipment level. This enhancement helps users to track events and milestones and provides consolidated analysis in detailed reports. Users can view and download milestone data, shipment tracking events data, and network analysis data on the Milestones, Shipment Tracking Event Report, and Network Analysis screens.

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 Milestones Report for Client Managers" • "Viewing the Shipment Tracking Event Report for Client Managers" • "Viewing the Network Analysis Report for Client Managers"

3.4.5.14 Updated Icons on the Real-time Transportation Execution Page

The NEO 3.8 release introduces new color-coded icons for visited stops and the immediate next stop on the Real-time Transportation Execution page (RTTEP) to make the icons easily distinguishable. The icons of visited stops are now colored green, while the immediate next stop is colored blue. The current position icon color is orange, and it displays even when it overlaps with other icons like pickup or delivery. Also, the legend slideout on the map is updated to reflect these changes and other icons like unvisited stops and current movement position. Previously, it was difficult to distinguish between visited and next stops and to see the current position when the icon was too close to other icons.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Viewing the Previous Stops, Next Stop, and Current Location on the RTTEP" in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. See the "Tracking Movements on the RTTEP" section in the current release of the <i>Online Help</i> for more information.</p>

3.5 Manufacturing

3.5.1 Demand Translation

3.5.1.1 Constrained Demand Translation (CDT) Engine Enhancements

This release improves how the Constrained Demand Translation (CDT) engine functions when running in constrained mode. When Production Manager roles run the CDT engine in constrained mode (either capacity, material constrained, or both), production demand forecasts and finished goods (FG) item supplies are updated for work in progress and raw material items. Previously, only the promised quantity of FG items was updated when the CDT engine ran in constrained mode.

For example, if an organization needs 300 units of a raw material item and supplier A can only supply 150 units, then the CDT engine requests 150 units from supplier A and 150 units from another supplier. With this enhancement, users have a more accurate view of the supply-demand of WIP and RM items. No user action is needed to take advantage of this feature.

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

3.5.1.2 Demand Fillability Analysis Report

The latest NEO 3.8 release has introduced a new report called Demand Fillability Analysis, which enables users to monitor the availability of capacity and required materials. This report is useful in identifying any shortages of capacity or raw materials and taking appropriate measures. To analyze the demand fillability, users need to run the Constrained Demand Translation Engine in the Unconstrained Mode, followed by the Material Check Mode. The results of the engine run can be viewed in the Demand Fillability Analysis report.

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

3.5.1.3 Waste Factors at Site Group Level

Starting in the NEO 3.8 release, waste factors are now applicable at the site group level instead of the site level. Previously, waste factors were applied only at the site level; if a user wanted to create and manage identical waste factors for several sites, they had to have one waste factor per site. But now, Production Manager roles can create and manage waste factors at the site group level, allowing them to create waste factors for all sites in a site group at once. To support this enhancement, the Site field is replaced with the Site Group Level field on the Create Waste Factors screen, and the Site column is replaced with the Site Group Level column on the Search Waste Factors screen.

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

3.5.2 Production Management

3.5.2.1 Enhancements to Capacity Contracts

In NEO 3.8, ONE makes enhancements to capacity contracts. The capacity contract UI now supports capacity contract creation for both buyers and sellers. Until the capacity contract is approved, it is not visible to the other party and is not considered by engines or timeline views (TLVs). Capacity contracts can only be created for dedicated site resources, and the CDT engine reads contract capacity if it is present for a site resource. This enhancement includes the following changes:

- The Site Resource field is now mandatory on the New Capacity Contract screen.
- Two new alerts are added to notify users if the sum of all capacity contract quantities for the same site resource exceeds or is likely to exceed the total production capacity of a site resource. The two alerts, the Contract Capacity Alert and the Contract Capacity Exceeded Alert, are in the Assembly Line Group category on the New Subscription screen.
- A flag is added to the site resource details screen to distinguish if a site resource is shared or dedicated. This flag is visible on the detail screen shown after an assembly line group is created and when searching and updating assembly line groups. By default, the flag is not selected, and the site is not shared.

These enhancements help users plan and allocate supply more efficiently based on contracted capacity. Users must first configure a site resource as dedicated and then create a capacity contract for the site.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Creating a Capacity Contract" and "Configuring a Site Resource as Dedicated or Shared" sections 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 additional information:</p> <ul style="list-style-type: none"> • "Searching Assembly Line Groups" • "Creating Assembling Line Groups" • "Creating and Customizing Alert Subscriptions"

3.6 Master Data Management (MDM)

3.6.1 Uploading Files Using Pipelines

With this update, users can more quickly create integration pipelines that transform uploaded files into a format the ONE inbound interfaces accept. The system can now automatically handle the configuration of boilerplate nodes so users can focus on the transformations necessary to match ONE inbound interfaces. In addition, users can now select an existing integration pipeline to run as a one-off transformation of an uploaded file

before it is input to an inbound interface. This allows pipelines to run once for a single file rather than every time a file is uploaded to an inbound interface.

Users no longer need to create new pipelines from scratch and can instead use the preconfigured pipeline generated by the system to transform uploaded files. Users may still need to modify the preconfigured pipeline, but they are no longer required to manually add and configure nodes. To support this enhancement, a new Pipeline Type section is added to the Select File to Upload popup window. From the popup window, users can choose either New Pipeline or Existing Pipeline to select which pipeline the uploaded file should be run through. If users do not want to use a pipeline transformation (the behavior before this update), they can simply ignore the new fields.

Previously, uploaded data had to conform to the specified inbound interface format exactly, but now users can upload data in a custom format, adding workflow flexibility.

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

3.7 NEO Platform

3.7.1 Enhancement to Managing Favorites

In the latest NEO 3.8 release, ONE has updated the Manage Favorites user interface to improve its usability. Previously, the Managing Favorites screen's Search dropdown filter field had two options: Favorites and My Favorites, which led to confusion in differentiating user-centric favorites and favorites created by other users. To address this issue, the Favorites option in the Search dropdown filter has been renamed to All Published Favorites, while the My Favorites label is now My Favorites Only. This change provides clarity, making it easier for users to find and manage their favorite screens, searches, reports, etc. in the ONE system. Users can now publish, delete, and rename their favorites more efficiently from the My Favorites option. Additionally, users can subscribe to favorites published by other users by selecting the All Published Favorites option.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	<p>See the "Managing Favorites" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>Also, please 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 Favorites" • "Adding Favorites" • "Deleting Favorites" • "Publishing Favorites" • "Subscribing to Favorites" • "Unsubscribing from Favorites" • "Using Favorites"

3.7.2 Disable Site-Site Group Association

Starting this release, users can disable site association with multiple site groups from the UI. As part of this enhancement, the Disable Deactivate Site Group Association policy is added to the Site Group Association tab of the Search Policies screen. This policy can be set at the Value Chain, Enterprise, or Organization level.

As new site groups are created in the system, a site might be associated with multiple site groups. However, users may want to keep only the latest site-site group association and deactivate all others. Enabling this policy also prevents associating sites under a Value Chain, Enterprise, or Organization with more site groups.

Previously, the Disable Deactivate Site Group Association policy could be toggled only via the site hierarchy inbound interface. This enhancement makes it easier for users to manage site group associations from the UI instead of uploading the site hierarchy inbound file.

Analytics Impact	None
Integration Impact	None
Related Functionality	Non

Usage and Configuration	<p>See the "Disabling Site-Site Group Association" section in the current release of the <i>New Feature Usage and Configuration Guide</i>.</p> <p>See the "Available Policies from the Search Policies Screen" and "Searching Policies by Policy Name" sections in the current release of the <i>Online Help</i> for more information.</p>
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3.7.3 Download Product Group Levels from the UI

We have added a new button, "Download Product Group Level", on the Product Hierarchy screen. This new feature eliminates the hassle of maintaining or creating a CSV spreadsheet every time you need to update the product hierarchy. You can now easily download the product hierarchy in CSV format, make necessary changes to the product group levels, and upload it again. This new workflow saves time and effort as there is no longer a need to create or maintain a product hierarchy CSV file for every update.

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

3.7.4 Gauge Chart Added to Pivot Widget and Workbench

We have introduced a new feature in this update that improves the visibility of data on the pivot workbench and pivot widget. A Gauge Chart icon has been added to these tools, making them easier to use. The widget is a type of Custom Analytic Widget with options similar to the existing Simple KPI options. To access the Gauge Chart, users simply click on the icon and customize the settings by selecting the Measure option and Unit of Measure filters. Additionally, users can set upper and lower band limits to define band thresholds. Based on these thresholds, the band types are defined as GOOD, WARN, and BAD. With this feature, users can easily view the gauge chart on the pivot widget and pivot workbench.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	<p>See the "Adding Widgets" section in the current release of the <i>Online Help</i> for more information.</p> <p>See the "Adding and Creating a Custom Analytic Widget" section in the current release of the <i>Online Help</i> for more information.</p>

3.7.5 New Node Types and Enhancements for NEO Plasma Pipelines

In this release, the NEO Plasma Pipelines screen has been updated to support new node types: write and query nodes. Write nodes are used to input data into the database and have a Stream<Record> input (where Record matches the inbound interface definition) and output that matches the inbound interface definition. Query nodes, on the other hand, are used to retrieve data from the database and have a Record input and a Stream<Record> output. This update results from user feedback, with many wanting to create their own prescriptions within the system. With these new node types, experienced users have greater control over the generation and execution of these prescriptions. Access to this enhancement is limited to Enterprise Admin and Value Chain Admin roles.

This release also adds a new node type, Hierarchical Flattener, to integration pipelines. Sometimes, users upload data with a hierarchical structure. For example, users might upload a JSON file with bulk orders and order lines. Adding the Hierarchical Flattener node to an integration pipeline transforms the hierarchically structured data into a flat structure compatible with a CSV inbound interface supported by the ONE system. Users can add a Hierarchical Flattener node while creating or modifying a pipeline.

Also, support for automatic iteration is added to the Script and Hierarchical Flattener nodes. When this feature is enabled, auto-complete suggestions are displayed for field names while writing an iteration script to transform a record from one schema to another. Users can enable the autocompleting feature on the Node Properties pop-up window of the selected node.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

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

- "Using Write and Query Nodes on the NEO Plasma Pipelines Screen"
- "Using the Hierarchical Flattener Node in Integration Pipelines"
- "Working with Global Python Scripts in Pipeline Script Nodes"

3.7.6 Login and Page Load Performance Enhancements

We have taken steps to enhance login and page load time performance by optimizing the cacheability of package.json files. Previously, certain package.json files were expiring after four hours, leading to performance issues. However, we have improved performance by extending the cache duration to one week. As a result, systems now return the correct cache headers, ensuring faster and more efficient access to package.json files.

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

3.7.7 Documentation of Facts and Attributes for Custom Analytic Widgets

The NEO 3.8 release documents facts and attributes for custom analytic widgets in several ways. ONE adds a Value Chain Data Warehouse (VC DW) data dictionary that contains all facts and attributes for custom analytic widgets. This dictionary can be downloaded as a spreadsheet from the Instance Docs screen by Value Chain Admin users. The spreadsheet contains a Facts and Dimensions tab with columns for Type, Name, and Description and a Fields tab with columns for Owning Fact or Dimension, Field Name, Field Type, and Field Category. In addition, the details in the dictionary are added as tooltips that give users information about fields and attributes on custom analytic widgets. Previously, users could not retrieve descriptions or definitions of specific fields or terms used in widgets. Now, when a user hovers over a field or attribute on custom widgets, details from the dictionary are displayed as a tooltip to provide the information.

The ONE Data Dictionary is also enhanced to include slice schema information. Two new columns - Included in VC Slice and Included in Enterprise Slice - are added at the last position in the Model Field sheet of the Data Dictionary spreadsheet.

This release also includes a new Custom Analytic Widget Workbench export button. Users can export the facts and attributes using this button. This enhancement provides users with options to view, save, and analyze data outside of the ONE system, thus providing them with more workflow flexibility.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Downloading the Value Chain Data Warehouse (VC DW) Data Dictionary" and "Exporting Facts and Attributes from the Custom Analytics Workbench" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.7.8 New Deleted Document Alert

With this release, users subscribed to a Document Alert are notified when a document is deleted from the system. An alert is sent to the user's inbox, and an issue subscription is created if the user has subscribed to the document alert. Previously, the document alert notified users of new documents and updates on documents in the system but not deletions. After the update, when a document is deleted, the user receives the document alert in their provided email inbox with a non-downloadable document file name.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the "Generating a Document Alert for Document Deletions" section in the current release of the *New Feature Usage and Configuration Guide* for more information.

See the "Creating and Customizing Alert Subscriptions" and "Alerts Inbox" sections in the current release of the *Online Help* for more information.

3.7.9 New Export File Format for Reports and Views

This release supports exporting reports and views in the rich-XLSX file format, a Microsoft Excel Open XML spreadsheet format. Unlike a CSV file, which strips all formatting from the exported data, the new format retains the report formatting. The exported rich-XLSX files also contain a new tab called Properties. This tab includes helpful metadata about the user/role that generated the report as follows:

- User Name
- Role
- Role Type
- Site
- Organization
- Enterprise
- Generate Date (Date on which the file was exported)

The new format can be enabled or disabled via external references at the Value Chain or Enterprise level for all or specific reports and views.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	Contact ONE NOC at support@onenetwork.com to configure external references to enable the rich-XLSX file format.

3.7.10 OAuth Support on HTTP Destination and OAuth2 Support on HTTPS Outbound

This release adds OAuth and OAuth2 support for HTTP Destination and HTTPS Outbound authentications, respectively, when creating integration subscriptions and message

destinations. Users can create message destinations of type HTTP and P2PI with OAuth-based authentication. The New Message Destination popup window on the New Integration Subscription screen is updated with fields such as Authenticate with Oauth 2.0, Client ID, Client Secret, and Access Token URL when HTTP is chosen as the Destination Type. Users can also create or update message destinations from the integration subscription detail screen. Previously, users created HTTP-based message destinations without OAuth authentication support.

With the OAuth2 support on HTTPS outbound interface, users can view the added OAuth message destination on the OAuth IB Client App report. This enhancement provides an additional option to use the OAuthOBClientApp as an additional authentication mechanism with the existing SSL-based authentications.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the following sections in the current release of the <i>Developer Network Documentation</i> for more information.</p> <ul style="list-style-type: none"> • "Creating a New Message Destination" • "Creating a New Integration Subscription" • "Viewing the OAuth OB Client App Report"

3.7.11 Support for Global Attachments in Integration Pipelines

The NEO 3.8 release adds support for global attachments when using integration pipelines. Developers use integration pipelines to perform mapping and custom transformations from input to output streams of records. Ideally, these transformation functions are generic and reusable across pipelines, but previously, there was no mechanism for developers to share Python scripts at a global level easily. If developers wanted to use or update a script on multiple pipelines, the script had to be added or updated on each pipeline individually.

The new global attachments feature allows scripts to be easily shared between users and pipelines, saving time and reducing repetitive workflows. VC Admin and Enterprise Admin roles can upload global attachments and then associate those attachments with any pipeline. Once associated with a pipeline, users can update scripts simply by re-uploading the script as a global attachment with the same file name, overwriting the previous version. The next time any associated pipeline runs, it uses the new and improved script.

3.7.11.1 NEO Plasma Pipelines Screen

On the NEO Plasma Pipelines screen, users can click the new Global File Manager icon to upload, download, and delete global attachments. There is no data validation in this window, and any file types can be added, including .zip and .py. Note that an error message appears if users attempt to delete global attachments referenced by individual pipelines.

3.7.11.2 Individual Pipeline Screens

Users can click the improved File Manager slideout on individual pipeline screens to upload, download, add, and delete files. The Upload icon replaces the Upload button but has the same functionality as before, allowing users to upload files. The Add icon allows users to add global attachments to individual pipelines. The download and delete functionalities are unchanged.

In addition, users can import global attachments with the .py file type (Python scripts) directly into Pipeline Script nodes by clicking the Edit Script option and then clicking the new Import Script icon. This inserts an import statement into the active script node and enables users to author Python scripts outside the system and then quickly import those scripts.

3.7.11.3 Support for Importing and Exporting Pipelines

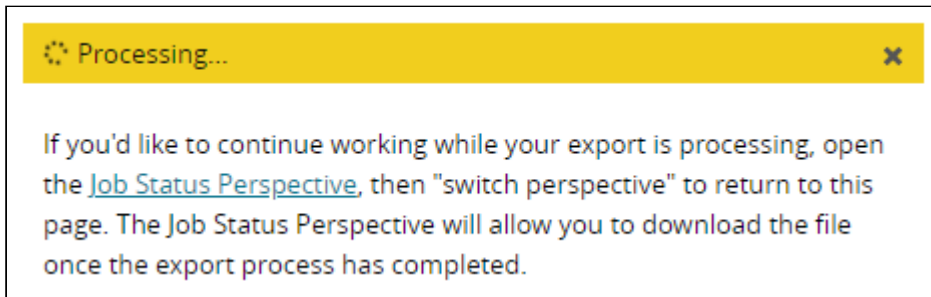
Global attachments are also now supported when importing and exporting global attachments. When users export pipelines with global attachments, the global attachments are included in the exported zip package; similarly, these exported zip packages can be imported, along with the pipeline, into another instance.

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

3.8 NEO UI

3.8.1 Popup Appears When Exporting to CSV From Dashboard Widget

Starting this release, a popup appears when exporting to a CSV file from a dashboard widget when the exporting takes more than a few seconds. When users click the Export to CSV button, the CSV file usually downloads immediately, but for large datasets, generating and downloading the CSV file can take more time. Previously, users were given no indication the export process was happening for large CSV files, but now a popup appears, informing users the export is in process. Note this behavior is identical to users clicking the Export to CSV button from any report screen.



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

3.8.2 Relative Date Display Improvements

This release improves how relative dates are stored and displayed to users on many screens throughout the ONE system. Relative dates are date fields in which users can select a relative date, such as "3 days from now" or "1 month from now," instead of selecting a specific date, such as August 1. Previously, if a relative date field or filter was selected and saved, the system fetched and saved the actual date. This led to stale data if users viewed the field or filter at a later date.

With this enhancement, relative date fields now continue to display the relative date text (such as "3 days from now") instead of resolving to a specific date. If users mouse over a relative date value, a tooltip appears that shows the selected relative date option and the

computed specific date that it equates to at that moment. The system now behaves as expected by always preserving the relative date, allowing users to create look-ahead and look-back fields and filters.



This enhancement is only applicable to modern-style UI screens and does not apply to older-style UI screens.

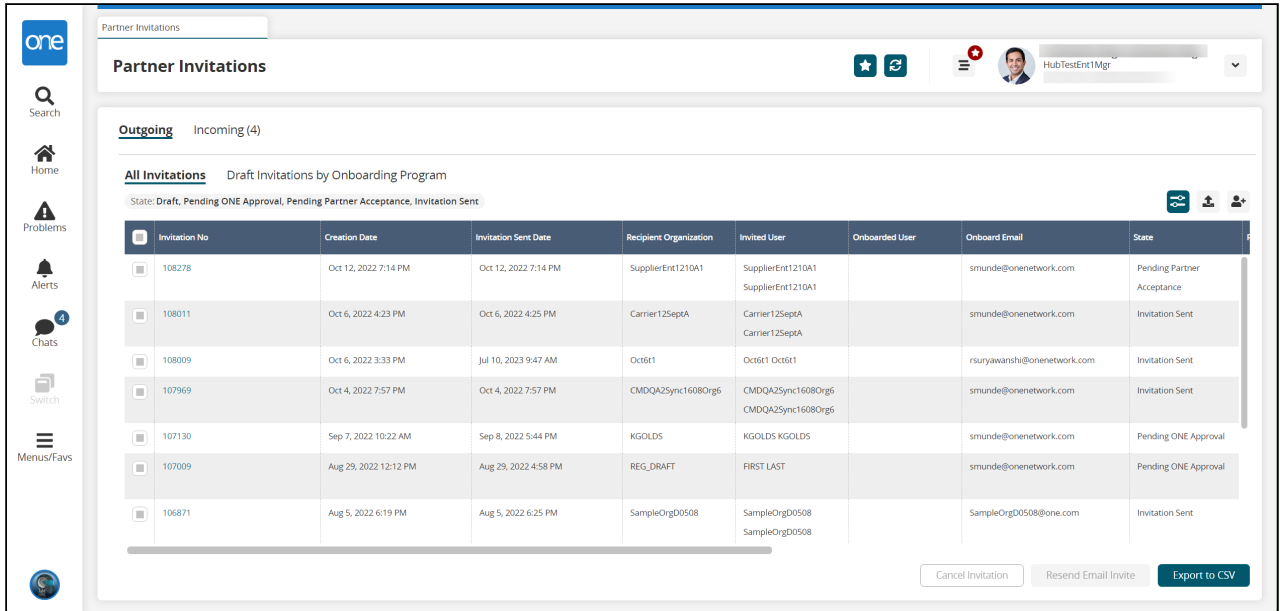
Modern UI

Older UI

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

3.8.3 Updated Partner Invitation UI

The NEO 3.8 release updates the Partner Invitation UI from the old style UI to the newer, modern style. This update increases usability and visual cohesiveness with the rest of the system.



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

3.8.4 User-Selectable Colors for Table Headers

The NEO 3.8 release allows all users to change the color of table headers and timeline views throughout the ONE system. This setting is available on the UI Preferences tab of the User Settings screen and allows users to change table headers to white, blue (default), purple, red, green, blue, and brown.



Previously, a Disable High Contrast Option setting was available on the UI Preferences tab that changed table headers from the default blue to white; this new feature supersedes and replaces the Disable High Contrast Option setting. With this graphical enhancement, users can customize the color of common UI elements to increase legibility, align the ONE system with their corporate color scheme, or for personal preference.

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

3.9 Optimization

3.9.1 Demand Planning

3.9.1.1 Partner Site Support Added for Outlier Detection

This release adds partner site support for outlier detection. To support the partner for outlier detection, the following fields are added:

Field Name(s)	Screen Name	Field Type
<ul style="list-style-type: none"> Partner Partner Site 	Outlier Adjustment TLV	Filters
	Search Outliers	Filters
	New Outliers	Columns

In addition, two new columns, Partner and Partner site, are added to the New Outliers widget. The outlier detection engine generates partner site outliers. Previously, partner sites were not supported in outlier detection. This enhancement ensures support for partner sites for split ratios and outlier detection. Users can verify the Outlier Adjustment TLV and search for the outliers on the Search Outlier Report. Users can create new outliers with additional data for partner and partner sites.

Analytics Impact	None
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Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the below 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 Partner and Partner Site Filters for the Outlier Adjustment TLV" • "Using the Partner and Partner Site Filters for the Search Outliers Report" <p>See the sections below in the current online Help release for more information.</p> <ul style="list-style-type: none"> • "Viewing the Outliers Adjustment TLV" • "Searching Outliers" • "Running the Outlier Detection Engine" • "Adding Widgets"

3.9.1.2 Run the DDMC Engine in Incremental Mode from the UI or from the JMX Console

The NEO 3.8 release enables users to run the Dynamic Data Measure Computation (DDMC) engine in incremental mode from the UI or the JMX console. Previously, the engine always ran in non-incremental mode. When run in incremental mode, the DDMC engine detects what data has changed through user overrides since the last run and performs computations for those changes only. Users check the Incremental Run checkbox on the Run Dynamic Data Measure Computation screen to run the engine in incremental mode from the UI. From the UI, users can optionally select a list of Data Override IDs (users who can override data) when running the engine. Users can also run the DDMC engine in incremental mode from the JMX console by selecting the Incremental Run radio button. Note that users cannot select a list of Data Override IDs from the JMX console since it currently does not support lookup functionality.

Only user override changes are supported by incremental mode. If the data was changed through other means, such as loading data, users must do a full DDM engine run (non-incremental mode). If the DDMC engine runs in incremental mode and does not detect any data changes since the last engine run, it returns a "Job was not created" error message. This enhancement helps the engine run faster and saves CPU and database resources.

Analytics Impact	None
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Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Running the DDMC Engine in Incremental Mode" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Also, please see the "DDMC Engine" section in the current release of the <i>Online Help</i> for more information.

3.9.1.3 Support for Partner Site Forecasting Added for Events

This release adds partner site support for events. The following explains the new fields added to the various screens/CSV files:

Screen Name/ CSV File Name	Field Type	Field Name(s)
Event_IB 1.0 CSV file	Columns	<ul style="list-style-type: none"> Partner Site Enterprise Name Partner Site Organization Name Partner Site Name
EventDimension_IB CSV file	Columns	<ul style="list-style-type: none"> Partner Site Enterprise Name Partner Site Organization Name Partner Site Name
Create Event	Field	Partner Site
Add Event Dimension	Field	Partner Site

Users can now run the Demand Planning Engine for event-based partner site forecasting. Previously, the system did not support events-based forecasting for partner sites via an inbound interface or UI. With this enhancement, users can upload CSV files or specify a partner site in the Partner Site field on Create Event and Add Event Dimension screens.

Analytics Impact	None
Integration Impact	Yes

Related Functionality	None
Usage and Configuration	<p>See the "Working with Partner Sites when Creating Events, Adding Dimensions and Running the Demand Planning Engine" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>See the sections below in the current online Help release for more information.</p> <ul style="list-style-type: none"> • "Creating Events" • "Searching Events" • "Adding Dimensions to Events" • "Searching the Partner Site Forecast Book"

3.9.1.4 Support for User Overrides for Data Measures in Partner Site Forecast Book

This release supports user override action for Partner Site Forecast Book data measures. To support the user override action for data measures, the following fields are added:

Screen Name	Field Type	Field Name(s)
Create Data Measure Type	Fields	<ul style="list-style-type: none"> • Product Dimension • Geo Dimension • Partner Dimension • Relative Start Bucket • Relative Start Bucket UOM
Search Data Measure Type	Columns	<ul style="list-style-type: none"> • Product Dimension • Geo Dimension • Partner Dimension • Relative Start Bucket • Relative Start Bucket UOM
Demand Forecast Override Audit	Data Measure	DM1 to DM20

Screen Name	Field Type	Field Name(s)
Partner Site Forecast Book	Report Fields	<ul style="list-style-type: none"> • User Override • Original Quantity

Previously, users could only perform the override action from the Search Data Measure report. This enhancement helps users override aggregated levels and make changes on the Partner Site Forecast Book. Users copy data from the Copy Forecast Data screen and view the Partner Site Forecast Book report to verify if the system overrides the data measures as per the override inputs given by users.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the sections below in the current release of the <i>Online Help</i> for more information:</p> <ul style="list-style-type: none"> • "Creating Data Measure Type" • "Searching Data Measure Types" • "Viewing the Demand Forecast Override Audit Report" • "Searching the Partner Site Forecast Book" • "User Overrides in the Partner Site Forecast Book" • "Copying Forecast Data"

3.9.1.5 Support to Run Alert Computation Engine With and Without a Scenario in the Same Instance

Starting this release, users can run the Alert Computation Engine with or without entering scenario data. Previously, when the alert computation engine was run without a scenario, it deleted scenario and non-scenario records. It created issues in the co-existence of scenario and non-scenario data in the engine. This enhancement helps users to run the engine with and without a scenario in the same instance. The Purge Mode dropdown field is added to the Alert Computation Item Subnet screen. Users can set the Purge Mode field for different options, such as Any Scenario, Same Scenario, or Full Purge, and run the Alert Computation Engine for different combinations.

For this enhancement, an optional filter, Scenario, and a Scenario column are added to the following alert reports:

- High MAPE Alert Report
- Forecast Plan Height Deviation
- Forecast Rolling Bias

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Setting the Purge Mode in the Alert Computation Engine" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>See the "Alert Computations" section in the current release of the <i>Online Help</i> for more information.</p>

3.9.2 Inventory Planning

3.9.2.1 Use Order-related Test Results for Lead Time Variability Computation

Starting this release, order-related test results are used to calculate lead time statistics. The Test Result model contains the Quality Analysis (QA) data for an item on a site and represents the state of order between when the order is received and before the order becomes a supply. To support this enhancement, the Read Orders As Supply and Read Test Results flags are added to the New Multi-Tier Stat Config screen; the two flags are added as columns to the Search Multi-Tier Stat Config report. This feature helps to understand the impact of quality analysis on supply so that users can manage supply and demand efficiently. Users set the Read Orders As Supply and Read Test Results flags on the New Multi-Tier Stat Config screen. Users can view the settings on the Search Multi-Tier Stat Config report.

Analytics Impact	None
Integration Impact	Yes. The Read Orders As Supply and Read Test Results flags are added to the MTIP Stat Config inbound interface.
Related Functionality	None

Usage and Configuration

See the "Using Order-related Test Results for Lead Time Variability Computation" section in the current release of the *New Feature Usage and Configuration Guide* for more information.

See the "Creating the Multi-Tier Stats Configurations" and "Searching the Multi-Tier Stats Configurations" sections in the current release of the *Online Help* for more information.

3.9.2.2 MEIO Engine Supports Site Capacity Computation for Site-based Constraints

With this release, the Multi-Echelon Inventory Optimization (MEIO) Engine supports site capacity calculation for site-based constraints. The site capacity is calculated based on maximum weight capacity, maximum volume capacity, maximum space capacity, or maximum quantity capacity. This feature helps to identify site capacity so that users can calculate safety stock efficiently. Users configure the MEIO Scenario for site capacity constraints and run the MEIO Engine to analyze applied site capacity constraint results.

Prerequisites:

- Users must set the Dimensions, Total Vol, and Max Weight values on the Location Settings screen to define the site's capacity constraints.
- Users must set the Site Capacity UOM, Site Volume Capacity UOM, and Site Quantity Capacity UOM on the Inventory Planning Settings screen in the Inventory Planning Policy Group to set up the different UOMs.
- Users must run the Site Capacity Computation engine and view the site constraints on the Search Site Constraints report.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the "Working with the Site Capacity Computation Engine for Site-based Constraints" section in the current release of the *New Feature Usage and Configuration Guide* for more information.

See the "Searching Sites," "Searching Site Constraints," "Creating and Working with MEIO Configurations," "Running the MEIO Engine," "Searching Locations," and "Searching Policies" sections in the current release of the *Online Help* for more information.

3.9.2.3 MEIO Site Capacity Percentage Computation Engine

The NEO 3.8 release allows users to calculate capacity percentages between two MEIO objectives if they share the same site, enabling users to determine if a site has exceeded its capacity. Site capacity can be defined by weight, volume, spaces, or quantity (such as pallets or cases). To support this enhancement, the MEIO Site Capacity Percentage Computation screen is added for Inventory Planner roles. The new MEIO Site Capacity Percentage Computation engine calculates site capacity limits (percentages) for every MEIO objective for the given MEIO scenario.

The generic MEIO engine can optimize inventory for entire organizations at once or for subnets of items. But issues can arise when optimizing inventory for item subnets because the system often makes determinations for multiple subnets simultaneously. For example, while subnet A will be optimized for site C, subnet B will also be optimized for site C. This leads to site C being overcapacity because each subnet was optimized without consideration for the other. This enhancement adds another engine that is designed to resolve this issue.

This enhancement helps users manage the safety stock of sites more efficiently and more in line with site capacities. To take advantage of this new feature, users must run the MEIO Site Capacity Percentage Computation engine for a given configuration before running the MEIO objectives.

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

3.9.3 Replenishment

3.9.3.1 Bucketized Order Forecast Collaboration Update

Bucketized Order Forecast (BOF) collaboration has been superseded by an enhanced version in 3.8 called Order Forecast Collaboration (OFC). While BOF collaboration has not been deprecated and will continue to be supported, we recommend you review the "[Order Forecast Collaboration\(see page 72\)](#)" section in this release's documentation and expect future enhancements to involve OFC rather than BOF.

3.9.3.2 Enhanced Advanced Replenishment Engine to Allow Fair Share Replenishment

In the 3.8 release, ONE enhances the existing Advanced (Adv) Replenishment engine to support using fair share replenishment configurations. If the system has multiple vendors, each with multiple sites, the system previously generated all replenishment supply from the vendor site with the highest priority (in the absence of an Approved Vendor List). Now, with the addition of an Allow Fair Share Replenishment flag on the replenishment configuration screens, users can configure the Adv Replenishment engine to evenly distribute generated supply among available vendors and available sites within the vendors. The system respects the lead time from available vendors when distributing replenishment requests to vendors. To use fair share replenishment, users must create a new replenishment configuration or update an existing replenishment configuration and select the Allow Fair Share Replenishment flag. This enhancement helps distribute supply requests evenly across multiple vendors and their sites.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Configuring the Advanced Replenishment Engine to Allow Fair Share Replenishment" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.9.3.3 New Filters for Bucketized Order Forecast State Summary Report and Widget

For the 3.8 release, ONE adds new filters to the Bucketized Order Forecast (BOF) State Summary report and widget, including Vendor, Item, Date, and State filters. These filters enhance flexibility and usability, allowing users to focus on specific vendors, items, date

ranges (e.g., the upcoming month), or non-promised records. This update expands user options and improves the overall functionality of the report and widget.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Order Forecasts" content in the Replenishment section of the <i>Online Help</i> for more information.

3.9.3.4 Order Forecast Collaboration



NOTE: Bucketized Order Forecast (BOF) collaboration has been superseded by an enhanced version in 3.8 called Order Forecast Collaboration (OFC). While BOF collaboration has not been deprecated and will continue to be supported, we recommend you review the OFC information in this release documentation and expect future enhancements to involve OFC rather than BOF.

NEO 3.8 introduces Order Forecast Collaboration (OFC) – the latest and greatest iteration of ONE's Bucketized Order Forecast Collaboration solution. The OFC solution is a collection of new features and screens that allows buyers and vendors to more quickly and efficiently collaborate to solve issues in order fulfillment.

OFC includes Order Forecast Collaboration Dashboards for buyers and vendors. These dashboards display relevant widgets, quick links to other OFC screens, and the Order Forecast Collaboration Workbench, which contains the bulk of the collaboration data, filtered by the user's parameters. From the OFC Workbench, vendors and buyers can communicate requested or promised quantity updates, add or read comments, add or view reason codes, and view or open collaborative tickets. When an issue arises, users open a collaborative ticket that allows the buyer and vendor to address the issue and agree to a solution.

Users can also configure order forecast collaborations to establish rules for how NEO interprets and uses the data during the collaboration process. Order Forecast Collaboration is configurable at the organization, site, item, or buffer lane levels.

Additional features of this enhancement include:

- Configuration history configuration and report screens
- Collaboration alerts
- Item Resource Capacity screen
- Search Collaborative Tickets screen

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Order Forecast Collaboration Guide" for more information.

3.9.4 Transportation Planning

3.9.4.1 Ability to Delete Distance Matrix Cache from the UI

This release adds a Delete action to the Distance Matrix screen allowing users to delete selected records directly from the Distance Matrix screen. This update allows users to delete specific records from the UI without dependence on production support teams. Users may use this to delete incorrect records, for example.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Deleting Records from the Distance Matrix Screen" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.9.4.2 Added Support for Single-Objective Optimization

The NEO 3.8 release supports Maximize Score MIP (Mixed Integer Programming) function for optimizing route quality. Maximize Score is a single-objective function that helps movement performance. Single-objective optimization is a technique used to solve optimization

problems that involve a single objective or goal. As part of this enhancement, ONE has implemented the single-objective optimization technique to use a pool of movements that are scored based on specific attributes. This allows reduced optimization time and a faster movement selection process. Users can create a TOSX configuration policy to use when executing the TOSX engine.

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

3.9.4.3 Enhancements to Solution Summary Report

This release brings several enhancements to the Solution Summary report.

The following new columns are added:

- Execution Type - helps distinguish between solutions such as Load Consolidation, Recommendation, and so on.
- Total Number of Stops
- Average Number of Stops Per Movement
- Total Number of Stops with Load Activity
- Total Number of Stops with Unload Activity
- Total Inbound Movements
- Total Outbound Movements
- Total MPMD Movements
- Total Global Movements
- Total Unconsolidated Cost
- Total Consolidated Distance
- Total Consolidated Distance UOM
- Average Consolidated Distance Per Movement

The following fields are renamed:

Old Name	New Name
Input Shipments	Total Input Shipments
Total Movements	Total Planned Movements
Common Carrier Movements	Total Common Carrier Movements
Private Fleet Movements	Total Private Fleet Movements
Deadhead Movements	Total Deadhead Movements
Singleton Movements	Total Singleton Movements
Multistop Movements	Total Multi-Stop Movements
Aggregated Movements	Total Aggregated Movements
Total Cost	Total Consolidated Cost
Shipments Using Pickup Flexibility	Shipments Using Pickup Flexibility
Shipments Using Delivery Flexibility	Total Shipments Using Delivery Flexibility
Pre-Planning Time	Pre-Planning Duration
Planning Execution Time	Planning Execution Duration
Strategy Time	Strategy Duration
Post-Planning Time	Post-Planning Duration
Total Planning Time	Total Planning Duration

Users can now see the Solution Summary report as a pivot table or a chart.

Analytics Impact	None
Integration Impact	None

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

3.9.4.4 Support for the Flat Accessorial Cost Method for the TOSX Engine

The NEO 3.8 release adds the Flat accessorial cost method to the TOSX engine for Site Accessorial and Accessorial rates when calculating costs. With this new feature, users can now add a flat cost in addition to the base cost. This approach allows users to account for flat costs such as vehicle usage, operational costs, tolls, etc. This enhancement empowers users to select cost-optimized movements and choose the best equipment.

Users must define the Site Accessorial or Accessorial Rate for the applicable base rate and routes to utilize this feature. Please note that Step rates are not supported with this update.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Setting the Cost Type as Flat for Accessorial Rates" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.9.4.5 New Job ID Link on Planning Jobs Report Opens Plan and Job Details

In this update, the Job ID number on the Planning Jobs report is now a hyperlink pointing to the Plan ID and Job ID details. This update allows users to quickly access the details and summary of the executed Plan ID. To use this enhancement, open the Planning Jobs report and click the Job ID link to retrieve the respective Job ID and Plan ID details.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	See the "Accessing Plan and Job ID Details from the Planning Jobs Screen Using the Job ID Hyperlink" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.9.4.6 New Thread-based Execution for Movement Generation

In NEO 3.8, ONE implements thread-based execution for movement generation, improving performance and optimizing CPU utilization. By default, this feature is enabled. To provide users with greater flexibility, the option to enable/disable parallel execution and customize the thread pool size is available at the enterprise admin level in TOSX Load Consolidation Policies. To disable the feature, navigate to the TOSX Load Consolidation Policies screen and set the Run Strategies In Parallel parameter to False and enter a value for the Number Of Threads In Pool policy.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Enabling/Configuring Thread-based Execution for Movement Generation" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.9.4.7 Set Load and Unload Fields in the Planning Policies Using a CSV File

The NEO 3.8 release allows users to set the load and unload settings for Planning Policies using a comma-separated values (CSV) file. This feature allows users to specify load and unload settings for the Pickup and Delivery fields in the CSV file, eliminating the need for manually setting those fields. Users can upload the settings using the Upload option found on the Tools menu.

Analytics Impact	None
Integration Impact	Use the TMS.SiteConsPolicyInboundInterface version 2 file to upload the record.

Related Functionality	None
Usage and Configuration	See the "Uploading Site Consolidation Policies" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. See the "Planning Policies" section in the current release of the <i>Online Help</i> for more information.

3.10 Order Management System (OMS)

3.10.1 Approval Routing

3.10.2 ASNs

3.10.2.1 Select Between Multiple Static Routes

In this release, users can pick and choose static routes if there are multiple static routes available for that day. Previously, the ONE system automatically selected a static route based on the earliest availability under the assumption that only one static route existed for a given day. With this enhancement, days in which multiple static routes are available are now supported. If only one static route is available on a given day, the system behaves as it did before this update. To support this enhancement, a new "Select existing or create ASN" popup window appears when selecting delivery schedules on orders. This popup appears when multiple eligible static routes exist for a given shipment and asks the user to select a static route. This popup window also includes links to the static routes and movement numbers.

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

3.10.3 Blanket Orders

3.10.3.1 Support Contracts and Blanket Orders at the Organization Level

General

Starting in the NEO 3.8 release, Buyer roles can create contracts and blanket orders not tied to a specific site, instead defining them at the organization level. Previously, contracts and blanket orders could only be defined at the site level, meaning if an organization added a new site, a new contract or blanket order had to be created and linked to that site. But with this enhancement, users can define contracts and blanket orders once at the organization level and apply that to all sites within the organization.

If a contract or blanket order exists at both the site level and organization level for a given site, then the site-level contract or blanket order takes precedence. With this logic, users can apply general conditions on all sites within their organization but still have specific conditions applied to special sites.

With this enhancement, users can save time by creating fewer contracts and blanket orders per site. Adding new sites to an organization no longer requires the creation of new contracts or blanket orders since any organization-level contracts and blanket orders automatically cover new sites.

New Policies

To enable this functionality, two new policies are available on the Contracts tab of the Search Policies screen at the organization level: Enable Contract at Org Level and Enable Blanket Order at Org Level. These policies can be set by both Buyer and Vendor roles and determine whether a site-independent contract or blanket order, respectively, can be created. When set to true, the Ship-To Site field is optional when creating contracts or blanket orders, respectively, allowing them to be created at the organization level.

Blanket Order-Specific Changes

In addition, the Ship-To Site field is added to the Order Scheduler popup window and the Create Shipment popup window for blanket orders. The Order Scheduler popup window is available for Buyer roles by clicking the Schedule icon on blanket order detail screens, and the Create Shipment popup window is available for Vendor roles by clicking the Create Shipment button on the Blanket Order Lines tab of blanket order details screens. If a blanket order has a Ship-To Site value, then that value is populated in these fields and is read-only. If a blanket order does not have a Ship-To Site value, then the user must populate these fields.

Analytics Impact	None
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Integration Impact	<ul style="list-style-type: none"> • OMS.PurchaseContract_IB v1.0 and v2.0 • OMS.BlanketContract_IB v1.0, v2.0 and v3.0
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"> • "Ship-To Site Field on Blanket Orders" • "Configuring the Ship-To Site Field as an Optional Field" <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 Contracts with Terms, Line Items, and Holds" • "Creating Blanket Orders"

3.10.4 Contracts

3.10.4.1 Added Customer of Buyer Organization Field to Contracts and Blanket Orders

This release adds the Customer of Buyer Org (CBO) field to contracts and blanket orders. The CBO field captures the organization that is the customer of a buying organization; often, this is a retailer. With this enhancement, retailer organizations gain read-only visibility to contracts and blanket orders relevant to them.

The new CBO field is visible in the header section of contracts and blanket orders on the New Contract, Search Contract, New Blanket Order, and Search Blanket Order screens and can be used as a filter on the Search Contract and Search Blanket Order screens. The field is not auto-populated and must be populated by the buyer organization user before the contract or blanket order leaves the New state; after the New state, the CBO field remains read-only for all organizations.

Analytics Impact	None
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Integration Impact	<p>Added the Customer of Buyer Org (CBO) field to the following inbound interfaces:</p> <ul style="list-style-type: none"> • OMS.BlanketContract_IB v4.0 • OMS.PurchaseContract_IB v2.0
Related Functionality	None
Usage and Configuration	See the "Using the Customer of Buyer Org Field on Contracts and Blanket Orders" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.4.2 Policy Added to Disable Contract Netting

This release adds the Perform Contract Netting policy at the organization and enterprise level to disable contract netting for blanket orders and purchase order releases: By default, the policy is enabled in the system, and the order's owning organization controls the policies. Previously, users couldn't control netting for blank orders and purchase order releases. This enhancement helps users to control netting within the ONE system. Disabling netting is helpful when ONE is not the system of record, so external systems manage contract consumption. In such cases, the expectation is that the ONE system does not perform netting.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Disabling Netting for Blanket Orders and Purchase Order (PO) Releases" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>See the "Searching Policies" section in the current release of the <i>Online Help</i> for more information.</p>

3.10.5 Invoice Changes

3.10.5.1 Added Actions to Search Invoices Report

The NEO 3.8 release adds actions to the Search Invoices report. The Actions button is now visible at all times on the report, and the available actions depend on the state of the selected invoice(s). Buyer Financial Manager roles can perform the Submit, Save, and Reject actions on invoices in the New state and the Ok To Pay action on invoices in the Valid state. No actions are currently available for all other invoice states or for line-level invoices. If multiple states are selected at once, only shared actions are displayed (in this case, no actions). This enhancement allows users to quickly perform common actions on invoices, saving time.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Performing Actions on the Search Invoices Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Also, please see the "Searching and Updating Invoices" section in the current release of the <i>Online Help</i> for more information.

3.10.5.2 New Inbound Interface to Move Invoices and Credit Memos to Ok To Pay State

The NEO 3.8 release adds the OMS.InvoiceOkToPay_IB v1.0 inbound interface to support OK To Pay actions on invoices and credit memos. Previously, users had no method to push invoices or credit memos from the Valid state to the OK To Pay state via inbound interfaces; this action had to be performed in the UI. But with this enhancement, users can push invoices and credit memos from the Valid state to the OK To Pay state. Note that if an invoice that is not in the Valid state is referenced in this inbound interface, an error is thrown. This enhancement allows the ONE invoicing module to efficiently connect with external invoicing applications and be updated based on triggers from these external systems.

Analytics Impact	None
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Integration Impact	OMS.InvoiceOkToPay_IB v1.0
Related Functionality	None
Usage and Configuration	None

3.10.5.3 Relocated the Invoice Policies on the Search Policies Screen

In this release, ONE moves all invoice-related policies from the Deployment tab to the Invoice tab on the Search Policies screen. The improvement helps users access and configure all required invoice policies from the same tab. The rearrangement promotes consistency and saves the navigation time for the user to identify and update the policies.

The following list contains the policies that are moved to the Invoice tab:-

- Auto Compute Tax
- Auto Invoice
- Auto OK to Pay
- Invoice Active Code
- Invoice Line Amount Tolerance
- Invoice Line Qty Tolerance
- Invoice Unit Price Tolerance
- Allow Discount on Freight
- Allow Discount on Fuel
- Allow Discount on Product
- Allow Discount on Service
- Allow Discount on Tax
- Tax Allowed

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing the New Location of the Invoice Policies on the Search Policies Screen" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. See the "Searching Policies" section in the current release of the <i>Online Help</i> for more information.

3.10.6 Master Data

3.10.6.1 Funnel Databot Data Directly to Master Data with NEO Plasma Pipelines

Starting in the NEO 3.8 release, users can create NEO plasma pipelines directly from databot questionnaires, allowing databot data to be synced to the ONE master data model. With this enhancement, NEO plasma pipelines can be created that allow users to sync data collected from a databot to known ONE integration interface formats. For example, users could now create a databot for all vendors to collect information for approved vendor lists, asking different questions to collect product data, site data, and so on. After receiving responses, users can create a pipeline to send this data to the appropriate ONE inbound CSV interfaces, populating that vendor data directly into the system. If users trust questionnaire responders to provide useful data, users can now directly feed user responses into the appropriate data fields in the system, saving time with tedious data entry.

Note that databots must be associated with the owning organization and in the Published state to create NEO plasma pipelines. In addition, once a databot is published, questionnaire changes are not possible.

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

3.10.6.2 Enhanced Filtering of Active and Inactive Records

In this release, ONE replaces the Show Inactivated checkbox filter with the Active dropdown filter on several screens to help users filter active or inactive records more effectively. Previously, when the user selected the Show Inactivated checkbox, the system displayed both active and inactive records. The enhancement enables the user to see only active records, only inactive records, or both.

The Active filter dropdown contains the following options:

- **Yes - The system displays only the active records.**

- No - The system displays only the inactive records.
- No value - The system displays all records.



The default value for the Active filter is Yes.

This improvement helps users quickly view, filter, and analyze the existing active and inactive parts on Approved Vendor Lists (AVLs), buffer lanes, site lanes, and more.

This change is implemented on the following screens:

- AVL Search
- ACL Search
- User Code Explorer
- Vendors
- Partner Document Collaboration
- Search Payment Terms
- Customers
- Search Item
- Search Buffer Lane
- Search Site Lane

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

3.10.7 OMS Workbench

3.10.7.1 Added Substitute Item Prescription to the Order Expedite Workbench

The NEO 3.8 release adds a new Substitute Item prescription to the Order Expedite Workbench. This improvement helps to resolve the stock-out problem if a particular item is not available at the site. On the Order Expedite Workbench screen, the user can opt for the Substitute Item prescription if an item is unavailable for a specific site.

Users click the Help NEO Out button, view details for available substitute items on the popup or slideout, and then click the Execute Now button to create a Purchase or Deployment Order. The prescription capability ensures streamlining the substitution of items on respective sites. The list of substitution items is separate for purchase orders and deployment orders, and users can select single or multiple items depending on availability. A list of items with high to low precedence parameters is displayed for multiple substitute item options. When users click the Execute Now button, the prescription creates an Approved Vendor List (AVL) Purchase Order.

Prerequisite:

By default, the Substitute Item prescription is applicable if the projected inventory is below the minimum quantity.

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

3.10.7.2 Prescription for Selecting Vendors with Lower Carbon Emissions

This release introduces a new prescription that recommends options with the least carbon emissions to source an item to solve the Projected Inventory Below Min Qty problems and Projected Stockout problems.

Example:

Item A can be sourced from Vendor A and Vendor B. Vendor A can supply this item from Site A with total carbon emissions of around 80 pounds. Vendor B can supply the same item from Site B with total carbon emissions of around 50 pounds. In the above scenario, the prescription recommends creating a new order for Item A from Vendor B.

This new prescription is a Help NEO Out prescription. Users can verify details like delivery, shipment dates, and quantity on the prescription. This prescription is only available for Approved Vendor List (AVL) purchase orders (POs) and is present on both the problem detail screen and the problem list screen.

Analytics Impact	None
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Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Using the Help NEO Out Low Carbon Footprint Prescription" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.7.3 Support for Expiry Date Details on Order Expedite Workbench and Buffer Detail Screens

This release adds support for the expiry date of inventory to the Order Expedite Workbench and to Buffer detail screens. To implement this enhancement, stock expiry dates and stock expiry measures are added to the Expedite Order Workbench PIV Graph. The expiration fields, such as Expiration Days, Consume Before Expire Days, and Consume Before Expire %, are added to the Buffer detail screen. This enhancement helps users to predict inventory from the expiry dates and prevent inventory stockout. Users can set the expiry fields on the buffers and view the Expedite Order Workbench PIV graph for projected inventory stockout.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing Expiry Details on the Expedite Order Workbench PIV Graph" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. See the "Using the Problems Workbench" section in the current release of the <i>Online Help</i> for more information.


3.10.8 Purchase Orders

3.10.8.1 Ability to Calculate Delivery Dates Based on Transportation Lead Time

In this release, ONE enhances the promise ship date and promise delivery date calculation based on the transportation lead time (TLT). Previously, the system calculated the delivery dates based on TLT for buyer users only; the TLT-based calculations only auto-populated the Request Ship Date (RSD) based on the Request Delivery Date (RDD) and vice versa. With this

enhancement, the system now uses TLT-based calculations to auto-populate the Promise Delivery Date (PDD) based on the Promise Ship Date (PSD) and vice versa for vendor users. On the Order Details screen, a Promise Ship Date icon is added next to the Promise Delivery Date that, when clicked, populates the respective delivery date.

Similarly, when clicked, the Promise Delivery Date icon next to the Promise Ship Date populates the respective shipment date based on TLT. The newly introduced promise ship date and delivery date icons are currently supported for Purchase Orders and Deployment Orders. They are unavailable for spot purchase orders or vendor-managed inventory (VMI) spot purchase orders.



Prerequisite

Users must enable the Populate Default Request Ship Date organizational procurement policy for the system to populate the promise icons. This policy is enabled on the OMS Org Policies screen. See the "OMS Organization Policies" section in the *Online Help* for more information.

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

3.10.8.2 Ability to Cancel Orders in Collaboration in the New State via Integration

In this release, ONE introduces the capability to cancel the collaboration for purchase and deployment orders. This improvement allows buyers to cancel specific order lines and request schedules using the CSV file upload. Previously, users could not cancel the order lines and request schedules in the New state.

As a prerequisite, buyers need to configure the following policies:

- Allow Collaboration On Cancel For PO for the purchase orders
- Allow Collaboration On Cancel For DO for deployment orders

This enhancement improves the buyer's flexibility to identify and confirm the order cancellation via CSV file.

Analytics Impact	None
Integration Impact	Deployment Order IB 1.0 and OMS Purchase Order IB 4.0, 5.0
Related Functionality	None
Usage and Configuration	See the "Searching Policies" section in the current release of the <i>Online Help</i> for more information. See the "Uploading Files" section in the current release of the <i>Online Help</i> for more information.

3.10.8.3 Enable Vendors to Share Scorecards with Customers

Starting this release, vendors can publish the customer scorecard widget and the scorecard report for their customers. The newly added Customer and Site Scorecard report allows users to filter and view a list of customer scorecards available. From this screen, users can open a Customer Scorecard Overview screen for the desired customer, which links to the Customer Scorecard Details report that shows the details for the measures used to create the scorecard. The Customer Scorecard widget captures score details, the previous month's score, and the score component information. Previously, the vendor-specific customer scorecard details were not visible to the customer. This enhancement offers better visibility to the users to determine and measure score components and track vendor performance. Users can refer to the Customer and Site Scorecard report for further details. This report is available to buyers at Menus/Favs > Reports > Vendor Performance > Customer and Site Scorecard Report. Vendor and customer users may contact their administrators or ONE for more information.



Currently, the widget is supported for Purchase Orders and Sales Order types.

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

3.10.8.4 Bulk Update Order Lines

In the NEO 3.8 release, when creating or working with order lines, any amount of data can be copied from one line to another using the new Bulk Edit feature. The Bulk Edit option is widely supported and is available for purchase, deployment, sales, and requisition orders on all columns in the Lines tab of order detail screens. Standard templates, such as Standard Order Template, Standard PO Schedules Template, and PR Standard Template, are supported.

No user action is required to enable this feature. Users simply click the Enable Bulk Edit option from any column header, select which columns they want to copy, paste that data to all desired lines, and then exit the bulk edit mode by clicking Disable Bulk Edit from any column header. Previously, if users had an order with 100+ lines and wanted them all to have the same value in a certain field, they had to enter that data on every line manually. But now, users can quickly copy any number of columns from one line to any number of other lines with minimal clicks, saving time.

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

3.10.8.5 Updated System Logic for Automatic UOM Conversions

NEO 3.8 adds enhancements related to how the system calculates UOM conversions for total order quantities and data resyncs (when a user changes a value in one place and the system automatically syncs this value to other data fields).

The system attempts to calculate total order quantities based on the quantities of individual order lines. Oftentimes, order lines are in different units of measure (UOMs) and must be converted to one UOM to be summed and useful. For example, an order may have 50 cases of item A and 100 units of item B, and the system attempts to calculate how many pallets the entire order is.

In addition, when users update order line values, the system automatically converts and resyncs those values to corresponding requisition lines. The system behaves similarly when users modify shipment lines, updating corresponding order line values.

The system logic that calculates total order quantities and resyncs is updated to produce more useful results. For order-line to order-header UOM conversions, if a conversion factor cannot be found, then the total order quantity on the order header is not calculated. For order line to requisition line resyncs and shipment line to order line resyncs, if a conversion factor cannot be found, the assumed conversion factor is 1. In addition, UOM validation checks are added to order headers, buffers, and items to remind users to populate UOM fields and values. With these enhancements, if users regularly ensure UOM fields are populated on order headers, buffers, and items, the system automatically calculates total order quantities and performs data syncing, producing a useful data point for users.

- [Updated UOM Conversion Workflows](#)(see page 91)
 - [Previous UOM Conversion Workflow \(Order Line to Order Header\)](#)(see page 91)
 - [New UOM Conversion Workflow \(Order Line to Order Header\)](#)(see page 92)
 - [New UOM Conversion Workflow \(Order Line to Requisition Line and Shipment Line to Order Line\)](#)(see page 94)
- [UOM Validations](#)(see page 95)

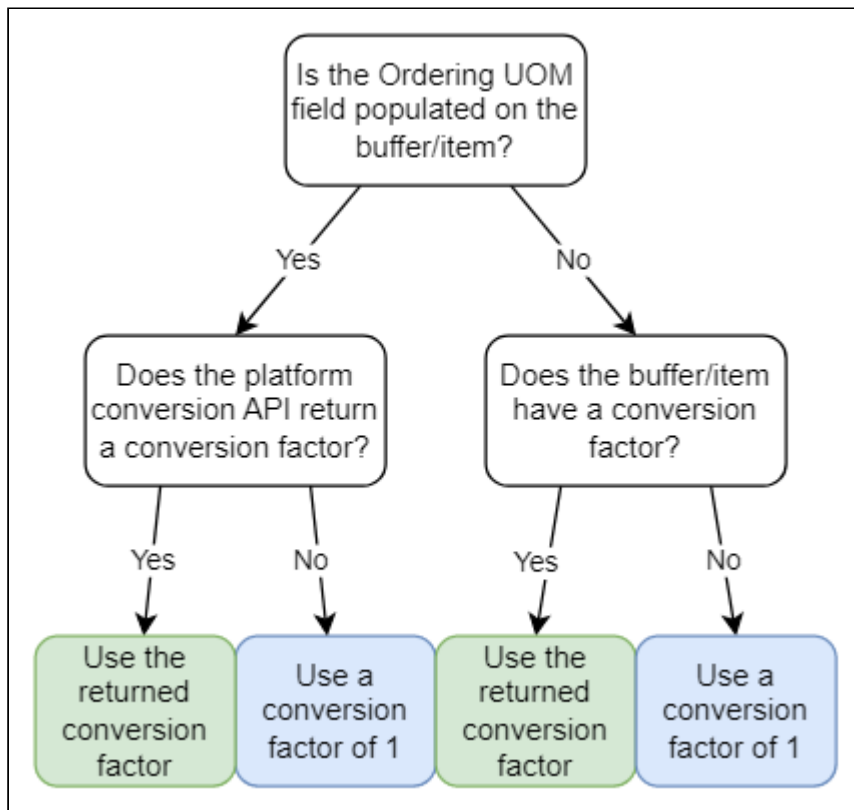
Updated UOM Conversion Workflows

The system determines the total order quantity by looking for conversion factors in the platform conversion API and at the individual buffer/item level. In a previous release, the Ordering UOM field present on buffers and items was deprecated and replaced with the Order UOM field; in this release, the Order UOM field replaces the Ordering UOM field in the conversion logic except as a last resort in some workflows. This section describes how the UOM conversion workflow is changed in this release for the following UOM conversions:

- Order line to order header
- Order line to requisition line resyncs
- Shipment line to order line resyncs

Previous UOM Conversion Workflow (Order Line to Order Header)

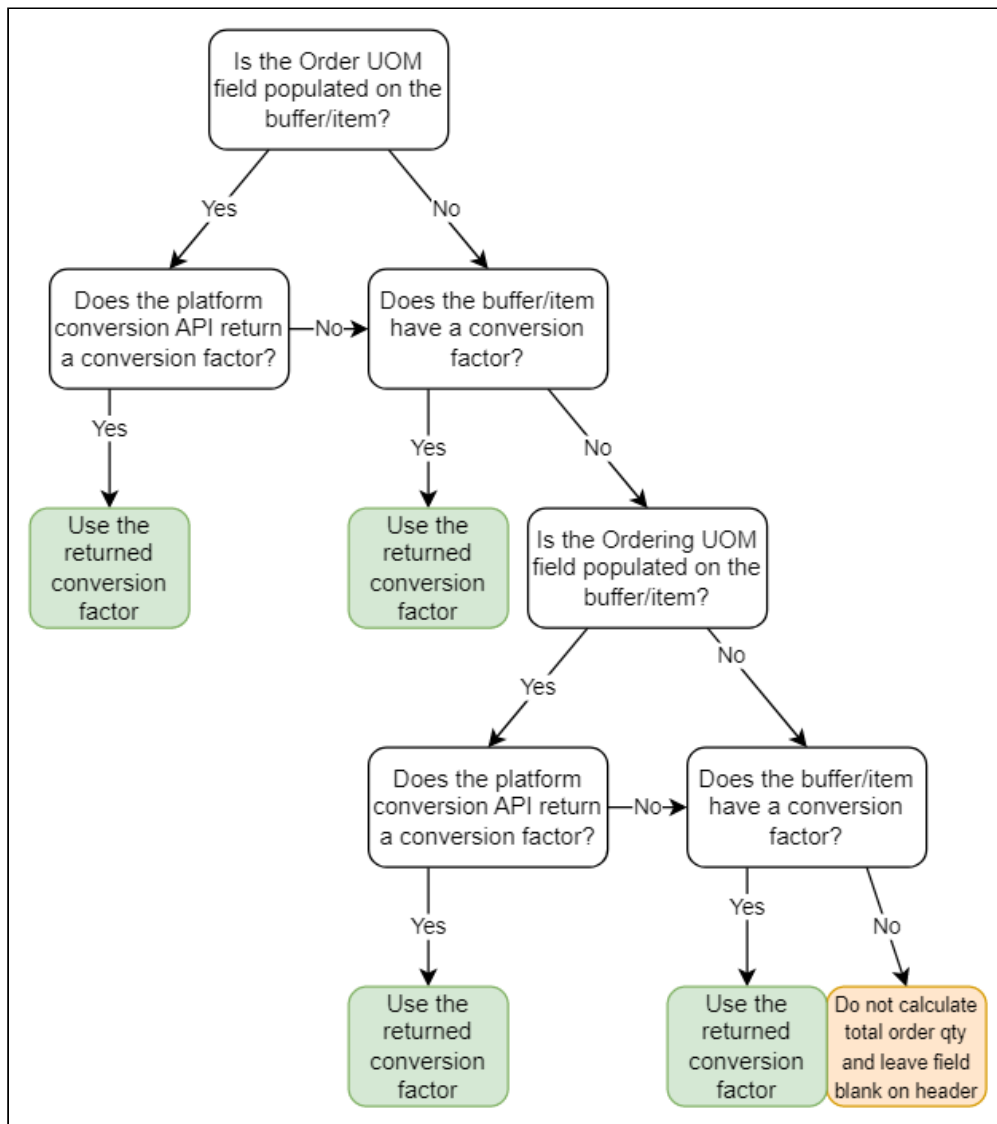
The previous logic to determine the conversion factor (from order line quantities to the UOM of the order header) for each order line was:



1. If the Ordering UOM field was present on the buffer/item of an order line, then the platform conversion API was used.
 - A. If a conversion factor was present, then it was used.
 - B. If a conversion factor was not present, a default conversion factor of 1 was used.
2. If the Ordering UOM field was not present on the buffer/item of an order line, the conversion factor of the buffer/item was checked.
 - A. If a conversion factor was present, then it was used.
 - B. If a conversion factor was not present, a default conversion factor of 1 was used.

New UOM Conversion Workflow (Order Line to Order Header)

The new logic to determine the conversion factor (from order line quantities to the UOM of the order header) for each order line is:



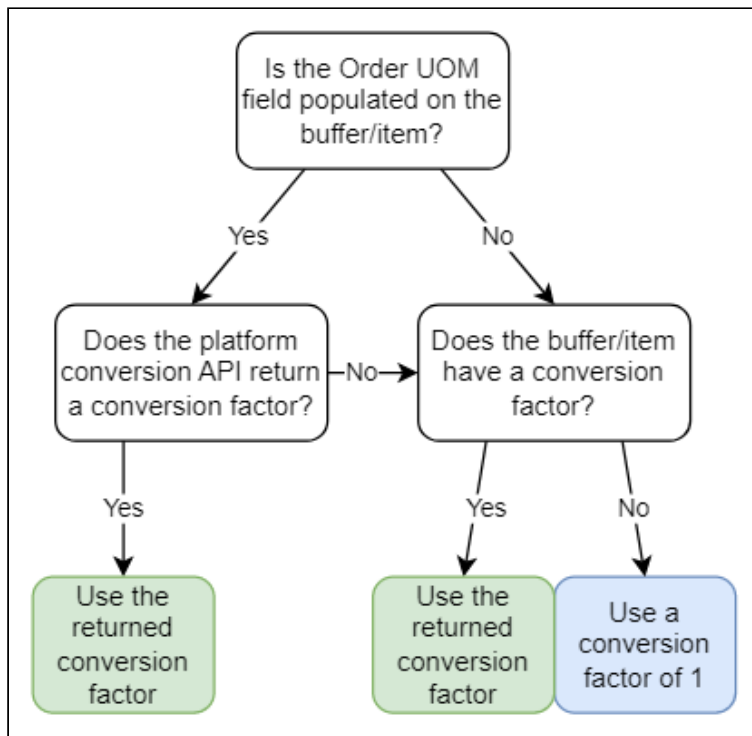
1. If the Order UOM field is present on the buffer/item of an order line, then the platform conversion API is used.
 - A. If a conversion factor is present, then it is used.
 - B. If a conversion factor is not present, then the conversion factor of the buffer/item is checked.
 - a. If a conversion factor is present, then it is used.
 - b. If a conversion factor is not present, then the total order quantity is not calculated and is left blank on the header.
2. If the Order UOM field is not present on the buffer/item of an order line, then the conversion factor of the buffer/item is checked.
 - A. If a conversion factor is present, then it is used.
 - B. If a conversion factor is not present, then the entire process begins again but looks at the Ordering UOM field instead of the Order UOM field. If the flow reaches this point again with no conversion factor found, then the total order quantity is not calculated and is left blank on the header.



This behavior is intended as a fallback option to handle legacy data that still uses the Ordering UOM field. Beginning in NEO 3.8, it is strongly advised to use the Order UOM field on master data.

New UOM Conversion Workflow (Order Line to Requisition Line and Shipment Line to Order Line)

This release updates how order line quantities are resynced to the corresponding requisition lines when changed and how shipped quantities on shipment lines are resynced to shipped quantities of corresponding delivery schedules when changed. In general, if a conversion factor is not present between the UOM of an order line and a requisition line, then the conversion factor is assumed to be 1. Similarly, if a conversion factor is not present between the UOM of a shipment and the UOM of a delivery schedule, then the conversion factor is assumed to be 1. The updated logic to determine the conversion factor in the above situations is:



1. If the Order UOM field is present on the buffer/item for that order line's site and item (for order line to requisition line resyncs) or for that shipment line's site and item (for shipment line to order line resyncs), then the platform conversion API is used.
 - A. If a conversion factor is present, then it is used.
 - B. If a conversion factor is not present, then the conversion factor of the buffer/item is checked.

- a. If a conversion factor is present, then it is used.
 - b. If a conversion factor is not present, a default conversion factor of 1 is used.
2. If the Order UOM field is not present on the buffer/item for that order line's site and item, then the conversion factor of the buffer/item is checked.
 - A. If a conversion factor is present, then it is used.
 - B. If a conversion factor is not present, a default conversion factor of 1 is used.

UOM Validations

Also added to this release are validation checks on UOM fields. If these validation checks fail, a new UOM MISSING hold is placed on the order.

- If the Total Quantity field is populated in the order header, then the Quantity UOM field must be populated as well.
- If the Total Weight field is populated in the order header, then the Weight UOM field must be populated as well.
- If the Total Volume field is populated in the order header, then the Volume UOM field must be populated as well.
- If the Line Weight Amount field is populated on an order line, then the Line Weight UOM field must be populated as well.
- If the Line Volume Amount field is populated on an order line, then the Line Volume UOM field must be populated as well.
- If the Request, Promise, or Return Quantity field is populated, then the Quantity UOM field must be populated as well.

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

3.10.8.6 Collaboration by Updating Order Quantity Unit of Measurement on Order Lines

Starting this release, any change in Quantity UOM on an order line by the buyer user triggers a notification to allow buyer and vendor users to collaborate on the order. Vendor users can change the promised quantity but not the UOM.

Example:

Workflow	Request Quantity	UOM	Promise Quantity	State
Original order line in the Open state	10	Each	10	Open
Buyer updates Quantity UOM. Order state changes to Buyer Change Request (BCR).	10	Pallet	10	BCR
Vendor confirms the change and updates the Promise Quantity. Order state changes to Vendor Confirmed With Change (VCWC).	10	Pallet	8	VCWC
Buyer again updates Quantity UOM. Order state changes to Buyer Confirm With Change (BCWC).	10	Case	8	BCWC
Vendor accepts buyer's change and updates the Promise Quantity. Order state changes to the Open state.	10	Case	10	Open

Collaboration by updating the Quantity UOM field is possible on purchase orders and deployment orders.

- For AVL purchase orders and deployment orders, Quantity UOM can be updated only via integration.
- For spot purchase orders, Quantity UOM can be updated on the UI or via integration.

Previously, collaboration was possible only on fields like Quantity, Delivery Date Unit Price, and other configured collaborative fields such as IncoDate and Minimum Item Expiry. With this enhancement, buyers can initiate collaboration by updating the Quantity UOM field.

Prerequisite

The Enable Notification By Collaboration organization-level policy must be enabled, and the policy value must be set to Quantity UOM.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Collaborating on Order Quantity Unit of Measurement (UOM)" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Also, see the "Searching Policies" section in the current release of the <i>Online Help</i> .

3.10.8.7 Confirm Schedule Action Added at Line/Delivery Schedule Level

With this release, buyers or vendors confirm schedules at the line/delivery schedule level for purchase orders (PO) and deployment orders (DO). The following two actions are added to the Order details screen and Order Schedule Dashboard:

- Buyer Confirm Schedules
- Vendor Confirm Schedules

Previously, buyers or vendors could not confirm only specific delivery schedules without confirming all of them. This enhancement helps users to carry out approvals at the line level and collaboration via the Order Schedule Dashboard. Buyers or Vendors can select the Confirm Schedules action on the order details screen for the respective order (PO or DO) to confirm schedules at the delivery schedule level.

Analytics Impact	None
Integration Impact	Yes
Related Functionality	None

Usage and Configuration

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

- "Confirming Schedules from the Order Details Screen"
- "Confirming Schedules from the Order Schedule Dashboard"

3.10.8.8 Improved Ranking System for Expedite Order Workbench Prescriptions

This release improves how prescriptions are ranked and sorted on the Expedite Order Workbench. Previously, the workbench supported the ranking and sorting of prescriptions, but only in a simple manner that sorted prescriptions based on their type with no customization options. Now, users can configure the scoring process to use several strategies for ranking prescriptions. Two new concepts are introduced in this enhancement:

- **Strategy:** ranks prescriptions on a scale of 0 to 1, with 1 being the most desirable and 0 being the least desirable.
- **Strategy cache:** stores all known strategies and links them to a simple name by which the strategy can be searched. Attempting to save a strategy with the same name as an existing strategy generates an error message, preventing strategies from being accidentally overridden.

With these enhancements, users can have different preferences for prescription sorting, supporting as many use cases as possible.

New Policies

In addition, two new policies are introduced on the Enhanced Order tab of the Search Policies screen:

- **ExpediteOrderSortingStrategies:** An organization-level policy that controls the type of strategies used when sorting prescriptions. The value of this policy is a JSON array containing the names of the strategies used when ranking prescriptions. The entries are ordered in order of their value, with the first entry being the primary sorting method (meaning it has the highest weight when sorting prescriptions) and each value after the first holding lesser and lesser weight. If the policy is not set or has an invalid JSON array, the value defaults to "OMS.ByPrescriptionType". If a strategy name is given in the policy, but no strategy is registered with that name, that strategy is skipped. If every strategy is skipped in this way, the prescriptions are scored using the default strategy.



Updating this policy changes how new prescriptions are ranked, but not existing prescriptions. This can lead to prescriptions appearing out of order, but it should not be a large issue as the policy is unlikely to change frequently.

- **ExpediteOrderPrescriptionRanking:** An organization-level policy that allows users to customize the ordering of prescriptions based on their type. This policy is used by the "OMS.ByPrescriptionType" strategy, which ranks prescriptions based on their type. The value of this policy is a JSON array containing the names of the prescription types and the order they should be ranked in. Prescription types earlier in the list are valued more than prescription types later in the list.

Supported Strategies

The following strategies are supported:

- **Highest Quantity:** Favors prescriptions with the highest quantity changes.
- **Lowest Quantity:** Favors prescriptions with the lowest quantity changes.
- **Lowest Cost:** Ranks the prescription with the lowest cost as the best and the highest cost as the worst.
- **Strong First:** Ranks strong prescriptions above any weak prescriptions. Prescriptions are considered weak by default.
- **Full First:** Ranks full prescriptions above any reduced prescriptions. Prescriptions are considered reduced by default.
- **Fastest Delivery:** Ranks prescriptions based on the date they impact. Earlier deliveries rank higher than later deliveries.
- **By Prescription Type:** Ranks prescriptions based on their type. This is the default strategy and how the system behaved before this update.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Using Expedite Order Sorting Strategies and Expedite Order Prescription Ranking Policies" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>See the "Using the NEO Order Expedite Workbench" section in the current release of the <i>Online Help</i> for more information.</p>

3.10.8.9 Upload and Download CSVs on Order Schedule Dashboard and Search POs Screens

The NEO 3.8 release adds the ability to download and upload CSVs on the Order Schedule Dashboard and Search POs screens for Vendor Supply Chain Admin roles. Users can download CSVs from the given screens, modify them on their system, and reupload them to the ONE system. Previously, these screens had no upload or download functionality, but now vendors can collaborate and update data much more easily. Note that purchase orders and purchase order lines in the Canceled, Deleted, and Vendor Rejected states are excluded and not downloaded. With this update, users can easily create and modify order schedule and purchase order information.

Analytics Impact	None
Integration Impact	OMS.PurchaseOrder_Vendor_ACK_Upload_IB v1.0
Related Functionality	None
Usage and Configuration	See the "Uploading and Downloading from the Order Schedule Dashboard and Search POs Screens" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.10.8.10 Product Group Level Fields Added to Purchase Order Sync Interface (V1.1)

With this release, the product-group-level fields are added to the 1.1 version of the purchase order sync inbound interface (v1.1). The product group level values are similar to the fields on the standard purchase order inbound interface. The below product group-level fields are added:

- Product Group Level 1 Name
- Product Group Level 2 Name
- Product Group Level 3 Name
- Product Group Level 4 Name
- Product Group Level 5 Name
- Product Group Enterprise Name
- Product Group Type Name

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

3.10.8.11 New Equipment Constrained Order Builder Workbench

This release adds the Equipment Constrained Order Builder workbench to allow Buyer Supply Chain roles to compute equipment capacity based on orders and forecasts. Previously, an Equipment Builder functionality was embedded in order screens but could only work with one order at a time; with this update, multiple orders and order forecasts can be viewed at the same time from a single workbench. The Equipment Constrained Order Builder workbench supports orders in the Draft and Awaiting Approval states and order forecasts in the Approved state. With this enhancement, material planner users can use order forecasts to optimize equipment utilization and capacity.

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

3.10.8.12 Support for Closing Backordered Orders

The NEO 3.8 release supports closing purchase orders, deployment orders, and sales orders in the Backordered state. When the Force Close action is taken on order headers, order lines, and order request schedules, they now transition from the Backordered state to the Closed state.

This enhancement is added to support scenarios where orders are in the ONE system but are not executed in the ONE system and are instead fully fulfilled by external contractors. In these scenarios, order tracking is still important, and many users place these orders in the Backordered state. Previously, when back-ordered external contractors completed orders, users could only cancel them, but now users can use the Force Close action to close these orders and optionally automatically populate certain fields.



A special case arises for orders with two or more lines with the first line in the Open state and the second line in the Backordered state. If the Force Close action is taken on the line in the Backordered state, then that line is considered as shipped and received, and therefore the order state transitions to the Partially Received state. This situation also applies to orders with two or more lines in the Backordered state, but only one order line is forced closed.

The Force Close action is available for users from the owning organization, buying organization, order management organization, and buying agents for purchase and deployment orders. For sales orders, the Force Close action is available for users from the owning organization, buying organization, order fulfillment organization, and selling agents. A new policy called "Default Shipped And Received Values For Force Close Backorder" is added to the Enhanced Order tab of the Search Policies screen to use this new action. This policy has the following possible values:

- **Use Blank Values:** When the Force Close action is taken, the back ordered order or line moves to the Closed state, and the Shipped Qty, Received Qty, Shipped Date, and Received Date fields are left blank. This is the default value of the policy and behaves as the system did before this update.
- **Use Ordered Values:** When the Force Close action is taken, the back ordered order or line moves to the Closed state, and several fields are populated as follows:
 - The Shipped Qty and Received Date fields are populated by the value of the Backordered Qty field.
 - The Actual Ship Date field is populated by the value of the Requested Ship Date field.
 - The Actual Receipt Date and Actual Delivery Date fields are populated by the value of the Requested Delivery Date field.

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

3.10.8.13 Support for Local Item in Order Reports

This release adds a new column and a new search filter, both called Local Item, to the following reports to support item mapping inside an enterprise:

- Order Schedule Dashboard Report
- Search POs Report
- Search DOs Report
- Search PO Schedules Report
- Search DO Schedules Report
- Order Detail Screen (for Purchase Orders and Deployment Orders)

The ONE system has customers with different Enterprise Resource Planning (ERP) systems at various levels that may have different names for the same item. Previously, users could not search orders and order schedules using the local item name. The addition of this field enables users to search orders using the Local Item name and view the Local Item column with the alternate name based on the user's role and organization. The Local Item field is mapped to the corresponding item within the enterprise. This enhancement improves data compatibility for customers at the integration and UI level.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Searching Orders Using the Local Item Field" 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"> • "Order Schedule Dashboard" • "Searching Purchase Orders" • "Searching Deployment Orders" • "Searching Purchase Order Schedules" • "Searching Deployment Order Schedules"

3.10.8.14 Support for Order-to-Shipment Sync

This release supports order-to-shipment sync for multi-modal and static route shipments. The enhancement supports Purchase Orders and Deployment Orders. Previously, the order-to-shipment sync was available for normal ASNs without static route links. This enhancement helps the system reflect changes to orders on the shipment automatically. Users need to enable different settings for different order states and shipment states for order-to-shipment sync in the system.

The order-to-shipment sync is not supported for orders beyond the In Fulfillment state. The order-to-shipment sync is supported for shipments in below states:

- **Awaiting**
- **Tendered**
- **Confirmed**
- **Multi-modal**

The changes in the order can be:

- **Change in Qty**
- **Change in Item Name on the order line**
- **Add new Order Line / Request Schedule/ Delivery Schedule**
- **Delete Order Line / Request Schedule/ Delivery Schedule**
- **Change the Delivery Date**

Users also need to set up some prerequisite data for order to shipment sync:

- **Create static route**
- **Create routing guide**
- **Set up Auto Tender**
- **Set Auto Accept Appointment Policy**

Users need to set the below policies for the orders in In Fulfillment state:

- **Sync Shipment at the Owning Organization level**
- **Allow Update In Fulfillment as Collaborative or Non-Collaborative at the Owning Organization level**

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	<p>See the "Enabling Order-to-Shipment Sync" 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 OMS Organization Policies" • "Updating OMS Organization Policies" • "Creating Static Routes" • "Searching Routing Guides" • "Updating Approved Vendor Lists (AVLs)" • "Updating Equipment Settings" • "Creating Purchase Orders" • "Searching Shipments"

3.10.8.15 Support Request Quantity Change via Integration

The NEO 3.8 release includes support for a request value change for purchase orders and deployment orders through integration when the Enable Buyer Collaboration Per DS policy is enabled. Previously, when a user tried to update the request quantity via a CSV upload, the system returned an error; users were only allowed to update the request value via the UI. Now, when the Enable Buyer Collaboration Per DS policy is enabled, users can update the request value or add a request schedule with an updated value in OMS.PurchaseOrder_IB or DeploymentOrder_IB CSV files. Users provide the updated values on the CSV files at the request level using the existing actions, OMS.CreateOrUpdateFromInteg and OMS.UpdateFromInteg. This enhancement expands the user's options for updating request values.

Analytics Impact	None
Integration Impact	OMS.PurchaseOrder_IB and DeploymentOrder_IB
Related Functionality	None
Usage and Configuration	See the "Updating Request Quantity via Integration" section in the current release of the <i>New Feature Usage and Configuration Guide</i> . See the "Uploading Files" section in the current release of the <i>Online Help</i> for more information.

3.10.8.16 Added Buyer Reason Code and Comment on Order Collaboration

Starting this release, buyers can be required to enter a reason code when they initiate any change request for collaboration. In addition, buyers and vendors both now have the option to enter a reason comment to give more details about the change request. Previously, vendors had no way to see why buyers requested a change to the original requested quantity or date, and vendors did not have a way to enter a comment about their change request to buyers. For buyers, a reason code dropdown field and a comment text field are added to the change request popup window on the Order details screen and Order Schedule Dashboard to support the enhancement. For vendors, a comment text field is added; the reason code field was already present for vendors. Users can bulk update the reason codes and comments using the popup window.

This policy-based feature gives users more transparency between buyers and vendors, helping vendors better align with buyer needs. It helps track the reason for collaboration via order analytics, as details for change requests can be downloaded based on reason code, providing visibility to the reasons changes are requested. The enhancement is available for purchase orders (PO) and deployment orders (DO). The new fields are available as filter fields when searching POs, DOs, PO schedules, or DO schedules. In addition, the buyer reason code can be included as a desired display field when creating a buyer confirm or buyer change request alert subscription.

Prerequisite:

Users must enable the `OMS.EnforceBuyerCollaborationDeviationCode` policy at the organization level to set the reason code and comment fields as required for any buyer change action.

Analytics Impact	None
Integration Impact	<p>The Reason Code and Comment fields are added to the following interfaces:</p> <ul style="list-style-type: none"> • PurchaseOrder_IB • PurchaseOrder_Synch_IB • PurchaseOrder_Vendor_ACK_IB • PurchaseOrder_OB • EnhancedDeploymentOrder_IB • DeploymentOrder_Synch_IB • DeploymentOrder_ACK-IB • DeploymentOrder_Synch_OB

Related Functionality	None
Usage and Configuration	See the "Adding Reason Code and Comment to Buyer Change Request" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. See the "Searching Policies" section in the current release of the <i>Online Help</i> for more information.

3.10.9 Requisitions

3.10.9.1 Chat Button on Requisition Details Screen

This release adds a Chat button on the Requisition details screen. The chat feature allows users to create and join an individual or group chat specific to the requisition and discuss any issues or queries. All individual and group discussion logs are maintained and available for reference in future chat sessions about the requisition.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Initiating Chats from the Requisition Details Screen" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Also see the "Chats, Collaborations, and Conversations" section in the current release of the <i>Online Help</i> .

3.10.10 Return Orders

3.10.10.1 Parent Organizations Have Visibility of Return Orders Created by Child Organizations

Starting this release, parent organizations have visibility of return orders created by child organizations on the Search Returns report. Previously, parent organizations could not search for return orders created by child organizations. With this enhancement, child organization users can create return orders and submit them for approval. Parent organization users can then approve return orders, and child organization users can complete the remainder of the return order workflow.

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

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

3.11.1 Activate or Deactivate an Asset Type

Starting this release, asset admins can deactivate or activate a particular asset type. The Asset Deactivation On Asset Type (MRO) policy is added to allow the forced deactivation of an asset type. When the policy is enabled, the system generates an alert notification for confirmation to deactivate and discontinue the asset type. Upon confirmation, all the assets are inactive, and the associated work orders are canceled.

Alternatively, if the policy is not enabled, the asset admin must manually deactivate the specific asset type from the asset category screen. The enhancement help users deactivate a specific asset line that may be no longer needed or supported.

The following UI elements are implemented as part of the enhancement:

- **Asset Type Active column with a Yes or No option to deactivate or activate the asset category and asset type on the Asset Category screen**
- **Specific batch programs and a selection menu to deactivate all associated assets linked to the deactivated asset type**



The asset type cannot be deactivated if existing assets and work orders are available in the system. If confirmed, the system generates an alert with the count of active assets and active work orders.

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

3.11.2 Associate the Asset Category and Type by Asset Make and Model

Starting this release, the system updates and associates the asset category and type by identifying the relevant asset make and model. Previously, if an asset or a work order was initiated from outside the Maintenance Repairs and Overhaul (MRO) module, the system faced an issue verifying and assigning the asset category and type.

The improvement ensures users can determine which asset category and type are not defined in the item master by confirmation in MRO. It also helps the asset admins integrate and manage assets and work orders initiated outside MRO.

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

3.11.3 Added Policies to Freeze an Asset Based on Asset State

In the NEO 3.8 release, ONE introduces new policies that allow asset admins to freeze an asset based on the selected asset state. This improvement helps asset admins to identify an asset state and then freeze the asset on that specific asset state. Users set policies on the MRO Policies screen.

The following policies are added:

- **Disable Component Change:** This policy disables or enables structure-level actions on assets for the selected asset state. If the policy is enabled, users can perform actions like swapping components, removing the components against

sub-assets, or updating the components. If enabled, then users will be restricted from making such updates.

- **State For View Only Asset:** If the policy is enabled, every action on the asset is disabled. Also, the asset is available in a read-only mode if the user selects one or multiple states. The asset admin is also restricted from updating the asset.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Setting the Policies to Freeze Assets Based on State" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.11.4 Asset Status Changes to In-Transit or In-Stock State When the Shipment Is Shipped or Received

In the NEO 3.8 release, ONE implements intra-module operations between Maintenance, Repair, and Overhaul (MRO), Transportation Management System (TMS), and Warehouse Management System (WMS) to track the managed assets that are shipped from TMS or received from the WMS.

Previously, this was an independent activity via MRO since users needed to create an order, follow up on the shipment, and pick and pack an asset. When shipped, the shipment state was displayed as Intransit, but the asset status remained unchanged as In Stock. Similarly, when an asset inventory was created in WMS, it was manually required to change the asset status in the MRO, which was a time-consuming activity. This improvement provides a single version of truth where the asset admins have all the visibility to the Shipped (In Transit) and In Stock (Inventory) assets. This enables asset admins to confirm the shipment of the asset type in the MRO for the location inventory created in the warehouse (WMS).

The following elements are added as a part of the enhancement:

- **Implemented two-way operations to support when an asset is being shipped in TMS.**
- **A new status, Transit Ready, is implemented in asset status. When a shipment is created with a Draft state and not yet shipped, the MRO asset status reflects as Transit Ready.**
- **Implemented the system-generated Confirm Shipment notification alerts when an asset type is shipped.**

- The Shipment state and shipment number are added to the Asset Details screen under the Additional Info tab.

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

3.11.5 Creation User and Date Columns Added on Search Asset Meter and Attribute Configuration Reports

This release adds the Created By and Creation Date columns to the Search Asset Meter Configurations report and the Search Asset Attribute Configurations report. Previously, there was no provision to identify the user and the creation date for the asset meter and asset attribute configuration on these reports. This enhancement helps users to identify the user and creation date of the asset meter and asset attribute configuration for auditing purposes.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Viewing and Adding the Created By and Creation Date Columns to the Search Asset Meter and Attribute Configurations Reports" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>See the "Searching Asset Attribute Configurations" and "Searching Asset Meter Configurations" sections in the current release of the <i>Online Help</i> for more information.</p>

3.11.6 Enable Work Orders to Build Partial Asset Assembly and Rework

In the NEO 3.8 release, a new checkbox, *Is Allow Partial Assembly*, is added to enable assembly work orders as partial asset assembly on the New Work Order screen. An *Incomplete* checkbox and *Partial Completion* checkbox are added to the Asset to identify the asset as incomplete and partially complete.

Enabling the policy allows the system to make the following changes in the Assets and Work Orders:

- Partial Assets can be in an *In Transit* state or *In Stock* state. This asset can be used to create a Work Order.
- Work Orders can build the asset without completing the *Bill Of Materials*.
- Work Orders can be completed and closed without adding some parts.
- Assets can be assembled and disassembled.

This enhancement provides the following capabilities for users:

- Users can assemble an asset and work with partially complete work orders.
- Users need not wait for all components on the same site; they can send partially built assets to another site or location to build them completely or put them in stock.

Users can enable the *Is Allow Partial Assembly* on the New Work Order screen to enable partial asset assembly. The system enables the *Incomplete* checkbox and the *Partial Completion* checkbox on the Asset details screen.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	<p>See the "Enabling Work Orders to Build Partial Asset Assembly and Rework " section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>See the "Creating Work Orders" section in the current release of the <i>Online Help</i> for more information.</p>

3.11.7 Enhancements to Work Order and Asset Alerts

The NEO 3.8 release adds the following alerts to the alert subscription UI:

Alert Category	NEO Dashboard Category Name	Alert Type
Work Order	<ul style="list-style-type: none"> Open State WO In Progress State WO Canceled WO State Material Shortage WO 	<ul style="list-style-type: none"> Open Work Order Alert In Progress Work Order Alert Canceled Work Order Alert Material Shortage
Asset Tax	Asset Tax Alert	Asset Tax Expiry Alert
Asset Insurance	Asset Insurance Alert	Asset Insurance Expiry Alert
Asset Warranty	Asset Warranty Expiry Alert	Asset Warranty Expiry Alert
Asset	<ul style="list-style-type: none"> Asset Failure Alert Asset Awaiting Shipment Asset In Transit 	<ul style="list-style-type: none"> Asset Failure Alert Asset Awaiting Shipment Asset In Transit

Previously, the system could not generate these alerts. This feature enhances the system to provide more alerts and prescriptions for the users. Users select from available alerts based on the alert subscription UI's alert categories.

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

3.11.8 Enhancements to the Work Order Report

The NEO 3.8 release introduces the Task, Task Parts, Tools, Problem Code, and Reason Code sections to the Work Order report and displays them in a hierarchical format below the work order in the report. Users can expand the work order line in the report and view the task-related information. Users can also download CSV files and print the work order report with all the sections. This enhancement helps users view any transactions against work orders at a granular level. Users can access the Work Order Report screen via the Reports menu.

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

3.11.9 Enhancement to the Maintenance Summary Report

In this release, ONE enhances the Maintenance Summary Report to provide the past maintenance information for an asset. The report provides better visibility to check and manage previous and future maintenance dates. The report ensures clarity and helps to remove confusion by displaying asset-wide maintenance details in a single window.

This improvement provides insights that can be further customized to build key performance indicators for the asset maintenance trajectory. These inputs are presently used in the Maintenance Calendar.

The following columns are added as part of the enhancement:


- Past Maintenance Days
- Past Maintenance Date

Analytics Impact	None
Integration Impact	None

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

3.11.10 Enhancement to Asset Meter and Asset Attribute Configuration Reports

In the NEO 3.8 release, ONE enhances the capability to override the meter and attribute parameters to accommodate an asset's effectiveness. The enhancement adds the Effective Start Date and Effective End Date columns to the Search Asset Meter Configurations and Search Asset Attribute Configurations reports, and the active asset's effectivity is measured and displayed under these columns. This improvement allows asset admins to track, maintain schedules, and update the old meter and attribute parameters. Users can change the meter and attribute parameters such as its value, range, min/ max, and yield. These changes performed prove useful for the maintenance and compliance of active assets. The asset admins may need to download the Meter and Attribute Configuration spreadsheets, update the effective start date, and upload the file to the system. The system auto-updates the effective end date.



Note
The meter and attribute recording is based upon the new parameters, and the system preserves all the historical records for predictive maintenance.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Viewing the Effective Start Date and Effective End Date on the Search Asset Meter and Attribute Configurations Reports" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. See the "Searching Asset Attribute Configurations" and "Searching Asset Meter Configurations" sections in the current release of the <i>Online Help</i> for more information.

3.11.11 Support for Configuring Due Days and Percentage for Asset Alerts

The NEO 3.8 release adds the following fields for different alerts on the alert subscription UI:

Alert Type	Field Added
Asset Warranty Expiry Alert	Asset Warranty Expiry Due Days
Asset Failure Alert	Asset Failure Due Days
Asset Schedule Maintenance Alert	Schedule Due Percent Value

Previously, the system sent the asset schedule maintenance alert when the scheduled maintenance due value reached 75 percent. This enhancement helps users to set the alerts before specific days and percentage values for scheduled maintenance alerts. Users set the due days in the Asset Warranty Expiry Due Days and Asset Failure Due Days fields and subscribe to the Asset Warranty Expiry Alert and the Asset Failure Alert. Users also set the percentage value in the Schedule Due Percent Value field and subscribe to the Asset Schedule Maintenance alert.

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

3.11.12 Restrict Role-Based Transaction on the Asset History

In the NEO 3.8 release, ONE implements UI changes to capture the tracking of asset history based on role type and associated details. Currently, the system tracks all the transactions performed on the asset by maintaining a historical trail of the asset change in hand, change in location, site, and an asset attribute change. This improvement helps asset admins to restrict user roles to perform specific actions on the Asset History screen. The capability provides better visibility if the historical transactional records are large in numbers.

The following list contains the UI elements that are added as part of this enhancement:

- The system allows users to restrict actions on Asset History transactions for recording a history line.
- A popup History transaction report is available for all user roles. The report is read-only.
- Users can configure the asset states where the actionable buttons and icons can create a work order and initiate an inspection.

Analytics Impact	None
Integration Impact	None
Related Functionality	None
Usage and Configuration	See the "Restricting Role-Based Transaction on the Asset History" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.11.13 Support for Maintenance Calendar

NEO 3.8 adds a Maintenance Calendar to track the maintenance due date, maintenance schedule, inspection schedule, projected inventory, or inventory availability for the assets. Previously, planners had no visibility of the pending bucketized demand and material inventory availability. The maintenance calendar gives insight to planners about the maintenance due date of assets and material availability in inventory. The calendar has options such as Daily, Weekly, and Monthly. Users can view the Maintenance Calendar from the Tools menu and filter the scheduled maintenance and inventory availability per daily, weekly, and monthly bucketization.

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

3.11.14 Support for Work Order Problem Code and Resolution Code

This release supports Problem Code, Problem details, and Resolution Code for the Spares, Maintenance, Repair, and Overhaul (SMRO) service. Previously, problem code management and the provision to add resolution code were not present in the SMRO service. Users can keep track of problems for work orders and assets with the problem codes and apply multiple resolution codes for a single problem code. Users can also add comments for a specific problem. The problem codes can also be added at the work order task level and users can view the count of already added problem codes. This enhancement helps users separately provide problem and resolution codes for work orders and assets. Users can search work orders with the Search Work Order screen and add problem codes, resolution codes, and problem code details for specific work orders. Users can view the work order details and problem code configurations on the Work Order Problem Code Details report and Work Order Problem Code Configuration report.

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"> • "Adding a Problem Code and Resolution Code to a Work Order" • "Viewing the Work Order Problem Code Details Report" • "Viewing the Work Order Problem Code Configuration Report" <p>See the "Searching Work Orders" section in the current release of the <i>Online Help</i> for more information.</p>

3.11.15 Create Contracts for Preventive and Repair Work Orders

This release adds support to create contracts for preventive and repair work orders. Previously, users had to create work orders and work order tasks manually. This enhancement automatically helps users create work orders with a configured set of tasks, reason codes, duration, cost, and tools. Users can identify different types of work orders and


asset types and change the contract according to these types. Users can configure the parameters below to create a preventive or repair work order.

- Task Type
- Task Item
- Labor Duration
- Cost
- Planned Duration
- Task Tools
- Reason Code

Analytics Impact	None
Integration Impact	Yes. An inbound interface to create work order contracts is added.
Related Functionality	None
Usage and Configuration	See the "Creating a Contract for Preventive and Repair Work Orders" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.11.16 Support Versioning for Bill of Materials Selection

Starting this release, the bill of materials (BOM) names available for selection in the Bill Of Materials (BOM) field on the work order or asset creation screens now includes the version number of the BOM. Previously, the version number was added to the BOM creation screen (Revision field), but that version number was not displayed when selecting a BOM during work order or asset creation. Asset admin users can use the BOM field to search and select the most suitable version of the BOM structure while initiating a work order or creating an asset. The system displays non-duplicated BOMs for selection, including version numbers. The enhancement ensures better visibility to identify and choose a valid BOM version coupled with the asset and item.



Note
The system allows asset admins to define several versions of a BOM for a single item.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	See the "Selecting the Bill of Materials Version During Work Order and Asset Creation" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.12 Warehouse Management System (WMS)

3.12.1 Added Filters to the Work Report

In the NEO 3.8 release, ONE added several optional filters to the Work Report pane on the Work screen. The enhancement improves the user experience of searching and accessing work report details. Previously, there was no option to search the Work Report pane on the Work screen by applying filters such as pick list number, packing list number, receipt number, and so on. This improvement allows users to search quickly and sort details by type.

The following optional filters are available for user selection:-

- Document Type
- Pick List Number
- Packing List Number
- Receipt Number
- Putaway List Number
- Inventory Move Order Number
- Order Number
- Shipment Number



By default, the filters may not be visible in the Work Report filter window. Users may need to click the Add Filter link to add the required filters.

Analytics Impact	None
Integration Impact	None

Related Functionality	None
Usage and Configuration	See the "Adding and Using Filters on the Work Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.12.2 New InventoryMoveOrderInbound Interface

The NEO 3.8 release adds the WMS.InventoryMoveOrderInbound interface to the ONE system. This interface allows users to more efficiently share current inventory positions between the ONE system and third-party systems. This enhancement has no graphical component in the ONE system.

Analytics Impact	None
Integration Impact	Added the WMS InventoryMoveOrderInbound v1.0 inbound interface.
Related Functionality	None
Usage and Configuration	None

3.12.3 New Allow Inventory Management Policy Change Policy

This release allows additional inventory attributes to be specified in inventory management policies after inventory is already present in the system. Previously, all inventory attributes had to be defined when that inventory was populated in the system. To support this enhancement, a new boolean policy called Allow Inventory Mgmt Policy Change is added to the Inventory tab on the Search Policies screen. When enabled, inventory management policies can be changed when the distinguishable attributes of an item change after item creation and if that item has inventory at a site. Using this new policy, inventory management is simplified after inventory is created.

Analytics Impact	None
Integration Impact	None
Related Functionality	None

Usage and Configuration

See the "Using the Allow Inventory Management Policy Change Policy" section in the current release of the *New Feature Usage and Configuration Guide* for more information.

3.12.4 Asynchronous Close Action for Pick Lists and Receipts

Starting in the NEO 3.8 release, ONE introduces a quality-of-life improvement for Warehouse Manager roles when closing pick lists and receipts. Now, when users click the Close action for pick lists and receipts over a certain size, the system automatically runs the action in asynchronous mode. No additional configuration is required for users. Previously, the system would prevent the user from performing other actions while the Close action was executing; this sometimes caused delays for large datasets. But with this enhancement, the system immediately notifies users the process is initiated and running in the background; once the Close action is completely executed, the user is notified and can review the results. With this update, users are provided with quicker feedback and reduced downtime.

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

3.12.5 Generate Receipts for External Delivery Locations

In NEO 3.8 release, users can generate receipts from an order or shipment with an external site or address in the ONE system. This feature helps generate receipts for one-off deliveries where the delivery location is not a site, address, or person in the master data. Previously, users couldn't create receipts on purchase orders or invoices without exact delivery information. To utilize this enhancement, users must leave the Location field blank on receipt lines while generating the receipt for an external site. The system automatically retrieves the delivery location from the order or shipment and populates the newly added Ext Site Name field on the receipt header.

Analytics Impact	None
Integration Impact	None

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

3.12.6 New Integration Subscription: Inventory Inconsistency Outbound

This release adds a new type of integration subscription called Inventory Inconsistency Outbound. When inventory data is loaded into the system, it is not validated against the user's inventory management policy, meaning invalid data can inadvertently be uploaded. With this new integration subscription, users can be notified by email of invalid inventory within the system and manually correct them via upload. When users initially subscribe to an existing Inventory Inconsistency Outbound integration subscription, the system runs the rule against existing inventory and policy. This option is available for Warehouse Manager roles on the New Integration Subscription screen in the Outbound Interface field.

Analytics Impact	None
Integration Impact	Added a new outbound interface called InventoryInconsistencyOutbound v1.0. This outbound interface is based on the WMS.InventoryInbound v2.0 interface with two additional columns: Reason Code and Comment.
Related Functionality	None
Usage and Configuration	See the "Creating an Inventory Inconsistency Outbound Integration Subscription" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

3.12.7 Reason Code Field Added to Pick Lists, Packing Lists, and the Inventory Discrepancies Report

The NEO 3.8 release introduces a new line-level field, Reason Code, to the Pick List, Packing List, and Inventory Discrepancies report screens. Previously, users couldn't enter the reason code while creating pick lists or packing lists. Users can track the difference between the occurred and actual action taken on the Pick List, Packing List, and Inventory Discrepancies report with a reason code. This feature adds more inputs to warehouse operation discrepancy analysis. Users select the Reason Code field value while creating Pick Lists, Packing Lists, or on the Inventory Discrepancies report screen.

Analytics Impact	None
Integration Impact	Yes. The Reason Code functionality is added for inbound and outbound interfaces for Pick List, Pack List, and Inventory Discrepancies.
Related Functionality	None
Usage and Configuration	<p>See the "Adding Reason Code to Pick Lists, Packing Lists, and the Inventory Discrepancies Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>For more information, see the sections listed below in the current <i>Online Help</i> release.</p> <ul style="list-style-type: none"> • "Searching and Updating Pick Lists" • "Creating Pick Lists" • "Searching Packing Lists" • "Creating Packing Lists" • "Viewing Inventory Discrepancies" • "Searching Cycle Count Plans" • "Creating Cycle Count Plans" • "Cycle Count Workbench"

4 Bug Fixes

4.1 Integration

4.1.1 Enterprise Identification Number and Number Type Fields Marked as Mandatory – SCC-6874

Problem:	When updating an enterprise from the UI, the Enterprise Identification Number Type and Enterprise Identification Number fields are mandatory. At the same time, the inbound integration file does not require values for these fields.
Cause:	The fields in the UI are incorrectly coded as mandatory.
Resolution:	The Enterprise Identification Number Type and the Enterprise Identification Number fields are no longer mandatory in the UI.

4.1.2 Integration Pipeline Sort Node Table Does Not Have a Blanks First/Last Column – PLT-28008

Problem:	The integration pipeline Sort node table does not have a Blanks First/Last column, preventing users from having the option to sort blank records first or last.
Cause:	System coding did not include this column in the Sort node table.
Resolution:	A Blanks First/Last option is now available for Sort nodes in integration pipelines.

4.1.3 SCC.InventoryBOH_IB Is Not Updating the On Hand Quantity – SCC-6835

Problem:	The inbound integration file SCC.InventoryBOH_IB does not update the buffer on hand quantity even though the file shows it processed successfully.
Cause:	Recent changes made to the inbound integration file caused the issue.

Resolution:	The recent changes were removed from the integration file, and the buffer on hand quantity now updates correctly.
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4.2 Logistics And Transportation Management

4.2.1 Dates Are Blank after In-Transit Shipments are Updated – LN-97186/PDS-70622

Problem:	When a user updates fields on shipment post pickup, the Actual Arrival Date, Gate In, and Gate Out dates are blank.
Cause:	Re-population of dates was causing the fields to go blank after updating records.
Resolution:	Updated the programming logic for saving shipments in this workflow.

4.2.2 Insufficient Error Message When GPS ID Is Already Assigned to a Vehicle – LN-94794/PDS-67084

Problem:	When a user tries to update any vehicle with an existing GPS ID assigned to another vehicle, the error message displayed is too generic to inform the user why the update failed.
Cause:	The system displays a generic error message
Resolution:	The error message is updated to explain that the GPS ID is already used on another vehicle.

4.2.3 Additional Charge Cost not Present in Charge Details in XML Tender Notifications – PDS-67522

Problem:	The Additional Charge Cost field is not in the additional charge component section of XML tender notifications.
Cause:	An error in the code caused this issue.
Resolution:	The Additional Charge Cost field now displays as expected in XML tender notifications.

4.2.4 Daily Appointments Inaccurate When Viewed in a Browser – LN-93932/PDS-66012

Problem:	When daily appointments at any site are displayed through the browser, the sequence number on the appointment is inaccurate. The sequencing is accurate when the information is exported in PDF or Excel format.
Cause:	The discrepancy in sequencing was caused by pagination. When the data was exported in xls or PDF format, all data was exported simultaneously, while the information in the browser was displayed by page, causing the discrepancy.
Resolution:	The daily appointment data is now displayed without pagination.

4.2.5 Exported Invoices Don't Show Actual Values – LN-96706/PDS-69619

Problem:	In certain situations, if the Approve amount is updated for In Review invoices and if that invoice is exported, then the original Approve value is shown instead of the updated value.
Cause:	TMS.InvoiceExportReport is used when the Download CSV for Upload action is taken. This fetches the original invoice line amount for shipper users to facilitate approval.
Resolution:	TMS.InvoiceExportReport now fetches the original invoice line amount only if the invoice line is not approved. For approved invoice lines, the Approve amount will display as expected.

4.2.6 Inconsistent Event Date Fields on Shipment and Movement Reports – LN-88035/PDS-61118

Problem:	The Creation Date, Event Date, and Last Modified Date fields are inconsistent on the Movement Audit Trail, Shipment Audit Trail, and Shipment Detail reports.
Cause:	The above three reports used a different field; the Movement Audit Trail report uses the Creation Date field, the Shipment Audit Trail report uses the Event Date field, and the Shipment Detail report uses the Last Modified Date field.
Resolution:	Added the Creation Date field to the Shipment Audit Trail report.

4.2.7 Issues with Load Consolidation Planning Engine - PDS-69713

Problem:	Sometimes the Load Consolidation Planning Engine can run for over an hour. During this time, if planners make changes to shipments that result in shipment state changes, then those recently changed shipments revert back to their previous state after the Load Consolidation Planning Engine completes.
Cause:	This issue was caused by the system running as expected, but the behavior was unforeseen for large data sets.
Resolution:	The Load Consolidation Planning Engine now skips over shipments that have been changed and executes the remaining shipments.

4.2.8 Milestone Missed Alert Subscription Not Considering Milestone Type – PDS-71843

Problem:	When a Milestone Missed alert subscription is created with a specific Milestone Type specified in the Alert Filters section, the system sends alerts for missed milestones of other milestone types rather than just for the specified type.
Cause:	The system was not considering the value in the Milestone Type filter on the alert subscription screen.
Resolution:	Users now receive Missed Milestone alerts only for shipments with a milestone process that has a milestone type matching the alert subscription.

4.2.9 Non-interleave Static Routes Can Be Updated with Empty Arrival Day Offset Field – LN-85270/PDS-57265

Problem:	The system allows users to update non-interleave static routes (routes with the Shipment Generation Scheme field blank) with a value missing in the Arrival Date Offset field.
Cause:	The Arrival Day Offset and Departure Day Offset fields were not mandatory when a Shipment Generation Scheme was not present for a static route.

Resolution:	Added validation to ensure the Arrival Time Offset and Departure Time Offset values are provided and are in ascending/descending order as per the outbound/inbound directionality of the route.
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4.2.10 Null Pointer Exception when Movement is Manually Rerated – LN-97432/PDS-71198

Problem:	A null pointer exception occurs when attempting to rerate a movement as a Transportation Coordinator role manually.
Cause:	An error in the code caused this issue.
Resolution:	Transportation Coordinator roles can now rerate movements as expected.

4.2.11 Performance Issues on the TMS Message Queue Summary Messages Report – PDS-67680

Problem:	The TMS Message Queue Summary Messages Report is running slowly.
Cause:	This issue was caused by poor code optimization.
Resolution:	<p>This issue is resolved by:</p> <ul style="list-style-type: none"> • Adding the TMS_FILE_NAME_PAYLOAD column • including a migration script to update records for the last three months • Added a trigger to update the TMS_FILE_NAME_PAYLOAD column value when a record is inserted or updated

4.2.12 Memory Constraint Error on Shipment Creation – PDS-61913

Problem:	Users receive a memory constraint error when creating a shipment.
Cause:	The java.lang.RuntimeException: DataAccessService queries did not allow more than 50,000 rows of data due to memory constraints.

Resolution:	<p>The root cause of the Out of Memory issue has been fixed and deployed into production.</p> <p>This issue is related to:</p> <ul style="list-style-type: none"> • Milestone Report CSV File Row Limit Is 50,000 – LN-94074/PLT-30655(see page 135) • Performance Issues in Shipment Integration - PDS-66833(see page 141)
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4.2.13 Shipper Unable to Delete a Movement in the 'Canceled By Carrier' State – LN-95845/PDS-68646

Problem:	Shipper users cannot delete movements in the Canceled By Carrier state.
Cause:	The system did not have the component populated.
Resolution:	The component was updated, and shippers can now delete movements in the Canceled By Carrier state.

4.2.14 System is Including Deleted Shipments in Consolidated Movements – LN-97293/PDS-70560

Problem:	If a user consolidates a shipment via the Planner Report screen and moves it to the Planner Workspace scratchpad, then in another tab un-consolidates and deletes one shipment from that consolidated movement, the deleted shipment and its associated costs continue to be included in the movement if the shipment is consolidated again via the Planner Workspace scratchpad.
Cause:	The system did not auto-refresh the planner report screen after changes to the movement.
Resolution:	The system now automatically updates the Planner Report when changes are made.

4.2.15 Time Zone Issues in Static Route Definitions – LN-94112/PDS-66265

Problem:	If travel time from the US Eastern time zone to the next stop in the US Central time zone is less than one hour, the system does not allow the correct local times to be entered in a route definition.
Cause:	The system considered stop time zones when auto-generating shipments but did not consider stop time zones during validation on static route configuration pages.
Resolution:	The system now validates stop sequences with respect to time zones for static routes as expected.

4.2.16 Tracking Events not Generated for Shipments after Cargo Response – PDS-68367

Problem:	In certain situations, the system does not show shipment actions and state transitions initiated by cargo vessels.
Cause:	Certain shipment tracking events failed because they were batched with other shipment tracking events for shipments in the Closed state.
Resolution:	Tracking events for containers assigned to shipments in the Closed state are now allowed.

4.2.17 Unable to Find Resource Error when Processing Shipment Alerts – PDS-69831

Problem:	When processing shipment alerts, sometimes errors appear, stating the system is unable to find the desired resource.
Cause:	This issue was caused because the system did not check if template resources existed.
Resolution:	The system now checks for template resources before processing.

4.2.18 Unable to Sort Columns on Select Reports – LN-89059/PDS-60712

Problem:	Sorting columns does nothing on the Detailed Capacity by Dock Door Group report.
Cause:	This issue was caused because the given report, and others, used an outdated framework.
Resolution:	The underlying framework for the given report is updated, and columns are now sortable as expected.

4.2.19 Vendor Roles Don't Have All Features after Onboarding – LN-67968/PDS-71661

Problem:	When a vendor completes onboarding, they should have access to four features: Execution, Financials, Scheduling, and Visibility, but new vendors only have access to Scheduling and Visibility.
Cause:	This issue is expected behavior based on what features are enabled for each company type.
Resolution:	No change.

4.2.20 Weekly PCV Search Does Not Load when Accessed via Favorites – LN-93768/PDS-66026

Problem:	When trying to access the weekly PCV search via favorites, a new tab opens, but the search results fail to load. A loading message is visible the data does not load as expected.
Cause:	This issue was caused by a legacy framework needing conversion to newer standards. All non-SQL-based PCVs had similar issues.
Resolution:	The PCV has been migrated to an SQL-based TLV and now behaves as expected when accessed via favorites.

4.3 Manufacturing

4.3.1 Extra Fields on the File Exported from the 'Production Order Failed Milestone Summary' Widget – PDS-69515

Problem:	When a comma-separated values (CSV) file is exported from the Production Order Failed Milestone Summary widget on the dashboard, the exported file contains extra columns that do not appear on the UI.
Cause:	Extra columns were included in the formatting of the exported spreadsheet that were not present as fields visible on the UI.
Resolution:	The columns on the exported CSV file are now corrected to match the fields in the UI.

4.4 NEO Platform

4.4.1 Enterprise-specific Translations Fail to be Honored if the Enterprise Name Contains Special Characters – PLT-30325

Problem:	Enterprise-specific translations fail to be honored if the enterprise name contains special characters.
Cause:	The properties file did not include logic to accept special characters in enterprise names.
Resolution:	Special characters used in the properties file name will now be replaced with an underscore.

4.4.2 Custom Tracking Event Names Adding Undesired Space – PLT-31133

Problem:	When a custom tracking event is created with a "(" character in the name, then an extra space character appears after the "(" character.
Cause:	This issue is caused by an internal process that automatically splits strings into multiple words when words are concatenated. The process was erroneously treating the "(" character as a beginning of a word.

Resolution:	Custom tracking events using the "(" character now display as expected.
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4.4.3 EDI Issue Alert Does Not Have Complete Data – PLT-30831

Problem:	The EDI issue alert is sent with missing data for the following fields: <ul style="list-style-type: none"> • Primary Ref Trans No • Secondary Ref Trans No • Tertiary Ref Trans No
Cause:	The alert had no way to capture and display the desired data.
Resolution:	Three references are added that are displayed in the alert if they have data: <ul style="list-style-type: none"> • Primary Ref Trans No • Secondary Ref Trans No • Tertiary Ref Trans No

4.4.4 Error on Updating Inactive User Details - SCC-6850

Problem:	System displayed error while reactivating an inactive user and updating user details
Cause:	Updated records not correctly saved for inactive users.
Resolution:	Update the user details and resubmit the update.

4.4.5 Exported CSV Files Do Not Show Which Columns Are Mandatory Fields - PLT-30111

Problem:	On report screens in the UI and on inbound interfaces, mandatory fields are marked with an asterisk. When the report is downloaded as a comma-separated values (CSV) file, the fields appear as columns that are not marked if they are mandatory.
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Cause:	The system was not coded to display the asterisk that marks columns as mandatory in exported CSV files.
Resolution:	Added an attribute, PairedInboundInterface. When that attribute is present in report metadata, the system marks the columns with an asterisk on reports based on whether the matching field is mandatory on the inbound interface for the report.

4.4.6 Full Name of Uploaded Files Not Visible – LN-79790/PLT-27445

Problem:	On a list of uploaded files, the system displays only 37 of the allowed 64 characters for the file name in both the UI and the email created when one of the files is sent via the email function.
Cause:	The system truncates the file name to 37 characters in both the UI and when attached to an email.
Resolution:	The full file name in the UI is now displayed as a tooltip when the user hovers the cursor over a file name. In email attachments, the full file name is now displayed.

4.4.7 Leading and Trailing spaces in Master Data – PLT-29558

Problem:	Enterprises and organizations with leading or trailing spaces added in error are not caught as data errors.
Cause:	Our system did not scrub customer data for leading/trailing spaces.
Resolution:	ONE added an "auto-trim" process to remove leading and trailing spaces to enterprises and organizations entered via the UI, normal CSVs, and SQL inbound CSVs.

4.4.8 Milestone Report CSV File Row Limit Is 50,000 – LN-94074/PLT-30655

Problem:	The user can see more than 50,000 results in the UI, but the CSV file only downloads 50,000 rows.
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Cause:	This report uses CustomPagingAndSortingReportHandler with an export limit of 50K to prevent out-of-memory issues.
Resolution:	<p>The root cause of the Out of Memory issue has been fixed and deployed into production.</p> <p>This issue is related to:</p> <ul style="list-style-type: none"> • Memory Constraint Error on Shipment Creation - PDS-61913(see page 129) • Performance Issues in Shipment Integration - PDS-66833(see page 141)

4.4.9 Number -128 Not Displaying on Reports – PLT-30612

Problem:	Blank values are displayed on the UI for certain reports when the number -128 is set for the following data types: integer, float, double, and long.
Cause:	This issue was caused because -128 has a special position in certain data types.
Resolution:	Eliminated bug that caused -128 to display for blanks.

4.4.10 Integration Files Processing to a Message Queue – LN-95173/PLT-30543

Problem:	Some integration subscription tasks failed to generate the ShipmentOutboundCustomV1.0 outbound files. There was a delay in submitting the outbound files to the customer's third-party application (SAP).
Cause:	The root cause was that one of the servers in the integration cluster had a stale, in-memory cache value; therefore, the system did not pick the integration subscription definition for consistently processing outbound files. There was no monitor for failed integration tasks.
Resolution:	We added a fix for the corrupt Maps cache for integration subscriptions. We also added additional debug logs to debug the issue.

4.4.11 Purchase Order Integration Errored Out – LN-97868/PLT-31551

Problem:	A Purchase Order failed to import to NEO via integration and errored out.
Cause:	The deserializing models fail when control characters exist in the database for any of the model strings.
Resolution:	We added logic to ignore control characters for all incoming CSVs.

4.4.12 Transactions Processed Even Though the Role Is out of Effective Date Range - PLT-30340

Problem:	Roles can perform operations on shipments even after the role is deactivated based on effective start and effective end dates.
Cause:	If a user/role was still logged into a session, the system did not deactivate the user's access or log the user out.
Resolution:	We added validation to terminate the current session based on the effective date range set.

4.5 NEO UI

4.5.1 Progress and Job Status Not Displayed When Exporting from Widgets - PLT-29924

Problem:	When a user clicks the Export to CSV button on a widget, the Processing popup with the link to the Job Status Perspective does not display, nor does the job appear in the My Jobs screen.
Cause:	The system was not coded to display this popup or add the job to the My Jobs screen when data was exported from widgets, only from report screens.
Resolution:	The system now displays the popup window, as well as the link to the Job Status Perspective in the popup window, and jobs exported from widgets are now displayed on the My Jobs screen.

4.5.2 Advanced Sorting Menu Does Not Work when Opened from Favorites – LN-96784 /PLT-31348

Problem:	If a user saves a filtered search as a favorite and then opens that search via the favorite, then the Advanced Sorting menu option does not populate with data.
Cause:	Error in the code.
Resolution:	The Advanced Sorting menu option works as intended from report pages when a filtered search is opened via a favorite.

4.5.3 Bar Chart Widgets Not Clickable in Certain Situations – PLT-30458

Problem:	When using a bar chart widget, if one value is very large and other values are very small but non-zero, it can be difficult to click the very small bars because they are only a pixel or two wide.
Cause:	This issue was caused by bar charts being rendered literally. If one value is 2 and the other is 600, the second bar will be 300x longer than the first, making it hard to click.
Resolution:	Bar charts values of zero are not displayed and the minimum bar chart rendering value is now five pixels for values of five or less, increasing clickability.

4.5.4 Date and Time Fields Work Incorrectly for Spanish Language – LN-96322/PLT-30979

Problem:	When the language is set to Spanish, the Date and Time filters sometimes don't work as expected when searching for shipments.
Cause:	An error in the code caused this issue.
Resolution:	The Date and Time filters now work as expected for Spanish language users.

4.6 Optimization

4.6.1 Multiple Values Cannot Be Selected for Filters on Bucketized Order Forecast Alert Subscriptions – PDS-68807

Problem:	The vendor, item, and site filters for Bucketized Order Forecast alert subscriptions do not allow users to select multiple values.
Cause:	The filter fields were not configured to accept multiple values.
Resolution:	The vendor, item, and site filters on Bucketized Order Forecast alert subscriptions are now configured to accept multiple values.

4.6.2 Replenishment Generates a New PO When the Same Item Has an Existing PO with a Future Delivery Date – PDS-65503

Problem:	When a shipment promise delivery date is adjusted, the RPL engine generates a new replenishment purchase order.
Cause:	The IXM engine contained conflicting logic that caused an additional delay in the forecast delivery date.
Resolution:	We added logic to alter the earliest order creation date by RLT to consider future supply.

4.7 Order Management

4.7.1 Blank Screen Appears When Opening a Purchase Order Detail Screen – PDS-65419

Problem:	When the user opens a purchase order detail screen, a blank screen appears while the screen loads.
Cause:	System performance issue.

Resolution:	The performance issue is fixed, and a loading icon is displayed while the screen loads.
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4.7.2 Commodity Code Not Populating When Requisition Converts to a Deployment Order – LN-96300/PDS-69277

Problem:	When a requisition is approved and converted to a deployment order, the commodity code for the item is not populated on the deployment order.
Cause:	The system did not consider the line commodity code from the commodity code hierarchy set on the item master.
Resolution:	The commodity code is populated from the item details when an approved requisition is converted to a deployment order.

4.7.3 Commodity Codes Not Visible on the Search Item Report – PDS-69402

Problem:	Users cannot view commodity codes on the Search Item report.
Cause:	The commodity code value was not present on the item model.
Resolution:	ONE added the commodity code value to the item model. Commodity codes are now visible on the Search Item report and are available as a filter field on the report.

4.7.4 Error Message when Creating ASN for Purchase Order – PDS-66215

Problem:	When creating an ASN for a purchase order, the system displays an error message that the allowed limit and the planned ship quantity do not match, even though the system shows the same numbers.
Cause:	This issue was caused by due to a float number comparison inequality. The system calculated the planned shipped quantity number to many decimal points, but the rounded displayed number appeared to be the same.

Resolution:	The system now behaves as expected.
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4.7.5 Inconsistent Requisition Sync Behavior When a Purchase Order Line Is Canceled – PDS-70745

Problem:	When a purchase order (PO) line is canceled through integration, the linked requisition is removed, but the related requisition line remains in the Closed/Partially Converted state.
Cause:	Error in the UpdateFromInteg and the cancel RequestScheduleAction flow.
Resolution:	When a converted PO line is canceled through UI or integration, the line is canceled, and the respective purchase requisition line moves to the Approved state.

4.7.6 Performance Issues in Shipment Integration - PDS-66833

Problem:	An error appears in shipment integration, stating queries that fetch more than 50,000 rows of data are not allowed due to memory constraints.
Cause:	The system had a cap of 50,000 data rows at once.
Resolution:	<p>The maximum number of data rows for the shipment integration functionality has been increased from 50,000 to 300,000.</p> <p>This issue is related to:</p> <ul style="list-style-type: none"> • Memory Constraint Error on Shipment Creation - PDS-61913(see page 129) • Milestone Report CSV File Row Limit Is 50,000 – LN-94074/PLT-30655(see page 135)

4.7.7 Price Cannot Be Updated to Zero on Requisitions – LN-97460/PDS-70767

Problem:	When a price on a pending requisition is updated to zero and saved, the price reverts to the previous value and does not reflect zero.
Cause:	The Target Price field on requisitions was set not to allow a value of zero.

Resolution:	The system now accepts a value of zero in the Target Price field when the user updates a pending requisition.
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4.7.8 Unpredictable Order Visibility for Supplier Roles - PDS-65156



Problem:	Some supplier roles are unable to view orders in the Draft, Awaiting Approval, and Deleted states when they should be able to. In addition, some supplier roles have visibility of orders in the Draft, Awaiting Approval, and Deleted states when they shouldn't.
Cause:	This issue was caused by an error in the code.
Resolution:	Orders now display as they should for Supplier roles.


4.7.9 Unable to Save Changes Made in Purchase Order Template – LN-93283/PDS-66226


Problem:	Users are unable to hide tabs when configuring a purchase order template.
Cause:	An error in the code caused this issue.
Resolution:	Users can now save changes made when configuring purchase order templates as expected.


5 Revision History

Version	Release Date	Author	Comments
0.8	 29 Aug 2023	TechDocs	Fixed an Issue where the document did not show the Supply Chain Administration section.
0.7	 29 Aug 2023	TechDocs	<p>Additions:</p> <ul style="list-style-type: none"> • "Support Versioning for Bill of Materials Selection" • "Support for Configuring Due Days and Percentage for Asset Alerts" • "Enhancement to the Maintenance Summary Report" • "Enhancements to Work Order and Asset Alerts" <p>Edits and Updates:</p> <ul style="list-style-type: none"> • "New Thread-based Execution for Movement Generation" • "New Node Types and Enhancements for NEO Plasma Pipelines" <p>Removal: pushed out to future release</p> <ul style="list-style-type: none"> • Creating Approval Routes
0.6	 19 Jul 2023	TechDocs	UAT Draft Release

Version	Release Date	Author	Comments
0.5	 19 Jul 2023	TechDocs	<p>Additions:</p> <ul style="list-style-type: none"> • "Support for the Flat Accessorial Cost Method for the TOSX Engine" • "New Job ID Link on Planning Jobs Report Opens Plan and Job Details" • "Ability to Delete Distance Matrix Cache from the UI" • "New Thread-based Execution for Movement Generation" • "Set Load and Unload Fields in the Planning Policies Using a CSV File" • "Demand Fillability Analysis Report" • "Associate the Asset Category and Type by Asset Make and Model" • "Added Support for Single-Objective Optimization" <p>Edits and Updates:</p> <ul style="list-style-type: none"> • "Enhanced Approval and Rejection Workflow for Approval Plans" • "Enhancements to Solution Summary Report"
0.4	 17 Jul 2023	TechDocs	Added all bug fixes.

Version	Release Date	Author	Comments
0.3	 05 Jul 2023	TechDocs	<p>Additions:</p> <ul style="list-style-type: none"> • "Enhanced Advanced Replenishment Engine to Allow Fair Share Replenishment" • "Enhancements to Capacity Contracts" • "Updated Partner Invitation UI" • "Activate or Deactivate an Asset Type" • "Support for Order-to-Shipment Sync" <p>Edits and Updates:</p> <ul style="list-style-type: none"> • "New Action Added to Load Master Data During Onboarding" • "Enhancement to Asset Meter and Asset Attribute Configuration Reports" • "Asset Status Changes to In-Transit or In-Stock State When the Shipment Is Shipped or Received" • "Support for Maintenance Calendar" • "Restrict Role-Based Transaction on the Asset History" • "Added Policies to Freeze an Asset Based on Asset State" • "Enable Work Orders to Build Partial Asset Assembly and Rework" • "Updated Icons on the Real-time Transportation Execution Page" • "OAuth Support on HTTP Destination and OAuth2 Support on HTTPS Outbound" • "Enable Vendors to Share Scorecards with Customers" • "Enhancements to the Work Order Report"

Version	Release Date	Author	Comments
0.2	 30 Jun 2023	TechDocs	<p>Additions:</p> <ul style="list-style-type: none"> • "New Action Added for Loading Master Data on Shipments" • Updated certified browser versions in the requirements section. • "Added Filters to the Work Report" • "Upload and Download CSVs on Order Schedule Dashboard and Search POs Screens" • "New Equipment Constraint Order Builder Workbench" • "Funnel Databot Data Directly to Master Data with NEO Plasma Pipelines" • "MEIO Site Capacity Percentage Computation Engine" • "New Allow Inventory Management Policy Change Policy" • "Waste Factors at Site Group Level" • "NEO Prescriptions and Hyperbots Added to Update Equipment and Carrier" • "Carrier Prescriptions for Shipments Based on Requested Container or Shipment Weight" • "Support for Work Order Problem Code and Resolution Code" • "Reason Code Field Added to Pick Lists, Packing Lists, and the Inventory Discrepancies Report" • "Enhancements to the Work Order Report" • "Create Contracts for Preventative and Repair Work Orders" <p>Edits and Updates:</p> <ul style="list-style-type: none"> • "Enhancements to Multi-Echelon Constrained Supply Planning" • "Enable Vendors to Update Shipments in the In-Transit State" • "Improved Ranking System for Expedite Order Workbench Prescriptions" • "Partner Site Support Added for Outlier Detection" • "New Deleted Document Alert"

Version	Release Date	Author	Comments
			<ul style="list-style-type: none"> • "Confirm Schedule Action Added at Line/Delivery Schedule Level" • "Added Commercial Invoice Support for DHL International Shipments" • "Compute Carbon Emissions at Shipment and Shipment Line Levels" • "Automatically Reschedule Soft Appointments if Shipment Target Delivery Date Is Updated" • "Disabling Appointment Links for Trading Partners Using Exclusion Rules" • "Added the Shipment Log Report" • "LCL Shipments Cannot be Added or Removed from Movements with Active Booking Requests" • "Reorganized Transshipment Fields to Allow Multiple Transshipment Ports" • "Create a Supplementary Invoice with User-Selected Invoice Lines from an Existing Invoice" • "Multiple Carrier Quotes for Conditionally Accepted Spot Bid Tenders" • "Support for User Overrides for Data Measures in Partner Site Forecast Book" • "Use Order-Related Test Results for Lead Time Variability Computation" • "Carrier Prescriptions for Shipments Based On Requested Container or Shipment Weight" • "Select Between Multiple Static Routes" • "Creation User and Date Columns Added on Search Asset Meter and Attribute Configuration Reports"
0.1	 26 May 2023	TechDocs	PDS Review Draft Release



About One Network

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

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