

# **Grocery Outlet Inc**

## **One Network Appointment Scheduler**

### **User Guide: Appointment Reporting**

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# 1 Introduction

- The Grocery Outlet Appointment Scheduler project forms part of a larger ERP revamp within the Grocery Outlet business. The appointment scheduling functionality will serve as an extension to the ERP suite being updated and will be dependent on the go-live of the SAP ERP, since order integrations that initiate the appointment scheduling logic will be purpose built to be delivered from the new ERP solution.
- As part of this project, the following functionality will be provided:
  - Confirmed Order Integration
    - Including Auto-ASN creation
  - Appointment Scheduling
    - Appointment Policy Configurations
    - Advanced Appointment Scheduling
      - Automated Appointment Scheduling
    - Appointment Mgmt.
      - Live & Drop Appointments
      - Supplier & Carrier Partners
        - Appointment Confirmations & Rescheduling
    - Integrated Appointment Details
      - Outbound to Talend for integration with ERP, WMS & TMS
  - Capacity Management
    - Site & Dock Door Group Capacity Tracking
    - Capacity Setting Management

## 2 Appointment Reporting

### 2.1 Projected Capacity View Reports

#### 2.1.1 Context

ACTIVITY PURPOSE	This activity enables system users to see projected capacity view for scheduling activities
ACTIVITY INITIATORS	
ACTIVITY PREREQUISITES	Appointment must be scheduled
ACTIVITY PERFORMER(S)	Any Buyer Orchestrator Role User
OTHER PARTIES INVOLVED	
ADDITIONAL INFORMATION	
ACTIVITY OUTCOME	A Projected Capacity view report can be seen

#### 2.1.2 Process Flow

N/A

#### 2.1.3 System Steps

**Project Capacity View** allows the warehouse owner to configure a projected capacity for different measures which consume resources. It provides greater visibility in the warehouse capacity utilization and capacity forecasts.

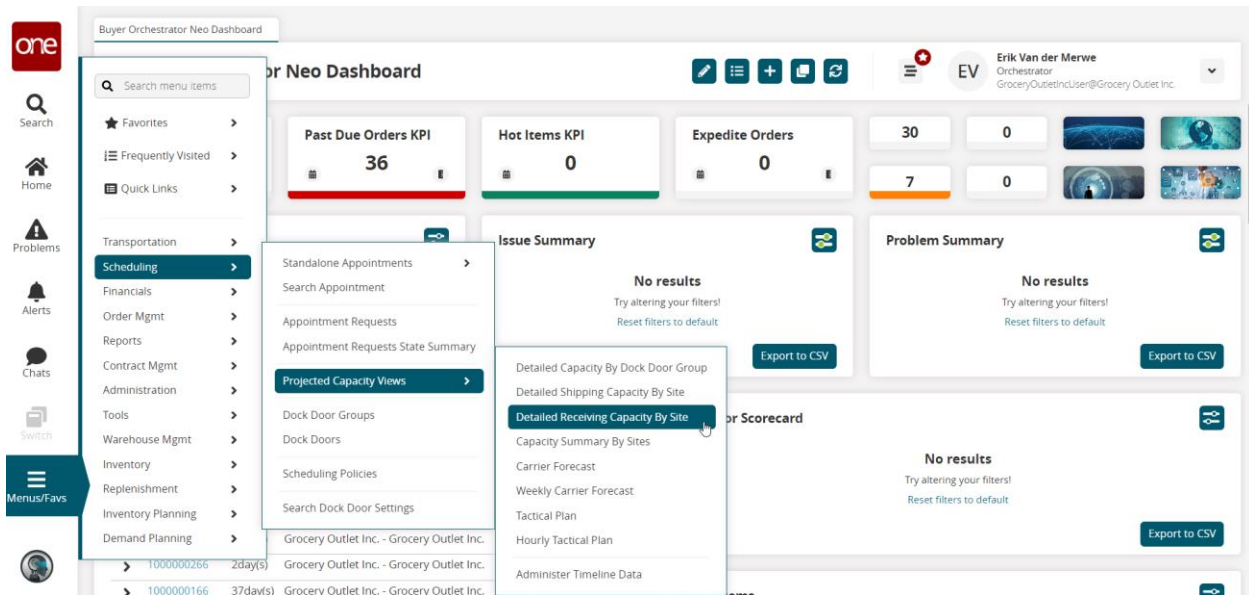
System users will be able to configure capacity settings by creating recurring patterns stored on at a daily level. This included planned capacity for appointment counts, pallets and case receiving capabilities.

#### Step 1: Viewing Detailed Receiving Capacity View

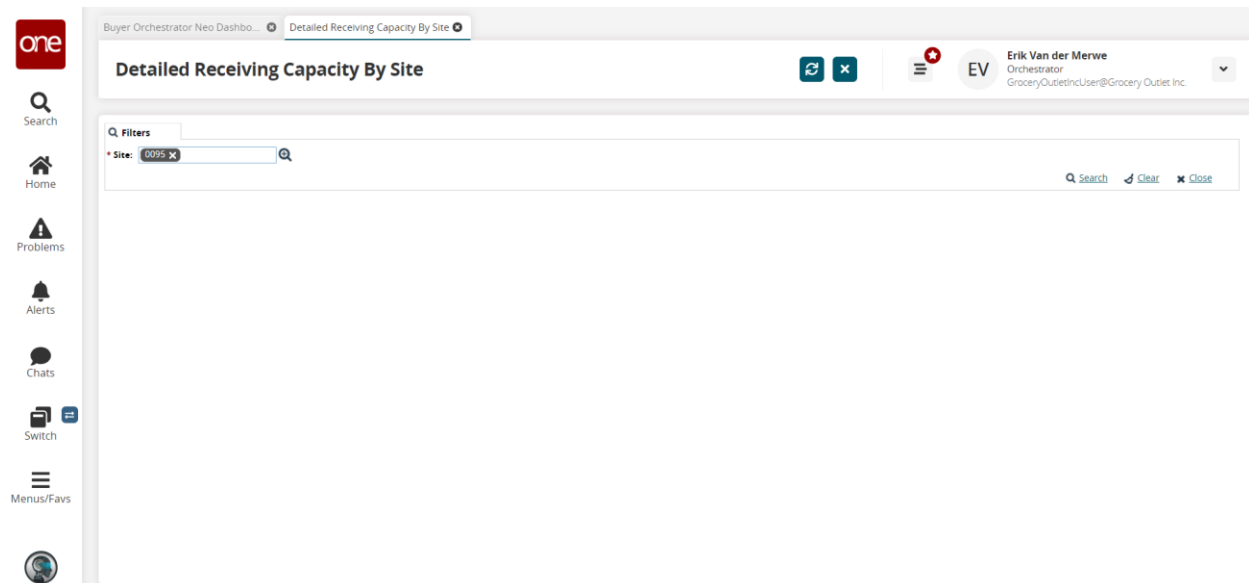
The **Detailed Receiving Capacity View** will be utilized to provide with a high-level capacity utilization for a full day at a Site. This view does not take specific door restrictions or shift restrictions into consideration when reporting capacity consumption.

A User can view Detailed receiving Capacity View for a full day at a site level

1. Login to the One Network system and use the NEO UI.
2. Navigate **Menu**→ **Scheduling** -> **Projected Capacity view** -> **Detailed Receiving Capacity View**



3. Detailed Receiving Capacity By Site screen appears. User can select any Site from Auto populate button.



Buyer Orchestrator Neo Dashboard - Detailed Receiving Capacity By Site

Filters: Site: 0095

Site Name	Enterprise Name	Type	Description	Site Group Name	Tier	Address	Time Zone
0093	Grocery Outlet Inc.	DC	Modesto Frozen/Deli/Candy			2050 LAPHAM DRIVE, MODESTO, CA, 953...	Ameri...
0094	Grocery Outlet Inc.	DC	Tacoma Frozen/Deli/Candy			1301 26TH AVE EAST, TACOMA, WA, 98424...	Ameri...
0095	Grocery Outlet Inc.	DC	Portland Grocery			20016 NE SANDY BLVD, PORTLAND, OR, 972...	Ameri...
0096	Grocery Outlet Inc.	DC	Lancaster Frozen/Deli			3800 HEMPLAND ROAD, MOUNTVILLE, PA, 1...	Ameri...
0097	Grocery Outlet Inc.	DC	Sacramento Grocery and Non-Foods			4400 FLORIN PERKINS RD, SACRAMENTO, CA, 95...	Ameri...

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Buyer Orchestrator Neo Dashboard - Detailed Receiving Capacity By Site

Filters: Site: 0095

Site Rsrc	Data Measure	Jun 2023																													
		Fri 02	Sat 03	Sun 04	Mon 05	Tue 06	Wed 07	Thu 08	Fri 09	Sat 10	Sun 11	Mon 12	Tue 13	Wed 14	Thu 15	Fri 16	Sat 17	Sun 18	Mon 19	Tue 20	Wed 21	Thu 22	Fri 23	Sat 24	Sun 25	Mon 26	Tue 27	Wed 28	Thu 29	Fri 30	
0095_Grocery	Remaining Appointment Receiving Capacity			-2																											
	Receiving Appointment Capacity																														
	Recurring Receiving Appointment Capacity																														
	Override Receiving Appointment Capacity																														
	Custom Receiving Appointments Scheduled				1																										
Used Appointment Receiving Capacity			1																												
0095_Grocery	Remaining Receiving Pallet Capacity																														
	Unload Pallet Receiving Capacity																														
	Custom Receiving Pallets Scheduled																														
	Receiving Pallets Unscheduled																														
	Used Pallet Receiving Capacity																														
0095_Grocery	Remaining Receiving Case Capacity																														
	Unload Case Receiving Capacity																														
	Custom Receiving Cases Scheduled				2																										
	Receiving Cases Unscheduled																														
	Used Case Receiving Capacity				2																										
0095_Recon	Remaining Appointment Receiving Capacity																														
	Receiving Appointment Capacity																														
	Recurring Receiving Appointment Capacity																														

Buttons: Customize, Export to Excel

## Step 2: Viewing Detailed Capacity by Dock Door Group

To view capacity consumption over a given time-period, the Detailed Capacity by Dock Door Group view can be referenced. This view provides a breakdown of capacity per dock door group at a site and allow for more granular tracking of capacity utilization at a commodity classification level.

A User can view Detailed Capacity by Dock Door Group report

**Login to the One Network system and use the NEO UI.**

1. Navigate **Menu** → **Scheduling** -> **Projected Capacity view** -> **Detailed Capacity by Dock Door Group**

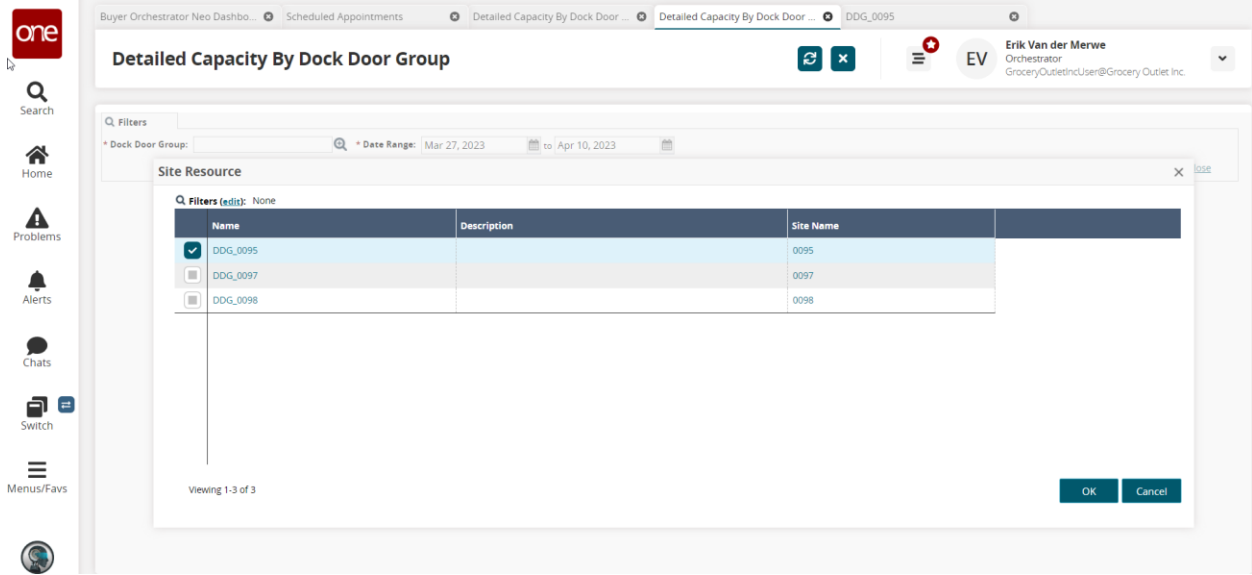
The screenshot displays the 'Detailed Capacity by Dock Door Group' report in the NEO UI. The interface features a sidebar menu on the left with 'Scheduling' selected. The main content area shows a table with columns for dates from Monday, March 27 to Monday, April 10, 2023. The table includes rows for 'Shipping Capacity' and 'Receiving Capacity'. A dropdown menu is open over the 'Projected Capacity Views' section, highlighting 'Detailed Capacity by Dock Door Group'.

	Mon 27	Tue 28	Wed 29	Thu 30	Fri 31	Sat 01	Sun 02	Mon 03	Tue 04	Wed 05	Thu 06	Fri 07	Sat 08	Sun 09	Mon 10
Shipping Capacity	99	100	100	99	100	50	24	100	100	100	100	100	50	25	100
Receiving Capacity	100	100	100	100	100	50	25	100	100	100	100	100	50	25	100

2. Detailed Capacity by Dock Door Group Screen appears.

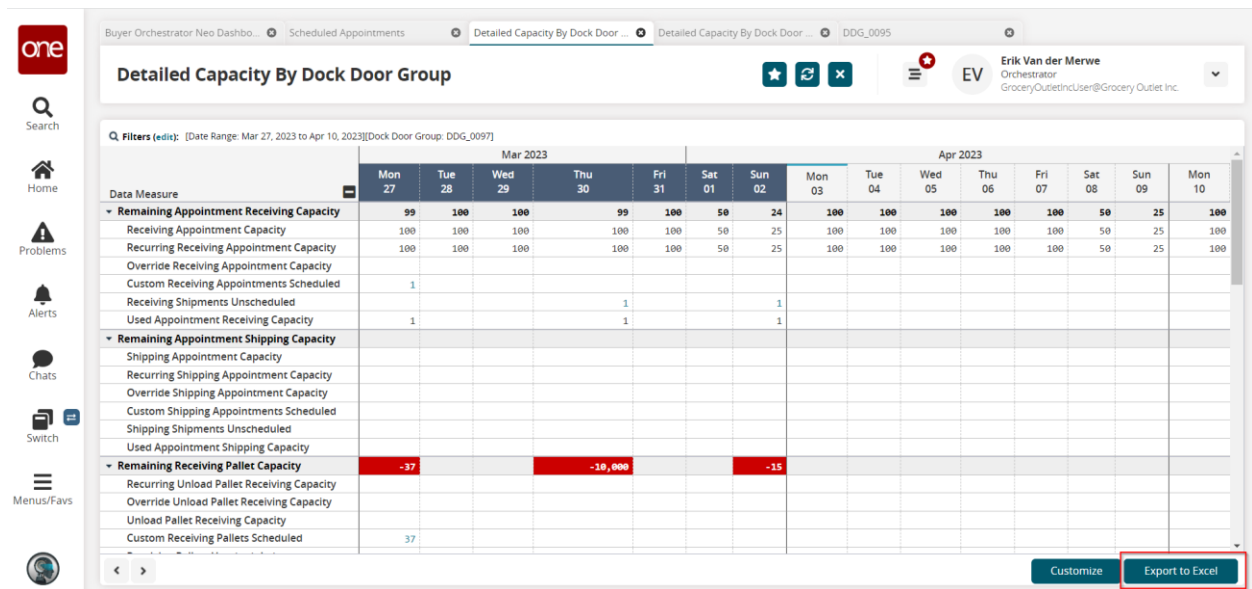
The screenshot shows the 'Detailed Capacity by Dock Door Group' screen. At the top, there is a search filter section with 'Dock Door Group' and 'Date Range' (Mar 27, 2023 to Apr 10, 2023) fields. The main content area is currently blank, indicating that the data has not yet been loaded or filtered.

3. User can select any **Dock Door Group** from selection and add any date range. press OK.



4. The Detailed Capacity By Dock Door Group appears.

5. It gives different capacity numbers for data measures like **receiving/shipping capacity (number of appointments), pallet receiving/shipping capacity, case receiving/shipping capacity**



6. User can also **export this report to excel** for further data analysis .

# 2.2 Appointment Reporting

## 2.2.1 Context

ACTIVITY PURPOSE	This activity enables system users to see Appointment Reports
ACTIVITY INITIATORS	
ACTIVITY PREREQUISITES	
ACTIVITY PERFORMER(S)	Any Buyer Orchestrator Role User
OTHER PARTIES INVOLVED	
ADDITIONAL INFORMATION	
ACTIVITY OUTCOME	

## 2.2.2 Process Flow

N/A

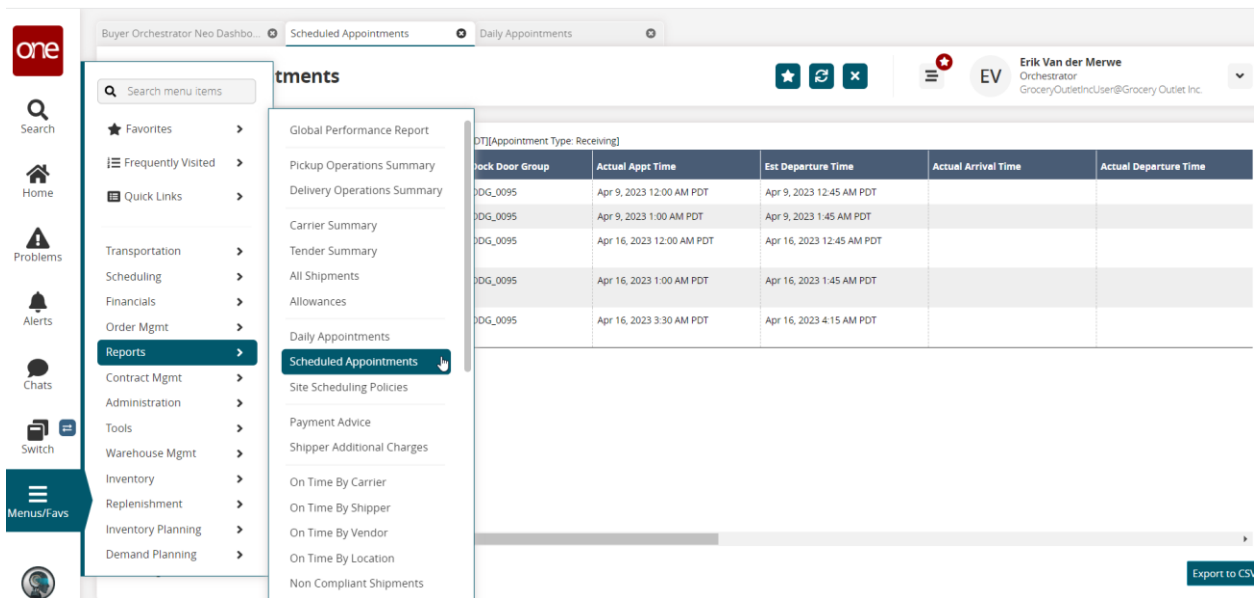
## 2.2.3 System Steps

Grocery Outlet users can access all listed appointments via the **Scheduled Appointments report**, which allow users to retrieve all appointments matching a predefined set of parameters.

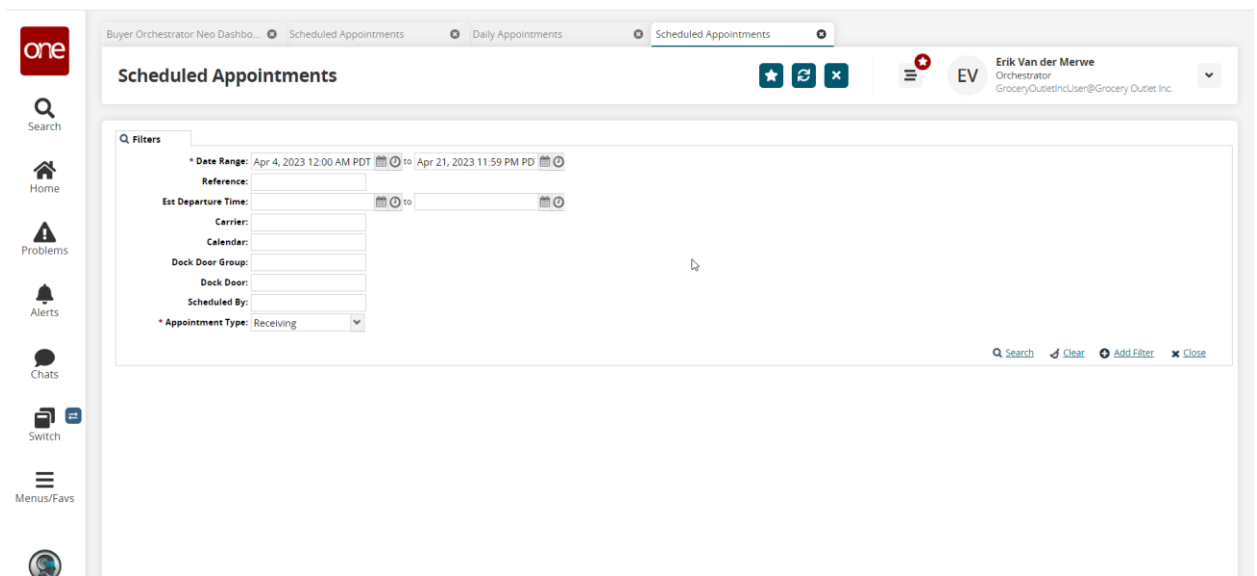
### Step 3: Viewing Scheduled Appointment Report

A User can view Scheduled Appointment report for all listed appointments on daily basis or for a particular time period.

1. Login to the One Network system and use the NEO UI.
2. Navigate **Menu → Reports -> Scheduled Appointments**.



3.A scheduled Appointments search screen appears.



4.A user can give any set of parameters for the appointments view fulfilling those criteria

5.In the above example Date ranges and Appointment type is given.

Buyer Orchestrator Neo Dashbo... Scheduled Appointments Daily Appointments Scheduled Appointments

Scheduled Appointments

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Orchestrator  
GroceryOutletIncUser@Grocery Outlet Inc.

Q Filters (edit): [Date Range: Apr 4, 2023 12:00 AM PDT - Apr 21, 2023 11:59 PM PDT][Appointment Type: Receiving]

Reference	Carrier	Calendar	Dock Door Group	Actual Appt Time	Est Departure Time	Actual Arrival Time	Actual Departure Time
S230990	MARKET EXPRESS	0095	DDG_0095	Apr 9, 2023 12:00 AM PDT	Apr 9, 2023 12:45 AM PDT		
S231229		0095	DDG_0095	Apr 9, 2023 1:00 AM PDT	Apr 9, 2023 1:45 AM PDT		
DL100000307_TEST		0095	DDG_0095	Apr 16, 2023 12:00 AM PDT	Apr 16, 2023 12:45 AM PDT		
DL100000307_TEST		0095	DDG_0095	Apr 16, 2023 1:00 AM PDT	Apr 16, 2023 1:45 AM PDT		
DL100000316	MARKET EXPRESS	0095	DDG_0095	Apr 16, 2023 3:30 AM PDT	Apr 16, 2023 4:15 AM PDT		

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Export to CSV

6. This report can also be exported to csv file.

#### Step 4: Viewing Daily Appointment Report

A User can view Daily Appointment report to see sequence of appointments per day at a dock door group level.

1. Login to the One Network system and use the NEO UI.
2. Navigate **Menu** → **Reports** → **Daily Appointments**.

Buyer Orchestrator Neo Dashbo... Scheduled Appointments Daily Appointments Scheduled Appointments

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Search menu items

- ★ Favorites
- 🏠 Frequently Visited
- 🔗 Quick Links
- 🚚 Transportation
- 📅 Scheduling
- 💰 Financials
- 📦 Order Mgmt
- 📊 Reports**
- 📄 Contract Mgmt
- ⚙️ Administration
- 📁 Tools
- 🏢 Warehouse Mgmt
- 📦 Inventory
- 🔄 Replenishment
- 📅 Inventory Planning
- 📈 Demand Planning

- Global Performance Report
- Pickup Operations Summary
- Delivery Operations Summary
- Carrier Summary
- Tender Summary
- All Shipments
- Allowances
- Daily Appointments**
- Scheduled Appointments
- Site Scheduling Policies
- Payment Advice
- Shipper Additional Charges
- On Time By Carrier
- On Time By Shipper
- On Time By Vendor
- On Time By Location
- Non Compliant Shipments

Total PLTS: 1,601 Case

Total WT: 0 POUNDS

Total PCS: 0 PCS \* required

Partner	Master Ref./Reference#	Order#	Reservation Id	Schedule Type	Equipment No	F/T	PCS#/WT
	DL100000307_TEST / ONE#5-7636887	100000307_TEST	850508754	LIVE		Prepaid	500.0/
	DL100000307_TEST / ONE#5-7636898	100000307_TEST	850508755	LIVE		Prepaid	100.0/
	DL100000316 / ONE#5-7636893	100000316	850508759	LIVE		Collect	1001.0/

Subtotal PCS #1: 1,601 Case

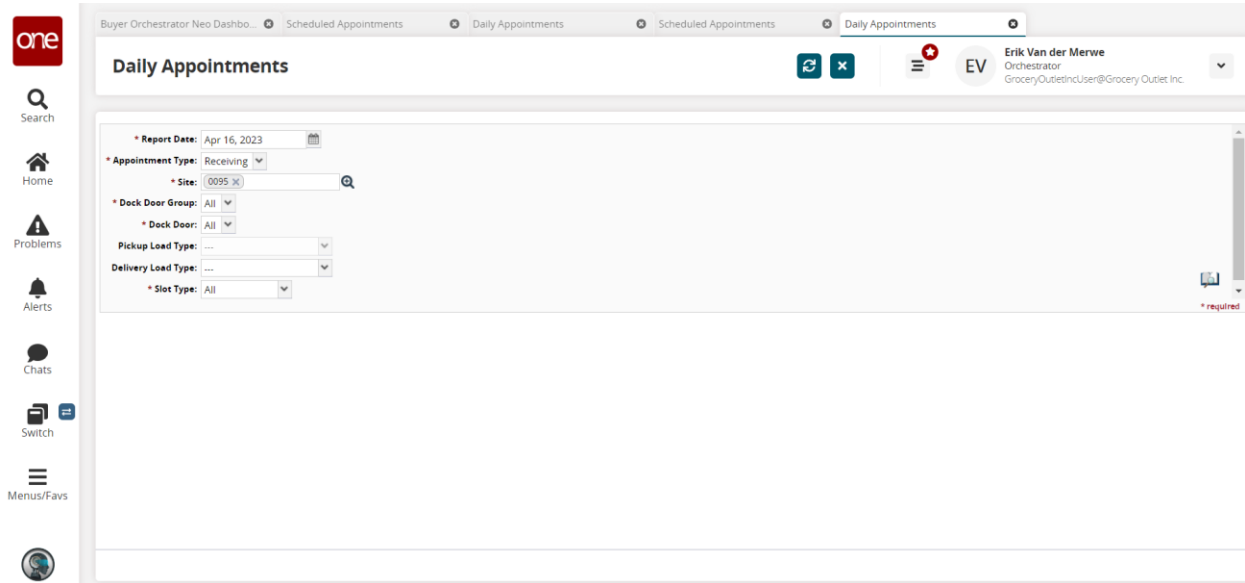
Subtotal WT: 0 POUNDS

Subtotal PCS #2: 0 PCS

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Export to PDF Export to Excel

1. Daily Appointments Search screen appears.
2. A user can give any set of parameters for the appointments view fulfilling those criteria
3. In the above example Report data , appointment type and site details are given.



4. Daily Appointment report based on given filters appears.
5. A user can also export this report to excel or pdf for convenience.

