

#### Introduction

This document provides a quick guide explaining how to configure Transportation related policies in the One Network System.

# **Configuring Transportation Related Policies**

- 1. Login to the One Network System.
- 2. Navigate to Transportation -> Policies. Three Policies options are available: Tracking Event Policies, Execution Policies and Distance Policies.

one	🏦 🊖 😂 🗛					QASanity QASanity User Administrator	?	0
Planning T	ransportation Scheduling	Financials Order Mgmt	Reports Contract Mg	ımt Administration	Tools	by Ship	ment No	٩
🟠 Dashboan								
	Pick Ready						Op	otions 🛞
Alert Sumn	Intransit			Shipment State Summa	ary Report			_ ق
	Delivery Ready							
Alert Na	Delivered	Total Alerts		State	Count			=
Cancelle	Multi Madal	2	<u>^</u>	Draft	0			
Carrier R	Multi Modal	1		Awaiting	3			
Confirme	Shipment Summary	4		Tendered	0			
DS-Alert	Client Shipment Summary	38		Confirmed	0			
Delivery		3	=	Pick Ready	0			
GH Move	Search Shipments	1		In-Transit	0			
Alert	Search Movements			Arrived	0			
GH Move				Delivery Ready	0			
GH Shipr Delivered	Non Controlled Shipments	Policies		Delivered	0			
GH Shipr	Get Rate Quote	5		Multi Modal	0			
GH Tend	Rate Movement	3						
GH Zero		Tracking Event Policies						
Gary Del	Policies 📕 🕨	-						
Gary Pick		Execution Policies						
		Distance Policies	-					-

# **Configuring Tracking Event Policies**

- 1. Select Transportation -> Policies -> Tracking Event Policies.
- The Tracking Event Policies screen will be displayed. There are two tabs at the top of the screen: Movement Events and Shipment Events. The Movement Events tab lists those Tracking Events that would be available at the Movement level, and the Shipment Events tab lists those Tracking Events that would be available at the Movement level.

Planni	ing Transportation Scheduling	Financials Order Mgmt Reports	Contract Mgmt Adm	inistration Tools	by Shipment No	۶
	board 🖲 Tracking Event Policies 🖲					
	ent Events Shipment Events					
S Filte	rs (edit) Event Type	* Target Groups	Custom Configured	Debrief Exception	Exception Code	
	09-BK Prearranged appointment	All	Yes		· · · · · · · · · · · · · · · · · · ·	-
	Activated for Tendering	All	Yes		A 20	E
~	Appointment Cancelled	All	No		A 20	
~	Appointment Rescheduled	All	No		A 20	
~	Appointment Scheduled	All	No		A 20	
~	Appointment Scheduled - Delivery	All	No		A 20	
~	Appointment Scheduled - Pickup	All	No		A 10 10 10 10 10 10 10 10 10 10 10 10 10	
<b>v</b>	Arrived	All	No		A	
_	Addressed and the second		N1-	_	· · · ·	-

3. To define which Tracking Events that will be displayed in the list of available Tracking Events at the Movement level and at the Shipment level, set the checkboxes under the **Active** column by each desired Tracking Event.

Note – this will be the list of Tracking Events shown when the user selects the **Create Tracking Event** button on the **Movement Tracking** or **Shipment Tracking** screen.

Plann	ing Transportation Scheduling	Financials Order Mgmt Reports	Contract Mgmt Adm	inistration Tools	by Shipment No	۶
🏠 Dash	board 🙁 Tracking Event Policies 🗷					
Movem	ent Events Shipment Events					
🔍 Filte	rs (edit)					
Active	Event Type	* Target Groups	Custom Configured	Debrief Exception	Exception Code	
	<sup>09</sup> Checkbox	All	Yes		<b>P</b>	<u>^</u>
	avaced for rendening	All	Yes		A 200	E
▼ ←	Appointment Cancelled	All	No		A 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	
~	Appointment Rescheduled	All	No		<u> 2</u> ×	
~	Appointment Scheduled	All	No		A 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	
~	Appointment Scheduled - Delivery	All 👻	No		<b>A</b> X	
•	Appointment Scheduled - Pickup	All	No		A 20	
~	Arrived	All	No		<u> 2</u> ×	
_	Address of Barbara	1	A1-	_	· · · ·	•

- 4. The system comes with a group of pre-defined Tracking Events. To see the list of system-provided Tracking Events, press the New button. On the Create Movement Evt Config screen or the Create Shipment Evt Config screen, for the Event Type field, select the Standard Event Type option from the drop down list. The field next to this will then have a drop down list of the system-provided Tracking Events. When selecting one of these events from the drop down list, the fields for this event will be displayed and if they are required by the system or not.
- 5. Note for a system-provided Tracking Event, the user can define if they want a non-required field to be required by selecting the check box next to that field name under the **Required** column. If a field is required by the system, the user cannot make it optional. To configure the field to be displayed or not, select or unselect the check box for that field name under the **Active** column.

The user can configure the fields for a Tracking Event by Partner Type. To define the Partner Type, select one of the options from the **Target Groups** field drop down list.

- 6. The user can create custom Tracking Events and configure the required and optional fields for different Partners. These custom Tracking Events are meant to be information only and they will not execute any business logic when selecting that event.
- 7. To create a custom tracking event, press the **New** button.
- 8. The **Create Movement Evt Config** screen will be displayed (Note if selecting the **New** button from the Shipment tab, the **Create Shipment Evt Config** screen will be displayed).

one	1		QASanity 🔧 - 🕐 🔮
Planning Trans	sportation	Scheduling Financials Order Mgmt Reports Contract Mgmt Administration Tools	by Shipment No
🟠 Dashboard 🛎 🛛 T	racking Ever	t Policies 🐨 🛛 Create Movement Evt Config 🏵	
* Event Ty * Target Grou Enable For Clie	ups: My (	om Event Type	
Name	Active	Required	
Address	~		▲
Estimated Arrival	~		
Location	~		
Message	~		
Special C	~		
4			×

- 9. For the **Event Type** field, select the **Custom Event Type** option from the drop down list, and enter a name for the custom Tracking Event in the text field next to the drop down list.
- 10. Select an option from the **Target Groups** drop down list to define who can view and operate on this custom Tracking Event. Options include: My Organization, Carrier Partners, Customer Partners, Supplier Partners, Carrier and Customer Partners, Carrier and Supplier Partners, All Partners, and All.

- 11. Select the fields you would like to be displayed for this custom Tracking Event by selecting the check box by the associated field name under the **Active** column. If you also want a field to be required, select the check box for that field under the **Required** column.
- 12. Press the **Submit** button to create the Custom Tracking Event.
- 13. A Movement or Shipment Tracking Event can be configured to raise an **Exception Request** in response to that event occurring. These **Exception Requests** can then be used by the Transportation Controlling Organization and the Carrier to capture details that justify the deviation from the standard, expected process.

Exceptions are events that occur that the Carrier would like to request exemption from so that the Carrier is not penalized accordingly. To associate an **Exception** with a Movement or Shipment event, the user must first create an **Exception Code** and then associate that code with a specific Movement or Shipment Tracking Event under the Tracking Event Policies screen. Once that Tracking Event is submitted by the Carrier, the associated **Exception** will be raised that the Hub can then view to see if they approve or deny the Carrier's exception request. An **Exception** can go thru various states which include: **Pending, Approved, Denied, Deferred**, and **Appealed**. Once A Carrier **Exception** is raised, it will start in the **Pending** state. The Hub can approve or deny the **Exception** which will move it to the **Approved** or **Denied** state. Denied Exceptions can be viewed by the Carrier who can appeal the denied **Exception** – these appealed **Exceptions** would move to the **Appealed** state. **Exception** until a later time – these deferred **Exceptions** would be moved to the **Deferred** state.

🟠 Dashboard			Contract Mgmt	Administration Tools	GHPickup16	
	Tracking Event Policies					
Movement Ev	vents Shipment Events			Profile		
🔍 Filters (e	dit)			Organization		
	nt Type	* Target Groups	Custom Config	Ent Role Types	Exception Code	
09-E	3K Prearranged appointment	All	Yes	Sites	A 10 10 10 10 10 10 10 10 10 10 10 10 10	
Activ	vated for Tendering	All	Yes	Users	A 20 20 20 20 20 20 20 20 20 20 20 20 20	1
Appo	ointment Cancelled	All	No	Roles	P1 83	
Appo	ointment Rescheduled	All	No	Items	<b>A</b> 8	
Appo	ointment Scheduled	All	No	Partners 🕨	A 20	
Appo	ointment Scheduled - Delivery	All 🗸	No	Partner Sites	A 20	
Appo	ointment Scheduled - Pickup	All	No	Regions And Lanes	Accessorial Codes	
Arriv	ved	All	No	Carrier Groups Transit Times	Appointment Codes	
	and a subsection	le contra c	N-1		Commodity Codes Exception Codes	

14. To create an **Exception Code**, navigate to Administration -> Codes -> Exception Codes.

15. On the **Exception Codes** screen, enter the name for the exception in the **Exception Code Name** field and then press the **Add** button.

	QASanity 🔧 - 🕐 🔮
Transportation Scheduling Reports Contract Mgmt Administration Tools	by Shipment No
	ţ٣)
* Exception Code Name: Delayed Exception Code Description:	
Exception Code List	
Active? Name Description	× •
	Close

16. To associate an **Exception Code** with a Tracking Event, navigate to Transportation -> Policies -> Tracking Event Policies.

17. To define a Tracking Event to raise an Exception Request when that event occurs, select the checkbox for the Debrief Exception for the specific event and enter the Exception Code under the Exception Code column. Press the Save button to save this setting. This can be defined for a Tracking Event at the Movement level using the related tab or at the Shipment level using its related tab.

Tran	sportation Scheduling Rep	orts Contract Mgmt Administra	tion Tools		by Shipment No	
🟠 Dashi	board 🛎 Tracking Event Policies 🛎 E	Exception Codes (#)				
	ent Events Shipment Events					
Filte Active	ers (edit) Event Type	* Target Groups	Custom Configured	Debrief Exception	Exception Code	
<b>v</b>	Customs Cleared	All	No		 ▶ ≫	-
~	Customs Hold	All	No		×	
<b>v</b>	Customs Submitter	ovement Event	Yes	Cł	neckbox for Exception	
•	Delayed		Yes		A 8	
~	Delayed	All	Yes		Delayed Exception Code 🔑 %	
~	Delivered	All	Yes			=
•	Delivery Not Completed	All	No		Exception Code	-
~	Departed	All	No		Exception Code	
•	ETA	All	Yes		A 22	
•	En Route	All	No		A 20	
•	Equipment Booked	All	No		A 22	
~	Equipment Loaded	All	No		<u> 2</u> ×	

18. When this exception-defined Tracking Event is added by the Carrier, an Exception will be raised. The Hub can view these Exceptions by navigating to Tools -> Exceptions -> Pending. The Hub can also view Exceptions by their State by navigating to Tools -> Exceptions -> State Summary or by navigating to Tools -> Exceptions -> Search Exceptions.

Tran	sportation Scheduling Rep	orts Contract Mgmt /	Administratio	on	Tools						by Shipm	ent No
🏠 Dashi	board 🙁 Exception Codes 🙁 Tracking I	Event Policies 🗵			Alerts Inbox							
Movem	ent Events Shipment Events				Alerts Subscrip	otions						
🔻 Suc	cessfully Saved				Exceptions	Þ	Pending					
🔍 Filte	ers (edit)		Feedback		Approved							
Active	Event Type	* Target Groups		Cus	Publish Messag	ge -	Denied		n Code			
	09-BK Prearranged appointment	All	•	Yes	Upload	Þ	Deferred Appealed			<i>P</i> ×		
	Activated for Tendering	All	•	Yes	UIPolicies		Search Exc	entions		A 10		
~	Appointment Cancelled	All	•	No	Integration Poli	sies	State Summ			A 22		
7	Appointment Rescheduled	All	-	No					,	<i>P</i> ×		
7	Appointment Scheduled	All	•	No						<i>P</i> ×		
~	Appointment Scheduled - Delivery	All	-	No						<i>P</i> ×		
~	Appointment Scheduled - Pickup	All	-	No						<i>P</i> ×		
~	Arrived	All	•	No						<u> </u>		
~	Attempted Delivery	All	•	No						<i>P</i> ×		
~	Available for Delivery	All	•	No						<b>A</b>		
_	Confirmed	Carrier Partners	-	Yes						<i>P</i> ×		

19. For pending Exceptions, the Hub can either approve the Exception if he is okay with it or he can deny it if he does not agree with it or he can defer it and look at it at a later time. The Carrier has a similar view of these Exceptions and can view Exceptions that the Hub denied and for denied exceptions, he can appeal them. The Hub would then see these under the Appealed state. The following screen shot shows a Pending Exception that was raised when the Carrier added a Delayed Tracking Event at the Movement level. Select the link exception number under the Detail column to go to the details of the Exception in order to perform an action.

ransport	 -	ports Contra	ct Mgmt Adm	inistration	Tools			by Shipment	t No
Dashboard (									
Detail	Shipment Evt	Movement	Movement Evt	Event Type	Requested Exception Code	Approved Exception Code	Carrier	Shipment Originator	State
2392		M-TestShipment1	40700505	Delayed	Delayed Exception Code		One Buelow Transport		Pending

20. On the **Exception Details** screen, the Hub can select an action such as **Approve** or **Deny**. The Hub can also add a comment that can be viewed by the Carrier by selecting the **Add** button in the **Comments** section and then can save that comment by pressing the **Add Comment** button on the bottom of the screen.

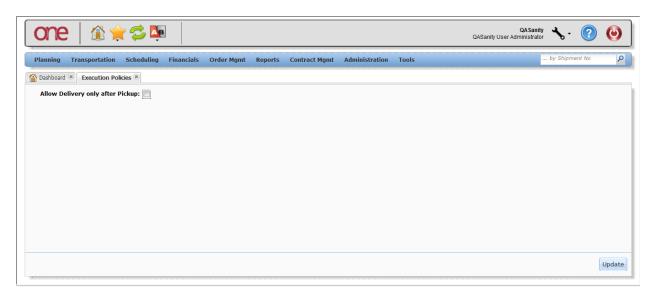
ne 🛛 🏦	🚖 🕏 陸						QA Sa QASanity User Administr	rator 🔧 - 🤇	?
ransportation Sc	heduling Reports	Contract Mgmt	Administration	Tools				by Shipment	No
Dashboard 🗷 Pending 🗷	2392 🗷								
Exception No: 2	,392				Moveme	ent: M-TestShipme	ent1		
State: P						Evt: 40700505			
Submission Date: 1	0/1/12 2:13 AM EDT		Carrier Org: One Buelow Transport						
Response Deadline: Response Date:			Requested Exception Code: Delayed Exception Code						
Response Date.					Approved Exception Co	Jue.			
Comments									
Action Taken	Comment		Commentin	g User	Date		-		
No data found									
						🕒 Add			
									Deny
						Δ	vailable actions		Anna
						A	vailable actions	$\rightarrow$	Appro
						А	vailable actions		
						A	vailable actions	Add Comment	Canc Defer

21. After performing one of the actions, the state of the **Exception** will change accordingly.

one   🏦 🚖	💋 💺				QA Sanity QASanity User Administrator		2 🙆
Transportation Schedu	uling Reports	Contract Mgmt Adm	inistration Tools		-	by Shipment	No 👂
Dashboard 🗷 Pending 🗷 23	92 ×						
Record was updated success	sfully	State of exception					8
Exception No: 2,392				Movement: M-TestShip	oment1		
State: Appro Submission Date: 10/1/				Movement Evt: 40700505			
Response Deadline:	12 2:13 AM EDT			Carrier Org: One Buelo Requested Exception Code: Delayed E			
Response Date: 10/1/	12 2:24 AM EDT			Approved Exception Code: Delayed E			
Comments					_		
Action Taken Add Comment	Comment Agree with delaye	d problem	Commenting User QASanity	Date 10/1/12 2:22 AM EDT			
Add Comment	Agree with delaye	a problem	QASamity	0 Add	4		
	- 1				·		
		Comment added and	d Approve action cel	acted			
		Comment added and	a Approve action ser	ected			
					A	dd Commen	Actions •

## **Configuring Execution Policies**

- 1. Select Transportation -> Policies -> Execution Policies.
- 2. The **Execution Policies** screen will be displayed.



- 3. On the screen, there is a Policy named "Allow Delivery only after Pickup". If set, this Policy will enforce that a **Pickup** action has to be done on a Movement/Shipment prior to performing a **Delivered** or **Ready for Delivery** action.
- 4. To set this Policy, select the checkbox next to the Policy name and then press the **Update** button. A success message will be displayed.

one î 🚖 ኞ 📭 🛛					QASanity QASanity User Administrator	∿∙	۲
Planning Transportation Scheduling Financial	ls Order Mgmt Reports	Contract Mgmt	Administration	Tools		. by Shipment No	P
Dashboard R     Execution Policies R     Record was updated successfully	Success message						8
Allow Delivery only after Pickup:	ckbox				Update bu	tton	Update

5. With this Policy set, if the user then tries to perform a **Delivered** or **Ready for Delivery** action prior to having done a **Pickup** action, the system will display an error message stating "Delivery/Delivery Ready action cannot be performed without Pickup action".

## **Configuring Distance Policies**

- 1. Select Transportation -> Policies -> Distance Policies.
- 2. The **Distance Policies** screen will be displayed.

	-	order Mgmt Reports	Contract Mgmt	Administration	Tools		by S	Shipment No	
Distance Policies	<u>c</u>								
-	e Beliveau Enterprises								
* Default Distance Source: PC		*							
* Default Distance Type: Sho	ortest 🗸								
* Default Location Basis: Zip	p/Postal,Lat-Long,City-Sta	te 💌							
* Default Location Basis: Zip	o/Postal,Lat-Long,City-Sta	te 🔻							
* Default Location Basis: Zip	o/Postal,Lat-Long,City-Sta	te 🗸							
	o/Postal,Lat-Long,City-Sta	te 🗸	J. From	<b>Э</b> , То	. Over	Jistance Source	Distance Type	<b>e</b> Location Basis	
Distance Policy Overrides			der From	<i>9</i> , То	Jover Dimensi Veight	Jistance Source	Jistance Type		
Distance Policy Overrides			of From	<i>S</i> , То	Over Dimensi Over Weight	Jistance Source	Jistance Type		_
Distance Policy Overrides			🦉 From	<b>8</b> , То	Over Dimensi Over Weight	Distance Source	Jistance Type		_
Distance Policy Overrides			n From	<b>2</b> , Το	Over Dimensi Over Weight	Distance Source	Jistance Type		_

3. The **Distance Polices** screen allows the user to customize the distance calculations for the system to use based on Shipment/Movement characteristics. For example, the user can add rules to say that all hazardous Shipments should use practical route mileage, even when the default mileage is computed using shortest route.

4. At the top of the screen, the default settings are defined – these are required fields. The fields include: "Default Distance Source" such as "PC Miler" or "Mile Maker", the "Default Distance Type" such as "Practical", "Shortest", etc. and the "Default Location Basis" such as "City-State, Zip/Postal, Lat-Long", etc.

Note – PC Miler and Mile Maker are third-party tools that the system uses to calculate postal codeto-postal code distances in the United States, Canada and Mexico.

anning Transportation	Scheduling Financials	Order Mgmt Reports	Contract Mgmt	Administration	Tools		GHPic	kup16
ashboard 🗵 Distance Polic	ies 🗵							
* Default Distance Source: * Default Distance Type:	Shortest 🗸	· -	Default	settings				
	Zip/Postal,Lat-Long,City-S	tate 🗸						
Distance Policy Overrides	Zip/Postal,Lat-Long,City-S		🍠 From	🛃 То	Jover Dimensi Veig	r de Distance Source	Jistance	Justice Location Basis
* Default Location Basis: Distance Policy Overrides Priority <i>P</i> Equipment			I From	🍠 То	Jover Over Dimensi Veig	r Jht Source	Jistance Type	Justication Basis
Distance Policy Overrides			n From	<i>2</i> , To	I Over Dimensi Weig	r Jht <sup>J</sup> Source	Jistance Type	
Distance Policy Overrides			I From	<i>9</i> , To	Junensi Junensi Kele	r Distance Source	Jistance Type	

5. On the bottom of the screen under the **Distance Policy Overrides** section, the user can set override settings based on Equipment, Commodity Code, From (Country), To (Country), Hazard Class, Over Dimension (Y/N) and Over Weight (Y/N) and then the corresponding Distance Source, Type and Location Basis.

6. To create a **Distance Policy Override** setting, press the **Add** link and enter information in each of the desired, editable fields (Note - these editable fields have a pencil symbol).

Note – all these settings do not need to be entered; the user can leave any setting blank.

For each of these override settings, the user also needs to specify its Priority. Priority Numbers must be unique (e.g. 1, 2, 3, etc. with 1 being treated as the highest priority). If multiple overrides apply, the system will use the one with the highest priority.

one   🏦 🚖	💋 🍢					QASanity User A	QA Sanity Administrator	• ?	(
Planning Transportation S	Scheduling Financials O	rder Mgmt Reports	Contract Mgmt	Administration	Tools		GHPic	kup16	_
Dashboard 🙁 Distance Policies									
* Organization: • * Default Distance Source: • * Default Distance Type: • * Default Location Basis: 2 Distance Policy Overrides	Shortest 🗸	• olicy Overrides se	ection						
niority nicy overhees	Commodity Code	🛃 Hazard Class	🧷 From	🍠 То	🖉 Over Dimensi 🍠 Over Weight	Jistance Source	Jistance Type	& Location Basis	
							Add	d link	() 
									5

7. Once the information has been entered, press the **Save** button to save the Default and Override settings.