

# Release Notes

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NEO 3.9

March 15, 2024

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# 1. System and Network Information

## Operating System Requirement:

- Windows 10
- Windows 11

## Browser Requirement:

- Chrome (verified on version 119.0.6045.160)
- Microsoft Edge (verified on version 120.0.2210.91)

## 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>

## 1.1. Backward Incompatibility

This release includes the following backward incompatible changes.

### Changes to WMS.InventoryAdjustOutbound version 1.1

The position of some fields has changed in the interface WMS.InventoryAdjustOutbound version 1.1. If you are using "name-based" mapping, this will have no impact. If you use "position-based" mapping, please consult the integration specification for that interface to see the new field positions.

The following fields are impacted:

- LPNEnterpriseName changed position from 41 to 45
- LPNEnterpriseName changed position from 64 to 68
- LPNEnterpriseName changed position from 55 to 59
- ReasonCodeEnterpriseName changed position from 42 to 46
- LPNEnterpriseName changed position from 35 to 39
- ToSublocation changed position from 40 to 44
- TargetLotInstanceSingletonEnterpriseName changed position from 69 to 73

## Changes to WMS.InventoryAdjustOutbound version 1.0

The position of some fields has changed in the interface WMS.InventoryAdjustOutbound version 1.0. If you are using "name-based" mapping, this will have no impact. If you use "position-based" mapping, please consult the integration specification for that interface to see the new field positions.

The following fields are impacted:

- TargetLotInstanceSingletonEnterpriseName changed position from 69 to 73

## 1.2. System Requirements

These are the basic system requirements for users. For more detailed requirements and support, see: <https://docs.onenetwork.com/NeoHelp/ProductSupportAndRequirements/latest>

### Operating System Requirement:

- Windows 10
- Windows 11

### Browser Requirement:

- Chrome (verified on version 119.0.6045.160)
- Microsoft Edge (verified on version 120.0.2210.91)

### 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.

## 2. Enhancements and New Features

### 2.1. NEO Platform

#### 2.1.1. Ability to Stop a Pipeline Run

In the NEO 3.9 release, a Stop Test Run link is added to the Pipelines details screen to stop the execution of the integration pipeline. Previously, only a loading mask called Testing and a spinner was visible when the pipeline ran. The Stop Test Run now displays while the pipeline is executing. This enhancement allows users to halt pipeline execution when required, avoiding unnecessary waiting for completion. Users can click the Stop Test Run link to stop the pipeline execution.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Stopping the Execution of Running Pipelines" in the v 3.9 release version of the <i>New Feature Usage and Configuration Guide</i> .

### 2.1.2. Additional Python Libraries Available for Pipeline Script Nodes

In the NEO 3.9 release, the Python libraries are added and made available for use in pipeline script nodes to parse PDF, Word, and Excel documents. The libraries are also used to read text from images. The below Python libraries are available to the script node:

- `openpyxl` (<https://pypi.org/project/openpyxl/>) for parsing Excel files
- `pdfplumber` (<https://pypi.org/project/pdfplumber/>) for parsing PDF files
- `docx2python` (<https://pypi.org/project/docx2python/>) for parsing Word files
- `pytesseract` (<https://pypi.org/project/pytesseract/>) for OCR files

Previously, the pipeline script nodes only supported parsing the CSV, XML, and JSON files. This enhancement helps users make inbound integration pipelines that consume PDF, Word, and Excel documents.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	Contact ONE at for assistance configuring this enhancement.

### 2.1.3. Deleting Namespaces and Schema Records from NEO Plasma Pipelines

Users can now delete record schema namespaces that are created for plasma pipeline nodes. Namespaces are groups of schema records created by users. A new Delete Namespace icon is added next to a namespace in the Record Schemas popup window, accessed when configuring node properties. The Delete Namespace icon and Delete button to remove schemas are disabled if one of the schemas from the same group is active or referenced by other schemas. Tooltips are added to the Delete Namespace icon and the Delete button to indicate why a schema or a namespace cannot be deleted.

When creating a schema using a sample file, each child in the file is created as a separate schema. Manually deleting a large number of these accidentally created schemas takes a long time. This enhancement makes it easier to clean up record schemas by allowing users to delete entire namespaces in one click.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Deleting Namespaces and Schema Records from NEO Plasma Pipelines" section in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i> .  For more information on creating NEO Plasma Pipelines, see the "Bring Your Own Intelligence," "Creating an Inbound Integration Pipeline," and "Creating an Outbound Integration Pipeline" sections in the NEO 3.9 release version of the <i>NEO Online Help</i> .

### 2.1.4. Email Template Support for Integration Subscriptions

In the NEO 3.9 release, ONE adds email template support to integration subscriptions with Email as a destination type. Previously, email templates were available for alert subscriptions but not for integration subscriptions, leaving no way for users to improve the appearance of those emails. With this enhancement, users can now select an email template in the newly added Email Template field on the New Message Destination popup window on the New Integration Subscription screens. When an email template is selected for

a subscription, all emails sent for the subscription use the template to apply formatting to the email. This enhancement helps users improve the appearance of their emails and add elements, such as headers and footers, to provide additional information to the email recipients.



**NOTE**

Prerequisite

Users must create an email template before it can be selected on the New Message Destination popup window.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	<p>For more information, see the following sections in the current version of the <i>New Feature Usage and Configuration Guide</i>:</p> <ul style="list-style-type: none"> <li>• "Selecting an Email Template for a New Integration Subscription"</li> <li>• "Creating a Custom Email Template"</li> </ul>

### 2.1.5. Enhanced Document Auto-Generation Framework

In the NEO 3.9 release, the generated document flow is improved to automatically create documents based on model actions. The generated document type flow allows the configuration of one or more actions per document type. When actions are configured for the generated document types:

- The platform module inserts a Grid Task on the Documents area of any screen, such as the Documents tab on an order detail screen, to generate/attach the document asynchronously after the action is executed.
- The user cannot manually generate the document.
- The Documents area of any screen or popup hides the document until it is auto-generated or attached.

To avoid confusion when the same action is performed multiple times for a single transaction, the platform module adds a timestamp in the format of (YYYY-MM-DD-HH-MM-SS) to the generated document name. This helps to distinguish between multiple generations of the same document. All the generated documents can be downloaded from the Documents area of a screen, such as the Documents tab on the shipment detail screen.

Previously, the system allowed users to generate documents manually by clicking the document link. The system now utilizes an integration outbound framework to generate documents based on events. Users can view the newly added Auto Generate On column on the Manage Document Types report. This column tells users whether the document type is auto-generated when specified action(s) occur.

When users create a new document type or update an existing one, a new field called Auto-Generated On displays when Generated is selected in the Payload Type field. Users can then add or change the actions that trigger auto-generation by entering a JSON array in the Auto-Generate On text field. This field is only visible for Generated document types.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	<p>For more information, see the "Configuring a Generated Document Type for Auto-Generation" section in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i>.</p> <p>For more information, see the "Viewing Document Types" and "Creating New Document Types" sections in the <i>NEO Online Help</i>.</p>

### 2.1.6. Enhanced Networking Capabilities for Pipeline Script Nodes

The NEO 3.9 release enhances networking capabilities for script nodes, introducing a feature that enables the ONE system to securely make calls to an external system for data so that the pipelines cannot access IP addresses or ports that the NEO instance owner does not explicitly allow. For this enhancement, ONE adds the Pipeline Whitelisted Addresses screen to manage approved network addresses. From this screen, users can create, delete, upload, approve, or reject network addresses.

This enhancement allows the system to make outbound HTTP calls to a whitelist of approved domains. The whitelist ensures the user has the appropriate network access to make outbound calls to ingest data but prevents them from doing so to non-approved domains, increasing system security while still giving users the necessary access to external systems.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	PLT.PipelineWhitelistedAddress_IB
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see "Working with Pipeline Whitelisted Addresses" in the current version of the <i>New Feature Usage and Configuration Guide</i> .

### 2.1.7. Enhanced Support for Header Rows in CSV Uploads for NEO Plasma Pipelines

The NEO 3.9 release adds more formal support for header rows when uploading CSV files using the Parse Node in plasma pipelines. For this enhancement, a Has Header Row checkbox is added to the Parse Node Properties popup window (when the uploaded file is in CSV format) and to the Create Schema popup window. This checkbox notifies the system whether to expect a header row with the column names. If the checkbox is selected, the Name-Based Mapping checkbox becomes active. When the Name-Based Mapping checkbox is selected, the header row in the CSV file is used to match data to the schema fields rather than using the column order, so optional columns can be omitted. This checkbox enables the pipeline author to relax the constraints so that not all columns in the CSV need to be present, and the columns do not have to be in the order specified by the schema. If a column name starts with a hashtag (#), the system ignores it during schema generation and name-based mapping.

Additionally, a new mandatory field, Quote Mode, is added, which tells the parser how to read CSV field values:

- All: All field values must be surrounded by the quote character set in the Quote Character field.
- Minimal: Only field values with special characters must be surrounded by the quote character.
- Non-Numeric: Only the non-numeric field values must be surrounded by the quote character.
- None: No quote character is expected in any fields.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see "Including Header Rows in CSV Uploads for NEO Plasma Pipelines" in the latest version of the v 3.9 <i>New Feature Usage and Configuration Guide</i> .

### 2.1.8. Enhancements to the Business Rule Expression Editor

The NEO 3.9 release brings the following enhancements to the business rule expression editor:

- Auto-completion and syntax highlighting when adding functions and data fields to the If and Then expressions: Matching functions and data fields appear as auto-complete suggestions when users start typing an expression. Functions are indicated by *f*, while data fields are marked by *x* to help differentiate them. In addition, different syntax elements are displayed in different colors to help with visibility and easy identification.
- When users hover over function and data field names in the expression editor, full function and data field names, along with valid parameters, display as tooltips when users hover them. These tooltips display the same information that is in the reference sidebar. Previously, the data field and function names only displayed tooltips when the user hovered over the names in the reference sidebar, not in the actual editor.

These enhancements simplify and improve the process of creating and updating business rules, making the business editor more user-friendly.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Creating Business Rules" section in the v 3.9 release version of the <i>New Feature Usage and Configuration Guide</i> .

### 2.1.9. Export to CSV Buttons Changed to Export to Excel Buttons

This release changes the format of all default report exports and downloads to Excel files (.xlsx) instead of comma-separated values (CSV) files (.csv). Previously, due to regional setting differences in Latin America and Europe, some users experienced issues when editing downloaded or exported CSV files from the system; when CSV files were opened in Excel, Excel manipulated the data based on regional settings on the user's computer. Users were then unable to upload the modified CSV files into the system. This enhancement is intended to address those scenarios.

By default, all Export to CSV buttons are replaced with Export to Excel buttons. The Export to Excel buttons can be further customized to either be a simple Export to Excel button that, when clicked, downloads an .xlsx file:



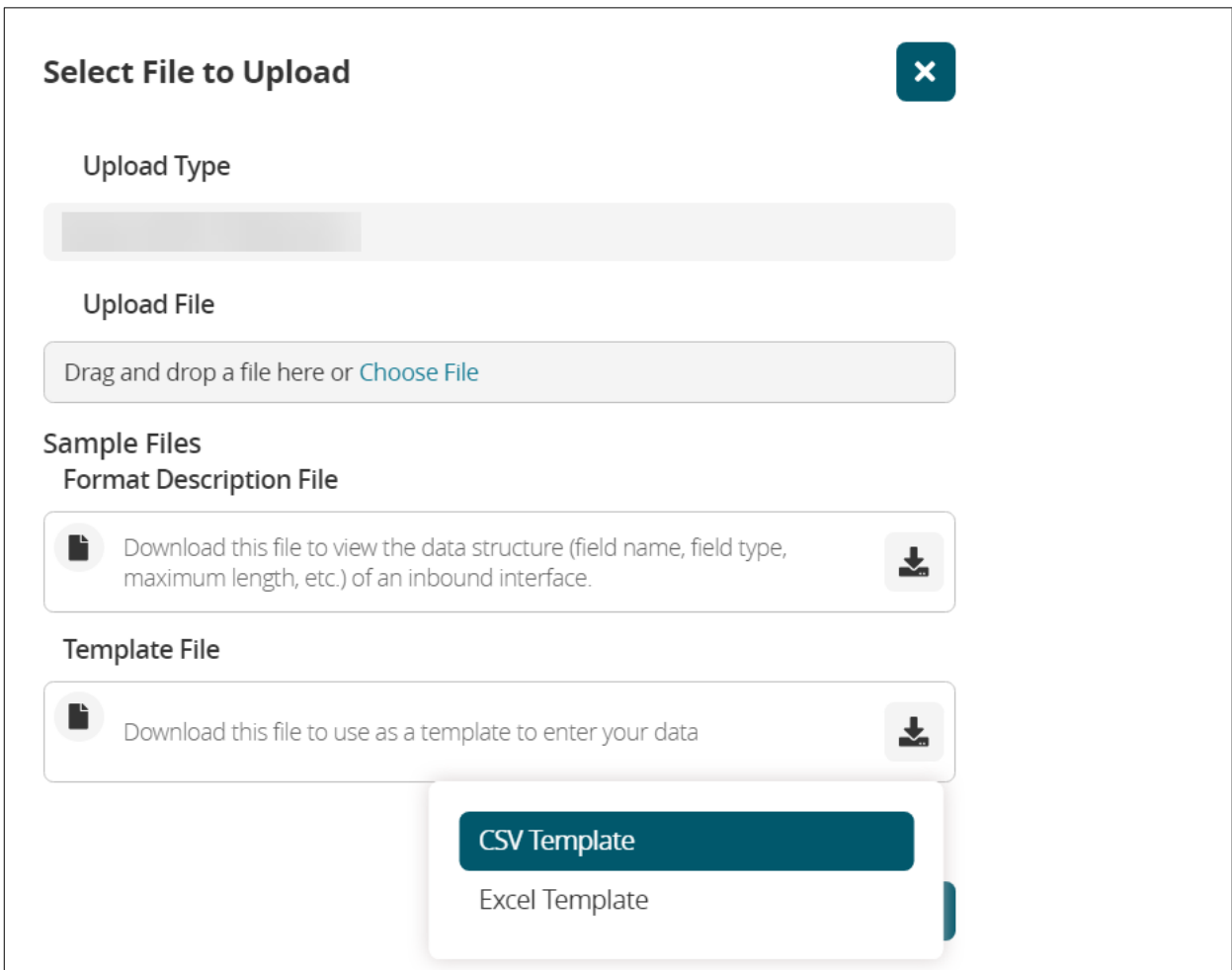
Or include a dropdown portion that, when clicked, allows users to explicitly export the data in a .csv file:



The Download button can also be configured similarly to include a dropdown portion. Note that the configuration of these buttons is not user-accessible; please contact your ONE representative for assistance.

Several secondary enhancements include:

- The ONE system uses the native data types of Excel for dates, numbers, booleans, and so on, so the formatting within the exported or downloaded Excel files may be slightly different than users are accustomed to. For example, previously, booleans were represented as Yes/No in .csv files but are represented as TRUE/FALSE in .xlsx files. Note that uploads of Excel files only support TRUE/FALSE for booleans and not Yes/No.
- Outbound report subscriptions now have the option to use the Excel file type instead of CSV. The default file type remains CSV regardless of the default setting for UI exports.
- The Template File field on the Select File to Upload popup window, present anywhere a file upload is performed, is updated to allow users to download either a CSV or an Excel template.



<b>Analytics Impact</b>	None
<b>Integration Impact</b>	All integrations should export .xlsx files by default.
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	Please contact your ONE representative if you wish to configure your Download button to the dropdown format.

### 2.1.10. Export to Excel Button Disabled When Records Are Selected

Starting this release, the Export to Excel button is disabled when users select one or more records on a report. Users can export or download entire reports, but exporting or downloading selected records in a report is not possible. This change helps remove any ambiguity around the Export functionality. For reports where both the Export and Download buttons are available, the Download button remains active even after selecting some records. Clicking the Download button downloads the entire report.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	Contact ONE NOC at for help configuring Download and Export options.

### 2.1.11. Net Change Support for Pipelines

In NEO 3.9, users can now configure a query node in a pipeline to fetch only records that have changed since the pipeline was last executed, helping users retrieve and work with this specific subset of records. For this enhancement, the following fields are added to the query node properties popup window accessible when a query node is added to a pipeline.

- **Configure Net Change:** When selected, this checkbox tells the system only to fetch records that have changed since the last pipeline run. Once this checkbox is selected, the remaining new fields described below become active.
- **Net Change ID:** This field contains an auto-generated Globally Unique Identifier (GUID) that displays when the Configure Net Change checkbox is selected.
- **Start Date Filter Field:** From the dropdown list, the user selects when they want the system to begin the check for changed records. Example: Last Modified Date.
- **Net Change Threshold:** This field specifies the number of seconds before the last sync date to fetch records.
- **Last Sync Date:** This field displays after the pipeline is run the first time with the query node configured for net change. This field shows the date last used for the Net Change query. Click the Edit icon to update it to a specific date or reset it to fetch all records. This date automatically updates after the Pipeline runs successfully but not for Test Runs.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See "Configuring a Query Node to Fetch Records Changed Since the Last Pipeline Run" in the current version of the <i>New Feature Usage and Configuration Guide</i> .

### 2.1.12. Schedule-Based Plasma Pipelines

The NEO 3.9 release introduces schedule-based plasma pipelines. Schedule-based pipelines are configured to execute on a recurring basis, as specified by the user. This type of pipeline has no direct input, but any standard pipeline node can be used to create a simple or complex schedule-based pipeline. Schedule-based pipelines can complete tasks such as queries from the database or external sources, transforming data, and writing to the database.

When creating a new pipeline, users select Schedule-Based as the pipeline type. They can then configure the pipeline's schedule, choosing either a simple recurring or complex recurring schedule and entering a schedule details. To support this enhancement, two new fields are added to the pipeline model: Schedule and ScheduledExecuteAs. The Schedule field enables users to configure when the pipeline runs, and the ScheduledExecuteAs field indicates the user context used for pipeline execution.



<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, please see "Creating a Schedule-Based Plasma Pipeline" in the current version of the <i>New Feature Usage and Configuration Guide</i> .

### 2.1.13. Support for Enterprise Password Policies

In the NEO 3.9 release, Enterprise Admin users can define and customize password policies for enterprise users on the newly added Password Policy screen. Enterprise Admin users can define password policies such as password patterns and other password settings. These customizable policies are in addition to the password requirements from ONE.

In the Password Pattern section on the Password Policy screen, password requirements can be defined based on the following policies:

- Minimum Lowercase Letters policy: The default value is 2. Enterprise Admin users can define the minimum number of lowercase letters required in the password.
- Minimum Capital Letters policy: The default value is 2. Enterprise Admin users can define the minimum number of capital letters required in the password.
- Minimum Special Characters policy: The default value is 2. Enterprise Admin users can define the minimum number of special characters required in the password.
- Minimum Numbers policy: The default value is 2. Enterprise Admin users can define the minimum number of numerical characters required in the password.

In the Other Password Settings section on the Password Policy screen, password requirements can be defined based on the following policies:

- Minimum Password Length policy: The default value is 8. Enterprise Admin users can define the minimum password length.
- Inactive Period (days) policy: The default value is 999. Enterprise Admin users can define the inactive period in days of the password.
- Max Consecutive Login Failures policy: The default value is 30. Enterprise Admin users can define the maximum number of consecutive login failures allowed.
- Password Age Limit (days) policy: The default value is 90. Enterprise Admin users can define the number of days until a password expires.
- Password Cycle Count policy: The default value is 3. Enterprise Admin users can define the password cycle count.

The Enterprise Admin and Instance Admin users cannot set a specific password on regular user accounts. The Reset User Password feature sends a reset password email to regular users. The system mandates that users set strong passwords on the password reset action. Previously, password requirements could not be set at the enterprise level. Enterprises can now customize password guidelines in the ONE system. Regular users set passwords in ONE, while Enterprise Admin users define the password policies.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	ONE controls global password policies for integration users. There are no individual settings for integration users at the Enterprise level.
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Setting the Password Policies for Enterprise Admin Users," "Resetting the Password for Enterprise Admin Users," and "Resetting the Password for Instance Admin Users" sections in the NEO 3.9 release version of the <i>New Feature Usage and Configuration Guide</i> .  Also, see the "Changing Your Password" and "Resetting a Forgotten Password" sections in the NEO 3.9 release version of the <i>NEO Online Help</i> .

### 2.1.14. Support for Wildcard Search in Enumeration Type Fields

The NEO 3.9 release adds support for wildcards in fields of the enumeration type. Enumeration fields are fields in which users can type a string in the field, and a list of field options containing that string displays below the field. The wildcard character is an asterisk (\*), and the following wildcard search methods are supported:

- Prefix: \*String
- Suffix: String\*
- Prefix and suffix: \*String\*
- Infix: Str\*ing
- Multiple infixes: St\*ri\*ng

These fields already supported an implicit suffix wildcard (as you are typing, the system shows options that complete your search term), but this enhancement is added to address situations where fields have many possible options with small differences in their display names. The wildcard search helps to narrow down the options displayed on the dropdown list, saving users time.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Using Wildcard Searches in Reports" section in the current release of the <i>New Feature Usage and Configuration Guide</i> .

### 2.1.15. Updates to the Default Minimum Password Requirements

In the NEO 3.9 release, the default minimum password requirements are updated to remove the maximum number of characters constraint.

Now, the password must satisfy the following requirements:

- at least 8 characters
- at least 2 upper-case letters (A-Z)
- at least 2 lower-case letters (a-z)
- at least 2 digits
- at least 2 special characters (!, -, @)

Previously, there was a maximum limit set for each character, upper case and lower letters, digits, and special characters. The password requirements were different for Enterprises and ONE single sign-on (SSO). This enhancement makes the password requirements consistent for Enterprises and ONE SSO.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Changing Your Password" and "Resetting a Forgotten Password" sections in the NEO 3.9 release version of the <i>NEO Online Help</i> .

## 2.2. NEO UI

### 2.2.1. Added Links Between Alerts and Problems

The NEO 3.9 release adds a link between related problems and alerts. When users create alert subscriptions, they can configure the system to generate a problem when an alert is generated for a given alert subscription. Previously, there was no easy way to find a problem that corresponded to an alert and vice-versa, but now the following fields are added to address this:

- Added the Problem ID field on the Alert Details screen. The value of the field is a hyperlink to the associated problem.
- Added the Alert Ref field on the Problem Details screen. The value of the field is a hyperlink to the associated alert.

Note that currently, any alert generated from a problem will not have these links available. With the enhancement, users can very quickly find alerts associated with problems and problems associated with alerts, saving time.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Viewing Problem Associated with an Alert" and "Viewing Alerts Associated with a Problem" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

### 2.2.2. System-Wide NEO Notification Feature Enabled for Enterprise Admin Role

In the NEO 3.9 release, the system-wide NEO notification feature is enabled for the Enterprise Admin role. Previously, the feature was available only for the Value Chain (VC) Admin role. With this enhancement, Enterprise Admins can create and send notifications to all active users within the enterprise. They can also filter and then review a report listing the notifications. The Create System Notification user interface (UI) and the System Notification report for the Enterprise Admin role have the same fields and options as the system notification UI and report for the VC Admin role. See the *NEO Online Help* sections referenced in the Usage and Configuration section below.

The Enterprise Admin can send notifications to the following users:

- All users within their enterprise
- All users within their enterprise by role - notification sent to all users in a specified role(s)
- All users based on partner type - notification sent to all users with a specified partner type, such as My Carriers
- Specific active users

This enhancement helps Enterprise Admin users notify large groups of users at once, which is helpful for network issues, maintenance windows, and other system-wide concerns.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	<p>For more information, see the "Viewing System Notifications for Enterprise Admin Users" and "Creating System Notifications for Enterprise Admin Users" sections in the NEO 3.9 release version of the <i>New Feature Usage and Configuration Guide</i>.</p> <p>Also, see the "Viewing System Notifications" and "Creating System Notifications" sections in the NEO 3.9 release version of the <i>NEO Online Help</i>.</p>

### 2.2.3. User Settings Screen Updated

In the NEO 3.9 release, the User Settings screen is reorganized and updated. The fields on the User Settings screen are now grouped and divided into four tabs:

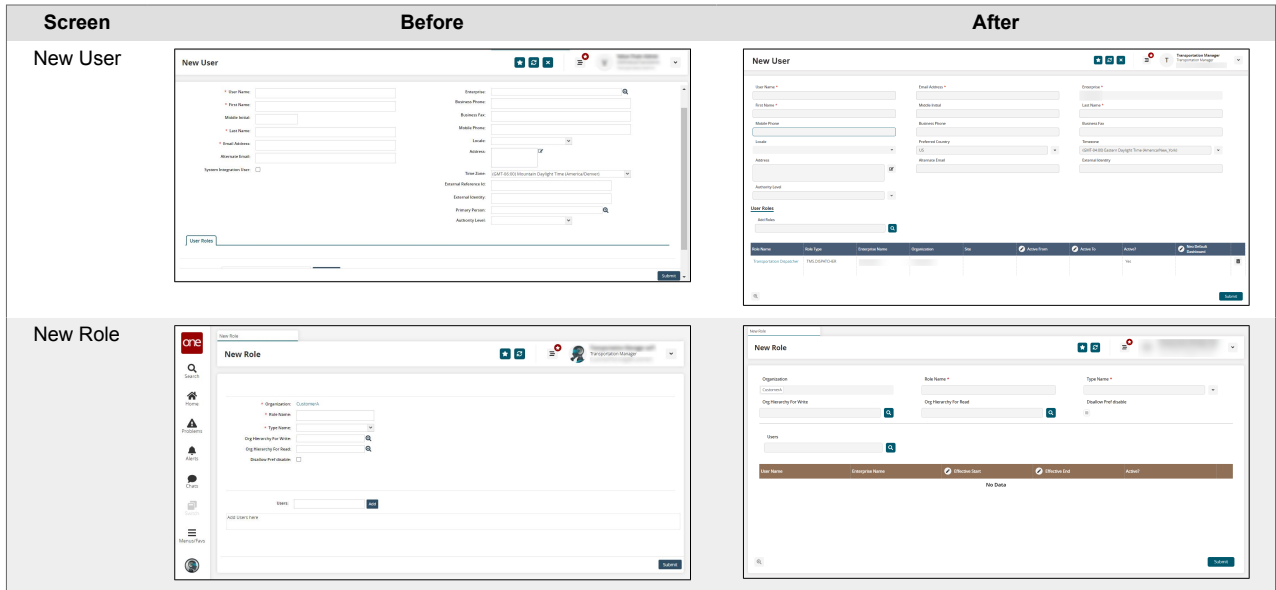
- **User Information:** This tab contains basic information about the user, such as name, phone number, email, and time zone.
- **User Interface:** This tab enables users to set user interface (UI) preferences such as table header color and whether they want to view perspectives as tabs or enable animations.
- **Data Display:** This tab lets users customize how they want data to be displayed across the system. Users can configure preferences for the display of currency, time and date, numbers, and so on.
- **User Role Overrides:** This tab displays the roles assigned to the user and allows the user to select a preferred time zone and country for each role to override the default role's time zone and country. When the user switches to a role with a time zone override and/or country override value selected, the user's view of the data is updated for that time zone and country.
- **Actions button:** This button lets users import and export user-preferred data via the inbound interface

Previously, adding new fields and features to user settings in previous releases led to the screen becoming less user-friendly and caused some misalignment on the screen. This enhancement makes the screen more organized and user-friendly, dividing it into organized tabs with fields that allow users to customize their experience with the NEO system. This enhancement also helps users to import or export user settings data in bulk via CSV file. Enterprise Admin users can import or export user settings data for multiple or single users via the inbound interface.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	<p>Yes. The CSV files below have been added as part of this enhancement.</p> <ul style="list-style-type: none"> <li>• PLT.User_IB</li> <li>• PLT.UserAssociation_IB</li> <li>• PLT.UserAndPreferences_IB</li> </ul>
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	<p>For more information, see the "Viewing the User Settings Screen and Using the Actions button " section in the NEO 3.9 release version of the <i>New Feature Usage and Configuration Guide</i>.</p> <p>Also, see the "Editing User Settings in the NEO UI" section in the NEO 3.9 release version of the <i>NEO Online Help</i>.</p>

### 2.2.4. Visual Refresh for New User and New Role Screens

This release visually refreshes the New User and New Role screens from the Flux UI to the React UI. The updated screens have all the same functionality as previously, but in a more compact 3-column design that matches other UI screens and minimizes vertical scrolling. No additional actions are required of users.



<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	<p>See the following sections in the current release of the <i>New Feature and User Configuration Guide</i> for more information:</p> <ul style="list-style-type: none"> <li>• Adding New Roles</li> <li>• Creating Users</li> </ul>

## 2.3. Administration

### 2.3.1. Bill of Materials Update Alerts for Vendor Users

In the NEO 3.9 release, vendor partners can receive alerts for any changes to a bill of materials (BOM) that uses a partner item belonging to the vendor organization or if the user has approved BOM access. This feature is helpful when the vendor organization needs to track changes to a BOM. Previously, vendors could work with BOMs but could not set up alert notifications for BOM updates.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	<p>For more information, see the "Creating an Alert Subscription for Bill of Material Updates" section in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i>.</p>

### 2.3.2. Business Rules for Approval Requests

While creating approval routes, users can now create a business rule to specify IF and THEN conditions as prerequisites for approval. For example, while creating an approval request for an enhanced order, a business rule can be created to set the minimum requested quantity as a condition for approval. When the IF and THEN conditions are fulfilled, no approval route is triggered, and the request is auto-approved. However, when the IF and THEN conditions do not match, the request goes through the approval process. If the first (IF) condition is not satisfied, the business rule does not apply.

As part of this enhancement, a new option, Do you want to include business rule?, is added to the Create an Approval Route screen. Selecting this option and clicking the Add Business Rule button next to it displays the Create Business Rule for Approval Route popup screen.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Creating Approval Routes" section in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i> .

### 2.3.3. Enhancements to Approval Routes

The NEO 3.9 release introduces the following two enhancements to approval requests.

#### Multiple Approval Routes

Users can now create multiple approval routes for the same model data instance. The following table describes how multiple approval routes are processed in different scenarios:

Scenario	Result
No approval plan exists for a model data instance. A user performs an action such as Update or Save.	The system displays a message with an action button. Clicking the button generates an approval plan with updated field values.
An approval plan exists for a model data instance in the Not Started state. A user updates the same or different fields in the same instance and performs the same action.	The system displays a message with an action button. Clicking the button updates the existing approval plan with the most recent updates to the same field or a different field.
An approval plan exists for a model data instance in the In Progress state. A user updates different fields in the same instance and performs the same action.	The system displays a message with an action button. Clicking the button generates a new approval plan for the most recently modified fields. The existing plan remains unchanged.
An approval plan exists for a model data instance in the In Progress state. A user updates the same fields in the same instance and performs the same action.	The system displays the message: "Approval process is in progress for the requested field."
Multiple approval plans exist for a model data instance. One is in the Not Started state, while others are in progress. A user updates different fields in the same instance and performs the same action.	The system displays a message with an action button. Clicking the button updates the plan in the Not Started state while the plans that are in progress remain unchanged.
An approval plan exists for a particular action. A user performs another action in the same instance.	The system displays a message with an action button. Clicking the button generates a new plan for the most recent action.

Previously, users could not submit a new approval request if another request for the same model instance was already in the approval process. For example, if the Save action for a purchase order (PO) was under review, users had to wait for the approval process to complete before performing the Submit action. With this enhancement, a model instance combination is no longer blocked for new approval requests.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information on how to create approval routes, see the "Creating Approval Routes" section in the current release of the <i>NEO Online Help</i> .

### 2.3.4. Filtering Public and Private Contacts

With the NEO 3.9 release, users can now filter public and private contacts in the Search Contact report. A new filter field called Public is added to the report, allowing users to include or exclude public and private contacts from the user's enterprise and from the partner entities. Users can select a partner entity in the Owning Ent filter and then set the Public filter to one of the following options to view public and private contacts from own and partner entities:

- If the Public filter is set to Yes, the Search Contact report displays all public contacts from the current user's enterprise and partner entities. The report does not display any private contacts.
- If the Public filter is set to No, the Search Contact report displays only private contacts (contacts not marked public) belonging to the current user's enterprise. The report does not display any public contacts.
- If the Public filter is blank, the Search Contact report displays all public and private contacts from the current user's enterprise and public contacts from partner entities.

This enhancement helps users be more specific about the types of contacts displayed in the report. Previously, the report showed private and public contacts without the option to filter based on whether the contacts were marked public.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Filtering Public and Private Contacts" section in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i> .

### 2.3.5. New Approval Request Widgets

The NEO 3.9 release introduces the following new approval request widgets:

- Approval Requests State Summary: shows the number of approval requests in each state (In progress, Completed, Rejected) either as a list view or a chart view. The data shown in the widget can be filtered by approval state and approval creation date range and can include or exclude approval requests created by the current user.
- Approval Requests Awaiting My Response: shows the number of approval requests awaiting review and response by the current user. The data shown in the widget can be filtered by the model level associated with approval requests, pending days, or approval creation date range.

With these new widgets, an approver can view state-wise approval request numbers and the number of approval requests awaiting their response on the dashboard.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Working with Approval Request Widgets" section in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i> .

### 2.3.6. New Feature Subscription for Policies

In NEO 3.9, ONE introduces a new feature subscription called SCC.Policies to resolve potential conflicts in policy management arising from an active module-level feature subscription. Previously, a module-level feature subscription, when active, sometimes prevented users from updating policies.

The new feature subscription, if enabled, overrides such restrictions on policy management introduced by other features and allows users to create, read, update, and delete policies as needed.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	Contact ONE NOC at for help with configuring the Download and Export options.

### 2.3.7. New Fields in the Approval Routing Inbound Interface

This enhancement updates the Approval Routing Inbound Interface to reflect the improvements made to the Approval Routing user interface (UI) in this release and a previous release.

The Approval Routing inbound interface is updated to version 5.0 to include the following new fields and fields with modified behavior:

Field	Description
Route Name *	This is the name of the approval route.  This field was already present in the previous inbound interface but is now mandatory in the new interface.
Active?	The Active? parameter is a new option added in this release. This parameter sets the status of the approval route, determining if it is active or inactive. In the interface, 0 = Inactive and 1 = Active.
The following fields are required only when the approval route requires a business rule:	
When Line Applies Name	This is the name of the business rule to apply to the approval route.  See "Business Rules for Approval Requests" in the current version of <i>Release Notes</i> for more information.
When Line Applies Enterprise Name	This is the enterprise associated with the business rule.  See "Business Rules for Approval Requests" in the current version of <i>Release Notes</i> for more information.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	SCC.Approval Routing IB v5.0
<b>Related Functionality</b>	Approval Routing User Interface
<b>Usage and Configuration</b>	For more information, see the "Uploading Files" and "Creating Business Rules" sections in the current release of the <i>NEO Online Help</i> .

### 2.3.8. New Returnable and Collapsible Packing Resource Fields and API

The NEO 3.9 release adds the following new fields to the Packing Resources report and New Packing Resource screens:

- Returnable: indicates whether the packing resource can be reused
- Collapsible: indicates whether the packing resource is collapsible/foldable

The following fields are enabled only if the Collapsible option is selected:

- Collapsible Height: the height of the packing resource when collapsed
- Collapsible Ratio: the amount of height saved when collapsed

These fields are also added to the Packing Resource Inbound Interface to upload packing resource details.

As a part of this enhancement, a new Packing Service API is introduced, which can be used to fetch the weight and volume of the packing resource (both root and child packings).

These new options help buyer and supplier users reduce costs by allowing a packing resource to be marked reusable throughout the supply chain and collapsible/foldable, which takes less cargo space.



<b>Analytics Impact</b>	None
<b>Integration Impact</b>	SCC.Packing Resource_IB v2.0
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Creating Reusable and Collapsible Packing Resources" section in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i> .

### 2.3.9. Reusing Approval Route Names Across Value Chain

Approval route names are now unique only at the enterprise level. This means that users can reuse an approval route name existing under one enterprise while creating a new route under another enterprise.

Previously, approval route names once used could not be reused to create new routes even if the two routes belonged to different enterprises. This enhancement gives users more flexibility in naming approval routes.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Creating Approval Routes" section in the v 3.9 release version of the <i>NEO Online Help</i> .

### 2.3.10. Support for Organization Hierarchy in Role Inbound Interface

In the NEO 3.9 release, the following new fields are added to the inbound interface used for bulk-creating new roles or updating existing ones:

- Org Hierarchy For Read
- Org Hierarchy For Read Enterprise
- Org Hierarchy For Write
- Org Hierarchy For Write Enterprise

While these four fields are optional, they cannot be partially filled. For example, if Org Hierarchy for Read is specified, then Org Hierarchy For Read Enterprise must also be specified. Additionally, the organization and enterprise mapping must be correct. Otherwise, the upload fails, and the system displays an error message.

Previously, users could specify org hierarchy details only when creating or updating roles in the UI.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	SCC.Role_IB v3.0
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Uploading Files" section in the v 3.9 release version of the <i>New Feature Usage Configuration Guide</i> .

### 2.3.11. Validation Check for Global Trade Item Numbers

NEO 3.9 adds a validation check for the Global Trade Item Number (GTIN) while creating new items or updating existing items. GTIN is used by companies to identify all of their trade items uniquely. When users enter any value in the Global Trade Item Number field, it is checked for a valid GTIN-8, GTIN-12 (only for wholesale shipments), GTIN-13, and GTIN-14 format. Each of these four numbering structures is constructed in a similar fashion, combining Company Prefix, Item Reference, and a calculated Check Digit. This validation check applies to items added and updated in the UI and via upload. Previously, the Global Trade Item Number field accepted any value. This created problems when integrating with external systems, which expected a valid GTIN.

Users can find more information on calculating a check digit manually on the [GS1 website](#).

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	SCC.Item_IB_6.0.csv
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Creating Items" and "Updating Items" sections in the v 3.9 release version of the <i>NEO Online Help</i> .

## 2.4. Integration

### 2.4.1. Conditionally Required Fields Enforced on Inbound Interfaces

The NEO 3.9 release allows enforcing conditionally required fields on inbound interfaces. Previously, fields could be marked as "Conditionally required" on inbound interfaces and could contain a description of the condition under which the field is required. However, this wasn't enforced, so these fields were technically optional to the end user.

Note that while this feature is supported, it is not necessarily implemented on every inbound interface at this time. To avoid production issues from enforcing conditionally required fields on all existing inbound interfaces, an external reference is also added to easily disable this check for certain inbound interfaces. Please contact your ONE representative for assistance in configuring the external reference.

With this enhancement, users are forced to populate fields required in the given scenario, reducing the amount of necessary and missing data in the system.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	Various inbound interfaces throughout the system.
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	Please contact your ONE representative for assistance in configuring the external reference mentioned above.

### 2.4.2. Ability to Stop a Pipeline Run

In the NEO 3.9 release, a Stop Test Run link is added to the Pipelines details screen to stop the execution of the integration pipeline. Previously, only a loading mask called Testing and a spinner was visible when the pipeline ran. The Stop Test Run now displays while the pipeline is executing. This enhancement allows users to halt pipeline execution when required, avoiding unnecessary waiting for completion. Users can click the Stop Test Run link to stop the pipeline execution.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Stopping the Execution of Running Pipelines" in the v 3.9 release version of the <i>New Feature Usage and Configuration Guide</i> .

### 2.4.3. Enhancements to Integration Message Previews

In the NEO 3.9 release, the Integration file previews displayed on the Messages screen are enhanced to support formatting. The Messages screen opens in a new tab when users click a queue name on the Message Queue and Message Queue Summary screens. The previews are properly formatted with line numbers and support syntax highlighting for JSON, XML, and CSV file formats. The syntax highlighting and formatting works only for files up to 512 kb. For larger files, the preview is displayed as plain text and truncated to avoid error messages resulting from longer response time.

Previously, these preview messages were plain text and difficult to read. Users had to copy and paste the text into a third-party tool to read them.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Viewing Message Previews" section in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i> .

## 2.5. Manufacturing

### 2.5.1. Added Finished Good Forecast By Raw Material TLV Screen

The NEO 3.9 release adds a new timeline view (TLV) called the Finished Good Forecast By Raw Material TLV screen for Production Manager roles. With this enhancement, users can view forecasts by raw material for finished goods in a timeline view with different bucketizations and different time horizons, providing valuable insight into previously unavailable datasets. Note that the maximum viewable time range is 18 months.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Viewing the Finished Good By Raw Material TLV" section in the current release of the <i>New Feature Usage and Configuration Guide</i> .

### 2.5.2. Added Production Order Forecast Links on the Multi-Buffer BOM Hierarchy TLV Screen

The NEO 3.9 release adds links to production order forecasts and production orders in the supply data measure on the Multi-Buffer BOM Hierarchy TLV screen. With this enhancement, users can see transaction details that make up the total production order forecast directly from the Multi-Buffer BOM Hierarchy TLV screen. No new user behavior is necessary; the new links simply replace the hardcoded values visible prior to this update.



#### PREREQUISITES

For data measure links to be available, the Constrained Demand Translation Engine should be run with the following conditions:

- Set the Site Enterprise Name field to your current enterprise.
- Set the BOM Enterprise Name field to your current enterprise.
- Set the Planning Mode field to Unconstrained Demand Translation.
- Set the Planning Bucketization field to Weekly.
- Set the Site Name field to the same site used on the Multi-Buffer BOM Hierarchy TLV screen.

In addition, a production order must exist for the given item and site combination for a production order forecast link to appear.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Multi-Buffer BOM Hierarchy TLV" section in the current release of the <i>New Feature and Configuration Guide</i> for more information.  Also, see the "Constrained Demand Translation (CDT) Engine" section in the current release of the <i>NEO Online Help</i> for more information.

### 2.5.3. Managing Work Shifts

This release adds the concept of work shifts for Production Manager roles, allowing them to create, view, and update work shifts at the organization level. Work shifts are used to schedule work in work orders and production orders manually. To support this enhancement, the Manage Work Shift screen is added, where users can create work shifts that support different work hours for each day of the week and multiple separate work shifts per day. From this new screen, users can also view and update all existing work shifts for which they have permission.

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

## 2.6. Master Data Management

### 2.6.1. Cross-Reference Transform Support for Report-Based Outbound Integration Subscriptions

The NEO 3.9 release adds cross-reference transform support for report-based outbound integration subscriptions. Cross-reference message transformations are used to map data like Enterprise Name, Org Name, and Site Name to the master data in the ONE system. For example, a site may have three different names in three different customer systems, but the customer prefers to map all three site names to a single site name in ONE. Cross-references map those three site names to the designated site name in the ONE system so that inbound and outbound files are converted to the correct site name for the system receiving the file.

Previously, cross-reference transformations worked with both inbound and outbound integration subscriptions but did not work with report-based outbound subscriptions. This enhancement transforms the site name in ONE into the applicable site name for the external system receiving the report-based outbound file. To use this enhancement, users can contact ONE to set up cross-reference message transforms to map external data to ONE if they have not already done so.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	Impacts report-based outbound integration interfaces
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Cross-References by External System Report" and "Cross-References Report" sections in the NEO 3.9 release version of the <i>NEO Online Help</i> .  Contact ONE at to set up cross-reference transform.

## 2.7. Optimization (OPT)

## 2.7.1. Demand Planning

### Apply Selected Forecast Types to Events

When creating demand planning events, users can now select forecast types to which an event applies. Previously, demand forecast events supported only statistical or consensus events. With this enhancement, users can select different forecast types from the list. Currently, ONE supports 20 forecast types.

A new multi-select list called Applied Forecast Types is added to the Create Event screen and the event details screen, and a new Applied Forecast Types field is added to the DPX Event IB 2.0 to support this enhancement.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	DPX.Event_IB v2.0
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Creating Events" section in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i> .

### Enhanced Outlier Adjustment Calculation

In the NEO 3.9 release, the outlier adjustment calculation is enhanced. The Outlier Detection Engine calculates % Relative to Baseline and Quantity Relative to Baseline for History Source Aggregated Orders, Aggregated Shipments, Aggregated POS, Orders, Shipments, Store POS, and Foot Traffic.

To support this enhancement, the following filters are added to the Outlier Adjustment TLV for both baseline and corrected history data:

- Show approved outliers adjustment relative to corrected history.
- Show new outliers adjustment relative to corrected history.

Previously, the original adjustment was unclear as it required users to adjust the original value to arrive at the adjusted value. But with this enhancement, users can view and change the original value. The user inputs adjustment values (as a percentage or delta) relative to the original value.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Viewing the Outliers Adjustment TLV Report" section in the v 3.9 of the <i>New Feature Usage &amp; Configuration Guide</i> .  See the following sections in the current release of the <i>NEO Online Help</i> .  <ul style="list-style-type: none"> <li>• "Viewing the Outliers Adjustment TLV Report"</li> <li>• "Running the Outlier Detection Engine"</li> </ul>

### Partner Group Level Filter Available on Various Demand Planning Screens

This release adds the Partner Group Level filter to the following Demand Planning screens; this filter is similar to the existing Product Group Level and Site Group Level filters.

- Demand History Review
- Forecast Book
- Forecast Book By Attribute
- Forecast and Demand History Review
- Forecast Review

- Item Forecast Book
- Outlier Adjustment TLV

Using this filter, users can view demand history or aggregated forecast data by partner group levels, providing additional flexibility and customization for how data is viewed. Note that this field is only useful if partner group level hierarchies are configured for the given instance of the system.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	<p>See the following sections in the current version of the <i>New Feature and Configuration Guide</i> for more information:</p> <ul style="list-style-type: none"> <li>• Demand History Review</li> <li>• Searching the Forecast Book</li> <li>• Viewing Forecast Book By Attribute</li> <li>• Forecast and Demand History Review</li> <li>• Running Forecast Review</li> <li>• Item Forecast Book</li> <li>• Viewing the Outlier Adjustment TLV Report</li> </ul>

## Scenario Support for Demand Planning Reports

In the NEO 3.9 release, ONE adds scenario support for several reports. Demand Planning is mainly concerned with past demand and creating projections, sometimes without considering other possible situations. Scenarios allow users to simulate what-if parameters to see their effects, keeping that data separate from real data.

The capability offers increased flexibility and deeper insights into demand planning. The following table shows a list of reports that are impacted:

Report Name	Enhancements
Aggregated Demand Forecast Accuracy	Added the Scenario Name, Scenario Plan Name, and Scenario Plan Type columns.
Consensus Forecast Output	
Demand Forecast Accuracy	
Demand Planning Output	
Search Events For Scenario	
Search Scenario Data Measures	
Search Scenario Demand Forecast	
Search User Forecast Override	
Aggregated Item Accuracy By Product Group	Added the Planned Forecast Scenario filter.
Demand Forecast Accuracy By Item and Site Group (The screen name in the system is Demand Forecast Accuracy by Item SG.)	Added the Scenario Name, Scenario Plan Name, and Scenario Plan Type columns.
Demand Forecast Accuracy By Product Group	
Demand Forecast Accuracy Summary SG	
Forecast Accuracy For Foot Traffic	
Item Forecast Top Difference	
Baseline Forecast Error	Added the Show Scenario checkbox as a filter. Removed the Show Without Scenario checkbox.
Forecast Rolling Bias	
Forecast Rolling Bias By Product Group	
Search Alert Value	
Demand Forecast Deviation	Added the Show Scenario checkbox as a filter. Removed the Show Without Scenario checkbox.
Engine Task Failure	
Forecast High MAPE Alert	Added the Scenario Name, Scenario Plan Name, and Scenario Plan Type columns.
Demand Forecast Override Audit	Added the Show Scenario checkbox as a filter.
	Added the Scenario Name, Scenario Plan Name, and Scenario Plan Type columns.
Forecast Plan High Deviation	Added the Show Scenario checkbox as a filter.
	Added the following columns:
	<ul style="list-style-type: none"> <li>• Primary Scenario Plan Name</li> <li>• Primary Scenario Plan Type</li> <li>• Secondary Scenario Plan Name</li> <li>• Secondary Scenario Plan Type</li> </ul>
Previous Forecast Accuracy Error	Added the Show Scenario checkbox as a filter.

Other Demand Planning reports may have the additional filter and columns as well. The functionality for this enhancement is similar for all affected reports.



### PREREQUISITE

A demand planning scenario must be defined with the appropriate parameters. See the "Creating Demand Planning Scenarios" section in the *NEO Online Help* for more information.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	Integration interfaces are updated to reflect the new fields/columns for reports with upload functionality.
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Viewing Scenario Data in a Demand Planning Report" section in the v 3.9 of the <i>New Feature Usage and Configuration Guide</i> .  See the "Creating Demand Planning Scenarios" section in the v 3.9 of the <i>NEO Online Help</i> for more information.

## Scenario Support to Various Widgets and a Report

The NEO 3.9 release adds scenario support to several demand planning widgets and a report. Generally, demand planning revolves around "no-scenario" data such as historical demand, generated forecasts, and so on, but with this enhancement, users can simulate what-if scenarios and keep that data separate from real data. Users can now create scenarios, data for those scenarios, and use the updated widgets and the report to simulate what-if situations.

### Widget Updates

The following enhancements are made:

- Added the Show Scenario checkbox as a filter
- Added the Planned Forecast Scenario picker as a filter
- Added the Scenario Name, Scenario Plan Name, and Scenario Plan Type columns

To the following widgets:

- Forecast Trend Deviation
- Significant Autonomous Adjustment
- Foot Traffic: Previous Forecast Accuracy Error
- Forecasts Without Sales Alert
- Forecast vs. Sales Deviation
- Forecast Plan High Deviation Report
- Running Problematic Promotions

This enhancement allows widgets to be used for scenario data. Users must either select a scenario to view specific scenario data or check the Show Scenario checkbox to view all data, including non-scenario and scenario data. By default, only non-scenario data is shown.

### Updates to the Forecast Plan High Deviation Report

The Forecast Plan High Deviation report is updated with the following enhancements to support scenarios:

- Added the Show Scenario checkbox as a filter
- Added the Primary Scenario Name and Secondary Scenario Name pickers as filters
- Replaced the Primary Scenario column with the Primary Scenario Name, Primary Scenario Plan Name, and Primary Scenario Plan Type columns
- Replaced the Secondary Scenario column with the Secondary Scenario Name, Secondary Scenario Plan Name, and Secondary Scenario Plan Type columns



#### PREREQUISITE

A demand planning scenario must be created with a parameters. See the "Creating Demand Planning Scenarios" section in the *NEO Online Help* for more information.



<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Forecast Plan High Deviation Report" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information. Also, see the "Creating Demand Planning Scenarios" section in the <i>NEO Online Help</i> for more information.

## Subscribe to Demand Planning Features at the Enterprise Level

The NEO 3.9 release adds feature support for demand planning screens. Enterprises can now subscribe to specific demand planning features, such as menus, and these features will appear for every applicable user in that enterprise. Similarly, features that are not subscribed to at the enterprise level will be hidden from all users of that enterprise. This enhancement can hide unused menu options, preventing unnecessary UI clutter. Please contact your ONE representative for assistance in subscribing or unsubscribing to specific demand planning features.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	None

## Support for Item Mapping

The NEO 3.9 release adds support for item mapping in Demand Planning. This enables the following engines to read buyer item history in addition to supplier item history as input:

- **Demand Planning Engine:** The demand planning engine reads items and the mapped item shipment or order history for forecasting. Users run the Demand Planning engine and search the item data on the Forecast Book user interface.
- **Split Ratio Engine:** The split ratio engine reads items and the mapped item shipment or order history for split ratio generation. Users run the Split Ratio engine and search for item data on the Daily Split Ratios user interface.
- **Forecast Accuracy:** The forecast accuracy engine reads items and the mapped item shipment or order history for populating actual history. Users run the Forecast Accuracy engine and search the item data on the Demand Forecast Accuracy By Item user interface.
- **Demand Aggregation:** The demand aggregation engine reads the mapped item's order history or shipment history and generates aggregated orders for the item. Users run the Demand Aggregation engine and search an item's order history on the Search Aggregated Orders user interface and its shipment history on the Search Aggregated Shipments user interface.

The following screens are enhanced to display items and their mapped orders and shipments:

- **Forecast Book TLV (Time Line View):** The Forecast Book TLV displays mapped shipment or order history for one's own item.
- **Forecast Book By Attribute TLV (Time Line View):** The Forecast Book By Attribute TLV displays mapped shipment or order history for one's own item.
- **Item Forecast Book TLV (Time Line View):** The Item Forecast Book TLV displays mapped shipment or order history for one's own item.

Previously, the Demand Planning module did not support item mapping when using historical data to determine demand. This enhancement considers buyer item orders and shipment data to determine supplier item demand.



## PREREQUISITE

The item mapping must be present. Users must maintain the item mapping from the Search Item Mapping user interface.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	<p>See the "Searching the Forecast Book" section in the v 3.9 of the <i>New Feature Usage and Configuration Guide</i>:</p> <p>See the following sections in the v 3.9 release version of the <i>NEO Online Help</i>:</p> <ul style="list-style-type: none"> <li>• "Running the Demand Planning Engine"</li> <li>• "Generating Split Ratios"</li> <li>• "Forecast Accuracy Engines"</li> <li>• "Demand Aggregation Engine"</li> <li>• "Viewing the Forecast Book by Attributes"</li> <li>• "Searching the Forecast Book"</li> </ul>

## Support for Partner Hierarchies

The NEO 3.9 release introduces a new hierarchy type, Channel Hierarchy, to allow the creation of partner hierarchies, similar to site group and product group hierarchies. Partner hierarchies are organized into Partner Groups, Partner Group Levels, and Partners.

A new menu, Partner Hierarchy, is added under Administration with the following new screens:

- New Partner Hierarchy - for creating new partner hierarchies
- Partner Hierarchy Level - for adding new partners and partner groups to an existing partner hierarchy

With partner hierarchies, users can view aggregate demand history or forecast for an entire product group. For example, Partner Group 1 includes Groups 1-1, 1-2, and 1-1-1. With a partner hierarchy, users can get the aggregate demand history or forecast for all three levels.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	<p>For more information, see the "Creating a Partner Hierarchy" and "Adding Partners and Partner Groups to a Partner Hierarchy" sections in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i>.</p>

## Updated and Renamed Partner Site Forecast Book to Forecast Book

The NEO 3.9 update brings a plethora of forecasting updates, including:

- A replacement for the Partner Site Forecast Book screen, now called the Forecast Book screen
- New policies to configure the Forecast Book screen
- New fields for Role Forecast Types
- New Forecast Chart section on the Forecast Book screen
- Updates to the Forecast Timeline section of the Forecast Book screen
- The ability to override aggregated shipments and aggregated orders from the Forecast Book screen

This collection of updates greatly improves forecasting functionality and allows users to fully customize various default attributes on the Forecast Book screen.

## Forecast Book Screen

The Partner Site Forecast Book screen is no longer available and is replaced with the Forecast Book screen; in addition, the previously named Forecast Book screen is now the Basic Forecast Book screen. The new Forecast Book screen has all the functionality of the retired Partner Site Forecast Book screen but with improved usability and a visual UI refresh to match other screens throughout the system. The Forecast Book screen has much more fluid and intuitive filtering and adds improvements to the forecast chart and forecast timeline.

To support this enhancement, the following enhancements are made to the newly named Forecast Book screen:

- The Product Group Level Hierarchy Navigation widget replaces the Item and Product Group filters.
- The Site Group Level Hierarchy Navigation widget replaces the Site and Site Group filters.
- The Partner Group Level Hierarchy Navigation widget replaces the Partner Site, Partner, and Partner Enterprise filters.

## New Policies

The following policies are added to the DPUI Policies tab of the Search Policies screen to control the default values of the Forecast Book screen:

- DefaultItem
- DefaultPartner
- DefaultPartnerGroupLevel
- DefaultPartnerHierarchy
- DefaultPartnerSite
- DefaultProductGroupLevel
- DefaultProductHierarchy
- DefaultSiteGroupLevel
- DefaultSiteHierarchy
- HierarchyNavigationHidePartner
- HierarchyNavigationHidePartner Site
- HierarchyNavigationHideSite

## New Fields for Role Forecast Types

The following fields are added to the Search Role Forecast Type and Create Role Forecast Type screens. Role forecast types define which user roles can view and edit which forecast types.

- Default Graph Types
- Time Phases
- Default View Types
- Hidden View Types
- Default Bucketization Types
- Hidden Bucketization Types

Collectively, these new fields allow users to specify what datasets are shown by default on the Forecast Book screen and specify custom short-, medium-, and long-term definitions.

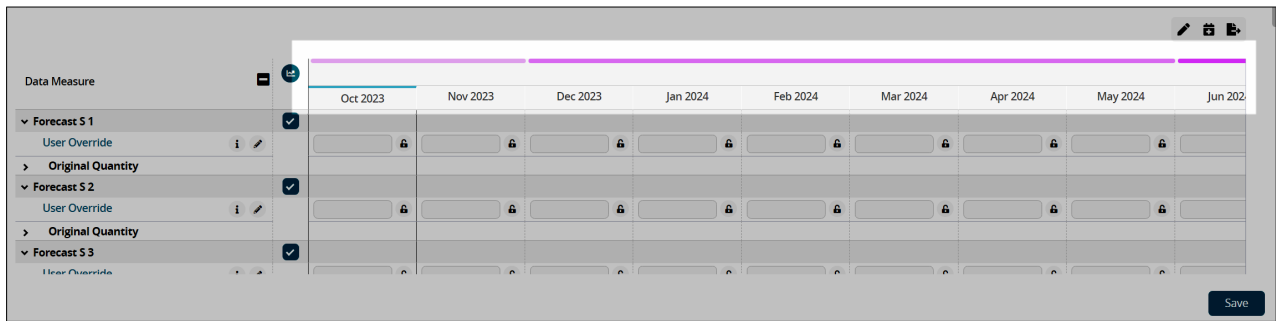
## Forecast Chart Updates

The new Forecast Chart section of the Forecast Book screen allows users to control the visible time range. By default, the Forecast Chart section matches the date range shown in the Forecast Timeline section,

but now users can zoom in, zoom out, or move the visible data forward or backward in time. In addition, configurable chart checkboxes are added that allow users to configure initial data measures.

### Forecast Timeline Updates

The Forecast Timeline section of the Forecast Book screen is updated with horizontal colored bars at the top of the table that indicate past and future dates (relative to the current date) and user-configurable date ranges. To specify date ranges for the bars, users must use the Time Phases field on the Create Role Forecast Type or Search Role Forecast Type screens.



For example, users could set the Time Phases value as "2, 6, 12" to represent that:

- Short-term is defined as two months.
- Medium-term is defined as six months.
- Long-term is defined as 12 months.

In addition, users can now lock forecast records at the Forecast Type level by clicking the lock icon next to each forecast record. Marking a forecast record as locked prevents all future user overrides of that forecast record without first unlocking it. This enhancement provides more flexibility for locking forecasts at a granular level.

### Override Aggregated Shipments and Aggregated Orders from the Forecast Book Screen

This release improves the Forecast Book screen by allowing users to override aggregated orders and aggregated shipments. To support this enhancement, the Edit History Types field must be populated when configuring a Role Forecast Type on the Create Role Forecast Type and Role Forecast Type detail screens. To override an aggregated order or aggregated shipment, there must be a Role Forecast Type for the active role, and data measure selections must be made in the Edit History Types field for that Role Forecast Type. Then, users can simply update values on the Forecast Timeline on the Forecast Book screen for the given data measures. By default, this feature is not enabled; the Role Forecast Type configuration must be set.

With this enhancement, users can easily override order and shipment values directly on the Forecast Book screen.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	<p>Added the following fields to the DPX.ForecastTypeRole_IB.in v1.0 inbound interface:</p> <ul style="list-style-type: none"> <li>• Default Graph Types</li> <li>• Time Phases</li> <li>• Default View Types</li> <li>• Hidden View Types</li> <li>• Default Bucketization Types</li> <li>• Hidden Bucketization Types</li> </ul>
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	<p>See the following sections in the NEO 3.9 release version of the <i>New Feature Usage and Configuration Guide</i>:</p> <ul style="list-style-type: none"> <li>• "Creating Role Forecast Types"</li> <li>• "Searching the Forecast Book"</li> <li>• "Creating Events from the Forecast Book"</li> <li>• "Editing Demand Planning UI Policies"</li> </ul> <p>See the following sections in the current release of the <i>NEO Online Help</i>:</p> <ul style="list-style-type: none"> <li>• "Searching Role Forecast Types"</li> <li>• "Available Policies - Demand Planning UI Policies"</li> </ul>

## Updated Demand Planning Menu Structure

The NEO 3.9 release updates the Demand Planning menu structure to be more convenient and consistent. The following updates are made:

- More frequently used screens are moved to the top of the Demand Planning menu, and the less frequently used screens are moved to the bottom.
- Some screens have been aggregated into new or existing submenus within the Demand Planning menu structure.
- Some screens have been slightly renamed to be more consistent and clear.

If users do not know the new location of a particular screen, they can easily use the search field available in the menu bar.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the " <a href="#">Demand Planning Menu Structure: Before and After [37]</a> " section later in the <i>Release Notes</i> for more information.

## Demand Planning Menu Structure: Before and After

- [Menu Structure Before NEO 3.9 Update \[37\]](#)
- [Menu Structure After NEO 3.9 Update \[43\]](#)

## Demand Planning Menu Before the NEO 3.9 Update

The following table describes the menu structure for the Demand Planning menu before the NEO 3.9 update.

Menu	Submenu 1	Submenu 2
Forecast Book		
Forecast Book For Channel		
Forecast Book By Attributes		
Item Forecast Book		
Partner Site Forecast Book		
New Forecast Book		
Product Forecast Deviation		
Copy Forecast Data		
Copy Forecast Overrides		
Create Demand Forecast		
Forecast Review		
	Forecast Review	
	Forecast Review By Site	
	Search Traffic Config Forecast	
	Forecast Review Within Event	
	Search Demand Forecast	
	Search SNOP Demand Forecast	
	Search Data Measure	
	Search SNOP Data Measure Report	
	Search Store Demand Forecast	
	Demand Forecast Deviation	
	Item Forecast Top Difference	
	Raw Material Forecast Review	
	Search User Forecast Override	
	Demand Forecast Override Audit	
	Analyze Forecast Data	
History Review		
	Sales Review	
	Demand History Review	
	Search Store POS	
	Search Aggregated Orders	
	Search Aggregated Order User Overrides	
	Search Aggregated Shipments	
	Search Aggregated Shipment User Overrides	
	Search Scenario Aggregated POS	
	Search Scenario Aggregated Orders	
Forecast And Sales Review		
Forecast and Demand History Review		
Demand Comparison By Items		
Events		
	Create Event	
	Search Events	
	Search Event Effects Timeline View	
	Cannibalization Effects	

Menu	Submenu 1	Submenu 2
		Search Reference Events
		Search Cannibalization Events Without Reference
		Search Cannibalization Effects
		Search LTO Items With Casual Effect
		Detect Cannibalization Effect
		Run Event Analysis
Foot Traffic		
	Search Traffic History	
	Search Traffic Forecast	
	Geo Forecast And History Review	
	Geo Forecast Book	
	Review Traffic By Items	
	Items With Enabled Traffic Forecasting	
	Traffic Based Forecasting	
		New Traffic Config
		Search Traffic Forecasting Configs
		Search Traffic Config Forecast
Last Demand		
	Search Lost Demand	
	Potential Lost Sales Report	
Forecast Accuracy		
	Forecast Accuracy Engines	
		Search Demand Forecast Accuracy Config
		Search Demand Forecast Accuracy Config Override
		Run Accuracy Engine For Standard Config
		Run Accuracy Engine For Ref Config
		Run Accuracy Engine For Pgrp Config
		Run Accuracy Engine For Channel Config
		Run Accuracy Engine For Sgrp Config
		Run Accuracy Engine For PartnerSite Config
		Run Accuracy Engine For Traffic Config
	Forecast Accuracy By Site	
		Demand Forecast Accuracy
		Demand Forecast Accuracy By Item
		Demand Forecast Accuracy Summary
		Demand Forecast Accuracy By Product Group
		Aggregated Item Accuracy By Product Group
		Aggregated Demand Forecast Accuracy
		Forecast Change Report
	Forecast Accuracy By Site Group	
		Demand Forecast Accuracy Details
		Demand Forecast Accuracy By Item SG
		Demand Forecast Accuracy Summary SG
	Forecast Accuracy For Foot Traffic	
	Baseline Forecast Accuracy By Item	
	Weekly Forecast Vs. Weekly Sales Deviation	
	Forecast High MAPE Alert	

Menu	Submenu 1	Submenu 2
	Forecast Plan High Deviation	
	Previous Forecast Accuracy Error Report	
	Baseline Forecast Error	
	Forecast Rolling Bias	
	Forecast Rolling Bias By Product Group	
Forecast Processing		
	Run Demand Generation Engine	
	Run DP With OF Correction	
	Run Autonomous Adjustment	
	Run Disaggregation Engine	
	Create DP Configs	
	Search DP Configs	
	Search DP Config Algorithm Override	
	Search Additional Algorithm Configuration	
	Create Additional Algorithm Configuration	
	Search Algorithm Parameters	
	Search Config Propagation Overrides	
	Demand Planning Output	
	Hierarchy Meta	
		Create Hierarchy Meta
		Search Hierarchy Meta
	Forecast Type	
		Create Forecast Type
		Search Forecast Type
		Create Role Forecast Type
		Search Role Forecast Type
		Create Data Measure Type
		Search Data Measure Type
Split Ratio Processing		
	Search Configuration Context	
	Engine Task Failure	
	Run Split Ratio Engine	
	Daily Split Ratio	
	Split Ratio By Dimension	
	Weekly Split Ratios	
	Scenario Daily Split Ratio	
	Scenario Split Ratio By Dimension	
Engine Configuration		
	Search Engine Custom Config	
	Create Engine Custom Config	
Forecast Management Policy		
	Create Forecast Policy	
	Search Forecast Policy	
Simulation		
	Run Demand Generation Engine	
	Forecast Comparison	



Menu	Submenu 1	Submenu 2
	Create DP Config	
	Search DP Configs	
	Setup Simulation Scenario	
	Search Events For Scenario	
	Create an Event For SScenario	
Life Cycle Forecasting	Item Life Cycle Forecasting	
		Search Item Similarity
		Analyze Item Similarity By Store Profiles
		Create Item Forecast Profiles
		Search Item Forecast Profiles
		Search Limited Time Offer
	Site Life Cycle Forecasting	
		Search Site Similarity
		Create Site Forecast Profiles
		Search Site Forecast Profiles
Seasonality	Search Seasonality Template	
	Search Item Seasonality	
	Item Without Seasonal Template	
	Seasonality Template Comparison	
	Statistical Seasonality Index Override	
	Search Site Seasonality Association	
	Sites Without Seasonal Template	
	Run Demand Seasonality Engine	
Outliers	Search Outliers	
	Outliers Adjustment TLV	
	Run Outlier Detection	
Forecast Template For NPI	Forecast Template Config	
		Create Forecast Template Config
		Search Forecast Template Config
	Create Forecast Template	
	Search Forecast Template	
Historical Data Analysis	Aggregated Sales Analysis	
Alert Computation	Invoke Alert Computation - Item Subnet	
	Invoke Alert Computation - Site Subnet	
	Invoke Alert Computation - Event Subnet	
	Search Alert Config	
	Search Alert Value	
	Search Active Alerts	
Master Data Sanity Check	Master Data Sanity Check UI	
	Item Sanity Check Report	

Menu	Submenu 1	Submenu 2
	Pgrp Level Sanity Check Report	
	Site Sanity Check Report	
	Sgrp Level Sanity Check Report	
Attach Rate		
	Create Attach Rate	
	Search Attach Rate	
	Search Attach Rate Trend	
	Attach Ratio Engine	
Data Upload		
	Upload DP Scenario Propagation Overrides	
	Upload Hierarchy Meta	
	Upload Forecast Statistic Override	
	Upload Demand Forecast	
	Upload Demand Forecast( Version 1.0)	
	Upload Aggregated POS	
	Upload Aggregated Orders	
	Upload Aggregated Shipments	
	Upload Statistical Seasonality Index Override	
	Upload Sesonality Template	
	Upload Item Seasonality Association	
	Upload Site Seasonality Association	
	Upload Alert Config	
	Upload Configuration Context	
	Upload Consensus Forecast Config	
	Upload Events	
Consensus Forecast		
	Consensus Forecast Computation Engine	
	Consensus Forecast Output	
	Search Consensus Forecast Config	
	Search Consensus Forecast Config Override	
	Create Consensus Forecast Config	
	Create Consensus Forecast Config Override	
Forecast Algorithm Competition		
Demand Aggregation		
	Run Demand Aggregation	
	Run Demand Aggregation -Standard	
	Search Fulfillment Site Change	
	Create Fulfillment Site Change	
Dynamic Data Measure Computation		
	Run Dynamic Data Measure Computation	
	DDMC Net Change workflow Engine	
	Computation Run Summary	
	Computation Simulation Data	
	Configuration	
		Create Computation
		Create Computation Input Data

Menu	Submenu 1	Submenu 2
		Create Computation Variable
		Create Computation Step
		Search Computation
		Search Computation Input Data
		SearchComputation Variable
		Search Computation Step
	Search Data Override	
Custom UOM		
	Create Custom UOM	
	Search Custom UOM	
Item Price		
	Create Item Price	
	Search Item Price	
	Create Item Price Override	
	Search Item Price Override	
Dynamic Enumerations		
Analysis UI		
DP Dashboard		

### Demand Planning Menu After the NEO 3.9 Update

The following table describes the menu structure for the Demand Planning menu after the NEO 3.9 update.

Menu	Submenu 1	Submenu 2
DP Dashboard		
Forecast Book		
Forecast Book For Channel		
Forecast Book By Attributes		
Item Forecast Book		
Partner Site Forecast Book		
General Review		
	Forecast Review	
		Forecast Review
		Forecast Review By Site
		Search Traffic Config Forecast
		Forecast Review Within Event
		Search Demand Forecast
		Search SNOP Demand Forecast
		Search Data Measure
		Search SNOP Data Measure Report
		Search Store Demand Forecast
		Demand Forecast Deviation
		Item Forecast Top Difference
		Raw Material Forecast Review
		Search User Forecast Override
		Demand Forecast Override Audit
		Analyze Forecast Data
	History Review	
		Sales Review
		Demand History Review
		Search Store POS
		Search Aggregated Orders
		Search Aggregated Order User Overrides
		Search Aggregated Shipments
		Search Aggregated Shipment User Overrides
		Analyze History Data
		Search Scenario Aggregated POS
		Search Scenario Aggregated Orders
	Analysis UI	
	Forecast And Sales Review	
	Forecast and Demand History Review	
	Outliers	
		Search Outliers
		Outliers Adjustment TLV
	Lost Demand	
		Search Lost Demand
		Potential Lost Sales Report
		Demand Comparison By Items
Forecast Accuracy		
	Forecast Accuracy Engines	
		Search Demand Forecast Accuracy Config

Menu	Submenu 1	Submenu 2
		Search Demand Forecast Accuracy Config Override
		Invoke Accuracy Agent For Standard Config
		Invoke Accuracy Agent For Ref Config
		Invoke Accuracy Agent For Pgrp Config
		Invoke Accuracy Agent For Channel Config
		Invoke Accuracy Agent For Sgrp Config
		Invoke Accuracy Agent For PartnerSite Config
		Invoke Accuracy Agent For Traffic Config
	Forecast Accuracy By Site	
		Demand Forecast Accuracy
		Demand Forecast Accuracy By Item
		Demand Forecast Accuracy Summary
		Demand Forecast Accuracy By Product Group
		Aggregated Item Accuracy By Product Group
		Aggregated Demand Forecast Accuracy
		Forecast Change Report
	Forecast Accuracy By Site Group	
		Demand Forecast Accuracy Details
		Demand Forecast Accuracy By Item SG
		Demand Forecast Accuracy Summary SG
	General Accuracy Reports	
		Forecast Accuracy For Foot Traffic
		Baseline Forecast Accuracy By Item
		Weekly Forecast Vs. Weekly Sales Deviation
		Forecast High MAPE Alert
		Forecast Plan High Deviation
		Previous Forecast Accuracy Error Report
		Baseline Forecast Error
	Forecast Bias	
		Forecast Rolling Bias
		Forecast Rolling Bias By Product Group
Alert Computation		
	Invoke Alert Computation - Item Subnet	
	Invoke Alert Computation - Site Subnet	
	Invoke Alert Computation - Event Subnet	
	Search Alert Config	
	Search Alert Value	
	Search Active Alerts	
Events		
	Create Event	
	Search Events	
	Search Event Effects Timeline View	
	Cannibalization Effects	
		Search Reference Events
		Search Cannibalization Events Without Reference
		Search Cannibalization Effects
		Search LTO Items With Casual Effect

Menu	Submenu 1	Submenu 2
		Detect Cannibalization Effect
		Invoke Event Analysis
Life Cycle Forecasting		
	Item Life Cycle Forecasting	
		Search Item Similarity
		Analyze Item Similarity By Store Profiles
		Create Item Forecast Profiles
		Search Item Forecast Profiles
		Search Limited Time Offer
	Site Life Cycle Forecasting	
		Search Site Similarity
		Create Site Forecast Profiles
		Search Site Forecast Profiles
Forecast Template For NPI		
	Forecast Template Config	
		Create Forecast Template Config
		Search Forecast Template Config
	Create Forecast Template	
	Search Forecast Template	
Seasonality		
	Search Seasonality Template	
	Search Item Seasonality	
	Item Without Seasonal Template	
	Seasonality Template Comparison	
	Statistical Seasonality Index Override	
	Search Site Seasonality Association	
	Sites Without Seasonal Template	
Manual Forecast		
	Product Forecast Deviation	
	Copy Forecast Data	
	Copy Forecast Overrides	
	Create Demand Forecast	
Split Ratio Processing		
	Invoke Split Ratio Agent	
	Invoke Disaggregation Agent	
	Search Configuration Context	
	Engine Task Failure	
	Daily Split Ratio	
	Split Ratio By Dimension	
	Weekly Split Ratios	
	Scenario Daily Split Ratio	
	Scenario Split Ratio By Dimension	
Demand Aggregation		
	Invoke Demand Aggregation	
	Invoke Demand Aggregation -Standard	
	Search Fulfillment Site Change	
	Create Fulfillment Site Change	

Menu	Submenu 1	Submenu 2
Outliers	Invoke Outlier Detection	
	Search Outliers	
	Outliers Adjustment TLV	
Autonomous Forecasting	Invoke Autonomous Adjustment	
Forecast Algorithm Competition	Invoke Forecast Algorithm Competition	
	Create Algorithm Competition Config	
	Search Algorithm Competition Config	
	Forecast Algorithm Competition Selection	
	Forecast Algorithm Competition Output	
Simulation	Invoke DP Agent	
	Create DP Config	
	Search DP Configs	
	Setup Simulation Scenario	
	Search Events For Scenario	
	Create an Event For Scenario	
	Forecast Comparison	
Forecast Processing	Invoke DP Agent	
	Invoke Demand Planning With OF Correction	
	Create DP Configs	
	Search DP Configs	
	Search DP Config Algorithm Override	
	Search Additional Algorithm Configuration	
	Create Additional Algorithm Configuration	
	Search Algorithm Parameters	
	Search Config Propagation Overrides	
	Hierarchy Meta	Create Hierarchy Meta
		Search Hierarchy Meta
	Forecast Type	Create Forecast Type
		Search Forecast Type
		Create Role Forecast Type
		Search Role Forecast Type
	Create Data Measure Type	
	Search Data Measure Type	
	Demand Planning Output	
Foot Traffic	Search Traffic History	

Menu	Submenu 1	Submenu 2
	Search Traffic Forecast	
	Geo Forecast And History Review	
	Geo Forecast Book	
	Review Traffic By Items	
	Items With Enabled Traffic Forecasting	
	Traffic Based Forecasting	
		New Traffic Config
		Search Traffic Forecasting Configs
		Search Traffic Config Forecast
Attach Rate		
	Create Attach Rate	
	Search Attach Rate	
	Search Attach Rate Trend	
	Attach Ratio Engine	
Dynamic Data Measure Computation		
	Invoke Dynamic Data Measure Computation	
	DDMC Net Change Workflow Agent Configuration	
		Create Computation
		Create Computation Input Data
		Create Computation Variable
		Create Computation Step
		Search Computation
		Search Computation Input Data
		SearchComputation Variable
		Search Computation Step
	Computation Run Summary	
	Computation Simulation Data	
	Search Data Override	
Consensus Forecast		
	Consensus Forecast Computation Engine	
	Consensus Forecast Output	
	Search Consensus Forecast Config	
	Search Consensus Forecast Config Override	
	Create Consensus Forecast Config	
	Create Consensus Forecast Config Override	
General Configuration		
	Item Forecast Dates	
	Custom UOM	
		Create Custom UOM
		Search Custom UOM
	Item Price	
		Create Item Price



Menu	Submenu 1	Submenu 2
		Search Item Price
		Create Item Price Override
		Search Item Price Override
	Dynamic Enumerations	
	Engine Configuration	
		Search Engine Custom Config
		Create Engine Custom Config
	Forecast Management Policy	
		Create Forecast Policy
		Search Forecast Policy
Master Data Sanity Check		
	Master Data Sanity Check UI	
	Item Sanity Check Report	
	Pgrp Level Sanity Check Report	
	Site Sanity Check Report	
	Sgrp Level Sanity Check Report	
Data Upload		
	Upload DP Scenario Propagation Overrides	
	Upload Hierarchy Meta	
	Upload Forecast Statistic Override	
	Upload Demand Forecast	
	Upload Demand Forecast( Version 1.0)	
	Upload Aggregated POS	
	Upload Aggregated Orders	
	Upload Aggregated Shipments	
	Upload Statistical Seasonality Index Override	
	Upload Sesonality Template	
	Upload Item Seasonality Association	
	Upload Site Seasonality Association	
	Upload Alert Config	
	Upload Configuration Context	
	Upload Consensus Forecast Config	
	Upload Events	

See the "[Updated Demand Planning Menu Structure \[37\]](#)" section earlier in the *Release Notes* for more information.

## 2.7.2. Inventory Planning

### Feature Subscription Enabled for Inventory Planning Module

In the NEO 3.9 release, the feature subscription functionality is enabled for the Inventory Planning module. There are several sub-menus available in the inventory planning menu, each providing navigation to the different screens. Previously, there was no way of enabling or disabling the menus based on user role types. This enhancement provides flexibility to configure the inventory planning features so that enterprises can subscribe only to required features and limit access to sub-menus as needed. Users can contact One Network to enable the feature subscription for their enterprise while onboarding their enterprises. The feature subscription is now enabled for the following inventory planning components:

- Single-Tier Inventory Planning
- Multi-Tier Inventory Planning
- Multi-Echelon Inventory Optimization
- ABC Analysis
- Demand Management Rule Processing

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	Contact ONE at for assistance configuring this enhancement.

## MEIO Workbench

The NEO 3.9 release adds the MEIO Workbench screen to the Inventory Planning menu. From this workbench, users can compare MEIO objectives and run numbers; for example, users can see how changing a fill rate affects the inventory investment or the target fill rate. The workbench is added to assist users in visualizing the impact of different factors on the MEIO engine results, allowing less money to be spent or more customers to be served.



### PREREQUISITE

To use the MEIO Workbench screen, users must first create an impact analysis configuration, run the MEIO Engine using that impact analysis configuration, and then go to the new MEIO Workbench screen and see the results for that engine run.

To support this enhancement, the workbench contains the following sections:

- **MEIO Analysis Chart:** Various graph types are supported, including a line, bar, Pareto, or pivot table. From each data point, users can also open the Recommended Policy Report or the Run Summary Report or create a scenario.
- **MEIO Analysis Table:** A table containing the following rows that, when clicked, opens the corresponding Search Impact Analysis Input screen.
  - Demand Deviation
  - Max Inventory Investment
  - Fill Rate
  - Lead Time Deviation
  - Forecast Error Deviation
  - Mean Lead Time
- **Impact Analysis:** Shows the impact of each row from the MEIO Analysis Table section.
- **Reports:** Links to the MEIO Recommended Policy Report, MEIO Run Summary, and Search Impact Analysis Input screens.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	Please see the "MEIO Workbench" section in the current release of the <i>New Feature Configuration and Usage Guide</i> for more information.

## Support for Impact Analysis in MEIO

The NEO 3.9 release introduces a new mode called Impact Analysis to run the Multi-Echelon Inventory Optimization (MEIO) engine. Users can specify an Impact Analysis configuration (config) while running the MEIO engine. When an Impact Analysis config is specified, the engine runs on not just the specific parameters entered by the user but also considers slight variations in those parameters.

The following table describes the new filters and columns added as part of this enhancement:

Screen Name	New Filters and Columns
Invoke MEIO Engine	A new field, Impact Analysis Config, is used to select an impact analysis configuration to run the MEIO engine.
MEIO Recommended Policy Report	<ul style="list-style-type: none"> <li>A new field, Impact Analysis Config, is used to select an impact analysis config to filter policy recommendations.</li> <li>A new checkbox, Impact Analysis Mode, is used to generate the policy report with recommendations for variations in MEIO parameters.</li> <li>A new dropdown field, Impact Analysis Input, is used to select the type of impact analysis to perform. This field is enabled only when the Impact Analysis Mode checkbox is selected.</li> </ul>
MEIO Run Summary	<ul style="list-style-type: none"> <li>A new field, Impact Analysis Config, is used to select an impact analysis config to filter policy recommendations.</li> <li>A new checkbox, Impact Analysis Mode, is used to generate the policy report with recommendations for variations in MEIO parameters.</li> <li>A new dropdown field, Impact Analysis Input, is used to select the type of impact analysis to perform. This field is enabled only when the Impact Analysis Mode checkbox is selected.</li> </ul>

This enhancement shows the impact of such variations in each parameter and improves decision-making.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	<a href="#">MEIO Workbench [50]</a>
<b>Usage and Configuration</b>	For more information, see the "Running the MEIO Engine on Scenario and Impact Analysis Data" and "Viewing Primary Scenario and Impact Analysis Data in MEIO Recommended Policy and MEIO Run Summary Reports" sections in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i> .

## Support for Scenario Data in MEIO

Users can now select a primary scenario while running the Multi-Echelon Inventory Optimization (MEIO) engine. If a primary scenario is specified, the MEIO engine runs on the scenario data instead of the live chain data. This allows users to test different hypothetical scenarios to help optimize inventory and plan demand and supply accordingly. Users can use different parameters to gauge possible outcomes and compare them against previous or current engine runs.

For this enhancement, three new integration interfaces are added:

- IVP.ScenBufferIPOverride\_IB
- IVP.ScenBufferLaneIPOverride\_IB
- IVP.ScenMEIOObjectives\_IB

The following table describes the new filters and columns added as part of this enhancement:

Screen Name	New Filters and Columns
Invoke MEIO Engine	Primary Scenario field: A field that allows users to select a primary scenario to run the MEIO engine.
MEIO Recommended Policy Report	<ul style="list-style-type: none"> <li>Primary Scenario filter field and Show Scenario checkbox: The Primary Scenario filter field allows users to filter the recommended policies based on the selected primary scenario. This is disabled by default. Users can select the new Show Scenario checkbox to enable this filter field and select a primary scenario.</li> <li>The Scenario column is added to show the primary scenario name.</li> </ul>
MEIO Run Summary	<ul style="list-style-type: none"> <li>The Primary Scenario filter field allows users to filter the engine runs that were based on the selected scenario. This is disabled by default. Users can select the new Show Scenario checkbox to enable this field and select a primary scenario.</li> <li>The Scenario column is added to show the primary scenario name.</li> </ul>



### PREREQUISITE

Users must first create a scenario to be used for the engine run. See the "Creating Demand Planning Scenarios" in the current version of the *NEO Online Help* for more information.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	IVP.ScenBufferIPOverride_IB IVP.ScenBufferLaneIPOverride_IB IVP.ScenMEIOObjectives_IB
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Running the MEIO Engine on Scenario and Impact Analysis Data" and "Viewing Primary Scenario and Impact Analysis Data in MEIO Recommended Policy and MEIO Run Summary Reports" sections in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i> .

## 2.7.3. Replenishment

### Added Enterprise Support for Order Forecast Collaboration Configurations

The NEO 3.9 release adds improved configuration options for order forecast collaborations (OFCs). Previously, OFCs could only be configured at the partner level, leading to a lot of duplicated work if users needed to configure OFCs for a collection of partners at a single enterprise. But with this update, OFCs can now be configured at the enterprise level, and therefore applied to all partners of that enterprise; this is accomplished by using the new Enterprise Name field on the Order Forecast Collaboration Config Details screen.

In addition, the system logic is updated as follows on the Order Forecast Collaboration Config Details screen:

- If the Enterprise Name and Partner fields are populated, then the value in the Partner field is used on the OFC Workbench screen.
- If the Enterprise Name field is populated and the Partner field is not populated, then the value of the Enterprise Name field is used on the OFC Workbench screen.
- If both the Enterprise Name field and the Partner field are not populated, then the vendor enterprise configuration values are used on the OFC Workbench screen.

This enhancement is added to simplify OFC configuration and save users time.

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

## Auto Accept Chat Invitations

Describe the enhancement here. What did we do? Why is it good? How does it help you, the user? What do you need to do differently now?

<b>Analytics Impact</b>	If impacted, describe the impact; otherwise, put None.
<b>Integration Impact</b>	If impacted, describe the impact; otherwise, put None.
<b>Related Functionality</b>	If impacted, describe the impact; otherwise, put None.
<b>Usage and Configuration</b>	Use one of the three following options, replacing <section> with the actual section name:  For more information, see the "<section>" in the v 3.9 release version of the <i>New Feature Usage and Configuration Guide</i> .  For more information, see the "<section>" in the NEO 3.9 release version of the <i>NEO Online Help</i> .  Contact ONE at for assistance configuring this enhancement.

## EBOF Data Measures on Replenishment Analysis Projected Inventory View

The Enhanced Bucketized Order Forecast (EBOF) for a site and an item is now visible on the Replenishment Analysis Projected Inventory View (PIV) as demand and supply dimensions. The two new fields added to the Replenishment Analysis PIV to support this enhancement are Supply Enhanced BOF and Demand Enhanced BOF. This feature helps users with better collaboration between partners by providing them with enhanced demand and supply bucketized forecasts.

Additionally, the bucketized order forecast engine is enhanced to generate EBOFs, which are then searchable on the Search Order Forecast Collaboration screen under the Order Forecast Collaboration menu.



### PREREQUISITE

- EBOFs for Sites and Items must be present in the ONE system.
- The Consider Bucketized Order Forecast option on the Transactions Config tab of a Replenishment Configuration must be selected.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Viewing EBOFs as Demand and Supply Data Measures on the Replenishment Analysis Projected Inventory View" section in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i> .

## Improved Order Forecast Collaboration Auxiliary Fields for Buyers and Vendors

The NEO 3.9 release enhances the preexisting user-customizable auxiliary fields on order forecast collaborations (OFCs) for both buyers and vendors.

Previously, the Order Forecast Collaboration Workbench and Order Forecast Collaboration Multiline Workbench screens supported user-customizable data measures (such as height, weight, cost, color, and so on), but these fields could not be configured to be user-editable on these workbenches; these fields could be marked as attributes or data measures but were always read-only. If users wanted to modify these fields, they had to navigate the OFC detail page or upload a CSV file.

With this update, these user-created data measures can still be marked as attributes or data measures, but any fields marked as data measures can be changed directly on the OFC Workbench and OFC Multiline Workbench screens, saving time and increasing collaboration flexibility. In addition, these fields can be marked for buyers or vendors; buyer fields can be editable by buyer roles and read-only for vendor roles, or vice-versa.

To support this enhancement, the following new screens are added:

- **Search Partner Process Template Details:** Shows partner process template (PPT) details.
- **Search Partner Process Template Registry:** Shows details of PPT registries.
- **Order Forecast Collaboration Enterprise Auxiliary Meta:** From this screen, users can view, edit, and create custom "auxiliary" fields that will appear on the OFC Workbench and OFC Multiline Workbench screen for a given enterprise. The preexisting Order Forecast Collaboration Auxiliary Meta screen allows users to view, edit, and create custom "auxiliary" fields only for certain partner process types.

The general process to use and create custom auxiliary fields is as follows:

1. **Search Partner Process Template Details:** Ensure a PPT exists for your role.
2. **Search Partner Process Template Registry:** Ensure a PPT registry exists with a PPT equal to your template and a Party 1 equal to your user role.
3. **OFC Auxiliary Meta:** Create an OFC auxiliary meta configuration using your PPT. From this screen, you can specify the names and values of the custom auxiliary fields for both buyers and vendors.
4. **OFC Enterprise Auxiliary Meta:** Create an OFC auxiliary enterprise auxiliary meta configuration for your enterprise. From this screen, you can specify the names and values of the custom auxiliary fields for your enterprise.
5. **OFC Workbench and OFC Multiline Workbench:** Load an order forecast collaboration. All fields selected as attributes are visible in the Additional Attribute section, and all fields selected as data measures are visible in the Additional Data Measure section.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	<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"> <li>• "Searching Partner Process Template Details"</li> <li>• "Searching Partner Process Template Registries"</li> <li>• "Order Forecast Collaboration Auxiliary Meta"</li> <li>• "Order Forecast Collaboration Enterprise Auxiliary Meta"</li> </ul> <p>See the following sections in the current release of the <i>NEO Online Help</i> for more information:</p> <ul style="list-style-type: none"> <li>• "Order Forecast Collaboration Workbench"</li> <li>• "Order Forecast Collaboration Multiline Workbench"</li> </ul>

## Improved Type Inference for CSV Schema Generation

The NEO 3.9 release improves the type inference of the system when generating schemas from inbound CSV files. Previously, when reading an inbound CSV file, the system only looked at the first row in a column to infer the type of that column. This often led to incorrect typing classifications, which led to errors elsewhere in the system. For example, if row 1 column 1 is "8781008", the system would set the type of column 1 as integer; but if row 2 column 1 was "878100R", the type of column 1 should have been set as string.

With this enhancement, the system now looks at the first 50 rows of each column in a CSV file to determine the type of a column, greatly improving the accuracy of the column type inference. The system adheres to the following logic to determine column types:

- If a column only contains values of a single type, then the column is that type.
- If a column contains at least one type integer, and every value can be represented as an integer, then the column is type integer.
- If a column contains at least one type string, then the column is type string.
- If a column contains any other combination of types, the column type any.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	None

## Optional Fields During End-of-Period Processing

This release makes various steps and processes optional during end-of-period processing for order forecast collaborations. End-of-period processing is when records for the same dates are loaded with new release numbers; history is created for old period records, and new records become available for collaboration.

The following Boolean fields are added to the End of Period Processing tab on the Order Forecast Collaboration Config Details screen. By default, all fields are set to false.

- Disable Auto-Close Collaboration Ticket
- Disable Reset Buyer Comments
- Disable Reset Vendor Comments
- Disable Reset Buyer Reason Code

- Disable Reset Vendor Reason Code
- Disable Reset Focus Flag

With this enhancement, order forecast collaboration is more flexible for users, providing more options to control end-of-period processing features.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Working with End-of-Period Processing for Order Forecast Collaboration Configurations" section in the <i>New Feature Usage and Configuration Guide</i> .

## Organization and Partner Filters Updated on Order Forecast Collaboration Workbench

The NEO 3.9 release improves the Order Forecast Collaboration (OFC) Workbench to more clearly delineate the difference between organizations and partners. Previously, users could only filter data on the OFC Workbench screen by organization, even if they were only interested in data from a single partner of that organization. The following updates are made to the OFC Workbench screen:

- Changed the Vendor filter to the Vendor Organization filter for buyer roles
- Changed the Buyer filter to the Buyer Organization filter for vendor roles
- Added the Partner filter for both buyer and vendor roles

With this enhancement, buyer and vendor users can more accurately filter organizations and partners on the OFC Workbench screen, enabling smoother collaboration and saving time.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Using the Organization and Partner Filters on the Order Forecast Collaboration Workbench Screen" section in the current release of the <i>New Feature Usage and Configuration Guide</i> .

## Support for Partner Process Type Templates in Order Forecast Collaboration

In the NEO 3.9 release, ONE has enhanced the bucketized order forecast collaboration experience by leveraging a new type of process template called Partner Process Type (PAPT). The PAPT template can be used to establish collaborative processes between two or more partners with similar configurations, reducing the number of configurations required and saving time. Each PAPT is named, versioned, and owned by either a single enterprise or the Value Chain Admin. All entities in the Value Chain can see all PAPTs, but only the Owing Enterprise Admin or Value Chain Admin can modify a PAPT.

Users must use the Partner Process Inbound Interface to create and upload PAPTs and then use the PAPT Registry inbound interface to define collaboration partners. Using PAPTs allows two or more partners to collaborate on the same screen and use the same set of configurations.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	<ul style="list-style-type: none"> <li>• PLT Partner Process Type_IB v2.0</li> <li>• PLT PaptRegistry IB v2.0</li> </ul>
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Uploading Files" in the NEO 3.9 release version of the <i>NEO Online Help</i> .



## Select Visible Replenishment Menus for Users During Enterprise Configuration

Starting this release, various Replenishment menu options can be configured to be visible or not visible for specific users and roles. This feature is not available in the UI and can only be configured during enterprise creation using the PLT\_FeatureSubscription inbound CSV interface. This enhancement was added to make replenishment features more flexible and configurable for customer environments, causing menus to be less cluttered and more usable.

The following menus and screens can be enabled or disabled using this enhancement:

- Advanced Replenishment Engine
  - Order Forecast Report
  - Scenario Order Forecast Report
  - Advanced Replenishment Engine OF Promising
  - Advanced Replenishment Engine BOF Promising
  - Advanced Replenishment OMO
- Retail Advanced Replenishment Engine
- Bucketized Order Forecast Engine
  - Bucketized Order Forecasts
  - BOF State Summary
  - Bucketized Order Forecasts Promised Short
  - Bucketized Order Forecasts Promised Discrepancy
- Sourcing Engines
  - Sourcing Engine - Order Forecast
  - Sourcing Engine – Order
  - Order Sourcing Engine Enhanced Order
- Accuracy Engines
  - Order Forecast Accuracy Engine
  - Bucketized Order Forecast Accuracy Engine
  - Aggregated Order Forecast Accuracy Engine
  - Buffer Accuracy Engine
  - Order and Shipment Accuracy Engine
  - Root Cause Analysis Engine
- Rebalance Engine
  - Rebalance Engine
  - Inventory Burn Off
  - Reposition

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	Added the PLT_FeatureSubscription_IB interface.
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	None

## State Transition in Order Forecast Collaboration

The NEO 3.9 release allows planner users to configure how Order Forecast Collaboration (OFC) handles the movement of transactions through various states, such as New, Open, Buyer Request, Vendor Request, and so on. If a transaction is marked as Stateless, then it remains in the Open state throughout the cycle. With this enhancement, any collaborative transaction not marked Stateless moves through various states based on actions taken by users.

To configure how the transition between states is handled in OFC, planner users enable or disable the Stateless flag on the OFC configuration (config). If the Stateless flag is false (unchecked), user actions trigger the movement through the transaction states. If the flag is true (checked), the transaction remains in the Open state throughout the cycle.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Configuring State Transitions in Order Forecast Collaboration" section in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i> .

## Support for Monthly Enhanced Bucketized Order Forecast

The NEO 3.9 release brings support for generating and collaborating on monthly enhanced bucketized order forecasts (EBOFs) in the Order Forecast Collaboration Dashboard and Workbenches (both Single-line and Multi-line). Users can manually create a monthly EBOF using the Create Order Forecast Collaboration screen or generate one by invoking the Bucketized Order Forecast Engine. The EBOFs generated by the BOF engine have a unique release ID starting with IXM.

To generate and collaborate on monthly EBOFs, users must execute the following steps:

- Invoke the Advanced Replenishment Engine to generate order forecasts up to the specified horizon.
- Set the Bucketization Policy Type for the vendor partner to Monthly.
- Invoke the Bucketized Order Forecast Engine for an item and a site to aggregate the order forecast for all buffers at the enterprise or organization level.

Some customers prefer monthly bucketization for order forecasts over weekly. This enhancement allows them to create and collaborate on monthly bucketized order forecasts. Previously, the OFC dashboard and workbenches supported only weekly forecasts.



### PREREQUISITE

The Bucketization Policy Type for the Vendor Partner on the Procurement tab of the vendor details screen must be set to Monthly.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Setting the Bucketization Policy Type for a Vendor to Monthly" section in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i> .  For more information on the Advanced Replenishment Engine and the Bucketized Order Forecast Engine, see the "Running the Advanced Replenishment Engine" and "Bucketized Order Forecast Engine" sections in the current release of the <i>NEO Online Help</i> .

## Using the Preferred Unit of Measurement in Collaboration

In the NEO 3.9 release, buyer and vendor users can collaborate on an order item in their preferred unit of measurement (UOM). A preferred UOM is set at the item level using the preferred UOM data model at the enterprise level. A buyer can enter the item quantity in one UOM, and if the vendor user has a different preferred UOM, then they see the requested item quantity in their preferred UOM. Additionally, users can

choose any other UOM on any UOM filter provided, and the system converts the quantities to the selected UOM.

Both hierarchical and standard conversions are supported. Hierarchical conversion takes precedence over standard conversion.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Setting a Preferred Unit of Measurement" section in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i> .

## 2.7.4. Transportation Planning

### Added Filter Favorites to the Workbench Screen for Transportation Planning Roles

This release adds filter favorites to the Workbench screen for transportation planning roles. Now, users can specify any filters on the Workbench, save that filter combination as a favorite, and later open the screen with those filters already selected by clicking on the favorite.

Saved favorites behave like any other favorites in the system and can be renamed, deleted, published, and unpublished from the Manage Favorites screen. Using favorites on the Workbench screen allows users to save time and quickly access commonly used filter settings for the screen.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Using Favorites on the Workbench" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.  See the "Favorites" section in the current release of the <i>NEO Online Help</i> for more information.

### Added Support for Per Time Cost Type for Accessorial Rates to TOSX Engine

The NEO 3.9 release enhances the Load Consolidation TOSX engine by adding support for accessorial rates with the "Per Time" cost type. Per Time cost types are accessorial rates that apply on a time basis, such as every day, week, month, and so on. Prior to this update, the Load Consolidation TOSX engine did not consider accessorial rates with a Per Time cost type, but now the engine considers the Per Time accessorial rates when calculating movement costs. Users must first define an accessorial rate for the applicable movement. This enhancement provides users with more realistic movement costs, allowing more accurate decision-making. There are no UI enhancements as part of this update; only the under-the-hood logic of the TOSX engine is updated.

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

### Filter Vehicle and Skill Data in Load Consolidation TOSX Engine Results

When users run the TOSX engine for load consolidation, the data shown in the Vehicles and Skills tabs of the Load Consolidation results can now be sorted and filtered to show only specific values to be considered for a planning run.

Vehicles can be filtered by Equipment, Site, Carrier, Vehicle Type, and Business Unit. Skills can be filtered by Carrier and Site.

This feature allows users to quickly select specific parameters for planning, thereby streamlining the process.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Running the TOSX Engine with Scenario Data" section in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i> .

## New TOSX Recalculation API

The NEO 3.9 release introduces a new TOSX Recalculation API to recalculate movement plan dates based on the following time constraints:

- Fleet resource available time window
- Internal blocks
- Reservations
- Site shipping and receiving Hours
- Shipment pickup and delivery window
- Driving laws

The available time window for a resource is calculated by deducting reservations and internal blocks from work hours. Additionally, the resource must have a time range available that is sufficient to complete a movement schedule. The recalculated plan dates cannot span multiple time ranges.

The existing API for calculating movement plan dates is used only when the resource added to a movement is trailers. The new API supports additional resource types such as trailers, trucks, and drivers.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Working with the Load Consolidation TOSX Engine" section in the current version of the <i>NEO Online Help</i> .

## New Solver Type Policy Enabling Vehicle Routing Using Districting

The NEO 3.9 release supports a districting solver to optimize vehicle routing using decomposition, a technique in which the problem is split iteratively into independent or semi-dependent shipment groupings known as districts. To support this enhancement, a new policy called Solver Type is added to the Load Consolidation TOSX tab of the Search Policies screen for Enterprise Admin roles. When the Solver Type policy is enabled, the system uses the districting solver to route shipments instead of the Mixed-Integer Program (MIP)-based approach. This method allows users to receive higher-quality vehicle routing results in less time.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Enabling the Solver Type Policy" section in the NEO 3.9 release of the <i>New Feature Usage and Configuration Guide</i> .

## Optimize Partial Legs on Multi-Modal Shipments Using the Load Consolidation TOSX Engine

The NEO 3.9 release enables users to optimize partial legs of multi-modal shipments without considering the previous or next legs. To support this feature, the Partial Leg Optimization Flag field is added to the TOSX Config Policy details screen. After enabling the flag, users can select the policy on the Load Consolidation TOSX screen and run the engine; the engine then optimizes partial legs for multi-modal shipments.

For example, if a multi-modal shipment is split into two legs, then by using the new Partial Leg Optimization Flag field, users can optimize a leg without impacting the other leg or the multi-modal shipment overall.

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

## Support for Scenario Data in Load Consolidation TOSX Engine

In the NEO 3.9 release, ONE adds a feature that allows users to select a scenario for load consolidation while running the TOSX engine. If a scenario is specified, the TOSX engine executes based on the scenario data. This allows users to run the engine with a set of parameters on different scenarios and compare hypothetical scenarios to help optimize load consolidation.

As part of this enhancement, two new integration interfaces, PLT.Scenario\_IB and PLT.Plan\_IB, are added. These interfaces allow users to upload plans and scenarios to use when running the TOSX engine. Additionally, a new report called the Scenario Generated Movement Report is now available. This report allows users to view details of the movements generated by running the TOSX engine on a scenario. Users can select a specific movement on the report and view its corresponding route in a separate tab.



### PREREQUISITE

Scenarios and Plans must be uploaded into the system.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	PLT.Plan_IB v1.0 PLT.Scenario_IB v1.0
<b>Related Functionality</b>	
<b>Usage and Configuration</b>	For more information, see the "Running the TOSX Engine with Scenario Data" and "Viewing the Scenario Generated Movement Report" sections in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i> .

## 2.8. Order Management System (OMS)

## 2.8.1. General

### Approval Route Framework UI for Order Approvals

In NEO 3.9, ONE's order approval process is now configured through our Approval Route Framework UI and uses action-based approvals. Our previous process for creating approval routing used a different UI in the system using transaction-invoked approvals. These changes are part of our move to new technologies and more efficient business processes. This enhancement ultimately helps users create the approval route and view, approve, and reject the plans generated based on the approval plan. Users select Model and Actions in the Approval Route Identifier field and Order in the Model field. The Model Actions field will contain current actions available for different order types.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Creating Order Approval Routes" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.  See the "Configuring the Approval Matrix" and "Working with Approval Routing" sections in the <i>NEO Online Help</i> for more information.

### New Filters on the Item Catalog Screen

The NEO 3.9 release adds the following new search filters to the Filters slideout on the Item Catalog screen:

- **Item Type:** Search items by type, such as service, material, product, and so on. Users can make multiple selections in this field.
- **Item Category:** Search items by category, such as pharma, medical equipment, grocery, and so on. Users can make multiple selections in this field.
- **Product Group:** Search items by the product group or groups they belong to. Users can make multiple selections in this field.
- **Vendors:** Search items from specific vendors only. Users can make multiple selections in this field. The following new filter fields can be added by selecting them from a dropdown list on the Filters slideout:
- **Shelf Life:** Search items by their shelf life (in days) specified on item details.
- **Is Generic?:** Include or exclude generic items in search results. The options are Yes, No, or Both.
- **GTIN:** Search items by the unique Global Trade Item Number (GTIN) assigned to them.
- **Attribute:** A free-form text field that allows users to search for items by other attributes such as color, material, brand, and so on. Users can specify multiple attributes by separating them with a pipe (|) character.

The search results can be further filtered by Item Class and Price, which appear in a slideout to the left of the search results when the menu icon (top left) on the Item Catalog screen is clicked.

Previously, the search filters were limited to Price, Availability, and Brand.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Searching the Item Catalog" section in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i> . Also, see the "Item Catalog" section in the NEO 3.9 of the <i>NEO Online Help</i> .

## 2.8.2. Requisition Order

### Emergency Code Not Mandatory During Emergency Requisition Creation

In the NEO 3.9 release, an emergency code is no longer required when an emergency requisition is created. Previously, if a requisition was flagged as an emergency, an emergency code had to be provided at the time of creation, and users sometimes didn't know the code, causing a delay. Now, the emergency code field is no longer mandatory when the emergency flag is selected during requisition creation. The code can still be made mandatory. A new validator, `RequisitionEmergencyCodeValidator`, is introduced in this release to ensure that organizations relying on the emergency code being mandatory can maintain this requirement. The system can be configured to make the code mandatory at a specified stage of the process, such as on approval, submission for approval, or revision.



#### PREREQUISITE

If users want the emergency code to remain mandatory, the `RequisitionEmergencyCodeValidator` must be configured for the following actions:

- `OMS.ApprovePR`
- `OMS.ApprovePRLine`
- `OMS.SubmitPRForApproval`
- `LineOMS.RevisePR`

Otherwise, the emergency code is no longer mandatory in the UI or via integration.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	An emergency code is no longer mandatory when uploading emergency requisitions unless the validator is configured to require the code.
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	Please contact ONE to configure emergency code validation as needed. For more information, see the "Entering Requisition Order Details" section in the current version of the <i>NEO Online Help</i> .

### Added Delivery Group Number to Requisition Lines

This release adds the Delivery Group Number field at the requisition line level; this field was already available at the order line level and the order schedule level. To support this enhancement, the Delivery Group Number column is added to the Lines tab of the New Requisition screen and the Search Requisition Lines screen. The field accepts an arbitrary string that can be used to group requisition lines and ship those lines together in a single order. Note that this field has no validation, so it is up to the user to enter the correct values. This enhancement allows users to better plan shipments at the requisition line level, increasing flexibility and saving time.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	<p>Added the Delivery Group Number fields to the following inbound interfaces:</p> <ul style="list-style-type: none"> <li>• Requisition_IB v3.0</li> <li>• Requisition_ConvertToOrder_IB v1.0</li> <li>• Requisition_Approve_IB v1.0</li> </ul>
<b>Usage and Configuration</b>	See the "Searching Requisition Lines" and "Creating Requisition Orders" sections in the current release of the <i>NEO Online Help</i> for more information.

### 2.8.3. Purchase Orders

#### Added Download and Upload Buttons to Order Schedule Dashboard and Search POs Screens

The NEO 3.9 release adds download and upload functionality to the Order Schedule Dashboard and Search POs screens. To support this enhancement, Download and Upload buttons are added to both screens; these buttons function similarly to other Download and Upload buttons found elsewhere in the system. These actions are intended to enhance the collaboration process between buyers and allow them to download orders in a CSV file, make updates outside the ONE system, and then upload those updated orders back to the ONE system.

Note that all PO lines for the searched POs are downloaded except for POs in the Canceled and Deleted states or backordered POs. This enhancement is beneficial for users who prefer to work offline, enabling faster data processing in an external program like Excel.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	Added the PurchaseOrder_UI_Upload_IB v2.0 interface.
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Uploading and Downloading on the Order Schedule Dashboard" and "Downloading and Uploading on the Searching Purchase Orders Screen" section in the current release of the <i>New Feature Usage and Configuration Guide</i> .

#### Enable or Disable the Addition of User-Defined Reason Codes

In the NEO 3.9 release, admin users can enable or disable user-defined reason codes for regular users when creating holds.

The order management external reference table adds a new policy, OMS Allow User Defined Hold Reason Code. The local value of this new external reference policy determines the visibility of the option to add user-defined reason codes on the Add Holds screen. By default, the policy is set to false, and the option to add user-defined reason codes is hidden. The Allow User Defined Hold Reason Code policy can be configured for requisitions, contracts, blanket orders, invoices, requests for quotes (RFx), and all order types. Customers can contact ONE to configure the external reference to enable user-defined reason codes.

Previously, the addition of user-defined reason codes was not configurable, and users could add a new reason code for every hold.

This feature allows admin users to effectively regulate and manage the creation of custom reason codes and prevent errors such as accidental duplication.



<b>Analytics Impact</b>	None
<b>Integration Impact</b>	The external reference is added to the following CSV files: PLT_ExternalReference_IB_Invoice.csv PLT_ExternalReference_IB_EnhancedOrder.csv PLT_ExternalReference_IB_Requisition.csv PLT_ExternalReference_IB_Contract.csv PLT_ExternalReference_IB_RFQ.csv
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	Contact ONE at for assistance configuring this enhancement.

## Integration of Packing Resources into Order Total Weight and Volume

In the NEO 3.9 release, the ONE system now includes the weight and volume of packing resources in calculating the order total weight and volume.

When processing an order with specific packing resources, the system considers the weight and volume of the packing resources and their corresponding schedules. To do so, the system multiplies the quantity of each packing resource by its volume and weight and then computes the resulting values. The grand totals for volume and weight are then included in the overall calculation for the entire order.

In addition, when a packing requirement is deleted, the volume and weight of the corresponding top-level packing resource are deducted from the total volume and weight of the order. The integration improvement simplifies the approach by focusing only on essential fields and reducing the likelihood of errors, resulting in a more seamless transactional experience.



### PREREQUISITES

Packing requirements must be present for the order schedule. See the "Viewing Packing Requirements" section in the *NEO Online Help* for more information.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the following sections in the <i>NEO Online Help</i> for more information: <ul style="list-style-type: none"> <li>• "Viewing Packing Requirements"</li> <li>• "Creating Packing Resources"</li> <li>• "Searching and Updating Packing Resources"</li> </ul>

## Make Selected Fields Read-Only for Purchase Order Templates

The NEO 3.9 release adds support for user-selectable read-only fields for purchase orders and purchase order schedules. When creating and saving a custom purchase order template, users can now select which fields should be read-only. To enable this enhancement, three new fields are added to the "Save As..." popup on the New PO screen:

- Fields to be Read-Only (dropdown): a dropdown selector in which users can select any combinations of fields to be read-only.

- Fields to be Read-Only (read-only field): a read-only field that displays all fields selected in the Fields to be Read-Only dropdown.
- Make all Fields Read-Only: a checkbox that, when selected, disables all fields for that specific template.

Note that all fields set to read-only still appear but are greyed out. In addition, users can share purchase order templates with partners on the Manage Order Templates screen. This feature enables users to quickly disable fields during purchase order creation in case those fields are not relevant to their organization or common workflow.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Make Fields Read-Only on Purchase Order Templates" section in the current release of the <i>New Feature Usage and Configuration Guide</i> .

## New Order Policies Allow Additional Costs to be Added in More States

This release adds four new policies that expand which states the Additional Costs field is editable in for deployment orders, purchase orders, return orders, and sales orders. Previously, users could not add any additional costs once orders entered the fulfillment/shipping/receiving states. But with these enhancements, users can more accurately report and record costs incurred on orders that may not be predictable, such as border-crossing fees. Users are not required to enable these policies, and when disabled, the system behaves as it did before this release.

To enable this new behavior, the following policies are added:

Policy	Policy Location
Allow Additional Cost In Fulfillment State Group (DO)	Deployment Order tab of the Search Policies screen
Allow Additional Cost In Fulfillment State Group (PO)	Purchase Order tab of the Search Policies screen
Allow Additional Cost In Fulfillment State Group (RO)	Return Order tab of the Search Policies screen
Allow Additional Cost In Fulfillment State Group (SO)	Sales Order tab of the Search Policies screen

When these policies are enabled, the Additional Costs field is editable in the following order states:

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

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Enabling the Allow Additional Cost In Fulfillment State Group Policies" section in the current release of the <i>New Feature Usage and Configuration Guide</i> .

## 2.8.4. Deployment Orders

### Restrict Site Access for Deployment Orders

The NEO 3.9 release adds support to restrict user access to certain sites for deployment orders. This enhancement is added to prevent planners from performing actions, such as promising or accepting

deployment orders, for sites that do not belong to them. User access to a site is determined by user-site associations, and sites can be defined by either the Ship-From Site or the Ship-To Site.

Note that any actions the user is not allowed to perform on a site are not filtered out. Instead, an error message displays if the user does not have permission to execute the action on a given site.

To enable this feature, a new validation rule called "ValidateOrderWithUserSiteAssociation" is added to validate the permissions of the logged-in user. This rule can only be configured through CSV upload by system administrators and must be enabled for buying and selling/shipping organizations. Please contact your ONE representative for assistance in using this feature. By default, this enhancement is inactive to maintain backward compatibility.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	None

## 2.8.5. Invoice Changes

### Support for Invoice Prepayments

In the NEO 3.9 release, ONE adds support for invoice prepayments. Previously, the system only allowed invoices to be paid after invoice submission; if prepayment was attempted, the system displayed an error, and the payment was not processed. With this update, early payment signals no longer produce errors; payments are processed successfully, and invoices are marked as paid when the invoice is submitted. When advanced payment for goods is required, users can now initiate prepayment for entire, partial, or multiple invoices.

To support this enhancement, a new upload interface called OMS.InvoicePrepayment IB v1.0 allows users to upload prepayment details for single and multiple invoices. A Search Prepayments screen for Financial Manager roles is added, with options to upload or export prepayments. From this screen, users can search, filter, and view available prepayments in the system and the audit trails for the prepayments.

In addition, the following fields are added to support prepayment in the ONE system.

Screen Name	UI Location	Field Name	Field Type	Description
Vendor details screen	Invoice Tab	Is Prepayment Allowed	Checkbox	These checkboxes allow the user to tell the system whether prepayment and auto-prepayment are allowed for the vendor.
		Auto Prepayment		
Invoice details screen	Lines tab	Apply Prepayment	Button	Click to apply prepayment(s) to the invoice line.
		Apply Prepayments for Invoice Number	Popup window	This popup window displays when the Apply Prepayment button is clicked. It enables users to select which prepayments to apply to the invoice.
		Unapply Prepayment	Button	Click to unapply (remove) prepayment(s) on the invoice line.
	Payment Info tab	Payment Number link	Link	Click the link to view the invoice prepayment details. This link already existed in the UI, but for prepayments, it opens the invoice prepayment details.
Is Prepayment		Column	If prepayment is applied, Yes is displayed.	

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	OMS.InvoicePrepayment IB v1.0
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	<p>See the following sections in the v 3.9 of the <i>New Feature Usage and Configuration Guide</i>.</p> <ul style="list-style-type: none"> <li>• "Searching Prepayments"</li> <li>• "Enabling Is Prepayment Allowed and Auto Prepayment on Vendor Invoices"</li> <li>• "Applying Prepayment to an Invoice"</li> </ul> <p>See the following sections in the v 3.9 of the <i>NEO Online Help</i></p> <ul style="list-style-type: none"> <li>• "Uploading Files"</li> <li>• "Updating Vendors"</li> <li>• "Searching and Updating Invoices"</li> </ul>

## 2.8.6. Order Analytics

### Vendor Scorecard and Vendor Performance Report Support for Spot Purchase Orders

In the NEO 3.9 release, vendor scorecards and vendor performance reports are available for spot purchase orders (POs) without a specified ship-to-site. Previously, order analytics and scorecards did not support orders without a ship-to address or ship-to site defined, limiting the user's information about the vendor's previous performance. This enhancement extends vendor performance analysis reports and scorecard support to orders without defined ship-to sites, providing users with a way to analyze the performance of those vendors. Users can view the scorecard for an order without a ship-to site in the vendor analytics and performance reports and the vendor scorecards.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Vendor Analytic and Performance Reports" and "Vendor Scorecarding" sections in the v 3.9 of the <i>NEO Online Help</i> .

## 2.8.7. DataBot

### Insert a Link into a Databot Email Invitation

In the NEO 3.9 release, ONE adds the ability to insert a link to a website address (URL) in the email message of a databot invitation. For this enhancement, a link icon is added to the email message editor. When the icon is clicked, an Add Link dialog box appears where users can enter a text for the link and the website address where the link takes the email recipient. Before this release, links could not be added to databot email invitations; if users wanted to add a link, they had to write out the URL for the website address, and then recipients had to copy and paste the address into a browser.

This improvement allows users to insert relevant website links in the databot invitation email message, enabling the invitation recipients to go directly to the website from the email.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Adding a Link in a Databot Email Invitation" section in the current release of the <i>New Feature Usage and Configuration Guide</i> .  Also, see the "Creating Databots with the Databot Builder" section in the current release of the <i>NEO Online Help</i> .

## 2.9. Sales and Operations Planning (S&OP)

### 2.9.1. Projected Revenue Shortfall Workbench

This release introduces a Projected Revenue Shortfall Workbench to help users address revenue target shortfalls. The workbench presents users with NEO prescriptions to help address the revenue target shortfalls. Once a shortfall is identified, NEO recommends one or more feasible promotional events that may address the shortfall. Through the workbench, NEO presents multiple resolution options for the user based on which possible combination of options represents the maximum lift with the minimum discount. To avoid causing additional problems, NEO considers material and capacity constraints when determining possible promotional items.

The Projected Revenue Shortfall Workbench allows users to work on solving problems in a sandbox environment called the scenario chain. Once the user is satisfied that the problem is solved, users can apply the solution to the live chain to make it effective. The solutions to these problems are presented to users via the workbench scratchpad.

The NEO It option finds the best-performing events from the previous year then calculates their effect on upcoming revenue and presents them to the user. Once the user clicks NEO It, they can either add the prescription to the scratchpad or execute these events on the scenario to solve the problem.

The Help NEO Out option works similarly to NEO It, with users providing additional input, and the user can select events and add them to the scratchpad to see their effect on revenue. test

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Working with the Projected Revenue Shortfall Workbench" section in the v 3.9 release version of the <i>New Feature Usage and Configuration Guide</i> .

## 2.10. Spares, Maintenance, Repairs, and Overhaul (SMRO)

### 2.10.1. Campaign Management User Interface (UI)

The SMRO module now has a Campaign Management user interface, which includes two sub-interfaces: New Campaign and Search Campaign. The Campaign Management UI supports various campaign categories, including Manufacturing, Range, Serial Number Range, Asset by Site, Lot Controlled, and Repair. The NEO 3.9 release adds support for the Repair Campaigns category.

A Campaign closes when all linked work orders are complete, and the Links tab on the Campaign details screen shows all created work orders. Campaign Management supports multiple parent work orders across different sites and locations and allows multiple lots. Users can use Campaign Management to recall, return, inspect, or replace defective products or upgrade sold assets. Users do not need to manage a campaign separately, as the state of the associated work order is automatically updated.

Users can create multi-lot-based campaigns under one campaign code for different campaign categories such as Manufacturing Range, Serial Number Range, and so on. Users can create new campaigns through the New Campaign UI, check the associated work orders via the Links tab, and search for them using the Search Campaign report.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Viewing the Material Problems Report" and "Resolving Return Problems" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

### 2.10.2. Configure the Tabs and Fields on the Asset and Work Order Screens

In the NEO 3.9 release, ONE introduces a capability to expand and collapse the tabs on asset and work order screens. Users click the Expand icon to display the tab details and click the Collapse icon to collapse these details. In addition, users can select the tabs and fields shown on these screens. Some fields are required and cannot be deselected. This enhancement applies to both the New Work Order and New Asset screens and the work order and asset details screens.

This enhancement allows users to configure the screens to improve visibility and customize the data displayed to meet their needs. Users can collapse less critical information and expand only the information necessary for their current task.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Configuring the Tabs and Fields on the Asset and Work Order Screens" section in the current release of the <i>New Feature Usage and Configuration Guide</i> .  For more information, see the "Creating Work Orders," "Searching Work Orders," "Searching Assets," and "Creating Assets" sections in the current release of the <i>NEO Online Help</i> .

### 2.10.3. Enhancements to the Asset Details Screen

In the NEO 3.9 release, ONE implements several UI changes to the asset details screen. This enhancement provides better flexibility in organizing and managing asset ownership changes.

Users can provide information related to ownership changes for their assets. The OEM serial number of an asset can be modified and linked to the owner's serial number. This allows users to have better visibility of their assets during transit to check shipment details more easily.

Users can now set a customized serial number for each asset based on their preferences. Additionally, an update was introduced to the system that allows it to track an asset's shipping details and display its shipped location while it is in transit. Previously, the system displayed the asset's current location regardless of its movement.

As part of this enhancement, the following elements are added to the Asset details screen:

- Owner Serial Number, Owner Code, Owner Auxiliary Key, Previous Owning Org, and Previous Owner fields under the Ownership tab.
- Contact information for the current and previous owners is available in a popup window.
- The Map icon under the Location tab displays the shipment details of the asset location when that asset is in transit.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Viewing the Ownership and Location on Asset Details" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

### 2.10.4. Field Service Work Orders and New Technician Role

In the NEO 3.9 release, ONE adds the ability to create a Field Service work order, and a new Technician role is now available in the SMRO module. A Customer Information tab is included in the Field Service work order. The Technician role supports multi-inventory transactions, inventory receipts, and replacements for return orders. The technician can view the field service work orders on their dashboard. The maintenance of large-scale assets depends on warranty entitlement, making field service necessary. The Field Service work order is a crucial requirement for commercial and aftermarket solutions, serving as one of the top features of SMRO operations.

The following roles carry out the creation and execution of field service work orders:

Role Type	Actions
Maintenance Admin and Maintenance Supervisor	<ul style="list-style-type: none"> <li>• Create a field service work order</li> <li>• Approve field service work order</li> <li>• Assign the Technician to the work order</li> <li>• Close work order</li> </ul>
MRO Planner	<ul style="list-style-type: none"> <li>• Create a field service work order</li> <li>• Approve a field service work order</li> <li>• Assign a Technician to the work order</li> <li>• Create a deployment order or purchase order for material shortage or demand</li> <li>• Create a replacement order from the Technician and close the work order</li> </ul>
Technician	<ul style="list-style-type: none"> <li>• Execute a work order</li> <li>• Return a work order</li> <li>• Issue inventory</li> <li>• Complete work order tasks</li> <li>• Own a dashboard</li> </ul>

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	<p>For more information, see the "Creating, Approving, and Assigning a Technician and Closing a Field Service Work Order" and "Executing Work Orders with the Technician Role" sections in the current release of the <i>New Feature Usage and Configuration Guide</i>.</p> <p>For more information, see the "Creating Work Orders," "Using My Dashboards," and "Searching Work Orders" sections in the current release of the <i>NEO Online Help</i>.</p>

### 2.10.5. Generate Actual Demand for Materials from Work Orders

In the NEO 3.9 release, ONE enhances the work order management by using a specific bill of materials (BOM) type (the newly created Maintenance type) to predict the demand for components. The actual demand for the material is derived based on the selection of a Maintenance BOM. This allows the system to seamlessly update the actual material demand before and during the planning stage of a work order.

By analyzing factors such as work site, location, date, material quantity, and type, the system accurately predicts inventory needs for specific locations. Furthermore, users now have increased flexibility to request, change, or update material details on the task parts.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Generating Maintenance Work Orders from the Schedule Maintenance Due Prescription" section in the current release of the <i>New Feature Usage and Configuration Guide</i> .

### 2.10.6. Links Tab Added to Display Related Orders and Shipments on Asset Details Screen

In the NEO 3.9 release, ONE introduces the Links tab on the asset details screen. This enhancement allows users to access orders and shipments that are associated with that specific asset. The relevant details are collectively grouped and displayed under the Links tab.



**NOTE**  
**Important**

By default, the Links tab is not displayed on the asset details screen. Users must click the Settings icon and then select the Links option to enable it.

This information can be viewed by clicking the action buttons on the Links tab. The buttons are labeled Work Orders, Sales & Purchases, Returns, and Shipments.

The following details are displayed in a table when the buttons are clicked:

- **Work Orders:** The asset-specific work order details are displayed in the columns, including Work Order Number, Type, State, Managing Org, Creation Date, and Completion Date.
- **Sales & Purchase Orders:** The sales order and purchase order details linked to this asset are displayed.
- **Return Orders:** The return order details linked to this asset are displayed.
- **Shipments:** The asset transit information is displayed in the columns, including Shipment Number, State, From Site Location, To Site Location, Ship Date, and Delivery Date.

Users can click the order or shipment number links to view order details. Also, users can export this information in Excel or CSV format. This improvement provides relevant asset management details in a single tab and helps enhance the user's efficacy and visibility.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Viewing Orders and Shipments Associated with an Asset" section in the current release of the <i>New Feature Usage and Configuration Guide</i> .

### 2.10.7. Maintenance and Repair Templates for Work Orders

In the NEO 3.9 release, ONE introduces the Maintenance and Repair template that allows Maintenance Admins and MRO planners to create reusable templates tailored to their specific work order needs. The template is designed to streamline work order management. For this enhancement, ONE adds two new screens - New Work Order Template and Search Work Order Template screens. The New Work Order Template screen has an intuitive and user-friendly interface that simplifies creating and organizing asset



type details linked to work orders. Users can customize their template by choosing specific options such as Work Order, Sub Work Order, Asset Type, Asset Category, Item, and Bill of Materials (BOM).

Based on the selected BOM version, relevant component-wise items are auto-populated. The template offers flexibility by incorporating crucial elements such as Task Parts, Task Schedules, Task Tools, Notes, and Attachments. This helps users to seamlessly plan their tasks as needed. Users can add template lines based on work order requirements.

Once the template is finalized, users can commit the template. Users can update the template until it's committed. The template cannot be used until it is committed.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Creating a Maintenance and Repair (MR) Template for Work Orders" and "Searching and Updating Work Order Templates" sections in the NEO 3.9 release of the <i>New Feature Usage and Configuration Guide</i> .

### 2.10.8. Maintenance and Repair Forecast Engine

The NEO 3.9 release introduces the new Maintenance and Repair (MR) Forecast Engine, designed to generate demand forecasting accurately for existing assets scheduled for maintenance and repair. Based on engine parameters set by the user, the MR Forecast Engine calculates demand associated with particular sites or locations, providing a more granular forecast of inventory demand. Using a Maintenance and Repair bill of material (BOM), the engine identifies components required for maintenance and repair tasks while utilizing asset failure dates to predict repair-related material demand. The engine ensures accuracy by verifying BOM effectivity and validity before utilizing the BOM for a specific item or asset. The engine can exclude either maintenance or repair activities as needed and forecast demand up to a specified number of days via the Forecast Due Days field on the MR Forecast Engine screen. By integrating future demand data for all maintenance BOMs and assets due for maintenance within the Forecast Due Days timeframe, the Forecast Engine ensures efficient planning for users.

This enhancement includes a new report called the Demand Forecast Report, where users can view the forecasted demand generated by the engine.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Running the Maintenance and Repair (MR) Forecast Engine" and "Viewing the Demand Forecast Report" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> .

### 2.10.9. Material Problems Report

The NEO 3.9 release includes a Material Problems report, available for Maintenance Admin, MRO Planner, and Technician roles. The report provides an overview and detailed information about issues related to material shortages and returns. It summarizes the problems for better understanding and includes necessary information such as work order details, tasks, and components.

The system encounters two problems when:

- **Material Shortage:** A material shortage occurs in Maintenance or Repair Work Order planning if the required components are unavailable in inventory.
- **Material Return:** A material return problem arises in Field Service work orders when material needs to be returned to a specific inventory or repair location.

This feature allows for visualizing, allocating, and executing material returns and shortages with different roles.

Maintenance administrators and MRO planners can view material shortages and returns and take actions such as assigning, closing, or resolving issues. Technicians can view and manage material return issues, including assigning, closing, and resolving issues. Technicians can send failing components to a repair center. MRO Planners can then view the issue and create Deployment, Purchase, or Return Orders as needed.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Working with the Material Problems Report" sections in the NEO 3.9 version of the <i>New Feature Usage and Configuration Guide</i> for more information.

### 2.10.10. New Maintenance and Repair BOM Types

In the NEO 3.9 release, users can create bills of materials (BOMs) for Maintenance and Repair work orders. The Maintenance BOM is linked to Maintenance work orders, while the Repair BOM is linked to Repair work orders.

As part of the enhancement, the following changes are made to the UI:

- Two new options - Maintenance and Repair - are added to the Bom Type dropdown field on the New Bill of Materials screen.
- A Bill of Materials field is added to the New Maintenance Schedule screen.
- A Bill of Materials column is added to the Search Maintenance Schedule report.

All the BOM structures can be customized based on versions and categorized by specific components. The evolved BOM structure allows the system to auto-populate the material components during work order execution. This helps users to manage their demand planning requests more efficiently.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Creating a Repair or Maintenance Bill of Materials" and "Creating Maintenance Schedules" sections in the current release of the <i>New Feature Usage and Configuration Guide</i> .

### 2.10.11. Preventive Work Type and Task Type Changed to Maintenance

In the NEO 3.9 release, the Work Type and Task Type that was previously called Preventive is now called Maintenance. This change is implemented across UI elements, changing field names, columns, and options that display in dropdown lists for Work Type (also called Work Order Type on some screens) and Task Type. This name change provides a more accurate description of this work type and task type and promotes consistency across UI elements in asset and work order management.

Preventive is changed to Maintenance on the Work Order Type (Work Type) field/column and the Task Type field/column on the following screens:

- Search Work Order screen
- New Work Order screen
- Task Type column in the Task tab on the Work Order screen
- Work Order details screen

- Work Order Report
- Work Order Costing Report
- Work Order Summary Report
- NEO Prescriptions

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Creating Work Orders," "Searching Work Orders," "Viewing the Work Order Costing Report," "Work Order Report," and "NEO Prescriptions for Assets" sections in the current release of the <i>NEO Online Help</i> .

### 2.10.12. Support for Hardware and Software Versions for an Asset

In the NEO 3.9 release, ONE adds new fields on the asset details screen that allow users to manage an asset's hardware and software versioning. The enhancement ensures historical data is captured and changes to an asset are tracked based on the effectiveness of applied hardware and software versions.

As part of the enhancement, the following updates are implemented:

- Hardware and Software Version fields are added to the Additional Info tab on the asset details screen. In addition, a Version History icon is present. When clicked, a Version History popup window opens.
- The Version History popup displays the Hardware and Software Version types, Effective From Date, Effective To Date, Active status, and an icon that links to the changes during that software or hardware version.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Working with Hardware and Software Versions for Assets" in the <i>New Feature Usage and Configuration Guide</i> .  For more information, see the "Creating Assets" and "Searching Assets" sections in the current release of the <i>NEO Online Help</i> .

### 2.10.13. Task Updates and BOM Explosion Before Work Order Submission

The NEO 3.9 release enables task updates and bill of materials (BOM) explosion before work order submission. Tasks, Task Parts, and Task Tools are now auto-populated when the newly added Prevent Task Explosion On Submit policy is set to False. This enhancement increases flexibility and improves material demand forecasting for work orders by enabling materials demand to be forecast prior to work order submission. Previously, the system did not allow material demand creation before work order execution. For this enhancement, the work order Site and Location fields are required before submission. Users retain the flexibility to update, add, or remove tasks before submitting the work order for processing, regardless of whether the work order was created via integration, templates, prescriptions, or manual input. These changes allow users to generate material demand before the work order is executed. Work order submission generates the actual demand, with parts saved upon submission.

For this enhancement, the new Prevent Task Explosion On Submit policy is set to False by default. This allows the system to auto-populate the task-related fields and allows users to update the task details before the Start Planning stage, helping users facilitate the demand for required parts. This enhancement improves flexibility to effectively manage inventory and demand for the parts required for work order execution.



**NOTE**

Tasks for Maintenance and Repair work orders are exploded after submission.



**PREREQUISITE**

The appropriate BOM must be selected, and the Prevent Task Explosion On Submit policy must be defined. By default, the policy is set to *False*, which allows the system to populate the task and task parts. If set to *True*, the tasks are populated during the Start Planning activity.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Viewing the Task Explosion on Work Orders" and the "Configuring the Prevent Task Explosion On Submit Policy" sections in the NEO 3.9 release of the <i>New Feature Usage and Configuration Guide</i> .

## 2.11. Transportation Management System (TMS)

### 2.11.1. Execution

#### Ability to Define Approval Routing and Approval Plan for Shipments

In the NEO 3.9 release, ONE extends the approval framework to the shipment model. Administrator roles can create approval routes to facilitate shipment-specific approval processes based on organizational requirements. This includes shipment-specific user actions and business rules that influence the shipment lifecycle, such as creation, update, and rejection.

As part of the enhancement, the designated approver roles can open that shipment and approve or reject a pending request under the newly introduced Approver tab on shipment details screens.

This improvement allows approvers to review actions performed on the shipments and take necessary action.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Creating Approval Routes" section in the current release of the <i>New Feature Usage and Configuration Guide</i> .

#### Direct Distance Populated on the Shipment Details Screen

In the NEO 3.9 release, ONE adds the Direct Distance field to the Carrier tab of a shipment details screen, enabling users to quickly view the shipment's direct distance between two locations in miles or kilometers. Previously, the shipment's direct distance was difficult to track since the shipment's distance (displayed in the Distance field on the Carrier tab) is calculated by including movement stops. This led to challenges in

verifying the exact distance for a particular shipment, which is a calculation sometimes used in shipping charges.

With this improvement, the system automatically computes and displays the correct direct distance in the Direct Distance field on the Carrier tab of the shipment details screen. This capability helps users track individual shipments and provides better visibility and more accurate information on shipments.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Viewing the Direct Distance on a Shipment" section in the NEO 3.9 release version of the <i>New Feature Usage and Configuration Guide</i> .

## Updated Static Route History Report

In the NEO 3.9 release, ONE has updated the Static Route History screen, converting it to a report format that allows the Transportation Manager roles to quickly view, search, and sort records. Previously, the static route history report was audit-based, which caused the report to be more difficult to read.

The following updates are included as part of this enhancement:

- A user-friendly static route history report screen that displays information in a semantic table structure
- Updated filters on the report to maintain consistency across the portal
- An Export to Excel button to export the static route history information into a spreadsheet

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Viewing Static Route History" section in the current release of the <i>New Feature Usage and Configuration Guide</i> .

## Enhancements to Planner Report and Planner Workspace

The NEO 3.9 release brings several changes and improvements to the Planner Report and Planner Workspace, including the Scratchpad. These enhancements add much more functionality to the Planner Report and Planner Workspace screens and improve the overall user experience.

### New Filters on the Planner Report Screen

Several new filters are added to the Planner Report, such as Directionality (Inbound/Outbound), Pickup Commodity Code, Delivery Commodity Code, Client, Lead Logistic Provider, only LLP shipments, Supplier, Shipper, and Consignee.

### Planner Workspace

The following new actions are added to the Actions menu of the Planner Workspace report to work with movements in the workspace. With these actions, users can update movement details and create new holds from the Planner Workspace screen without navigating to another screen or tab.

- Update Freight Attributes
- Modify Pickup and Delivery Dates
- Explore Itineraries
- Update Special Instructions
- Update Equipment

- New Hold

In addition, the following new columns are added to the Planner Workspace report:

- Equipment
- Shipment Reference
- Parent Shipment
- Resource (in the Movements section)

### Scratchpad

Scratchpad gets a new icon in the Scratchpad slideout on the Planner Workspace report. Clicking the new icon allows users to select the type of scratchpad to create, Resource or Equipment Type. If users select Resource, they can set a Resource template, select a resource type, and a specific resource to add to the movement; if users select Equipment Type, they can add equipment to the movement. In addition, the Scratchpad header now displays more details like Transit Time, Distance, and Utilization. Also, new sorting options are added for movements added to a scratchpad:

- Least Distance: movements are sorted by the shortest to the longest distance.
- Time Sequence: movements are sorted according to their pickup and delivery times.
- Recalculate: Invokes the Load Consolidation engine to recalculate shipment load after the selected Plan After date.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Planner Workspace" in the current release of the <i>New Feature Usage &amp; Configuration Guide</i> .  For more information, see the "Planner Report" section in the current release of the <i>NEO Online Help</i> .

### Enhancements to the Distance Cache Upload Interface

In the NEO 3.9 release, ONE enhances the distance cache upload interface, enabling users to create, update, or delete distance cache records via CSV upload. Previously, users manually created, updated, and deleted individual distance cache records from the Distance Matrix screen, which was tedious and time-consuming. For this enhancement, an Action Name column that supports create, delete, and update actions is added to the CSV template for distance cache records.

This feature helps users apply the defined templates for distance cache records and conveniently create, delete, or update them using CSV files. As part of the enhancement, a Distance Source dropdown menu is added on the Create Distance Cache screen that helps users define specific sources such as Crowflight, Grasshopper, Manual, Mile Maker, and so on. To ensure correct values are entered, the system updated and paired the From Latitude with From Longitude and To Latitude with To Longitude. This prompts users to enter accurate information in these fields. An error message is displayed if any incorrect value is entered.

The improvement saves time by enabling users to conveniently create, update, and delete single or multiple records with one CSV upload.



**NOTE**

The updates to the distance cache inbound interface in the NEO 3.9 release are not compatible with the CSV files used in previous releases. Users must download the new file by clicking the Download CSV from Upload button, make the required data updates, and then proceed to upload. As a result, the CSV files downloaded in previous NEO release versions cannot be processed by the system in this release.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	TMS Distance Cache Inbound v1.0
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	<p>For more information, see the "Creating Distance Matrices" section in the current release of the <i>New Feature Usage and Configuration Guide</i>.</p> <p>For more information, see the "Uploading Files" section in the NEO 3.9 release version of the <i>NEO Online Help</i>.</p>

### Forwarder's Cargo Receipt for Third-Party Shipments

NEO 3.9 introduces the ability to generate and attach the Forwarder's Cargo Receipt (FCR) document for a third-party shipment. An FCR is an important document that a shipper receives from a freight forwarder or an agent to validate the cargo and the completion of the required documentation. An FCR is generated in the following scenarios after a Verified Gross Mass (VGM) is created for the assigned container:

- Standard ocean shipments
- The ocean leg of a multi-modal shipment
- Export Container Fan In/Fan Out request
- Import Container Fan In/Fan Out request
- Transshipment Container Fan In/Fan Out request
- Empty Repo Container Fan In/Fan Out request

The FCR document typically contains the following information fetched from shipment details:

- TCO logo
- Shipper
- Date of Receipt
- Mode of Transport
- Special Instructions
- Consignee
- Notify Party (parties that should be notified when FCR is generated)
- Freight Payment Terms
- Sales Order #
- Carrier
- Estimated Vessel/Voyage
- Type of Move
- Place of Receipt
- Port of Lading
- Port of Discharge
- Shipment Line contents

- Terms and Conditions
- Signature and Date

To support this feature, an action, Generate and Attach FCR, is now present in the context menu for shipments when an enterprise is enabled for freight-forwarding services. When the action is selected, users can first review and update the information before generating and attaching the FCR document to the shipment.



### PREREQUISITE

A container must be assigned to the shipment, and a Verified Gross Mass (VGM) must be created for the assigned container. For more information on submitting VGM information, see the "Submitting VGM (Verified Gross Mass) Information for Containers" section in the v 3.9 release version of the *New Feature Usage and Configuration Guide*. In addition, the user's enterprise must be enabled for freight-forwarding services.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Generating Forwarder's Cargo Receipt for Third-Party Shipments" and "Submitting VGM (Verified Gross Mass) Information for Containers" sections in the v 3.9 release version of the <i>New Feature Usage and Configuration Guide</i> .

### Functionality Added to Accept, Confirm, and Reject Booking from Carrier

The NEO 3.9 release adds functionality to accept booking acknowledgments from the carrier system. To handle booking confirmation and rejection responses from the carrier system, an Application Programming Interface (API) is implemented.

Previously, the carrier system sent the booking confirmation with a temporary identification number after the booking was created in the carrier system. Also, the booking confirmation was not sent immediately. The single API endpoint allows users to accept and reject bookings through a single interface, facilitating integration with carrier systems. This enhancement improves integration with carrier systems.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	Contact ONE at for assistance configuring this enhancement.

### Option to Define a Threshold for Milestone Failed Alert Subscriptions

In the NEO 3.9 release, ONE adds the "Failed after duration (in hours)" field that enables users to define a time-based threshold while creating an alert subscription for failed or missed milestones. This field is visible when the user selects the Shipment Milestone category and the Milestone Failed alert type when creating the alert subscription.

Previously, users were notified of every missed milestone. There was a need to configure a subscription to generate an alert only after the specified amount of time had elapsed since a milestone failed or was missed. When a numerical value is added to this new field, an alert is generated after the specified number



of hours has passed since the milestone was missed. The maximum value allowed in the new field is 120 hours.

This improvement allows users to customize when an alert is generated for a failed or missed milestone. Users can subscribe to this alert in the same way as any other alert.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Defining a Time-Based Threshold for a Failed Milestone Alert Subscription" in the NEO 3.9 release version of the <i>New Feature Usage and Configuration Guide</i> .

## Rating Type Changed Option Added to Rating and Pricing Policies

In the NEO 3.9 release, ONE adds the Rating Type Changed checkbox on the Rating Policies and Pricing Policies screens. This enhancement allows the system to automatically rerate the shipment cost if there is a change in the rating type of the shipment and an equivalent rate is available in the carrier contract. Previously, the system did not allow users to control the rerating of the shipment if a rating type change occurred.

While configuring the rating or pricing policies, users now select the Rating Type Changed checkbox on the Rating Policies or the Pricing Policies screen to trigger the automatic rerating of the shipment when the rating type is changed. This capability saves time and helps optimize the process by removing the manual tasks previously required to rerate the shipment.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Enabling the Rating Type Changed Option on the Rating Policies and Pricing Policies Screens" section in the NEO 3.9 release version of the <i>New Feature Usage and Configuration Guide</i> .

## Static Route Creation/Modification Alert

The NEO 3.9 release enhances the system to help users track static route creation or modification. A time-based workflow is added, which starts every day at 2:00 a.m. EST and checks the static routes updates in the database based on the creation date and last modified date. The users subscribed to the new Static Route Creation/Modification alert are notified of static route creation or modification with details such as route name, equipment type, days of operation, and schedule time. This enhancement helps users track static route changes and helps in cases where shippers or carriers need to update external organizations like couriers. Users can create a Static Route Creation/Modification alert subscription by selecting the Static Route category on the New Subscription screen, accessible via the Tools menu.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Creating a Static Route Creation/Modification Alert Subscription" section in the NEO 3.9 release version of the <i>New Feature Usage and Configuration Guide</i> .

## Support for PC Miler Single Search API for Distance Calculations

In the NEO 3.9 release, distance policies configured to use PC Miler as the distance source can use the new PC Miler Single Search API to fetch latitude-longitude (lat-long) coordinates for an address. The lat-long coordinates are then passed to the existing PC Miler API to calculate the distance. If the

address given is incorrect, the system displays the distance as 0 and generates an alert notification. This enhancement introduces the following new options:

- A new Default Location Basis option, Lat-Long, is added on the Distance Policy header and in the Distance Policy Overrides grid. This option is available only when PC Miler is selected as the distance source.
- A new shipment alert type called Invalid Address On Shipment Alert is added to generate notifications for incorrect addresses.

Support for the new PC Miler Single Search API provides more accurate distance calculations.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Using Lat-Long Coordinates for a PC Miler Distance Policy" and "Creating an Alert Subscription for Invalid Shipment Addresses" sections in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i> .

## Support for Tender Notifications for Spot Tenders

The NEO 3.9 release adds a new organization policy called TMS\_ENABLE\_SPOT\_TENDER\_NOTIFI that, when enabled, allows tender notifications for spot tenders. With this update, users can create a spot tender for a carrier or freight forwarder, and when the carrier or freight forwarder responds with quote information, the movement is confirmed to the carrier or freight forwarder with the quote amount.

To utilize this enhancement, users must create a spot tender for the carrier, enable tender notifications for the carrier organization, and the given carrier must be GLG enabled. In addition, note that the new policy is not available through the UI; please contact your ONE representative for assistance in configuring this policy.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	None

## Telematics ETA for Movements

Starting this release, the estimated time of arrival (ETA) for the next movement stop is displayed on both the Movement/Shipment reports and the Load tab of the movement details screen. The ETA is calculated based on events, like Delayed and Update CurPos (Current Position). A new column, Telematics ETA, is added to the Stops section on the Load tab as part of this enhancement. Previously, the ETA displayed on the movement/shipment reports did not always reflect a delayed departure from the previous stop or the current movement position, leading to an erroneous ETA.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Viewing the Telematics ETA for a Movement" section in the v 3.9 release version of the <i>New Feature Usage and Configuration Guide</i> .  For more information, see the "Using the Movement Details Load Tab" section in the NEO 3.9 release version of the <i>NEO Online Help</i> .

## Total Rest Time Displayed on the Movement's Load Tab and the Resource Assignment Screen

In the NEO 3.9 release, ONE introduces the capability to display the total rest time on the Load tab on the Movement detail screen and on the Gantt chart on the respective Resource Assignment screen. Previously, the system considered the rest time but displayed it as part of the line haul, which is the drive time of the vehicle assigned to the movement. This sometimes led to confusion in viewing the actual rest time on the movement.

Based on the defined driving law policy, the system applies the rest time by analyzing and accounting for the duration between the actual drive time and stops and then displays the computed total rest time in the Load tab on the Movement details screen and the Gantt chart on the Resource Assignment screen. This helps users with better visibility to identify and analyze the time a driver takes to rest during a movement delivery.



### PREREQUISITE

The rest time is defined based on the Driving Laws Policy. Users must configure the rest time for drivers in the Driver Off-Duty Time field on the Driving Laws tab on the Planning Policies screen.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	<p>See the "Viewing the Rest Time on the Movement Load Tab and the Resource Assignment Screen" 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 version of the <i>NEO Online Help</i> for more information:</p> <ul style="list-style-type: none"> <li>• "Planning Policies"</li> <li>• "Resource Assignments" (and its subsections)</li> <li>• "Using the Movement Details Load Tab"</li> </ul>

## Update Date Fields in Bulk for Movements

In the NEO 3.9 release, transportation users can update date fields on multiple movements simultaneously. Previously, users were required to update movements one at a time, but with this enhancement, users can save significant time when modifying shipments and movements.

To support this feature, a new column called Action is added to the Modify Movement popup window on the Search Movements screen. The following date fields can be changed in bulk:

- First Stop Date Start
- First Stop Date End
- Last Stop Date Start
- Last Stop Date End

Users must click the Modify Movement action after selecting multiple movements on the Search Movements screen. In the Modify Movement popup, users simply update a date fields in the first movement, click the "Apply All" link in the new Action column, and then click Submit. Any date changes on the first row are

applied to all other selected rows. Note that the date must be valid for all movements; for example, the system will still display an error if a "date end" date is before a "date start" date.

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

## Update Skills via Inbound Interface

Users can now update resource skills (for example, driver, shunter, and long-haul driver) by uploading the TMS.SkillInbound CSV file. This is useful particularly when bulk-updating existing skill records. Previously, users could only create skills using the CSV file. They needed to update skills one at a time manually. This was inconvenient and time-consuming when a large number of records needed updates. The TMS.SkillInbound CSV file can now be used to both create new skills and update existing ones.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	TMS.SkillInboundv1.0
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Uploading Files" section in the NEO 3.9 release version of the <i>NEO Online Help</i>

## Using Longest Shipment Distance for Movement Cost Calculations

NEO 3.9 allows users to rate movements based on the longest shipment distance within a movement. A new flag, Longest Shipment Distance, is added to the Rating Policies screen to enable the cost calculations based on the longest shipment within the movement.

### Example 1. Example

A movement has three shipments:

- Shipment 1 from Point A to B: 100 miles
- Shipment 2 from Point A to C: 300 miles
- Shipment 3 from Point B to D: 500 miles

In this case, the total distance from Point A to D is 600 miles. But if the Longest Shipment Distance rating policy is enabled, the rating distance for this movement is 500 miles, which is the longest distance shipment (Point B to D).

Previously, all movements were rated based on the distance between the origin and the final destination, and customers paid more in carrier costs. With this enhancement, the longest shipment distance is considered, resulting in carrier cost reductions.



### PREREQUISITE

The Longest Shipment Distance rating policy must be enabled.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	<p>For more information, see the "Enabling the Longest Shipment Distance Policy for Rating" section in the v 3.9 release version of the <i>New Feature Usage and Configuration Guide</i>.</p> <p>For more information on various rating policies available, see the "Rating Policies" section in the NEO 3.9 release version of the <i>NEO Online Help</i>.</p>

## 2.11.2. Financials

### Apply the Site Accessorial Rate Based on Value Added Service Provider Fields

In the NEO 3.9 release, the system applies the correct Site Accessorial Rate based upon the value entered in the Pickup Value Added Service (VAS) Provider and Delivery Value Added Service (VAS) Provider fields in the Other Info tab on the Shipment screen. The system now computes and denotes the value-added costs based on the Value Added Services (VAS) provider specified in the field(s). This ensures accuracy and efficiency in the shipping process.

Previously, if there were two vendor partners for pickup and delivery, the system computed all site accessorial rates for both vendors based on the rate applied at the pickup and delivery sites. With this enhancement, ONE supports manual invoice creation of VAS Providers. The Total Amount Tolerance section is added in the Invoicing Policies section on the (VASP) Value Added Contracts screen. This allows users to configure a tolerance limit for applying the hold. The improvement helps to optimize, automate, and apply the correct site accessorial rate.



#### TIP

Value Added Contracts must be defined for the site's vendor partners selected in the Pickup/Delivery Value Added Service Provider fields.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	<p>See the "Global Invoicing Policies" section in the current release version of the <i>New Feature Usage and Configuration Guide</i> for more information.</p> <p>See the "Other Info Tab (Standard Template)" section in the current release of the <i>NEO Online Help</i> for more information.</p>

## 2.11.3. Global Trade

### Added Scenario Filter on Transportation Forecasting Workbench

The NEO 3.9 release adds scenarioization to the Transportation Forecasting Workbench. When multiple scenarios or templates are available for a specific lane, users can conveniently filter out other templates by enabling scenarioization. To support this enhancement, the Scenario checkbox filter is added on the filter panel of the Transportation Forecasting Workbench screen.

When the Scenario filter is enabled, any template scenario lanes created are used as scenario names, persist in the scenario table, and are visible in the template dropdown. Conversely, if the Scenario filter is

not enabled, then any template scenario lanes created are not used as scenario names, do not persist in the scenario table, and are not visible in the template dropdown.

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

## Added the Global Trade Dashboard for the Lead Logistics Provider Role

In the NEO 3.9 release, ONE introduces a new Global Trade Dashboard for the Lead Logistics Provider (LLP) role when the Global Trade feature is enabled.

Previously, there was no dedicated dashboard to showcase the global trade data. The new dashboard organizes and displays ocean booking and container movement information through various widgets and graphs, including Bookings by State, Container by State, Last Event-wise Container Count, Container-wise Container Count, Total Bookings, Booked Containers, Containers at POL, and Containers at POD.

Users can select and configure the widgets and reports displayed on the dashboard according to their needs. This enhancement helps users view and analyze global trade data within a specified date range based on selected criteria.

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

## Add Multiple Bookings to Shipping Instructions

In the NEO 3.9 release, ONE introduces the capability to add multiple bookings to shipping instructions when they have the same parent booking or have a parent-child relationship. Previously, there was no provision to add multiple bookings when creating shipping instructions.

The following elements are added as part of the enhancement:

- The Create Shipping Instruction option is added to the Action menu whenever users select multiple bookings with the same parent booking or have a parent-child relationship. This facilitates the creation of shipping instructions for the selected bookings.
- Under the General tab on the Create Shipping Instructions screen and the shipping instructions detail screen, ONE adds a Bookings grid that provides information such as Booking ID, Movement Type, Load Type, Port of Loading, Port of Discharge, ETD Port of Loading, ETA Port Of Discharge, State, Carrier Booking Number, Carrier Partner, Plan of Receipt.
- An Add link is displayed in the new Bookings grid, which enables users to add related bookings to the shipping instructions.



### NOTE

The bookings should not be associated with other Shipping Instructions.

- The Charges tab is removed from the Create Shipping Instructions screen and shipping details screen if multiple bookings are available. These charges are now displayed under the Links column in the

Shipment Details grid. Users can click the Charges link to view the shipment charges for that specific booking.



**NOTE**

For single bookings, the Charges tab is displayed on the Create Shipping Instructions screen and shipping details screen. In the case of multiple bookings, it is not available.

- The Voyage Details section on the shipping instruction screens provides vessel-related information for the bookings. This section is now in a grid format, providing details such as the Feeder Vessel Name, Feeder Vessel Voyage, and Mother Vessel Name.
- On the Container tab of the shipping instruction screens, the system now displays the Booked Containers and Requested Containers for all bookings and displays the Booking ID in a newly added column.

The enhancement promotes consistency and gives users better visibility of booking requests and aligned details.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Creating Ocean Booking Shipping Instructions" section in the current release of the <i>New Feature Usage and Configuration Guide</i> .

## Client-Specific Carrier Contract Access for the Lead Logistics Provider (LLP) Role



**PREREQUISITES**

Client-specific carrier contracts must be created for users in the LLP role.

In the NEO 3.9 version, users in the Lead Logistic Provider (LLP) role can now view and select a carrier contract created by a servicing organization. Previously, when LLP users tried to view client-specific carrier contracts on the Carrier Contracts screen or select a client-specific contract on a booking, they encountered a loading failure and/or received an error message. However, this upgrade resolved the error, and LLP users can now easily view and select a client-specific carrier contracts. This enhancement gives LLP users improved contract visibility and more flexibility when selecting carrier contracts on a booking.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Searching and Viewing Carrier Contracts" section in the current release of the <i>New Feature Usage and Configuration Guide</i> . For more information, see the "Creating Bookings" and "Updating Booking Details" sections in the current release of the <i>NEO Online Help</i> for more information.

## Enhanced Global Moves ETA Computations in the ML Model

The NEO 3.9 enhances the existing machine-learning ETA pipeline to accommodate ETA prediction for ocean loads. Previously, the ETA calculations didn't support conditional or branching parameters to create

necessary performance factors and better ETA predictions for global, multi-modal shipments. The new conditional calculations predict the ETA between the port of loading and the port of discharge for ocean loads based on the customer's historical transaction data. Users now have clearer predictions that improve their operational efficiency. Users do not do anything differently; the configuration is loaded on the system by the Solution Architect/Technical Project Manager.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	None

## NEO Prescription for Shipment Consolidation Based on Container Utilization

In the NEO 3.9 release, ONE introduces a prescription that recommends the consolidation of shipments based on container utilization. To be eligible for consolidation, the shipments must have Ocean or Ocean LCL as the transportation mode and must have the port details populated on the shipment. Shipments within the same region are candidates for consolidation.

For this enhancement, a NEO prescription slideout called Consolidate Shipments displays the projected container utilization in terms of a percentage and the shipments in the same port region available for consolidation. As users select shipments for consolidation, the projected container utilization percentage updates. Once shipments are selected, the user executes the recommendation, and the system combines and optimizes container utilization with other shipments in the current movement.

Previously, the system did not support a prescription for consolidating shipments to achieve optimal container usage, which caused more containers to be required, increasing costs. This improvement helps users optimize container utilization, saving transportation costs. As part of the enhancement, the NEO prescription also displays the container type and the specific routing group.



### PREREQUISITE

The Port Of Loading and the Port of Discharge must be defined on the shipment. When creating a global ocean shipment, users must provide requested container details and/or total weight and volume details. The system uses this information to determine container type and quantity.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Consolidating Shipments Based on Container Utilization" section in the current release of the <i>New Feature Usage and Configuration Guide</i> .

## 2.11.4. Parcel Management

### Support for DHL-specific Hazardous Material Codes

In the NEO 3.9 release, ONE adds support for adding DHL-specific hazardous material information in shipments created using either the standard or the DHL shipment template. A new field, Hazmat, is added to the Header tab of the DHL template. For standard shipments, a new field, DHL Hazmat, is added under



the Additional Information section of the Other Info tab. Now, users can enter the hazmat information in a format supported by the DHL API, enabling better integration between the ONE and DHL systems.



### PREREQUISITE

- The DHL Parcel Execution Policy must be enabled. For more information on how to configure parcel execution policies, see the "Parcel Execution Policies" section in the NEO 3.9 release version of the NEO Online Help.
- For the Standard Template only: The Equipment Type field on the Shipment Header must be set to Parcel.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	TMS.Shipment Inbound Interface v1.0
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Adding DHL Hazmat Information in Standard Shipments" section in the v 3.9 release version of the <i>New Feature Usage and Configuration Guide</i> .  Also, see the "Other Info Tab" section under "Creating Shipments Using Standard Template" in the NEO 3.9 release version of the <i>NEO Online Help</i> .

## 2.11.5. Planning Workbench

### Adjusting Confirmed and In-transit Movement Plans

In the NEO 3.9 release, users can now assign resources, consolidate shipments, add or remove stops, and create continuous movements even when a movement is in the Confirmed or In-transit state. As part of this enhancement, a new button, Adjust Plan, is added to the Load tab of the movement details screen. The Adjust Plan button is not visible by default. It displays only after resources are added to a shipment. In case of a new shipment, the shipment must be saved to the confirmed state for the Adjust Plan button to display.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Adjusting Confirmed and In-transit Movement Plans" section in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i> .

## 2.11.6. Scheduling

### Auto-Reschedule Dock Door Appointments for Delayed Shipments

In the NEO 3.9 release, the ONE system can be configured to automatically reschedule delayed appointments and allocate the vacated time slots to another shipment. As part of this enhancement, a new basic scheduling policy called Auto Reschedule is added for live and drop dock doors. By default, when the policy is enabled for a drop dock door, it applies to all partners, and for a live dock door, it applies to selected partners.

When the Auto Reschedule policy is enabled for a live dock door group, the system automatically reschedules the delayed shipment. It allocates the vacated slot to another shipment with one of the partners selected on the Auto Reschedule policy. The shipments eligible for the vacated slot must meet also have:

- A live pickup appointment and an Arrived or In-gate event at the pickup location or
- A live delivery appointment and an Arrived or In-gate event at the delivery location.

When the Auto Reschedule policy is enabled for a drop door group, the system automatically reschedules the delayed shipment and allocates the vacated slot to another shipment with:

- A drop delivery appointment and an Arrived or In-gate event at the delivery location, irrespective of the partner.
- A drop pickup appointment and an Arrived or In-gate event at the pickup location, irrespective of the partner.

In both scenarios, the auto-rescheduling occurs only when the other shipment's ETA has an ETA - including buffer - falling within the vacated time slot. The system does not auto-schedule a shipment to a vacated slot if the partner on the shipment is excluded from auto-scheduling.

In addition, the Help NEO Out slideout on the Predicted Delivery Arrival Delay problem has a new section to display a list of candidates that can take up the vacated slot. Users can select a candidate shipment and reschedule it.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Enabling Auto-Rescheduling for Delayed Shipments" and "Working with the Predicted Delivery Arrival Delay Problem" sections in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i> .

## Consider Standing Blocks for Carriers During the Soft Appointment Process

The NEO 3.9 release allows the system to consider standing blocks that match carriers added during the soft appointment confirmation process. A standing block is a means of blocking certain times or dock doors as unavailable for the scheduling of appointments. To support this enhancement, a new external reference called TMS.RescheduleSoftApptOnStandingBlockForCarrier is added where the external\_value="EnterpriseName~OrganizationName" and the local\_value is TRUE.

When a soft appointment is created via Auto Scheduling on shipment creation, the carrier is not provided, and, therefore, carrier-specific scheduling policies cannot be applied. With this external reference enabled:

- If a supplier partner or retailer confirms the carrier on a soft appointment, the system searches for standing block candidates on the same date as the original appointment that match the provided carrier. If a standing block is matched, the system automatically reschedules and confirms the appointment.
- If a carrier confirms a soft appointment and the system finds a matching standing block, the new time and door are displayed when the appointment details page is opened. The carrier is then able to confirm this rescheduled appointment.
- In both cases, the history shows the Reschedule Reason Code as OTHER and the Reason Comment as Rescheduled Soft Appointment on Standing Block for Carrier.

By using this enhancement, users can ensure that appointment times and doors that are expected to be used by certain carriers, encoded as standing blocks, are utilized when available, even when the original Soft Appointment Auto Scheduling process was unaware of the carrier. No additional actions are required of users to utilize this feature. Please contact your ONE representative for assistance in enabling this feature.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	Please contact your ONE representative for assistance in enabling this feature.

## Save Dock Door Shipping or Receiving Times as a Template

In the NEO 3.9 release, users can now save the shipping or receiving hours for any dock door as a work hours template. Previously, shipping and receiving hours could not be saved as a template; each template had to be created from scratch. This enhancement automates that process, letting users create a template while setting the hours for a specific dock door so that the work hours can be easily reused.

For the enhancement, the system adds the Start Day and End Day fields to the Work Hours Template tab at the Organization level on the Scheduling Policies screen. Additionally, on the Scheduling Policies screen, a Save As Template button is added to the Shipping Times tab and the Receiving Times tab for dock doors selected in the Explorer pane. Users first click the Save button to save the hours for the chosen dock door and then click the new Save As Template button to save the entered hours as a template.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Saving Dock Door Shipping or Receiving Times as a Work Hours Template" section in the current version of the <i>New Feature Usage and Configuration Guide</i> .  For more information, see the "Dock Door Policies" and "Work Hours Templates Tab" sections in the NEO 3.9 release version of the <i>NEO Online Help</i> .

## Specify Which Carriers Are Auto-Confirmed for Soft Appointments

The NEO 3.9 release adds more granular controls on confirming carriers for shipment soft appointments. There may be a limited set of carriers for which customers wish to auto-confirm soft appointments; previously, if customers used the "Auto-Confirm Soft Appointments to the carrier after expiration time" policy, the system would auto-confirm to any carrier that is confirmed on a shipment. But with this enhancement, users can specify a list of carriers for which the system should always auto-confirm appointments.

To support this, a new external reference called "TMS.RestrictedCarriersForSoftApptConfirmation" is added that is intended to be used with the existing scheduling policy, "Auto-Confirm Soft Appointments to the carrier after the expiration time." The external reference has an external value of "EnterpriseName~OrganizationName" and a local value consisting of a tilde-separated string of carrier organization names (for example, "CarrierA~CarrierB~CarrierC"). Please contact your ONE representative for assistance in implementing this external reference.

When the policy is enabled, and the external reference is configured, the system only auto-confirms soft appointments to carriers present in the external reference and rejects any other carriers. For example, if the external reference specifies CarrierA and CarrierB, but the shipment is confirmed to CarrierC, the system cancels the appointment. If the shipment is confirmed to CarrierA instead, the system auto-confirms the appointment.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Configuring, Creating, and Confirming Soft Appointments" section in the current release of the <i>NEO Online Help</i> for more information.

## Supplier and Carrier Filters on Soft Appointment Not Confirmed Alert Subscription

In the NEO 3.9 release, ONE added two filter fields, Carrier and Supplier, to the Soft Appointment Not Confirmed alert subscription configuration. Previously, the Soft Appointment Not Confirmed alert type did not have a provision to select specific carriers and suppliers.

This feature helps users configure alert subscriptions based on specific partner combinations rather than for all carriers and suppliers. If both a supplier and a carrier are specified, an alert is only generated for shipments that match both the carrier and the supplier. If only the carrier or the supplier is specified, the alert is generated for all shipments that match that carrier or supplier, along with any other filter values specified. These fields are hidden for carrier users when they create an alert subscription.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Creating a Soft Appointment Not Confirmed Alert Subscription for a Specific Carrier or Supplier" section in the current release of the <i>New Feature Usage and Configuration Guide</i> .

## Support for Scheduling Standards Consortium Standards and APIs

The NEO 3.9 release adds support for the Scheduling Standards Consortium (SSC) format and APIs. The SSC APIs help integrate the different systems shippers, carriers, and intermediaries use to create a more efficient appointment scheduling process.

All incoming and outgoing scheduling requests in the ONE system go through the Global Logistics Gateway (GLG). GLG receives an SSC-compliant incoming request and sends it to the ONE system in the ONE format. Similarly, an outgoing scheduling request is first sent to GLG from the ONE system to convert it into the SSC format and then sent to the external scheduling system.

As part of this enhancement, pickup appointments can be scheduled directly from the success message that displays on creating a new appointment on the Delivery appointment screen. Also, the candidates for a pickup appointment are generated based on transit time between the delivery and pickup locations. With this enhancement, ONE system adds support for SSC-compliant external scheduling engines.

A pickup or delivery site must be SSC-compliant for the scheduling requests to be processed in the SSC format. For sites not compliant with the SSC, scheduling requests are processed in ONE's format.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Creating Delivery and Pickup Appointments for SSC-Compliant Sites" section in the v 3.9 release version of the <i>New Feature Usage &amp; Configuration Guide</i> .

### 2.11.7. Visibility

#### Add Contacts via Shipment CSV File

The NEO 3.9 release adds the Shipment Contact column to the shipment inbound CSV file. Previously, users had to provide the contact details for the shipment separately in the system. This enhancement helps users create multiple shipments with details for one or multiple contacts and link them to each other in a single operation. Users provide the contact details in the shipment contact field and upload the CSV file. Users can verify that the contact details were added under the shipment's Contacts tab.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	TMS.ShipmentInboundInterfacev1.0
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Viewing the Contacts Tab in the Shipment" section in the v 3.9 release version of the <i>New Feature Usage and Configuration Guide</i> .  For more information, see the "Uploading Files" section in the NEO 3.9 release version of the <i>NEO Online Help</i> .

## Add Price Component via CSV File

The NEO 3.9 release adds a boolean field, Is Price, to the Cost Component inbound interface. Setting the field value to True enables users to add an additional charge to shipments as part of the shipment price component. Previously, users had to add additional charges for each shipment separately from the user interface. This enhancement helps users easily add additional price component charges when needed via CSV upload.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	TMS.CostComponentInboundInterface.in
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Uploading Files" section in the NEO 3.9 release version of the <i>NEO Online Help</i> .

## Bulk Upload Fleet Work Hours

In the NEO 3.9 release, the system adds a dedicated upload interface called Fleet Work Hours that allows users to bulk upload fleet work hours. Previously, users had to manually configure the work hours for vehicles and drivers, one at a time. This activity was time-consuming and tedious, which sometimes led to errors.

This feature helps users upload fleet work hours in bulk using CSV files. This improvement provides better visibility to optimize and efficiently manage fleet work hours across organizations. Users can upload work hours for any fleet resources at a site, including tools, skills, vehicles, and drivers.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	TMS.FleetWorkHours_IB 2.0
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Uploading Files" section in the NEO 3.9 release version of the <i>NEO Online Help</i> .

## Carrier Profile Name Added to Movement Shipment Reports

In the NEO 3.9 release, ONE adds a Carrier Profile Name column to movement shipment reports. This addition helps users identify and manage the partner profile details directly from the report and filter the shipments according to the partner profile name. Previously, there was no provision to quickly view the profile information from movement shipment reports.

The improvement allows the system to populate the carrier profile value based on the value defined in the TMS\_CARRIER\_INTEG\_REF field.



## NOTE

Users can upload carrier profile details in the Carrier Partner Profile Name column via the shipment upload capability. The added details are reflected in the shipment reports' Carrier Profile Name column.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	TMS.ShipmentInboundInterfacev1.0
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Viewing the Carrier Profile Name in Movement Shipment Reports" in the current release of the <i>New Feature Usage and Configuration Guide</i> .

## Delivered State and Status Changed to Received

With the NEO 3.9 release, the shipment state and status, Delivered, is renamed Received across all shipment-related screens in the system. Previously, both the Delivered and Received state and status filters fetched the same data output in all shipment-related reports. Changing the Delivered state's name to Received helps maintain consistency and avoid confusion in the system.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	None

## Enhancements to Problem Assignment Rules

In the NEO 3.9 release, the Problem Assignment Rules are enhanced to provide automatic problem assignments based on role and vehicle group selection for more targeted resource problem assignments. Previously, the assignment system allowed for problem assignment to specific users only and without a provision for assigning problems to users dedicated to a single resource, such as a specific vehicle group. These enhancements give users more flexibility in assigning problems and reduce the number of rules they have to create since they don't have to create a separate rule for each user. Rules can now target all users in a role rather than one user. The vehicle group parameter filters out problems that aren't related to the specified vehicle group and directs the problem assignments for the selected vehicle group to the users responsible for them. Users can set the parameters in the newly added Role and Vehicle Group columns on the Problem Assignment Rules screen. Users can either specify a user or role for each problem assignment rule.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Setting Problem Assignment Rules by Role or Vehicle Group" section in the v 3.9 release version of the <i>New Feature Usage and Configuration Guide</i> .  For more information, see the "Setting Problem Assignment Rules" section in the NEO 3.9 release version of the <i>NEO Online Help</i> .

## Enhancements to the Transportation Forecast Workbench

The NEO 3.9 release improves the cost computation process on the Transportation Forecast Workbench screen by adding support for constraint-based forecast planning. Specifically, Transportation Manager roles

can now provide direct and pool point costs in a pool-point-based template and compare them. Previously, the system did not consider site throughput constraints, such as a site's capacity for shipping or receiving. Now, by incorporating site throughput constraints, the system can accurately forecast the equipment and movements required and consider constrained factors like weight and volume.

The Transportation Forecast Workbench screen now considers the following site-level and distribution center-level constraints:

- Daily throughput: uses the throughput constraints, such as weight, volume, or truckload, configured for the given site or distribution center
- Number of private fleet vehicles vs. dedicated fleet vehicles
- Number of working days: considers site holiday calendar, shipping and receiving hours, and so on
- Demurrage costs

To support this enhancement, the Template Type field is added on the Add Forecast Scenario Template popup window on the Transportation Forecast Workbench screen. In addition, the Add Forecast Scenario Lane popup window displays different fields based on the option selected in the Template Type field. The new Template Type field has three possible values:

- Fleet Planning: Allows users to identify and use private fleet and carrier commitment constraints to compute forecasts. In addition, this option offers recommendations for common carrier fleet requirements and suggests any additional commitments necessary to meet the requirements.
- Potential Pool Point: Allows users to determine whether inserting a pool point in a movement would result in cost savings compared to using a direct route.
- Standard Forecast: The default template the system used prior to this update. Users can provide on-the-fly costs and hard capacity for a given lane. If a cost is not provided, the system calculates a cost based on the existing contract with the carrier.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Transportation Forecast Workbench" section of the <i>New Feature Usage and Configuration Guide</i> for more information.

## New Alert and Policy Allowing Much Faster Shipment Creation

This release simplifies the shipment creation process by allowing users to create shipments with only the most important information. To accomplish this, a new policy called "Shipment Creation With Minimal Fields" is added to the Execution Policies screen, and a new alert called "Integration Warning Alert" is added.

When enabled, the new "Shipment Creation With Minimal Fields" policy allows users to create shipments with only the essential fields populated; note that this policy applies to all shipments created through integration or through the UI. The new "Integration Warning Alert" alert is triggered when there are any warnings present while creating shipments through integration or CSV upload. The alert provides users with specific warning messages and detailed information about the uploaded file. This helps users to identify and fix any shipment problems.

This enhancement was added to provide an alternative to the complex shipment creation process that often led users to make mistakes. But now, users can create shipments with only a few necessary fields in the CSV file and be notified of any warnings present after the shipment is created, saving time.



<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Configuring Shipment Creation with Minimal Fields" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.  See the "Execution Policies" section of the current release of the <i>NEO Online Help</i> for more information.

## Ocean and Air Modes Supported in Map View

In the NEO 3.9 release, ONE displays shipments with the air and ocean modes of transportation on maps based on their actual transit route. Previously, the transportation route generated by the mapping feature displayed all routes as if they were traveling by ground, even if the transportation mode was ocean or air.

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

- Users can view the actual route based on transportation mode by navigating to any Route Map screen (accessible by selecting a shipment or movement and clicking the View Route button on the Search Shipments and Search Movements reports) or the map view on the RTTEP screen and Control Tower Workbench screen.
- For air transportation mode shipments, the route is indicated by a straight line on the map between destinations.
- For ocean transportation mode shipments, the map displays the maritime route between the destinations.

This improvement provides users with better visibility and more accurate information on the actual route a movement follows based on the transportation mode.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the following sections in the current release of the <i>New Feature Usage and Configuration Guide</i> : <ul style="list-style-type: none"> <li>• "Viewing Shipping Routes"</li> <li>• "Tracking Movements on the RTTEP"</li> <li>• "Working with the Control Tower Workbench"</li> </ul>

## Parent Organization Visibility of Child Organization Sites

Starting in the NEO 3.9 release, Transportation Manager roles belonging to a parent organization have read-only visibility of sites belonging to child organizations on the Sites screen under the Administration menu. This enhancement is added as a quality-of-life improvement to decrease the number of clicks and is active for all end users; no additional actions or configurations are available in the UI to end users.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	None

## Shipment Type and Carrier Commodity Fields on the Shipment Details Screen

In the NEO 3.9 release, ONE added the following fields to the shipment details screen:



Field Name	UI Location	Screen Name
Shipment Type	Carrier Tab	Shipment details
Commodity Code	Content Tab (Shipment lines)	Shipment details

The addition enables users to add information specific to shipment type and carrier commodity code. Previously, identifying carrier codes by merchandise for individual carriers and freight forwarders during integration was a tedious task. The enhancement aims to synchronize and maintain consistency for shipment carriers when performing integration.

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

## Singleton Event Alert Subscription

The new Singleton Event Alert subscription can be configured to notify users when a specified event occurs for singletons. After selecting Singleton from the Category field, users select an event from the Alert Type dropdown list. A system-generated alert notification is triggered when that event is performed.

The Event Name field is displayed in the Alert Filters section when the Singleton Event Alert is selected in the Alert Type field. Users select a event option from the field's dropdown list of events. A system-generated alert notification is triggered when the specified event is performed. This enhancement ensures users are notified of events related to singletons as needed.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Creating a Singleton Event Alert Subscription" section in the current release of the <i>New Feature Usage and Configuration Guide</i> .

## Tracking Event Message and Location Added to the Problem Details Screen

In the NEO 3.9 release, ONE introduces the Event Message and Event Location fields to the problem details screen, enabling the system to display the user's message and specific address details when the user views the problem details.

When creating a movement or shipment tracking event, users must enter relevant information in the Message field and the Latitude, Longitude, Location, and Address fields on the Create Tracking Event popup window. When the event is initiated, the system generates the corresponding problem, and the location and message are visible on the problem details screen for users who have subscribed to the Movement Event Alert or the Shipment Event Alert.

Previously, it was difficult to identify and resolve a particular problem due to a lack of information on the problem details screen, leading to delays. This improvement gives users better visibility of the reason for specific problems and the location details without going to a different screen. The capability ensures users can quickly view the problem details with the associated movement or shipment, saving them additional time and effort.



## PREREQUISITES

- Create a Movement Event Alert or a Shipment Event Alert Subscription.  
Users must create a Movement Event Alert and/or a Shipment Event Alert subscription by selecting Movement or Shipment in the Alert Category field and Movement Event Alert or Shipment Event Alert in the Alert Type field. See the "Creating a New Alert Subscription" and "Location Filter for Shipment Event Alert Subscriptions" sections in the 3.8 release of the *NEO Online Help*. In the 3.9 release of the *NEO Online Help*, see the "Creating a New Alert Subscription" and "Creating a Shipment Event Alert Subscription for Specific Locations" sections.
- Add a Tracking Event with a Message and Location Information.  
When a tracking event is added to a shipment or movement, users must input values in the Message field and the Latitude, Longitude, Location, and Address fields for the values to appear on the problem details screen. See the "Adding Tracking Events via the Search Shipments Page" and "Adding Tracking Events via the Search Shipments Page" sections in the current release of the *NEO Online Help* for more information.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Viewing Shipment Problem Details" and "Viewing and Adding Shipment Tracking Events" sections in the current release of the <i>NEO Online Help</i> .

## Tracking Status Report

The NEO 3.9 release adds a Tracking Status report for the Transportation Manager role. Filters on the Tracking Status report include Retrieve For, State, Pickup Date, Delivery Date, Movement, Shipment, Vehicle, Carrier, Arrived At Destination, and more. Previously, users had to view the shipment or movement details separately to track the shipment or movement status. This enhancement helps users track movements or shipment status details through a single report.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Viewing the Tracking Status Report" section in the v 3.9 release version of the <i>New Feature Usage and Configuration Guide</i> .

## Zebra Print Option in the Print Labels Popup Window

In the NEO 3.9 release, ONE improves the label printing process by enabling users to print Zebra Print Label (ZPL) documents directly from the Print Labels popup window. For this enhancement, when ZPL is listed in the Format column, a Zebra Print link is added under the Available Actions column in the Print Labels popup window. If the document format is listed as PDF in the Format column, a Print PDF link is displayed.

This improvement simplifies the printing of ZPL-supported document types like return labels and waybills by making it convenient for users to easily identify the label type and print the labels directly from the window. In contrast, users previously had to download the file and then print the labels from the downloaded file. Now, when the user clicks the Zebra Print link, the system prints the labels in a format.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	<p>For more information, see the "Printing Zebra Print Label Documents from the Print Labels Popup Window" section in the v 3.9 release version of the <i>New Feature Usage and Configuration Guide</i>.</p> <p>For more information, see the "Printing Labels for Shipments" section in the NEO 3.9 release version of the <i>NEO Online Help</i>.</p>

## 2.12. Warehouse Management System (WMS)

### 2.12.1. Associate a Barcode with a Location

In the NEO 3.9 release, users can associate barcodes with warehouse locations. Using barcode technology for locations reduces the chance of human errors and improves the overall efficiency of warehouse operations. Users can add or update barcodes on the New Location or Location details screen.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	<p>For more information, see the "Associating Barcodes to Locations" section in the v 3.9 release version of the <i>New Feature and Configuration Guide</i>.</p> <p>For more information, see the following sections in the v 3.9 release version of the <i>NEO Online Help</i>:</p> <ul style="list-style-type: none"> <li>• "Creating Locations"</li> <li>• "Searching Locations"</li> <li>• "Updating Locations"</li> </ul>

### 2.12.2. Ability to Automatically Crossdock Assembled Inventory

Starting this release, a new Create Crossdock checkbox is added to the Assemble popup window. Users can initiate crossdocking of assembled inventory from the Assemble popup, which allows users to create an assembly work order from the Warehouse Planner Workbench. To create the crossdock, users must click the Create Crossdock checkbox before saving the assembly work order. Once a user saves the assembly work order, the crossdock information is populated on the order details screen, the shipment details screen, and on the Warehouse Planner Workbench.

Previously, there was no way to auto-generate crossdocking transactions for an assembled inventory. This enhancement streamlines the user experience for assembly operations by reducing clicks and improving the make-to-order process.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	<p>See the following section in the online help for more information on Assembly Work Orders:</p> <ul style="list-style-type: none"> <li>• "Creating an Assembly Work Order from a Shipment using the Warehouse Planner Workbench"</li> <li>• "Searching Assembly Work Orders"</li> <li>• "Creating and Assigning Assembly Work Orders"</li> <li>• "Updating Components of an Existing Assembly Work Order"</li> </ul>
<b>Usage and Configuration</b>	For more information, see the "Creating a Crossdock from the Assembly Work Order Creation Popup" section in the v 3.9 release version of the <i>New Feature and Usage Configuration Guide</i> .

### 2.12.3. Create Kits from Receipts

In the NEO 3.9 release, the ONE system now allows the creation of kits for line-level items from the Receipts report. This offers a better user experience by reducing clicks and streamlining the kitting process.

This enhancement improves the usability of the system when receiving a kit from vendors that are not onboarded. To create a kit, users click the Make a Kit hyperlink on the receipt details screen.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Creating Kits from Receipts" section in the v 3.9 release version of the <i>New Feature and Usage Configuration Guide</i> .  For more information, see the "Creating Receipts" section in the current release of the <i>NEO Online Help</i> .

### 2.12.4. Inventory Inbound Split by LPN

In the NEO 3.9 release, ONE has added new inbound interfaces, WMS.InventoryInbound v.3.0 and WMS.InventoryInbound v.4.0. These new interfaces allow users to split inventory by license plate number (LPN) while loading data during system initialization. The 3.0 version of the new interface is a standard CSV file for uploading WMS inventory data, while the 4.0 version is compatible with SQL Loader for parsing data from the uploaded file (CSV or delimited).

The previously used inbound interface didn't support the split by LPN functionality, resulting in a manual packing process through the UI for newly onboarded warehouses. It was time-consuming and required a lot of manual effort.

The newly added inbound interfaces help users upload inventories using the LPN split option.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	WMS.InventoryInbound v.3.0 (Standard CSV Processor)  WMS.InventoryInbound v.4.0 (Sqlldr Processor)
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	For more information, see the "Uploading Files" section in the v 3.9 release version of the <i>NEO Online Help</i> .

### 2.12.5. Lite Mode for Work Processing

In the NEO 3.9 release, a Lite option is added to the work management workflow, increasing work creation and assignment options and improving warehouse operations and resource utilization. To enable Lite Mode, users must set the Work Processing Mode policy to Lite on the Work Mgmt tab of the Search Policies screen. The default mode is called Standard and behaves as the system did before this update. When the Lite mode is enabled:

- Work is created, assigned, and released just like in Standard mode.
- Users cannot claim, start, or execute work or a work line.
- Users can adjust source documents and execute actions.
- If the Cancel action is taken or the source document is closed, the corresponding work is also canceled or completed.

<b>Analytics Impact</b>	NA
<b>Integration Impact</b>	NA
<b>Related Functionality</b>	NA
<b>Usage and Configuration</b>	For more information, see the "Setting the Work Processing Mode Policy" section in the v 3.9 release version of the <i>New Feature Configuration and Usage Guide</i> .  For more information, see the "Searching Policies" section in the <i>NEO Online Help</i> .

### 2.12.6. New Distinguishable Attributes Added for Sites

The NEO 3.9 release adds two new fields, Inventory Owning Organization and Inventory Possessing Organization, as distinguishable attributes on all inventory-related screens for Warehouse Manager roles. These new distinguishable attributes can be enabled on the Inventory Management Policies screen and configured in two separate ways:

- **Distinct:** If this option is selected, inventory at a site can be tracked or differentiated by the given attribute.
- **Required:** If this option is selected, the attribute is required for all inventory at a site and must be populated.



#### NOTE

By default, inventory attributes cannot be changed while inventory is present at a site unless the "Allow Inventory Mgmt Policy Change" policy is enabled on the Inventory tab of the Search Policies screen. See the "Searching Policies" section in the *NEO Online Help* for more information. In later releases of the *NEO Online Help*, this section may be titled "Searching for Policies."

When configured, the new attributes apply to all inventory at a site. This enhancement increases inventory tracking flexibility and improves inventory tracking and tracing.

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

### 2.12.7. Order Lookup Enhancements

The ONE system helps users determine suitable delivery schedules when executing picking or non-internal consumption transactions. However, there were issues with clarity on how orders were determined and populated during these transactions, especially when an external transaction reference number was provided.

To address this issue, the order lookup process for pick lists and inventory consumption is enhanced in the NEO 3.9 release, allowing users to skip the order lookup step for specific customers. This new feature provides more flexibility and avoids ambiguity in warehouse operations, streamlining the process of creating pick lists and consuming inventory against off-network orders.

The following new policies are added as part of this enhancement:

- Populate Order Reference under the Pick Lists policies tab
- Populate Order Reference under the Consumption policies tab

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	None
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Enabling and Disabling Order Reference on Pick Lists and Consumption" section in the current release of the <i>New Feature Usage and Configuration Guide</i> for more information.

### 2.12.8. Upload LPNs via CSV File

The NEO 3.9 release allows some Warehouse Management System (WMS) users to create multiple License Plate Numbers (LPN) by uploading them as a CSV file. A new upload menu item, Upload LPNs, is added under the Tools > Uploads menu path. From this new screen, Upload LPNs, users can download a template file as well as a format description file with details on the data structure of the CSV and upload a CSV file containing multiple LPNs. This enhancement saves time and streamlines the LPN creation process, as users previously had to create LPNs one at a time. This option is available for users in the Warehouse Clerk role and other roles derived from the Warehouse Clerk role, such as Warehouse Manager.

<b>Analytics Impact</b>	None
<b>Integration Impact</b>	WMS.LPN Inbound Interface v1.0 WMS.LPN Upload.csv
<b>Related Functionality</b>	None
<b>Usage and Configuration</b>	See the "Uploading Files" section in the current version of the <i>NEO Online Help</i> for more information.

## 3. Bug Fixes

### 3.1. Global Logistics Gateway

#### 3.1.1. No Response for Accept or Reject Tender Action When Invalid Movement Mentioned in EDI 990 — PDS-73162

<b>Problem</b>	Customers experienced no response for accept/reject tender actions when invalid movements were mentioned in EDI 990. They received an error EMQ: Unable to process this EDI transaction, please contact the system administrator for assistance.
<b>Cause</b>	TMS did not propagate a proper error message to GLG: Shipment/Movement is not present or found in the Shipper network. The EDI990BaseMapper did not handle a failure response and log the error message received by EMQ. Proper validation checks were not passed between TMS and GLG.
<b>Resolution</b>	We added a check in the GLGClient system to check if the movement is present when accepting or rejecting the tender, if it is not then users see the following message: Movement not found for movement no : #####.

### 3.2. Platform

#### 3.2.1. Date Transform Interface Doesn't Work with CSVs Using a Semicolon as a Delimiter — PLT-33152

<b>Problem</b>	User's CSV files are failing to upload.
<b>Cause</b>	User preferences for uploading a CSV with a semicolon (;) conflicted with an inbound interface defining the Date Mapper Transform with the Transform class set as com.transcendsys.platform.integ.datexform.
<b>Resolution</b>	We enhanced our configuration call back to check the delimiter from a country-specific configuration or from user's settings.

### 3.2.2. date\_to\_mills() Function Ignoring Time Component — PLT-33290

<b>Problem</b>	The date_to_mills() function in the Edit Computed Column popup of various reports includes a date and time component, but the system only considered the date part and ignored the time part.
<b>Cause</b>	When converting the date_to_mills() function, the system was not breaking the condition the date + time was successfully parsed, and the value was replaced with only the date.
<b>Resolution</b>	The date_to_mills() function now functions as intended.

### 3.2.3. Exported File Showed Server Time Instead of User Local Time — PLT-33060/PDS-75820

<b>Problem</b>	On the Projected Capacity Views screen, the exported Excel file shows the server time instead of considering the time zone of the user exporting the file.
<b>Cause</b>	Error in code.
<b>Resolution</b>	The system now displays the users' local time in exported Excel files from the Projected Capacity Views screen.

### 3.2.4. Favorites Between Roles Open Action Capabilities — PLT-25368

<b>Problem</b>	Users assigned multiple roles and permissions could access a favorited report created in one role when logged in with a different role, even if that role didn't have the permissions to access it otherwise.
<b>Cause</b>	The code that validates role permissions and restrictions did not account for reports favorited by a single user with multiple roles.
<b>Resolution</b>	We added support to restrict permissions with forward and backward capability that is flexible to continue modifications for expected permission-based scenarios.

### 3.2.5. Inactive User State While Creating Enterprise Admin Context — PLT-31992

<b>Problem</b>	While running the Load Consolidation engine, the system creates an Enterprise Admin context, but that user is not active.
<b>Cause</b>	Error in code.
<b>Resolution</b>	The system now behaves as expected and does not let inactive users perform actions.

### 3.2.6. Incorrect Field Definition Causing Error with Portuguese Language — PLT-32587

<b>Problem</b>	When the system is configured to use Portuguese, an error message is displayed when the user confirms a shipment (Save to Confirm action).
<b>Cause</b>	When the system language was configured to Portuguese, there was an error in the field definition and field name for the shipment state.
<b>Resolution</b>	The coding was corrected, and the error message is no longer displayed when shipments are confirmed.

### 3.2.7. Links in Jasper Report Output Emails Not Working — PDS-72056

<b>Problem</b>	Links to the content repository in Jasper report output emails return an error message.
<b>Cause</b>	The Quartz job scheduler in the system did not have the complete URL.
<b>Resolution</b>	The URL is now correct in the system, and the links to reports are now working.

### 3.2.8. Kafka Updates to Support GLG Telematics – PLT-32577

<b>Problem</b>	NEO/RTVN Kafka libraries are not updated.
<b>Cause</b>	GLG Telematics customers required updated Kafka instances for security measures. The NEO/RTVN side must update their Kafka libraries for compatibility.
<b>Resolution</b>	We updated our Kafka client version to 3.5.1.

### 3.2.9. Misspelling in the Description of date\_to\_millis() Function of the Computed Column Feature – PLT-33294

<b>Problem</b>	Users copy/pasted the description of the function for date_to_millis() to build their custom computation and received an error.
<b>Cause</b>	The description was misspelled.
<b>Resolution</b>	We corrected the spelling in the description so users could copy/paste it to build a formula without errors.

### 3.2.10. Setting External\_Identity to Null Is Not Reflected in SSO – PLT-32813

<b>Problem</b>	The customer created three users with the same external identity. Even though the value is showing null for two of the users, they are having issues logging in via SAML due to the users having the same external identity in SSO.
<b>Cause</b>	When setting the external identify field on the user table to null either through the UI or through the DB, the same field on SSO doesn't get changed to null. When changing just the external identity field to null through the DB, the UpdateUser record isn't getting generated on plt_sso_replication. If it is changed in the UI, the UpdateUser record does get generated, but the null still doesn't get replicated.
<b>Resolution</b>	We updated SSO code to compare the old and new values to nullify the value if value is nullified through UI. We also updated the trigger to correctly reflect the external reference ID for replication.

### 3.2.11. Which User Role can Delete Destination Names from Integration Subscriptions – PLT-32619

<b>Problem</b>	Users faced inconsistencies when working with integration subscriptions depending on what role they were assigned. Integration subscriptions could be deleted but the emails (Message Destination) could not depending on the user role.
<b>Cause</b>	User-based permissions did not accommodate the different roles performing actions.
<b>Resolution</b>	We addressed this issue by matching the user-based dimension permission with the user name or with the audit user name if user is an IAU user.

## 3.3. NEO UI

### 3.3.1. Relative Date Configuration Displaying Incorrect Date on Favorite Widgets – PLT-32297

<b>Problem</b>	The relative date configuration on date fields does not display the date correctly in the widget filters when the report is saved as a favorite and then used in a favorite widget.
<b>Cause</b>	Coding error
<b>Resolution</b>	Code fixed to display the date correctly in favorite widgets.

## 3.4. Order Management



### 3.4.1. Line Numbers Incorrect when Creating Purchase Orders — PDS-76827

<b>Problem</b>	Users encountered issues while creating Purchase Orders with multiple line items, as the Line No. was not unique each time.
<b>Cause</b>	There was an issue with data syncing and updating.
<b>Resolution</b>	The Template data should be set via proper order JSON object rather than just the data from the template data configuration.

### 3.4.2. Search by Description in Item Catalog — PDS-76991

<b>Problem</b>	Users were unable to search items by description in the Item Catalog.
<b>Cause</b>	The Description filter was missing.
<b>Resolution</b>	Added a dynamic filter named Item Description to filter items based on description.

### 3.4.3. Out of Memory When Accessing Orders/Buffers — PDS-76358

<b>Problem</b>	Users faced performance issues when working with enhanced orders and buffers.
<b>Cause</b>	The cache was growing beyond reasonable limits so we added limits to cache size.
<b>Resolution</b>	We added limits to cache size.

### 3.4.4. Sales Order Reports Displays Incorrect Ship From Organization — PDS-70927

<b>Problem</b>	Sales Order reports display the incorrect Ship From organization at the line level.
<b>Cause</b>	SQL query error
<b>Resolution</b>	SQL query error was fixed. Sales Order reports now display the correct Ship From organizations at the line level.

### 3.4.5. Vendor Filter Field for Alert Subscriptions Displaying Incorrect Data — PDS-77339

<b>Problem</b>	On some alert subscriptions, the selected vendor in the Vendor filter field changes to another value when the alert subscription is saved.
<b>Cause</b>	An error in coding caused the vendor filter to display the selling organization instead of the vendor.
<b>Resolution</b>	ONE corrected the coding behind the vendor filter for alert subscriptions.

## 3.5. Optimization

### 3.5.1. Incorrect Order Forecast Collaboration View — PDS-77593

<b>Problem</b>	Users experienced issues in the Order Forecast Collaboration TLV while reading orders with item mapping.
<b>Cause</b>	The OrderSql query returned redundant records with different items (due to item mapping) that caused extra buffers showing up incorrectly in the Order Forecast Collaboration TLV.
<b>Resolution</b>	We updated the SQL query responsible for returning the item.

### 3.5.2. Projected Inventory Views Not Calculating Projected On-Hand Data Correctly — PDS-73204

<b>Problem</b>	Projected Inventory Views (PIVs) do not consider In-Transit shipments when calculating Projected On-Hand quantity.
<b>Cause</b>	Coding error
<b>Resolution</b>	The coding error has been resolved, and PIVs now count In-Transit shipments when computing the Projected On-Hand quantity.

## 3.6. Supply Chain Core

### 3.6.1. Error When Updating Inactive Users on Search User Screen — SCC-7370

<b>Problem</b>	The Search User screen displayed errors when trying to activate an inactive user.
<b>Cause</b>	Code-level issues
<b>Resolution</b>	Updated the code to allow user activation from the report.

### 3.6.2. Missing Source Models in Document Type Creation — SCC-7287

<b>Problem</b>	Several source models were missing from the document type creation.
<b>Cause</b>	Source models not registered to support document type creation.
<b>Resolution</b>	Added the following missing models: <ul style="list-style-type: none"> <li>• SCC.InventoryDiscrepancy</li> <li>• SCC.InventoryMoveOrder</li> <li>• SCC.Receipt</li> <li>• SCC.Requisition</li> <li>• SCC.RequisitionLine</li> <li>• SCC.PackingList</li> <li>• SCC.PickList</li> <li>• SCC.IssueInventory</li> <li>• WMS.CycleCount</li> </ul>

### 3.6.3. Site Inbound Interface Allows Uploading Invalid Lat -Long Information — SCC-7111

<b>Problem</b>	The inbound interface for Sites (Site_IB) introduced invalid Lat-Long information.
<b>Cause</b>	There was no validation for the Lat-Long information uploaded via the Site IB.
<b>Resolution</b>	Added validation for the Lat-Long coordinates.

## 3.7. Transportation Management

### 3.7.1. Appointment Details Incorrect on Movement Printout — PDS-75615

<b>Problem</b>	On movement printouts, appointment details are incorrect. They do not match the details on the shipment or appointment detail screens.
<b>Cause</b>	Coding error
<b>Resolution</b>	The coding error was fixed, and movement printouts now contain the correct appointment details.

### 3.7.2. Back To Domicile Flag Bot Working Properly — PDS-66337

<b>Problem</b>	The dead head stops are visible to the user even if the vehicle is not set as back to domicile. The Movements are created where the vehicle returns to domicile even though the vehicle is not set to return.
<b>Cause</b>	The issue was with the recalc function. There was a difference between the recalc performed on the movement and the recalc that happens when the shipment is changed.
<b>Resolution</b>	The truck resource dead head is not considered as a candidate for movement dead head stop. The dead head stop is not generated at the end as back to domicile flag is set to false on trailer, and it is set to true on Truck.

### 3.7.3. Delayed Card on RTTEP Shows the Count as Zero When No Transportation Policy Is Set — PDS-76191

<b>Problem</b>	When a Transportation Policy is not set, the Delayed card on the Real-Time Transportation Execution page (RTTEP) displays zero as the count.
<b>Cause</b>	The function get_rttep_severity, which contains the threshold for the severity of the delay, returns a null value if the Transportation Policy is not defined.
<b>Resolution</b>	If Transportation Policy is not set for the organization, the RTTEP now considers default thresholds while calculating delay severity, allowing the RTTEP to display the count accurately.

### 3.7.4. Delete Button on the Planning Region and Policies Should Have a Confirmation Popup — PDS-71906

<b>Problem</b>	While setting up Policy and Region data, a user accidentally deleted data when they clicked the Delete button instead of the Save button.
<b>Cause</b>	No confirmation popup was written as a validation check for users after clicking the Delete button.
<b>Resolution</b>	We added a confirmation popup upon clicking the Delete button so that users can confirm that they want to delete the data.

### 3.7.5. Different Admin Users Cannot Update or Delete Message Destinations — PDS-75278/LN-100955

<b>Problem</b>	When one admin user under a given enterprise creates a Message Destination on the Integration Subscription screen, another admin user within the same enterprise cannot update or delete that message destination.
<b>Cause</b>	Permissions issue between system modules.
<b>Resolution</b>	Admin users can now update and delete Message Destinations on the Integration Subscription screen regardless of which admin user created it.

### 3.7.6. Disabled Wrapped Text Not Saving in Favorite Report — PDS-73914

<b>Problem</b>	When users open report, disable text wrapping, and then save it as a Favorite, the text wrapping customization does not stay disabled. It reverts back as enabled.
<b>Cause</b>	
<b>Resolution</b>	

### 3.7.7. Checkboxes Out of Sync on Search Order and Payable Invoices Reports — PDS-73992

<b>Problem</b>	The position of checkboxes is disrupted on the Search Order and Payable Invoice reports when the user moves the columns and performs the Save Layout action.
<b>Cause</b>	The getColumnIndex function was not working properly.
<b>Resolution</b>	Added an undefined check for the getColumnIndex function

### 3.7.8. Distance Matrix Screen Pagination Arrows Not Working Correctly — PDS-73927

<b>Problem</b>	On the Distance Matrix screen, the pagination arrows at the bottom of the screen that allow the users to move forward and backward through the pages of data are not working.
<b>Cause</b>	Coding error
<b>Resolution</b>	The coding was fixed, and the pagination arrows on the Distance Matrix screen now advance the user forward and backward through the pages as needed.

### 3.7.9. Estimated Arrival Field Not Populated When ETA Tracking Event Is Created — PDS-73203

<b>Problem</b>	When the Create Movement Tracking Event action was selected and ETA was chosen as the Event Type, Estimated Arrival was not one of the fields available on the Create Movement Tracking Event popup window. When users viewed the details about the event, the estimated arrival was not visible.
<b>Cause</b>	There was no option to input the estimated arrival information on the Create Movement Tracking Event popup window that opened when the Create Movement Tracking Event action was selected.
<b>Resolution</b>	Instead of using the Create Movement Tracking Event action, users now select the newly created Create ETA Event action. The popup window that displays when this action is selected has a field for estimated arrival information.

### 3.7.10. Event Received Column Not Sorting Correctly in the Milestone Report — PDS-75249

<b>Problem</b>	In the Milestones report, the Event Received On column is not sorting correctly.
<b>Cause</b>	An error in coding caused issues with sorting when a milestone has multiple events.
<b>Resolution</b>	ONE corrected the error, and the report is now sorting correctly.

### 3.7.11. Inconsistent Time Zone Designations When Entering Pickup/Delivery — PDS-76307

<b>Problem</b>	During pickup and delivery, time zones are sometimes showing the pickup/delivery site time zone when entering an event for a single shipment. For multiple shipments, the time zone from the user's settings displays.
<b>Cause</b>	When there are more than one stop in different time zones, the last stop time zone was displayed.
<b>Resolution</b>	We now display the time zone for each stop respectively.

### 3.7.12. Incorrect Error Message Displayed for Decimal Separator Mismatch — PDS-72985

<b>Problem</b>	In user settings, customers set a preference for the type of decimal separator they want to use, such as a comma or a period. When a CSV file is uploaded with a different separator than what is set in user settings, a generic error message displays, rather than one that tells the user the issue.
<b>Cause</b>	Coding issue
<b>Resolution</b>	The coding was corrected, and now the error message tells the user which data in the CSV file caused the error.

### 3.7.13. Incorrect Load Utilization Data — PDS-75189

<b>Problem</b>	Load utilization data for some movements are incorrect.
<b>Cause</b>	A mismatch between the Shipped Quantity UOM on the movement and the Shipped Quantity UOM on the equipment settings caused the load utilization computation to be incorrect.
<b>Resolution</b>	If a mismatch occurs between the Shipped Quantity UOM on equipment settings and the Shipped Quantity UOM on the movement, the load utilization displays as 0.

### 3.7.14. Incorrect Shipment Mileage — PDS-54643

<b>Problem</b>	Incorrect mileage for shipments.
<b>Cause</b>	When a user updates the pickup dates of a shipment after the delivery appointment date, then the movement stop sequence is affected and the system creates extra delivery movement stop in between, incorrectly increasing the total distance traveled of the movement.
<b>Resolution</b>	For shipments, pickup dates cannot be changed after the delivery appointment date.

### 3.7.15. Post-Loading Time Included in ETA Recalculation After Departure — PDS-68196

<b>Problem</b>	When ETA is recalculated after a departure event, post-loading time is included in the calculation.
<b>Cause</b>	An issue with the TOSX API
<b>Resolution</b>	The issue was addressed, and the ETA recalculation after a departure event no longer includes post-loading time.

### 3.7.16. RTTEP Map Doesn't Show Delivered Movements — PDS-77564

<b>Problem</b>	When users selected movements from the Delivered report and attempted to use the View RTTEP action, the resulting map did not show the delivered movements.
<b>Cause</b>	This issue was caused by a movement number filter name mapping issue.
<b>Resolution</b>	We corrected the movement number filter mapping.

### 3.7.17. Selecting One Pickup Location on a Movement Updates the Pickup Date for All Shipments — PDS-77347

<b>Problem</b>	On movements with multiple shipments and multiple stops, when selecting pickup for only one stop, the system updates the pickup date for all shipments rather than just the shipments for the selected stop.
<b>Cause</b>	Coding error
<b>Resolution</b>	The error was fixed, and now only shipments under selected stops are marked as picked up.

### 3.7.18. Shipment Number Is Set as Null When Updating the Shipment Number in the Draft State — PDS-77656

<b>Problem</b>	The shipment number is set as Null when updating the shipment number in the draft state. This caused an issue at the ARC end when processing the JSON.
<b>Cause</b>	The request date was not set when the shipment moved to Awaiting state from Draft state and then tendered it.
<b>Resolution</b>	Set RequestDate on shipment while moving shipment from Draft state to Awaiting state.

### 3.7.19. Shipments Disappear During Consolidation — PDS-22631/LN-81757

<b>Problem</b>	Shipments sometimes disappear from consolidation when consolidating two or more shipments into a single movement.
<b>Cause</b>	When consolidating shipments, the <code>_valueSinceLastBlur</code> variable retained its value even after a form reset, and the value change event was not triggered.
<b>Resolution</b>	The variable has been reset manually.

### 3.7.20. Some Shipment States Changing Without Tendering — PDS-62973

<b>Problem</b>	Some shipments are in the Awaiting or Accepted state without being tendered.
<b>Cause</b>	Shipment status changed automatically when equipment for the shipment was updated. If no route was available for the equipment, then the tender plan state of the shipment was changed to Awaiting or Accepted by the system.
<b>Resolution</b>	Shipment states now behave as expected.

### 3.7.21. Transshipment Port ETD/ETA Time Zone Incorrect for Shipments Created via Upload — PDS-72990

<b>Problem</b>	When transshipment ports are added to a shipment from the UI, the port's time zone displays correctly. However, when shipments are created via upload, the time zone is incorrect.
<b>Cause</b>	Coding error
<b>Resolution</b>	The error was fixed, and the transshipment port ETD/ETA fields now display the port's time zone when shipments are created via upload.

### 3.7.22. Unable to View History for Some Shipments — PDS-75457

<b>Problem</b>	When attempting to view a shipment history, users receive an error message on some shipments.
<b>Cause</b>	When the <code>tms_shipment_evt.additional_params</code> field was larger than 4000 characters, it caused the query that retrieves shipment history to fail.
<b>Resolution</b>	A code change fixed the issue with the query, and the shipment history is now visible even when the affected field is over 4000 characters.

## 4. Change Log

Version	Release Date	Changes
1.0	March 15, 2024	<p>Updated:</p> <ul style="list-style-type: none"> <li>• OPT: "Support for Item Mapping"</li> <li>• TMS: "Support for Scheduling Standards Consortium Standards and APIs"</li> <li>• SMRO: "Preventive Work Type and Task Type Changed to Maintenance"</li> <li>• SMRO: "Configure the Tabs and Fields on the Asset and Work Order Screens"</li> <li>• SMRO: "Field Service Work Orders and New Technician Role"</li> <li>• SMRO: "Ability to Support Hardware and Software Versions for an Asset"</li> </ul>
0.4	February 16, 2024	<p>Updated:</p> <ul style="list-style-type: none"> <li>• Updated "Scenario Support for Demand Planning Reports"</li> <li>• Updated "Enhanced the MRO to Generate the Actual Demand Work Order"</li> <li>• Updated "Maintenance Repair Forecast Engine"</li> <li>• Updated "Support for Scenario Data in Load Consolidation TOSX Engine"</li> <li>• Updated "Generate Actual Demand from Work Orders"</li> </ul> <p>Added:</p> <ul style="list-style-type: none"> <li>• SMRO: "Task Updates and BOM Explosion Before Work Order Submission"</li> <li>• SMRO: "Configure the Tabs and Fields on the Asset and Work Order Screens"</li> <li>• SMRO: "Links Tab Added to Display Related Orders and Shipments on Asset Details Screen"</li> <li>• SMRO: "Maintenance and Repair Templates for Work Orders"</li> <li>• SMRO: "Material Problems Report"</li> <li>• SMRO: "New Maintenance and Repair BOM Types"</li> <li>• SMRO: "Preventive Work Type and Task Type Changed to Maintenance"</li> <li>• OPT: "New Solver Type Policy Enabling Vehicle Routing Using Districting"</li> <li>• OMS: "Approval Route Framework UI for Order Approvals"</li> <li>• TOSX: "Added Support for Per Time Cost Type for Accessorial Rates to TOSX Engine"</li> <li>• System Requirements section added.</li> <li>• Backward Incompatibility section added.</li> </ul>
0.3	January 28, 2024	<p>Updated:</p> <ul style="list-style-type: none"> <li>• Updated "Scenario Support for Demand Planning Reports"</li> <li>• Updated "Ability to Support Hardware and Software Versions for an Asset"</li> </ul> <p>Added:</p> <ul style="list-style-type: none"> <li>• SMRO: Allow Work Order Task Explosion Based on Policy</li> <li>• SMRO: "Campaign Management User Interface (UI)"</li> <li>• SMRO: "Field Service Work Orders and New Technician Role"</li> <li>• SMRO: "Filter Vehicle and Skill Data in Load Consolidation TOSX Engine Results"</li> <li>• TOSX: "Support for Scenario Data in Load Consolidation TOSX Engine"</li> <li>• TMS: "Support for Scheduling Standards Consortium Standards and APIs"</li> </ul>
0.2	January 19, 2024	<p>Updated:</p> <ul style="list-style-type: none"> <li>• Updated "Scenario Support for Demand Planning Reports"</li> <li>• Updated "Ability to Stop a Pipeline Run"</li> <li>• Updated "Enhancements to the Asset Details Screen"</li> <li>• Rearranged OMS enhancements to be in the correct sections.</li> <li>• Included additional bug fixes.</li> </ul> <p>Added:</p> <ul style="list-style-type: none"> <li>• SMRO: "Ability to Support Hardware and Software Versions for an Asset"</li> <li>• SMRO: "Enhanced MRO to Generate the Actual Demand Work Order"</li> <li>• SMRO: "Enhancements to the Asset Details Screen"</li> </ul>

Version	Release Date	Changes
0.1	January 15, 2024	Initial Draft Release for User Acceptance Testing