

Quick Guide to Configuring Transportation Policies

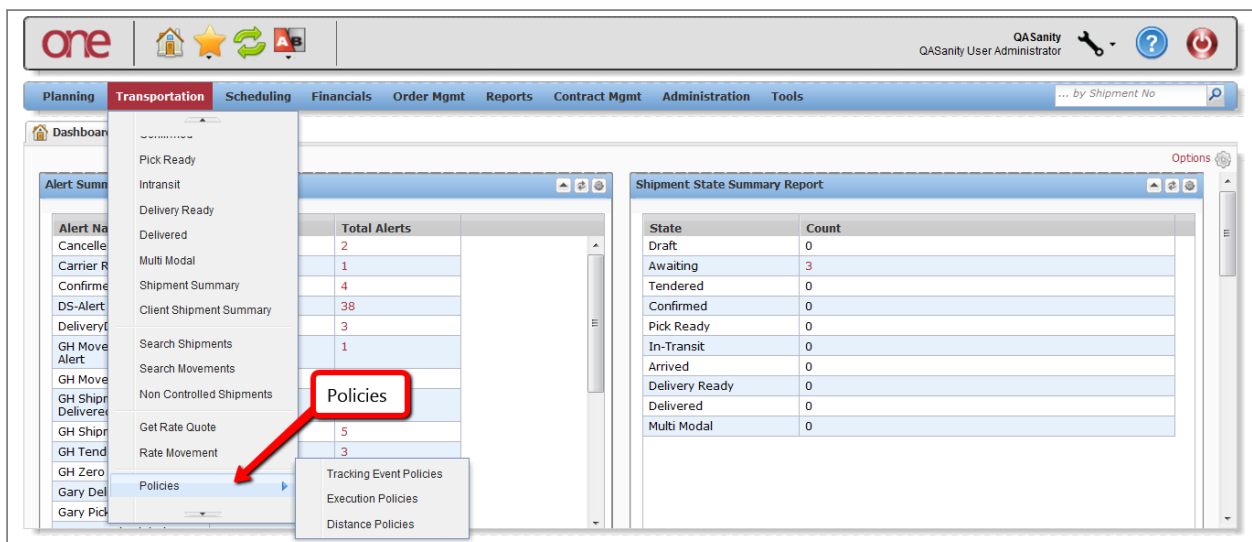


Introduction

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

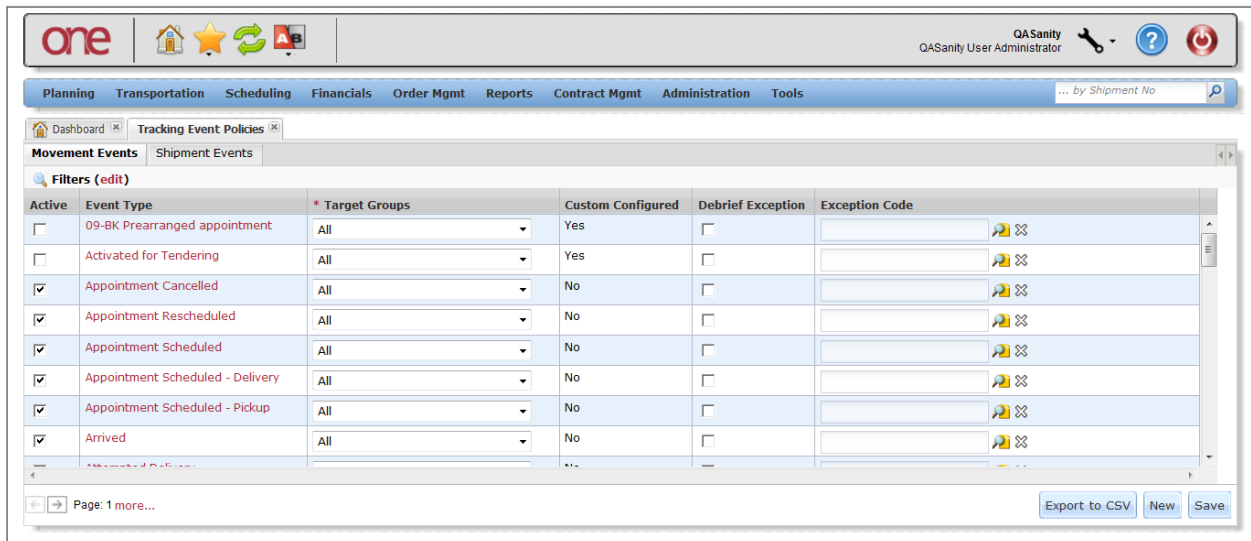
Configuring Transportation Related Policies

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.



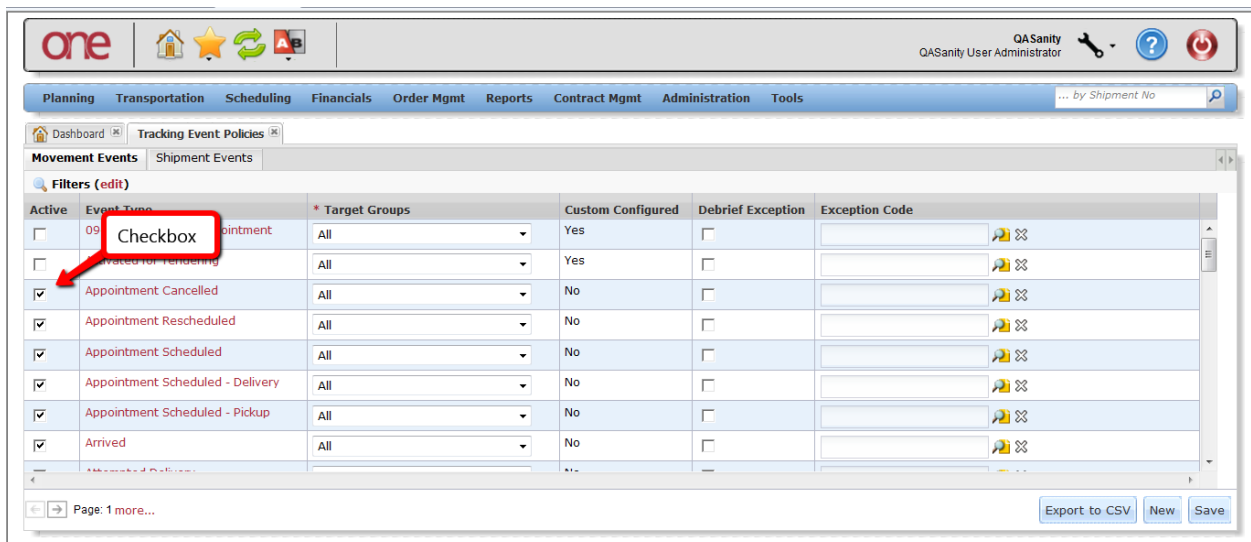
Configuring Tracking Event Policies

1. Select Transportation -> Policies -> Tracking Event Policies.
2. 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 Shipment level.



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.



- 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.
- 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.

- 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.
- To create a custom tracking event, press the **New** button.
- 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).

The screenshot shows the 'Create Movement Evt Config' screen. At the top, there's a navigation bar with the 'one' logo and icons for home, star, refresh, and a warning sign. The user is logged in as 'QASanity User Administrator'. The main menu includes Planning, Transportation, Scheduling, Financials, Order Mgmt, Reports, Contract Mgmt, Administration, and Tools. The current page is 'Create Movement Evt Config' under the 'Tracking Event Policies' tab. The form contains the following fields:

- Event Type:** Custom Event Type (dropdown menu)
- Target Groups:** My Organization (dropdown menu)
- Enable For Clients:**

Name	Active	Required
Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Estimated Arrival	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Location	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Message	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Special C	<input checked="" type="checkbox"/>	<input type="checkbox"/>

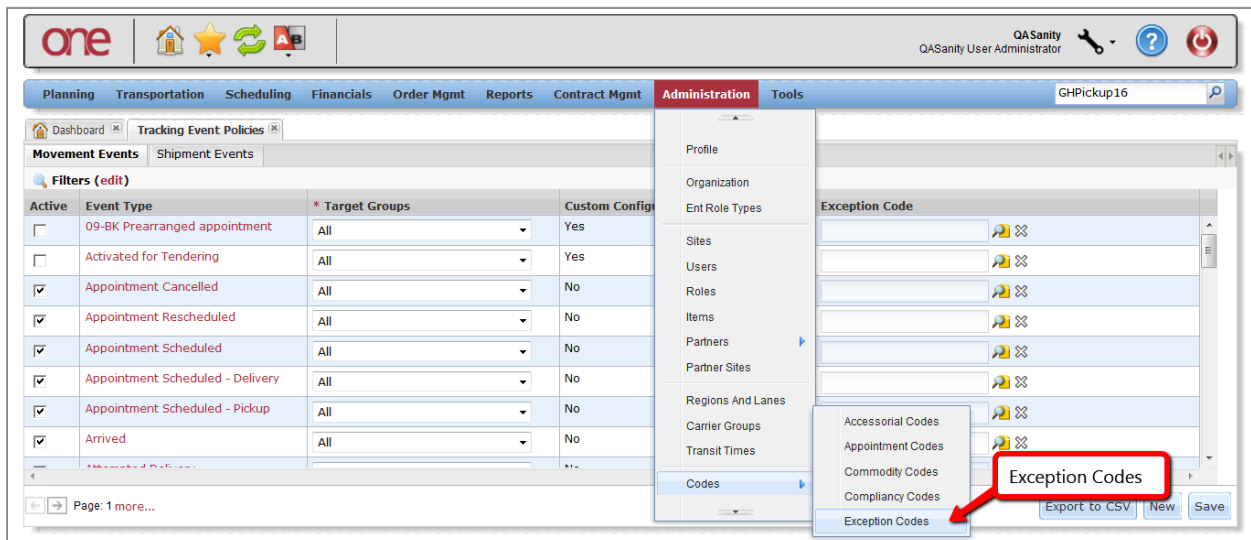
A 'Submit' button is located at the bottom right of the form.

- 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.
- 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, Customer and Supplier Partners, All Partners, and All.

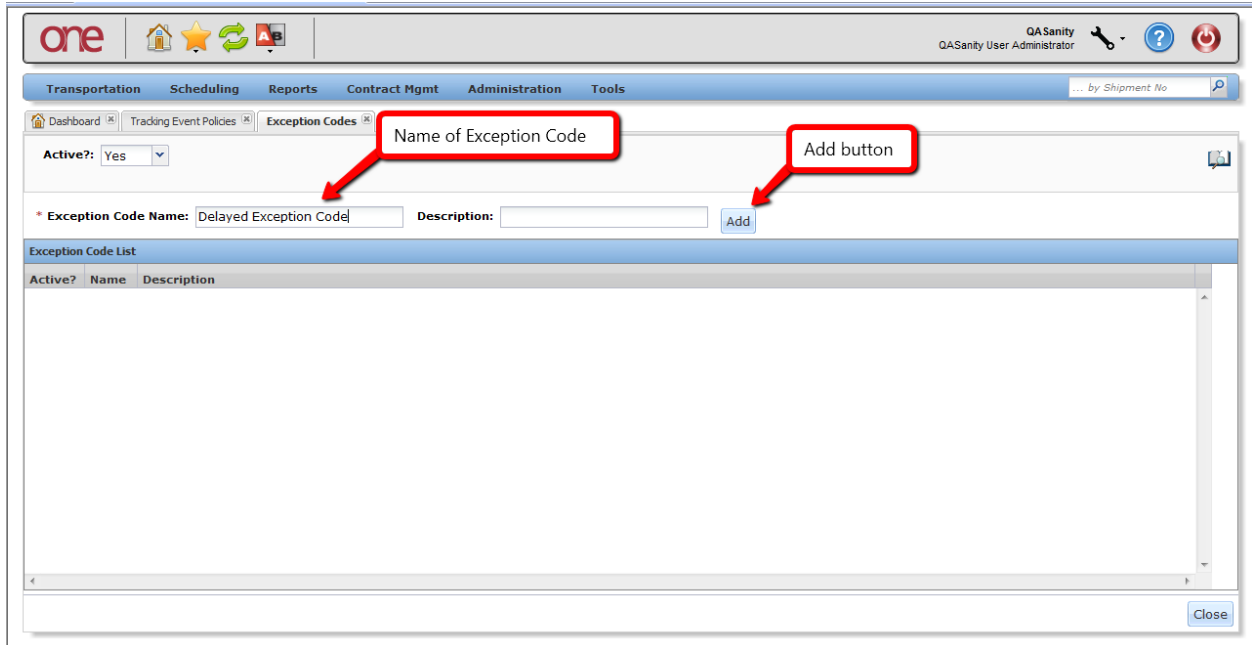
11. Select the fields you would like to be displayed for this custom Tracking Event by selecting the check box by the associated field name under the **Active** column. If you also want a field to be required, select the check box for that field under the **Required** column.
12. Press the **Submit** 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. **Exceptions** are viewed by the Carrier on his dashboard using the **Exception Request Summary** portlet. A Hub can defer looking at the **Exception** until a later time – these deferred **Exceptions** would be moved to the **Deferred** state.

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

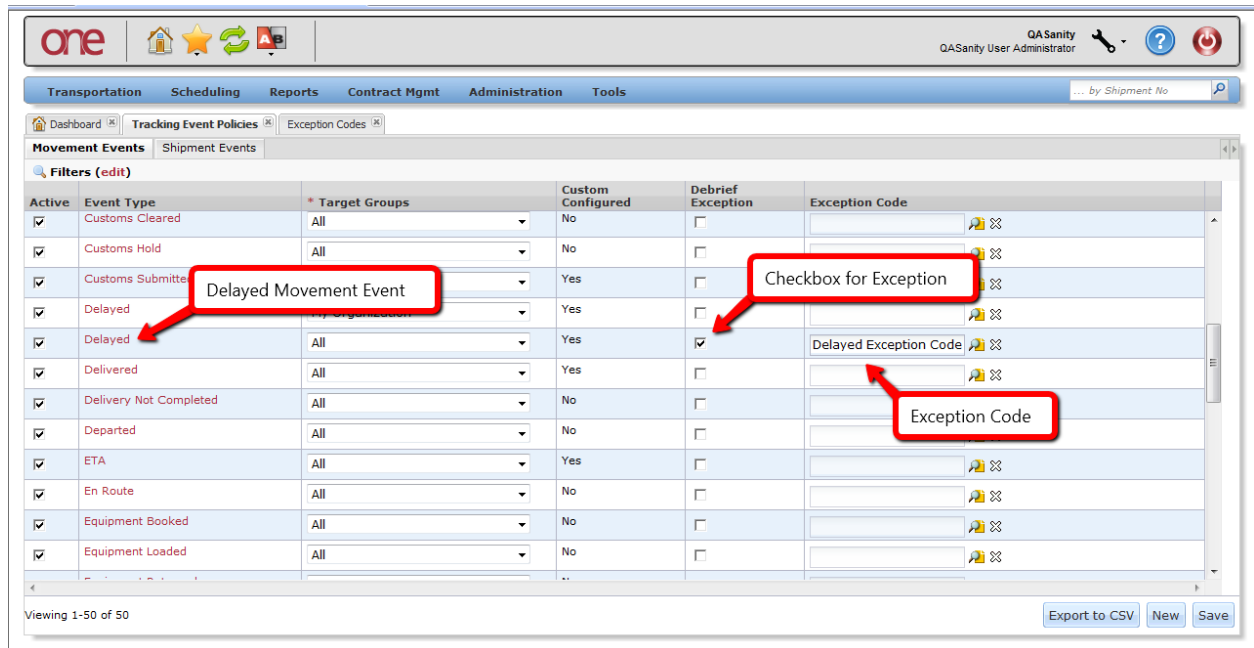


15. On the **Exception Codes** screen, enter the name for the exception in the **Exception Code Name** field and then press the **Add** button.

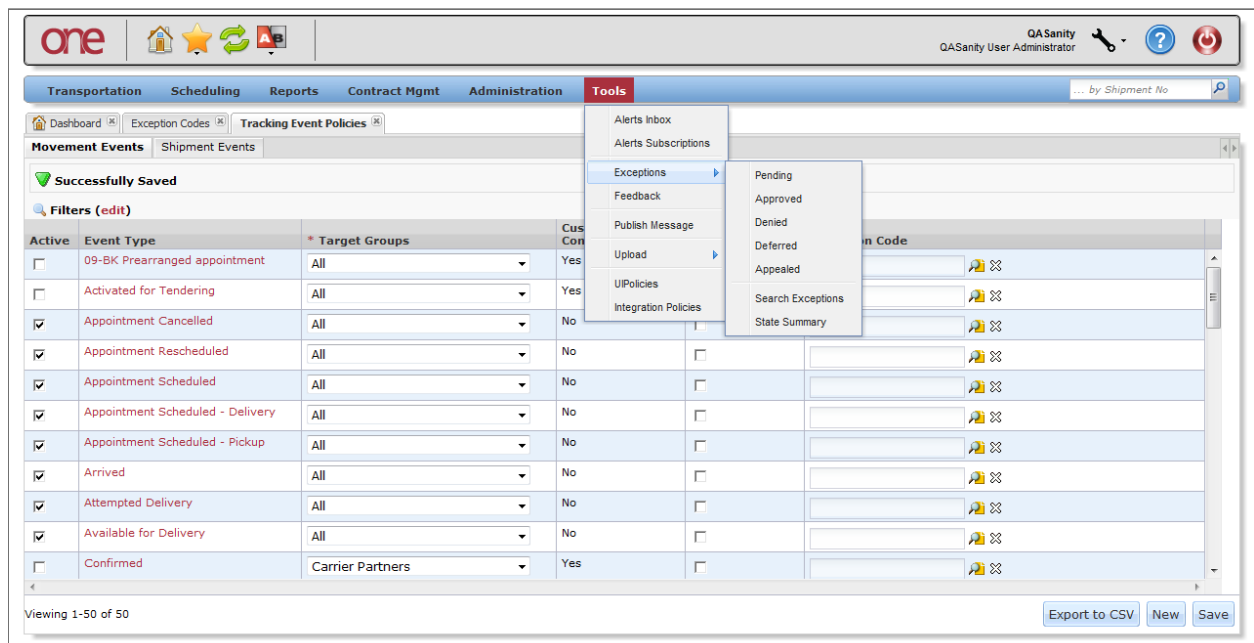


16. To associate an **Exception Code** with a Tracking Event, navigate to Transportation -> Policies -> Tracking Event Policies.

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.



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.

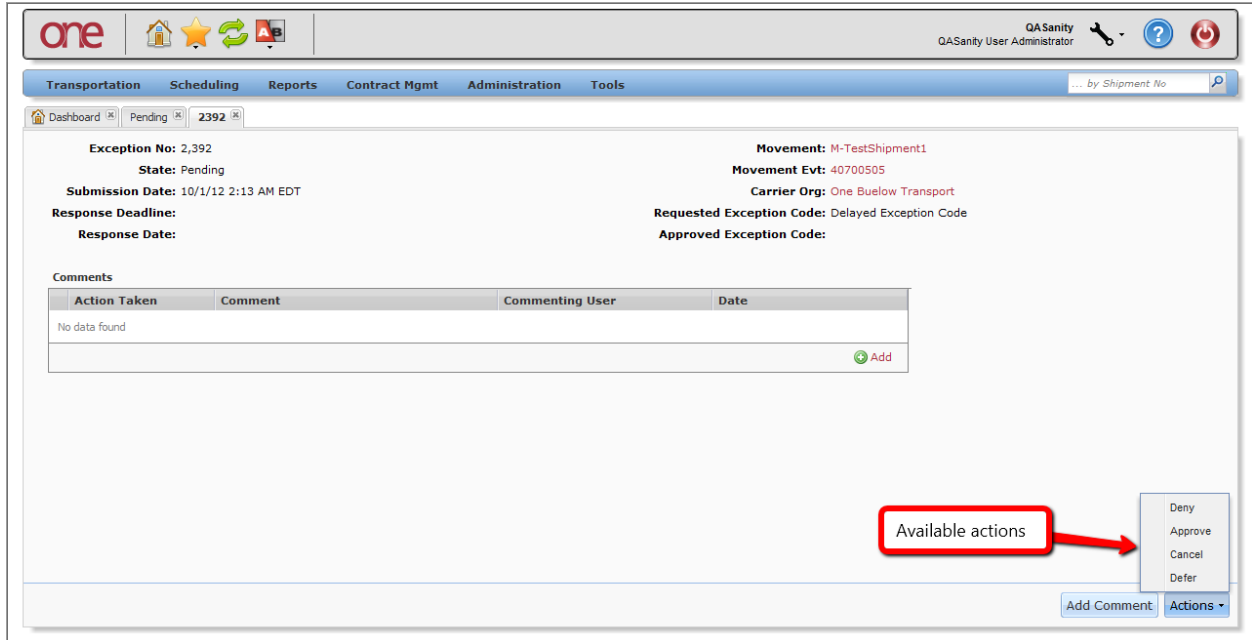


19. For pending **Exceptions**, the Hub can either approve the **Exception** if he is okay with it or he can deny it if he does not agree with it or he can defer it and look at it at a later time. The Carrier has a similar view of these **Exceptions** and can view **Exceptions** that the Hub denied and 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.

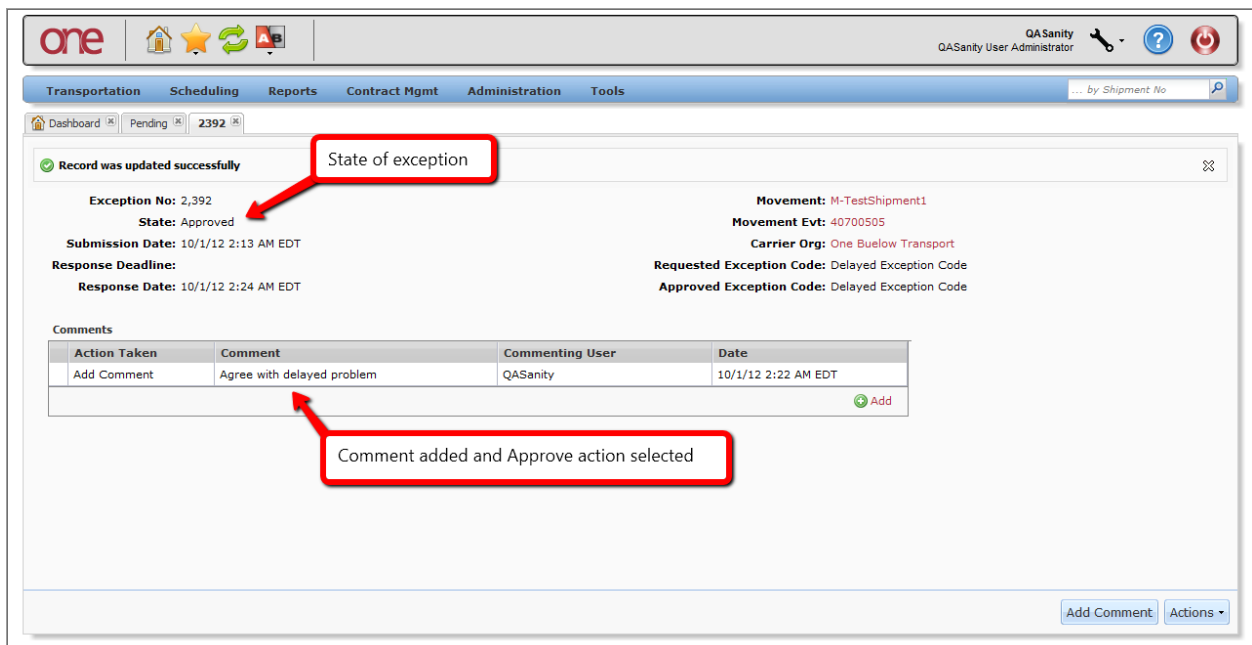
The screenshot shows a web application interface with a navigation bar at the top containing the 'one' logo and various icons. Below the navigation bar is a menu with options: Transportation, Scheduling, Reports, Contract Mgmt, Administration, and Tools. A search bar is present on the right side of the menu. The main content area displays a table of pending exceptions. The table has the following columns: Detail, Shipment, Shipment Evt, Movement, Movement Evt, Event Type, Requested Exception Code, Approved Exception Code, Carrier, Shipment Originator, and State. A single row is visible with the value '2392' in the Detail column. The status of the exception is 'Pending'. At the bottom of the table, there is a status bar that reads 'Viewing 1-1 of 1 Selected: 0' and buttons for 'Export to CSV' and 'Actions'.

Detail	Shipment	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.

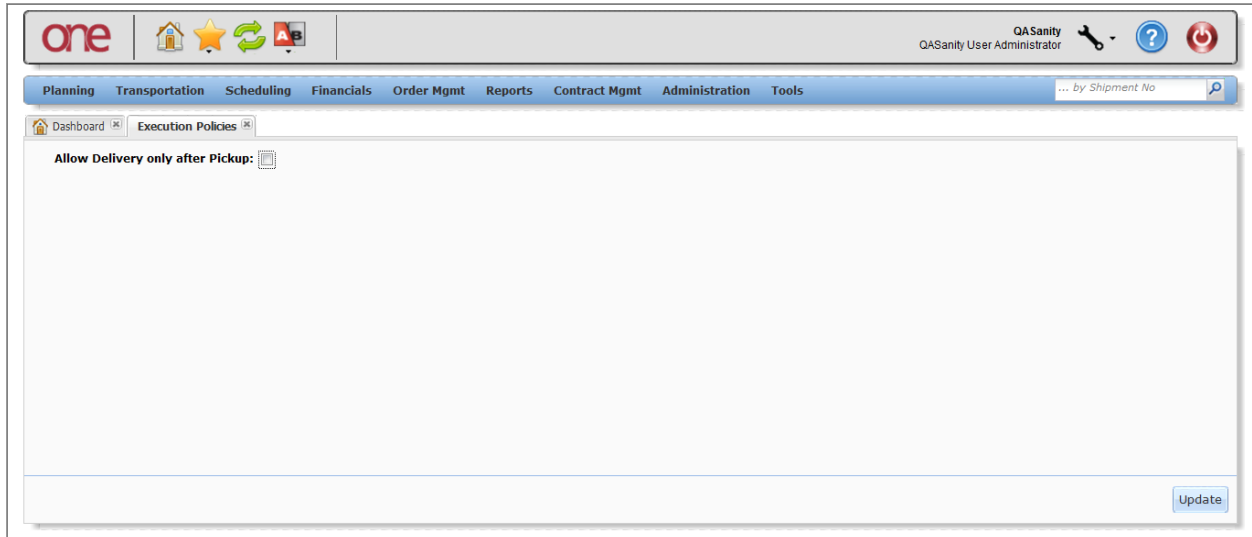


21. After performing one of the actions, the state of the **Exception** will change accordingly.

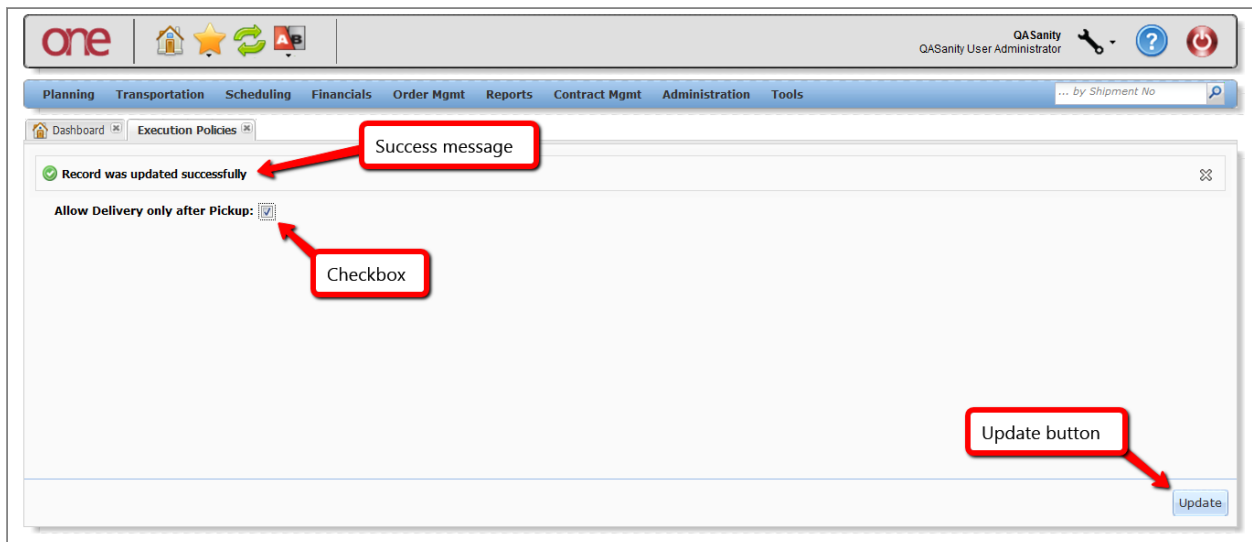


Configuring Execution Policies

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.



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.

The screenshot displays the 'Distance Policies' configuration interface. At the top, the 'one' logo and navigation icons are visible. The user is logged in as 'QA Sanity QA Sanity User Administrator'. The main navigation bar includes 'Planning', 'Transportation', 'Scheduling', 'Financials', 'Order Mgmt', 'Reports', 'Contract Mgmt', 'Administration', and 'Tools'. The current page is 'Distance Policies' under the 'Transportation' tab. The configuration area shows the following settings:

- * Organization: One Beliveau Enterprises
- * Default Distance Source: PC Miler
- * Default Distance Type: Shortest
- * Default Location Basis: Zip/Postal, Lat-Long, City-State

Below these settings is a table for 'Distance Policy Overrides' with the following columns: Priority, Equipment, Commodity Code, Hazard Class, From, To, Over Dimensi, Over Weight, Distance Source, Distance Type, and Location Basis. An 'Add' button is located at the bottom right of the table. A 'Save' button is located at the bottom right of the entire configuration area.

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.

- 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 code-to-postal code distances in the United States, Canada and Mexico.

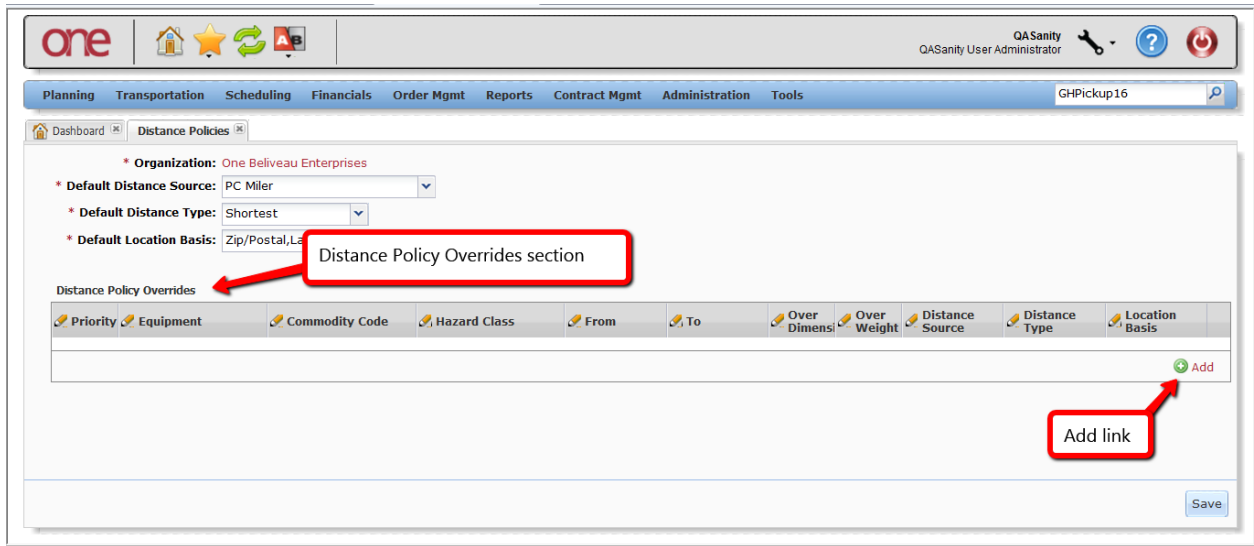
The screenshot displays the 'Distance Policies' configuration interface. At the top, the 'one' logo and navigation tabs (Planning, Transportation, Scheduling, Financials, Order Mgmt, Reports, Contract Mgmt, Administration, Tools) are visible. The user is logged in as 'QA Sanity QA Sanity User Administrator'. The main content area shows the 'Distance Policies' for 'One Beliveau Enterprises'. Three default settings are listed: 'Default Distance Source' (PC Miler), 'Default Distance Type' (Shortest), and 'Default Location Basis' (Zip/Postal, Lat-Long, City-State). A red box labeled 'Default settings' points to these fields. Below is a table for 'Distance Policy Overrides' with columns: Priority, Equipment, Commodity Code, Hazard Class, From, To, Over Dimensi, Over Weight, Distance Source, Distance Type, and Location Basis. An 'Add' button is at the bottom right of the table, and a 'Save' button is at the bottom right of the page.

- 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.

- 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.



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