

Grocery Outlet Inc

One Network Appointment Scheduler

User Guide: Scheduling Policies

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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 Scheduling Policies

2.1 Scheduling Policies

2.1.1 Context

ACTIVITY PURPOSE	This activity enables system users to enable Scheduling Policies
ACTIVITY INITIATORS	
ACTIVITY PREREQUISITES	Organization , Sites , Dock Door Groups (DDG) and Dock Doors (DD) should be configured
ACTIVITY PERFORMER(S)	Transportation Manager role users
OTHER PARTIES INVOLVED	
ADDITIONAL INFORMATION	
ACTIVITY OUTCOME	Scheduling policies would be set per site per DDG and per DD.

2.1.2 Process Flow

- N/A
-

2.1.3 System Steps

2.1.3.1 Setting the Policy at Organization Level

Step 1 : A user can set the policies for your organization, sites, dock door groups, and dock doors.

At the organization level, you can define templates, load time settings, and dock door settings for dock door groups and dock doors. In addition, you can define standalone appointment creation, primary search permissions for carriers and trading partners, and planning policies.

To set organization policies:

1. GO to **Menu -> Scheduling -> Scheduling Policies**.
2. The Scheduling Policies tab appears showing a hierarchy of the organization.

The screenshot shows the Neo Dashboard interface. On the left, a navigation menu is open, highlighting 'Scheduling' and 'Scheduling Policies'. The main dashboard area displays several summary cards: 'Alert Summary' (No results), 'Problem Summary' (No Carriers Found: 24, Predicted Deliveries: 5, Zero Cost: 4), and 'Late Delivery Scorecard' (No results). A search filter dialog box is overlaid on the dashboard, showing a search bar and a list of filter options, with 'Scheduling Policies' selected.

3. To search for a specific site, dock door, or dock door group, click the Filters link. The search filters dialog box appears.
4. In the **Site, Dock Door Group, or Dock Door** boxes, type an option.
5. Click the Search link.

The screenshot shows the 'Scheduling Policies' configuration page. The 'Basic Policies' tab is selected, displaying a list of settings for 'Grocery Outlet Inc.' The settings include: 'Allow Trading partners to change Target Appointment Date' (checked), 'Allow Carriers to change Appointment Code' (checked), 'Allow Partners to create Standalone Appointments' (unchecked), 'Allow Partners to Update Appointment Beyond Date Tolerance' (unchecked), 'Require Phone for Appointment Scheduling/Rescheduling' (unchecked), 'Restrict Load Change' (unchecked), 'Allow Next Candidates' (checked), 'Resize Appointment on Shipment Change' (checked), 'Cancel On Validation Failure' (unchecked), 'Dock Door LookUp Method' (Based on Commodity), 'Force Commodity Code for Partners' (dropdown), 'Force Partner Profile for Partners' (dropdown), 'Force Appointment Code' (dropdown), 'Force Load type for Partners' (dropdown), 'Require Reason Code for Shipment Date Change' (dropdown), 'Require Reason Code for Appointment Date Change' (Delivery), 'Skip For System Provided Candidates Policy' (unchecked), 'Always use Scheduling Codes from Partner Profile' (unchecked), 'Allow Notes Updates' (checked), and 'Allow Partners To Update Notes' (checked). A 'Save' button is visible at the bottom right.

6. Select the organization level in the hierarchy.
7. The organization settings appear. By default, the Basic Policies setting is selected.

1. Basic Policies

As required, select or clear the check box for

- **Allow Trading partners to change Target Appointment Date** :When selected, this policy allows all trading partners to change target appointment dates for this organization.
- **Allow Carriers to change Appointment Code** :When selected, this policy allows all carriers to change target appointment dates for this organization.
- **Allow Partners to create Standalone Appointments** :When selected, this policy allows all carriers and all partners to create standalone appointments for this organization.
- **Allow Next Candidates** :When selected, this policy allows next appointment candidates to be suggested.
- **Resize Appointment on Shipment Change** :When selected, this policy allows the appointment duration to be updated when shipment quantities are changed. The change in duration will depend on the Load Time settings that are applicable. Similarly, if a shipment is removed from a movement, then the appointment associated with the shipment(s) still in the movement is updated. When this policy is not selected, an appointment will be automatically cancelled if any shipment associated with the appointment is deleted or cancelled. Appointments will also be cancelled if all shipments under a movement have been consolidated to another movement, if the pickup site for a pickup appointment has changed, or if the delivery site for a delivery appointment has changed.
- **Dock Door Look Up Method** list, select a *dock door look up method* option for this organization:
- **First Dock Door Group**: Shipments will pick the first Dock Door Group available.
- **Based on Commodity Code**: The Dock Door Group is selected based on the Commodity Code referenced on the shipment and the Dock Door Group.

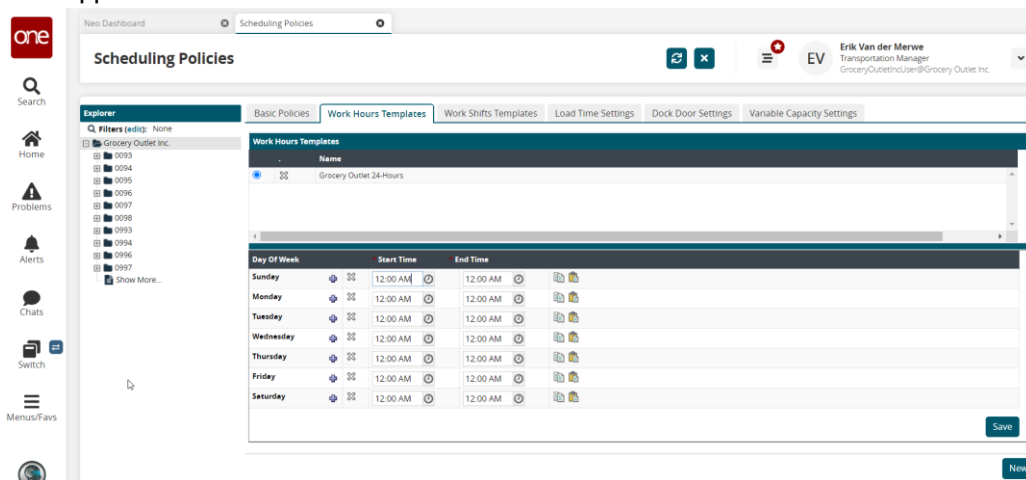
2. Click Save.

3. A success message appears in an information box at the top of the Basic Policies form.

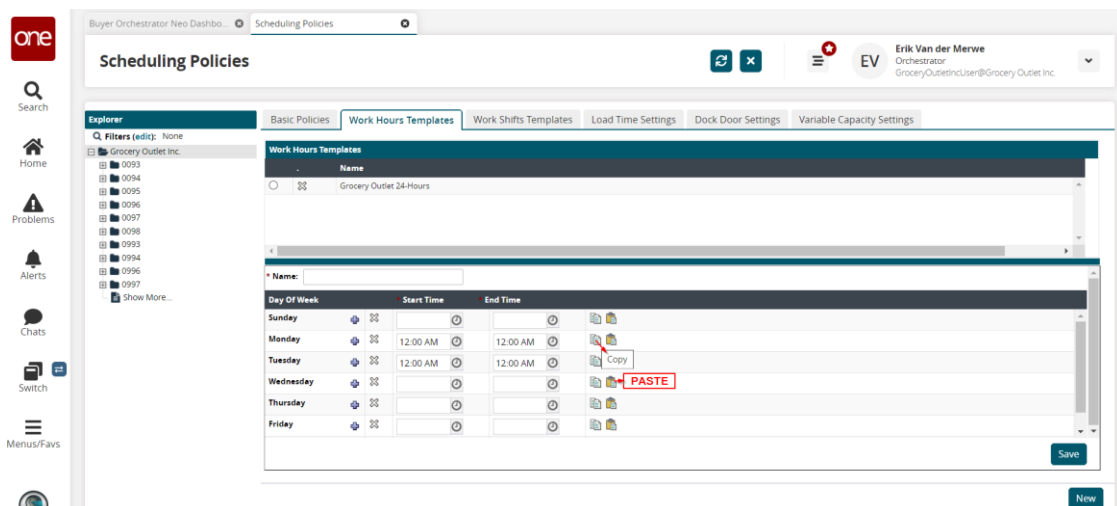
2. Work Hours Templates

This policy defines templates for shipping and receiving hours, which can be referenced when defining work hours for an individual dock door.

1. Click the Work Hours Templates tab. The Work Hours Templates form appears. Existing work hours templates will appear in a list.



2. To add a new work hours template, click **New**. The work hours template form appears.
3. In the **Name box**, type a *name* for the template.
4. For each date pattern under the Day of Week, click the Start Time button to display the Time list, and then click a time from the list.
5. Repeat the previous step for End Time.
6. To add a date pattern to a day of the week, click the Add Pattern button. Another date pattern row appears for the selected day of the week.



Tip

You can quickly copy and paste a date pattern to another row using the Copy and Paste buttons on the right side of each row.

7. Repeat the previous steps to select **Start Time** and **End Time** for the new date pattern.
8. To delete a date pattern, click the **Delete Row** button.
9. Click **Save**.
10. The new shipping time schedule name appears in the Work Hours Templates list.

3. Work Shifts Templates

This policy defines templates for work shifts, which can be referenced when defining shifts for a dock door group. The number of shifts per day is unlimited. Shifts may span midnight but may not overlap. Shifts may be disjointed. Capacity and priority may be allocated among multiple shifts date patterns per day. An example of shift usage is to balance workload within available capacity.

1. Click the **Work Shifts Templates** tab. The Work Shifts Templates form appears.

The screenshot shows the 'Scheduling Policies' interface with the 'Work Shifts Templates' tab selected. The interface includes a sidebar with navigation options like Search, Home, Problems, Alerts, Chats, and Switch. The main content area displays a table of work shift templates. The table has the following columns: Day of Week, Start Day, Start Time, End Day, End Time, Percent Of Capacity, Priority, and Capacity Variations. The data rows show a 24-hour shift starting at 12:00 AM on each day of the week, with a capacity of 100% and a priority of 1. A 'Save' button is located at the bottom right of the table.

Day of Week	Start Day	Start Time	End Day	End Time	Percent Of Capacity	Priority	Capacity Variations
Sunday	Today	12:00 AM	Tomorrow	12:00 AM	100	1	...
Monday	Today	12:00 AM	Tomorrow	12:00 AM	100	1	...
Tuesday	Today	12:00 AM	Tomorrow	12:00 AM	100	1	...
Wednesday	Today	12:00 AM	Tomorrow	12:00 AM	100	1	...
Thursday	Today	12:00 AM	Tomorrow	12:00 AM	100	1	...
Friday	Today	12:00 AM	Tomorrow	12:00 AM	100	1	...
Saturday	Today	12:00 AM	Tomorrow	12:00 AM	100	1	...

2. To add a new work shift template, click **New**. The work shift template form appears.
3. In the **Name** box, type a name for this work schedule.
4. For each date pattern under the **Day of Week**, in the **Start Day** list, click **Today** or **Yesterday** to specify whether the work shift begins today or yesterday.
5. Click the **Start Time** button to display the time list, and then click a time from the list.
6. In the **End Day** list, click **Today** or **Tomorrow** to specify whether the work shift ends today or tomorrow.
7. Click the **End Time** button to display the time list, and then click a time from the list.
8. In the **Capacity** box, type a capacity value in per cent for the date pattern. For days with only one shift (date pattern), capacity is assumed to be 100 per cent.
9. In the **Priority** box, type a priority value. For example, a day with three shifts (date patterns) will have priorities of 1, 2, and 3. When the Appointment Scheduling engine searches for time slots, slots during the shift assigned priority 1 will be selected over slots during the shift with priorities 2 and 3. Similarly, slots with priority 2 will be selected over slots with priority 3.
10. To add a date pattern to a day of the week, click the Add Pattern button. Another date pattern row appears for the selected day of the week.
11. Repeat the previous steps to select **Start Day**, **Start Time**, **End Day**, **End Time**, **Capacity**, and **Priority** for the new date pattern.
12. To delete a date pattern, click the **Delete Row** button.
13. Click **Save**.

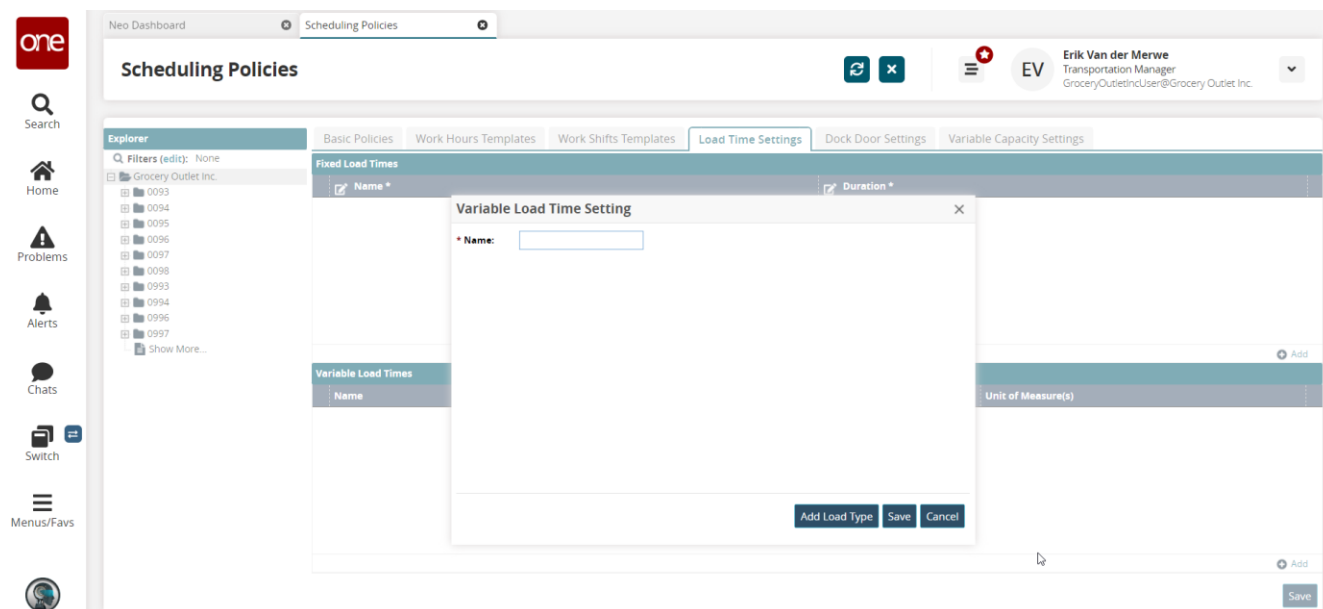
The new shipping time schedule name appears in the **Work Shifts Templates** list.

Tip

You can quickly copy and paste a date pattern to another row using the Copy and Paste buttons on the right side of each row.

3. Load Time Settings

This policy defines the load time settings, which are referenced when defining rules for appointment time length calculation for a dock door group.

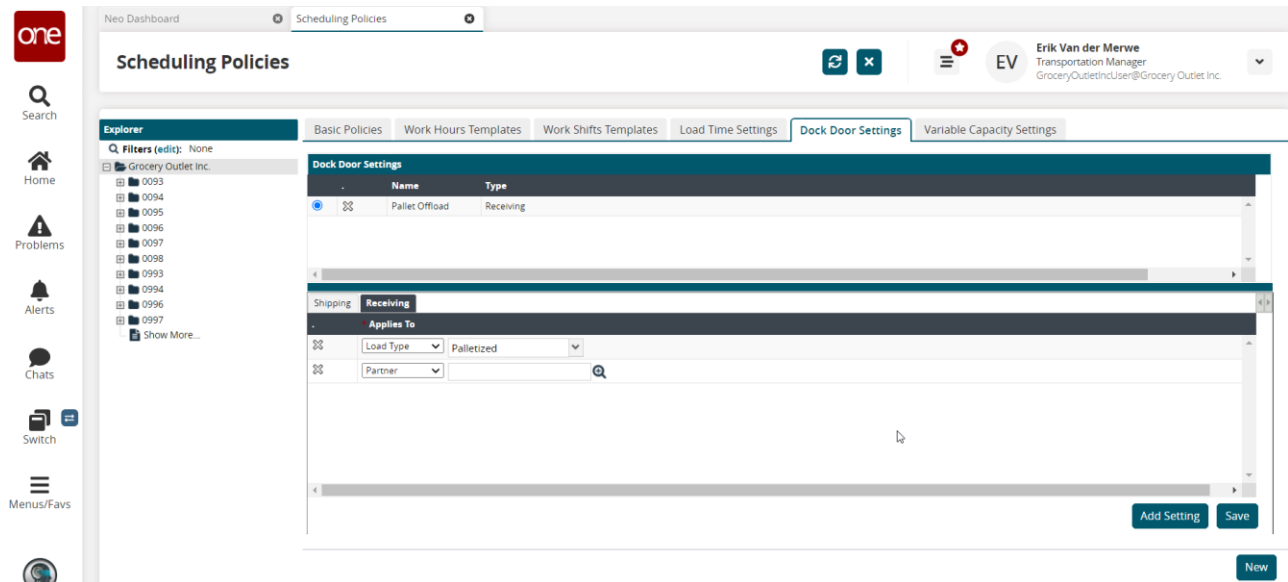


1. Click the **Load Time Settings** tab. The Load Time Settings table appears.
2. To add a new fixed load time setting, click the **Add** button in the Fixed Load Times table.
3. A row for adding a fixed load time setting appears in the table.
4. In the **Name box**, type a name for the fixed load time setting.
5. Click inside the **Duration cell**, and type values for Days, Hours, and Minutes.
6. Click **Save**. The new fixed load time setting appears in the Load Time Settings table.
7. To add a new **variable load time setting**, click the **Add button** in the Variable Load Times section. The Variable Load Time Setting dialog box for adding a variable load time setting appears.
8. In the **Name box**, type a name for the variable load time setting.
9. Click the **Add Load Type** button. The Variable Load Time Setting form appears.
10. In the Load Type list, click a **load type** option.
11. To add a variable load time setting, click the **Add** button. A row for adding a variable load time setting appears in the table.
12. In the **Quantity box**, type a *quantity* for this variable load type setting.
13. In the **Unit of Measure list**, click a *unit of measure* option.
14. Click inside the **Duration cell**, and type values for Days and Hours.
15. In the Additional Time per Distinct Item Duration boxes, type a duration in Days, Hours, and Minutes.
16. To add another variable load time setting, click Add Load Type, and then repeat the previous steps. Click Save.
17. The new variable load time setting appears in the **Variable Load Times table**.

4. Dock Door Settings

This policy defines the dock door settings, which are referenced when defining rules for individual dock doors when matching shipment attributes for shipping, receiving, or both. Shipment attributes can be a combination of one or more load types, appointment codes, carrier or vendor partners, and/ or vendor profile.

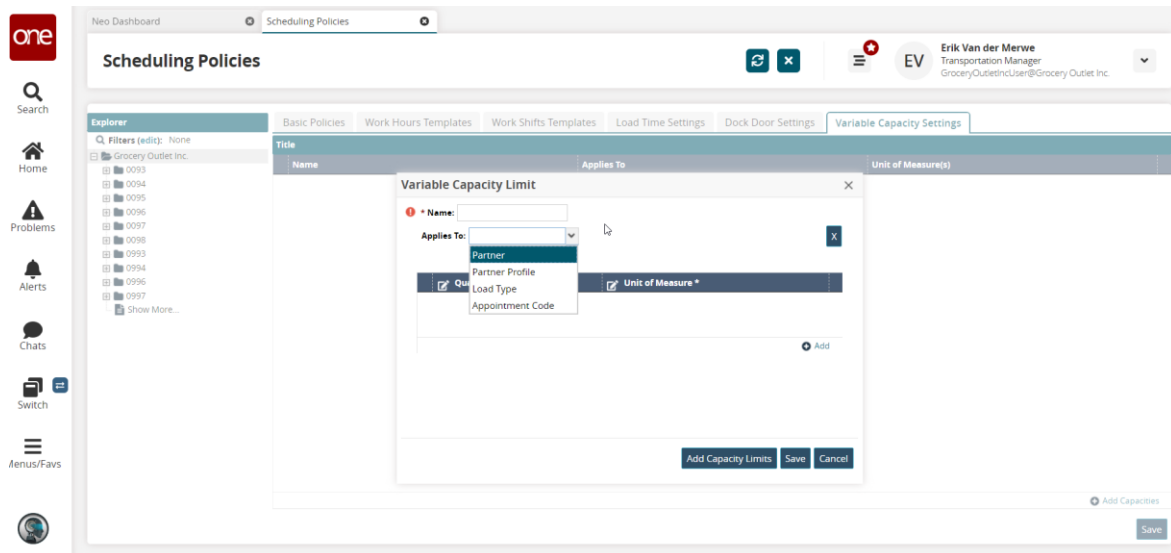
1. Click the Dock Door Settings tab. The Dock Door Settings tab appears.



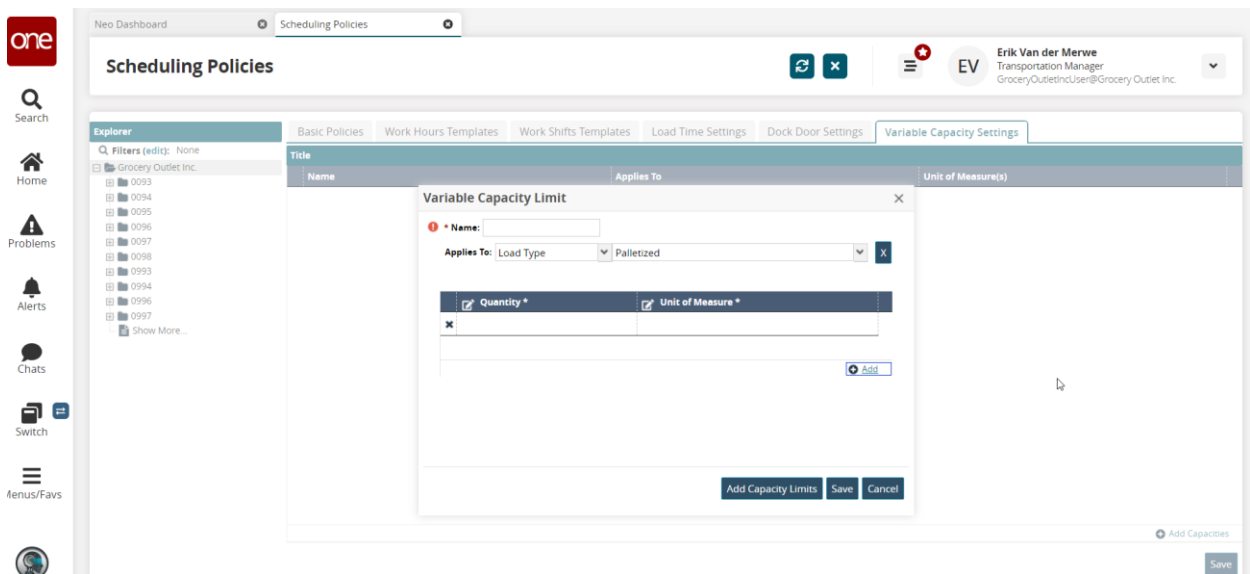
2. To add a new dock door setting, click the **New** button. The **Receiving** form appears.
3. In the **Name** box, type a name for the dock door setting.
4. To add a new setting, click the **Add Setting** button. The **Receiving** form shows a new setting row.
5. In the **Applies To** list, click an option to which the dock door setting applies.
6. For **Applies To: Partner**, select a partner.
7. For **Applies To: Partner Profile**, select a partner profile.
8. For **Applies To: Org Code**, select an organization code.
9. As required, repeat the previous steps for each additional dock door setting for receiving.
10. To add a dock door setting for shipping, click the **Shipping** tab, and then click **Add Setting** button. The **Shipping** form appears.
11. As required, repeat steps the previous steps for each dock door setting for shipping.
12. Click **Save**. The new dock door setting appears in the **Dock Door Settings** table.

5. Variable Capacity Settings

Variable capacity settings are used in the work shift templates tab to manage the capacity that can be received during a shift.



1. This tab forms the dropdown the list in the capacity dropdown in the work shift template tab.
2. Capacities can be added by clicking on the **Add Capacities** button.
3. Once the **Add Capacities** has been clicked, add a Name.



4. Now click on **Add Capacity Limits**, choose the relevant Applies To, populate the Quantity and Unit of Measure. Click on Save.

2.1.3.2 Setting the Policy at Site Level

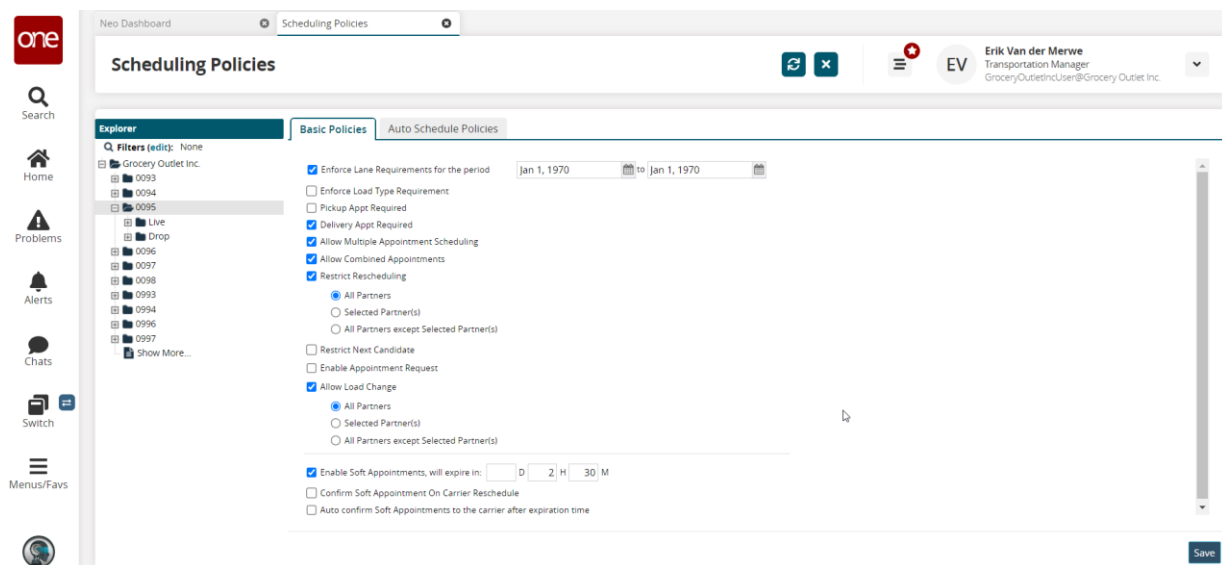
Step 2 : A user can set the Policy at Site Level

At the site level, you can specify the shipment combination rule, whether to drive the appointment time calculation based on the shipment with the heaviest load or earliest target delivery date. Other site policies include site consolidation, shipping hours, receiving hours, drop appointments, and site holidays. Setting site policies is typically performed by transportation manager roles.

To set site policies:

1. Select the site level in the hierarchy.

The site settings appear. By default, the Basic Policies setting is selected.



As required, select or clear the check box

- **Enforce Lane Requirements for the period** :When selected, this policy enforces lane requirements during the specified date range for this site.
- **Multiple Appointment Scheduling** : When selected it allows the site to have multiple appointments scheduled per shipment.

3. Click Save.

4. A success message appears in an information box at the top of the Basic Policies form. You can define policies for auto schedules at a site. These policies are used to schedule appointments automatically as part of shipment creation or confirmation. **Auto scheduling**, which can be enabled for Pickup, Delivery, or Both, is supported for the following shipment actions:

- Accept Tender
- Save to Confirm
- Auto Tender Accept
- Confirm NonControlled

2. Click the Auto Schedule Policies tab.

1. Auto-scheduling policies appear.

The screenshot shows the 'Scheduling Policies' interface in the Neo Dashboard. The 'Auto Schedule Policies' tab is selected. The configuration includes:

- Enable Auto Scheduling: Delivery
- Scheduling Type: Live
- Auto Schedule Event Type: Before Shipment Confirmation
- Appointment Type: Soft
- Auto Schedule Freight Type: Both

Under 'Included Partners', there is a table with the following data:

Included Partners	Included Partner Profiles	Freight Type Override
All	All	

The 'Excluded Partners' section is currently empty, showing 'No Data'. A 'Save' button is located at the bottom right of the main content area.

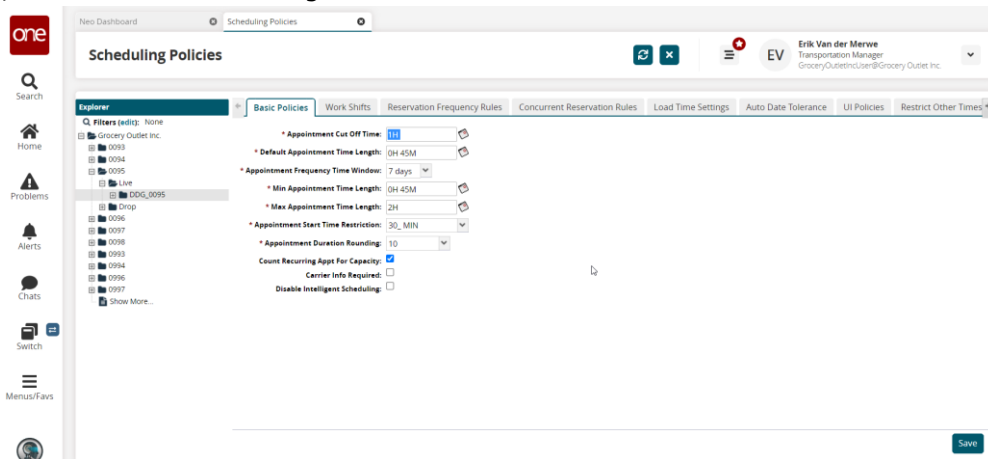
2. For **Enable Auto Scheduling**, select Pickup, Delivery, or Both.
3. For Scheduling Type, select Live, Drop, or Both.
4. For Auto Schedule Event Type, select On Shipment Confirmation or Before Shipment Confirmation.
5. To include a **partner** for the site's auto-scheduling policies, click the Add link under the Included Partners heading.
6. A line is added under the Partner column. Use the picker tool to select a partner.
7. To save all changes, click the Save button at the bottom of the screen.
8. A **success** message appears.

2.1.3.3 Setting Dock Door Group Policies

Dock door group policies allow organizations to set different operating rules by logical warehouse that share the same physical location address. Setting dock door group policies is typically performed by **Transportation Manager roles**.

Basic Policy Settings

1. Select the dock door group level in the hierarchy. The dock door group settings appear.
2. By default, the Basic Policies setting is selected.



3. Select a duration for **Appointment Cut Off Time**. Type values for Days, Hours, and Minutes, and then click OK.
4. Appointments can be made online up to 8.5 hours before the target delivery date and time.
5. Select a duration for **Default Appointment Time Length**. Type values for Days, Hours, and Minutes, and then click OK. This is the default length of the appointment if the load time setting does not apply.
6. In the **Appointment Frequency Time Window** list, click an option for the minimum number of days between appointments.
7. Select a duration for **Min Appointment Time Length**. Type values for Days, Hours, and Minutes, and then click OK. The length of appointments cannot be less than the specified minimum time regardless of calculated time.
8. Select a duration for **Max Appointment Time Length**. Type values for Days, Hours and Minutes, and then click OK.
9. The length of appointments cannot exceed the specified maximum time regardless calculated time.
10. In the **Appointment Start Time Restriction** list, click an option for the start time. Appointments may only start on the hour, every 15 minutes, or every 30 minutes, or they may have no restriction.
11. In the **Appointment Duration Rounding** list, click an option for rounding duration. Rounding options include no rounding or 5, 10, or 15 minutes.
12. To restrict appointment candidates to just those available on the due date, select the Restrict Candidate Search When Available check box.
13. To count recurring appointments for capacity, select the Count Recurring Appt for Capacity check box.
14. To require that partners enter carrier name and contact number on the appointment, select the Carrier Info Required check box.
15. Click Save.
16. A success message appears above the Basic Policies form.

1. Work Shifts

Multiple shifts can be defined for a single dock door group with overlapping start and end effective dates. After work shifts are defined, appointments can only be scheduled within the defined time windows that are covered both by the shift and the shipping or receiving hours. Work shifts have the following characteristics:

- Work shifts are setup for a week.
- Weekly work shift settings have effective time periods.
- Work shifts are associated to a specific day of the week and can span into other days.
- Work shifts may exceed the shipping or receiving hours.

A shipment or order is considered within tolerance as long as it is shipped or received during a shift which is considered to be part of a day that is within tolerance. For example, calendar A is set up to have zerotime tolerance. Shipment 123 has a target delivery date of 8/2/04 (Monday). Calendar A has a shift defined from 8:00 PM Monday to 1:00 AM on Tuesday that is associated to Monday. Shipment 123 can be scheduled as late as 1:00 AM on Tuesday and be considered in tolerance. However, if the shipment is scheduled for 1:01 AM on Tuesday, it will be considered out of tolerance.

An appointment will count against the capacity of the day that contains the shift during which the shipment or delivery occurred. For example, calendar A has a shift from 11:00 PM on Monday to 8:00 AM on Tuesday. This shift is associated with Tuesday. All items shipped or received before 11:00 PM on Monday will count towards Monday's capacity. All items shipped or received at or after 11:00 PM on Monday will count towards Tuesday's capacity. If an appointment spans a shift change, the work shift rules apply to the shift in which the appointment begins.

Work Shifts tab.

The Work Shifts form appear

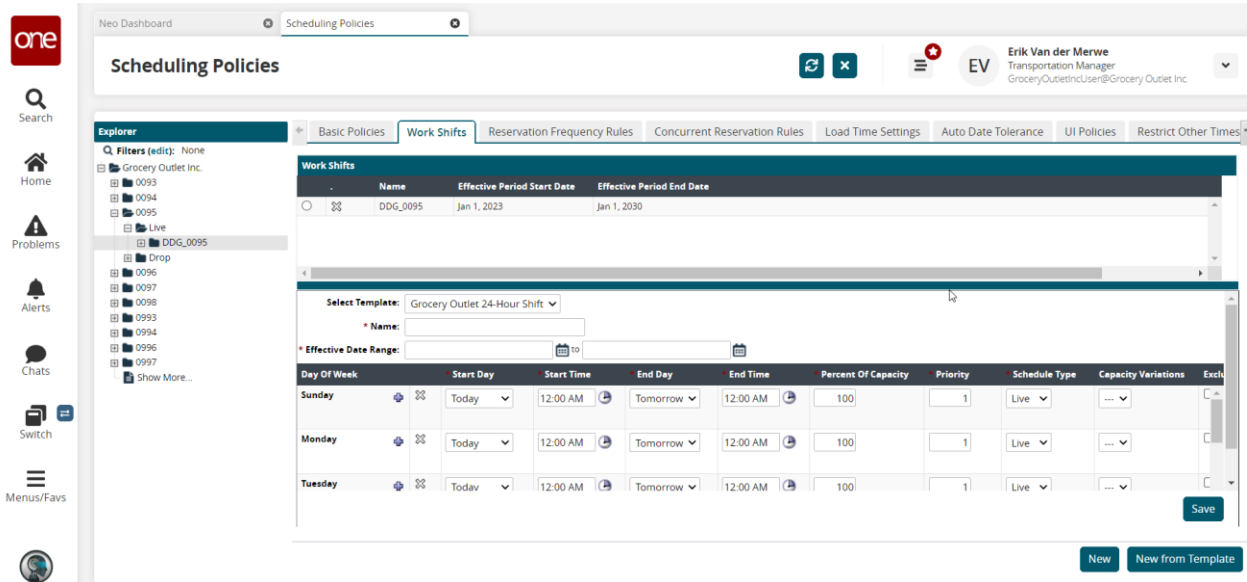
The screenshot displays the 'Scheduling Policies' interface. The 'Work Shifts' tab is active, showing a table of defined work shifts. The table has columns for Name, Effective Period Start Date, and Effective Period End Date. Below the table, there is a detailed view for a specific shift with columns for Day Of Week, Start Day, Start Time, End Day, End Time, Percent Of Capacity, Priority, Schedule Type, and Capacity Variations. The table shows shifts for Sunday, Monday, and Tuesday, all starting at 12:00 AM and ending at 12:00 AM, with 100% capacity and priority 1. At the bottom right, there are buttons for 'Save As Template', 'Save', 'New', and 'New from Template'.

Add a work shift using one of the following options:

- To add a new work shift, click **New**.
- To add a new work shift based on an existing template, click **New from Template**, click the

Select from Template list, and then select a template option. The template will populate the schedule.

The work shifts form appears.



1. In the Name box, type a name for this work schedule.
2. Select start and end dates for the **Date Range**.
3. For each **date pattern** under the Day of Week, in the Start Day list, click Today or Yesterday to specify whether the work shift begins today or yesterday.
4. Click the **Start Time button** to display the time list, and then click a time from the list.
5. In the **End Day list**, click Today or Tomorrow to specify whether the work shift ends today or tomorrow.
6. Click the **End Time button** to display the time list, and then click a time from the list.
7. In the **Capacity box**, type a capacity value in per cent for the date pattern.
8. You can allocate a **percentage of the available daily shipping or receiving capacity** to a shift (date pattern) along with a sequence (priority) number. Shipment planning considers these capacity percentages for load distribution. For days with only one shift, capacity is assumed to be 100 per cent.
9. The Priority box, type a priority value. For example, a day with three shifts (date patterns) will have priorities of 1, 2, and 3.
10. The priority number determines the order in which the shifts will be filled with appointments when applying scheduling sequences. When the Appointment Scheduling engine searches for time slots, slots during the shift assigned priority 1 will be selected over slots during the shift with priorities 2 and 3. Similarly, slots with priority 2 will be selected over slots with priority 3
11. To add a date pattern to a day of the week, click the Add Pattern button.
12. Another date pattern row appears for the selected day of the week.

The screenshot displays the 'Scheduling Policies' interface in the Neo Dashboard. The 'Work Shifts' tab is active, showing a list of work shifts and a detailed configuration form. The configuration form includes a template selector, name input, date range picker, and a table for defining the schedule by day of week. The table columns are: Day Of Week, Start Day, Start Time, End Day, End Time, Percent Of Capacity, Priority, Schedule Type, and Capacity Variations. The table shows entries for Sunday, Monday, and Tuesday.

Day Of Week	Start Day	Start Time	End Day	End Time	Percent Of Capacity	Priority	Schedule Type	Capacity Variations	Excl
Sunday	Today	12:00 AM	Tomorrow	12:00 AM	100	1	Live	...	
Monday	Today	12:00 AM	Tomorrow	12:00 AM	100	1	Live	...	
Tuesday	Today	12:00 AM	Tomorrow	12:00 AM	100	1	Live	...	

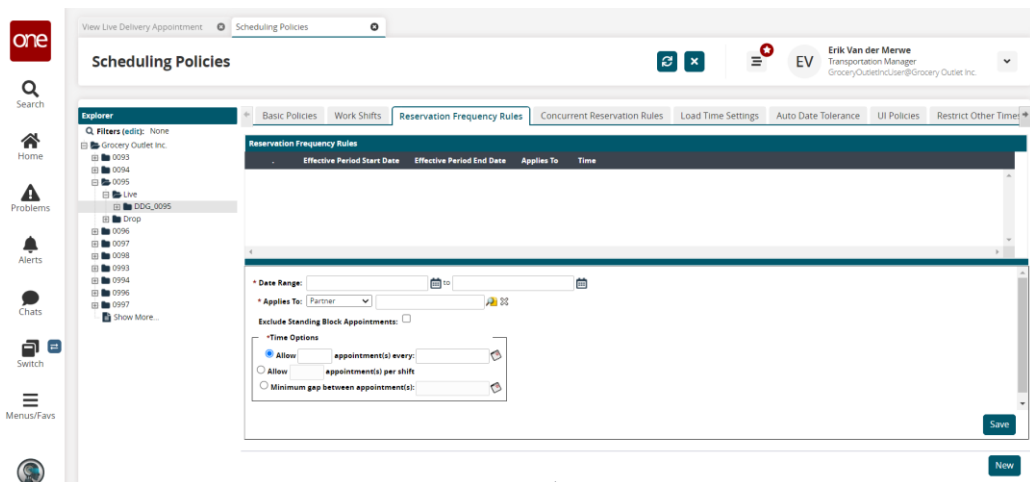
13. Repeat the previous steps to select Start Day, Start Time, End Day, End Time, Capacity, and Priority for the new date pattern.
14. To delete a date pattern, click the Delete Row button.
15. Click Save.
16. The new work shift schedule name appears in the Work Shifts list.

3. Reservation Frequency rules

The **Reservation Frequency Rule** prevents a single partner or partner profile from booking all available capacity during a specified date range. It also allows for limiting the number of shipments of a particular load type or appointment code during a specified date range.

The appointment frequency limiting rule can be specified for shipping, receiving, or both, and it has an effective date range.

1. Click the Reservation Frequency Rules tab. The **Reservation Frequency Rules** screen appears.



Click **New**. A new reservation frequency rule form appears.

1. Select a **Date Range**.
2. In the **Applies To** list, click an option to which the dock door setting applies.
3. For **Applies To: Partner**, select a partner.
4. For **Applies To: Partner Profile**, select a partner profile.
5. For **Applies To: Org Code**, select an organization code.
6. As required, repeat the previous steps for each additional dock door setting for receiving.
7. In the **Time Options** section, select a time option for appointments.

- Allow n appointment(s) every <duration>: Specify number of appointments and the length of time using the Duration button.
- Allow n appointment(s) per shift: Specify number of appointments per shift.
- Minimum gap between appointments: Specify minimum length of time between appointments using the Duration button

Only one rule can be in effect at any time.

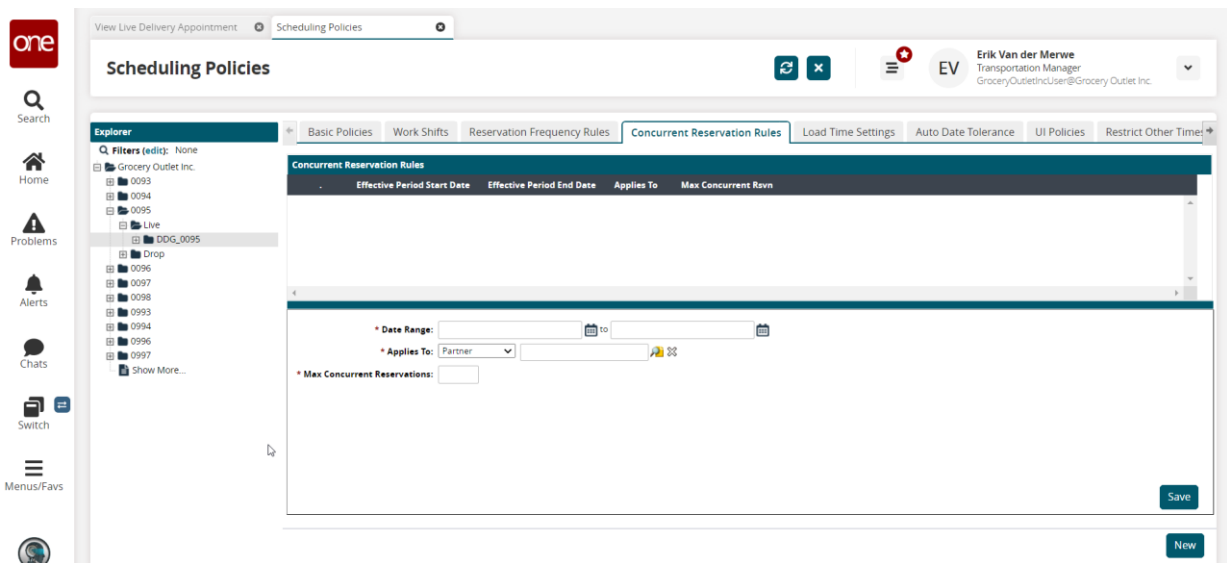
8. Click **Save**.

The new reservation frequency rule appears in the Reservation Frequency Rules list.

4. Concurrent Reservation Rules

The Concurrent Reservation Rules defines the number of concurrent appointments for a dock door group during a specified date range. This concurrency rule can be configured in terms of Load Types.

1. Click the **Concurrent Reservation Rules** tab.
2. The Concurrent Reservation Rules form appears.

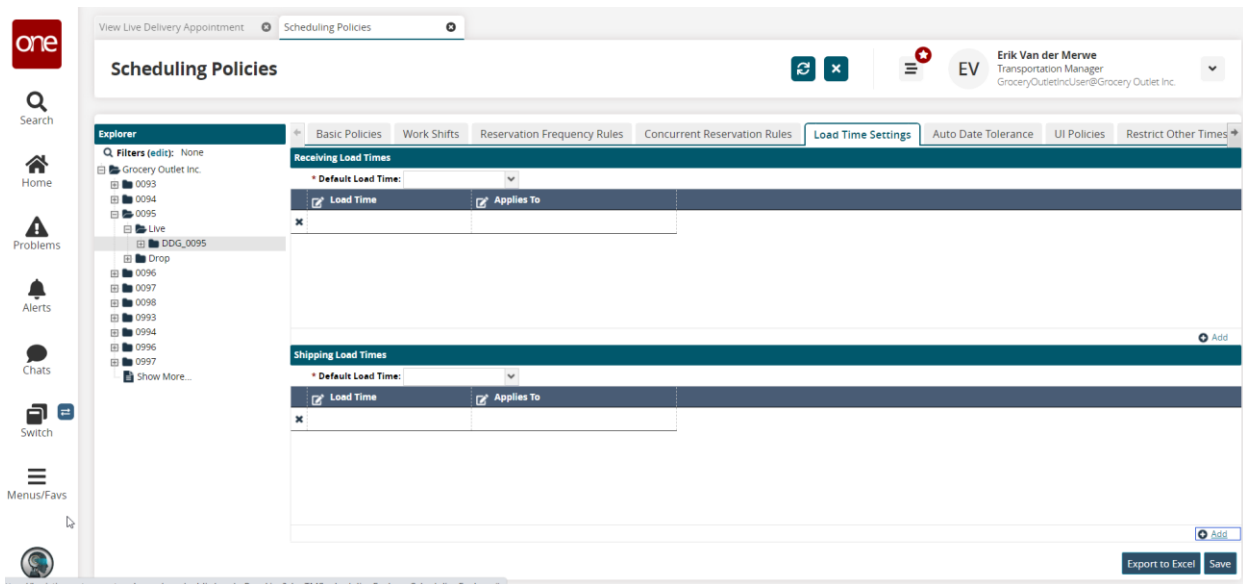


3. To add a new concurrent reservation rule, click **New**.
The concurrent reservation rules form appears.
4. Select **Date Range**.
5. In the **Applies To** list, click an option to which the concurrent reservation rule applies:
 - a. **Partner**: Select a partner.
 - b. **Partner Profile**: Select a partner profile.
 - c. **Delivery Load Type**: Select a delivery load type from the **Delivery Load Type** list.
 - d. **Org Code**: Select an organization code.
6. In the **Max Concurrent Reservations** box, type the maximum number of concurrent reservations allowed for this dock door group.
7. Click **Save**. The new concurrent reservation rule appears in the **Concurrent Reservation Rules** list.

5. Load Time Settings

Load time settings specify appointment length calculations by vendor given that load characteristics vary and affect loading and unloading time. The default setting for receiving and shipping is applicable unless you specific a load time setting for the partner or partner profile.

1. Click the **Load Time Settings** tab. The **Load Time Settings** form appears, showing sections for **Receiving** and **Shipping**.
2. In the **Receiving** title bar, click the **Default Load Time** list, and then select a default load time.
3. To add a new load time setting, click **Add**.
4. A new load time row appears.



5. In the **Load Time** list, click a load time option, for example, Fixed 30 Minutes, Fixed 1 Hr 15 Min, Fixed 2 Hr, or Variable Slipsheet.
Fixed times are available only in the increments in the list. Variable appointment times are calculated by the Appointment Scheduling Engine based on load type, number of pieces, pieces UOM, and number of time units per distinct piece UOM. If the calculated time exceeds the specified maximum appointment time length, then the maximum appointment length is used.
6. In the **Applies To** list, click an option to which the load time setting applies.
To add another load time setting, repeat the previous steps for each new row.
7. In the **Shipping** title bar, click the **Default Load Time** list, and then select a default load time.
8. To define load time settings for **Shipping**, repeat the previous steps for each new row.
9. To save load time settings for both **Receiving** and **Shipping**, click **Save**.
10. The Load Time Settings form shows the setting for Receiving and Shipping.
11. To add more load time settings, repeat the previous steps.
12. **To delete a load time setting row, click the Delete Row button**

6. Auto Date Tolerance

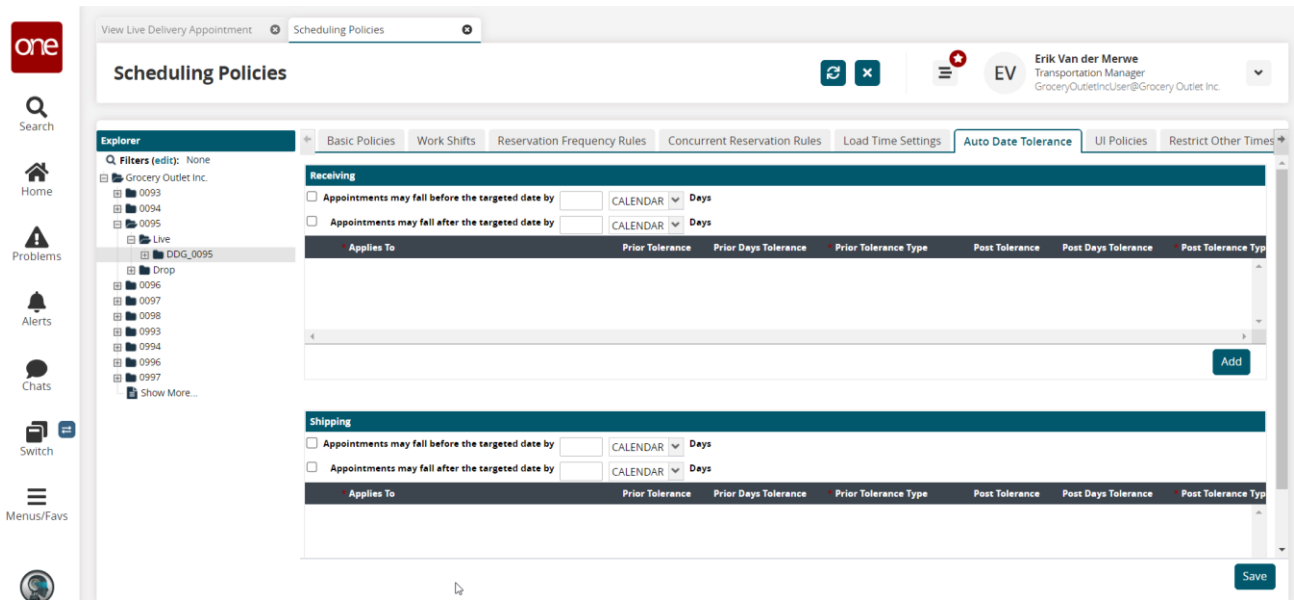
The auto date tolerance setting allows for the creation of an appointment by a partner on a date other than the target delivery date. Variance can be a different value prior to or after the target delivery date, expressed in either business days or calendar days.

Click the Auto Date Tolerance tab.

The Auto Date Tolerance form appears. The Auto Date Tolerance form has section for Receiving and Shipping.

1. In both **Receiving** and **Shipping** sections, select the check box for each auto date tolerance option that you want to define.

2. For each selected option, type a value for the number of days, click the **Day** list, and then select whether the tolerance is in **Calendar** or **Business** days.
3. To specify which partner or partner profile that the auto date tolerance option applies, click
4. the **Add** button in the **Receiving** section.
5. A new setting row appears below the **Applies To** column.



6. In the **Applies To** list, select an option to which the dock door setting applies.
7. For **Partner**, select a partner.
8. For **Partner Profile**, select a partner profile.
9. If prior tolerance is allowed for this partner or partner profile, select the **Prior Tolerance** check box.
10. For **Prior Days Tolerance**, type a value.
11. In the **Prior Tolerance Type** list, select **Business** days or **Calendar** days, or leave blank.
12. Select or specify values for **Post Tolerance**, **Post Days Tolerance**, and **Post Tolerance Type**.
13. Repeat the previous steps for the **Shipping** section.
14. Click **Save**.

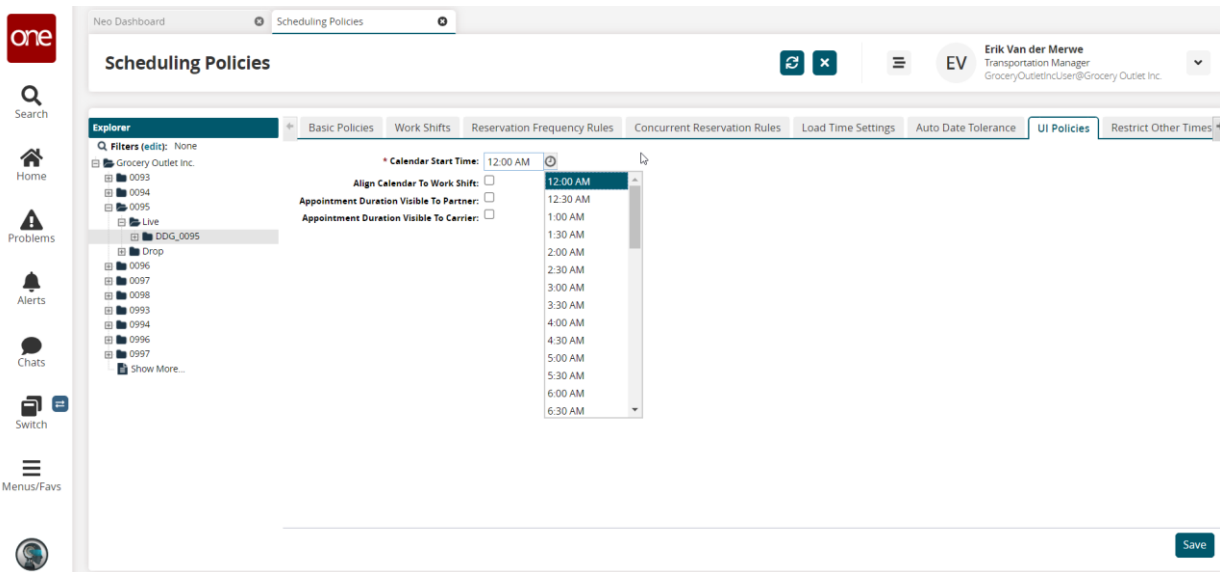
A success message appears in an information box above the form.

7. UI policies

The Calendar Start Time policy determines the start time on the calendar tile for one or more dock door groups. The Appointment Duration Visible policy specifies whether a partner or carrier can see the length of an appointment.

The calendar tile displays a time grid from start time until midnight. The Summary tab displays used and available capacity.

1. Click the **UI Policies** tab.
The UI Policies form appears.
2. Click the **Calendar Start Time** Time button to display the time list, and then click a time from the list.



3. Select the check box for each policy that you want to be valid.
4. Click **Save**.
5. **A success message appears in an information box above the form.**

8. Restrict Other Times

Partners (vendors or carriers) specified in the Restricted Partner list are not permitted to create an appointment on a different time other than the three suggested auto-generated reservations. The Other Scheduled Time option will not appear on the Appointment Times tab when scheduling appointments.

The screenshot displays the 'Scheduling Policies' interface in the Neo Dashboard. The 'Restrict Other Times' tab is active, showing a table of restricted partners. The table has a header row with 'Restricted Partner' and a sub-header 'Partner'. Below the header, there is a search bar and an 'Add' button. The table is currently empty. The left sidebar contains navigation icons for Search, Home, Problems, Alerts, Chats, Switch, and Menus/Favs. The top right corner shows the user's name 'Erik Van der Merwe' and their role 'Transportation Manager'.

1. Click the **Restrict Other Times** tab.
2. The Restrict Other Times form appears.
3. To add a partner, click the **Add** button. A new partner row appears.
4. Select a partner.
5. Click **Save**. A success message appears.

9. Restrict Next Candidates

Partners (vendors or carriers) specified in the Restrict Next Candidates list are not permitted to use the restricted partners' facility to get the next candidates apart from those provided by the scheduling engine.

1. Click the **Restrict Next Candidates** tab.
2. The Restrict Next Candidates form appears.
3. To add a partner, click the **Add** button.
4. **A new partner row appears.**
5. Select a partner.
6. Click **Save**.
7. **A success message appears.**

The screenshot displays the 'Scheduling Policies' configuration page in the Neo Dashboard. The 'Restrict Next Candidates' tab is active, showing a list of restricted partners. The list is currently empty, with an 'Add' button at the bottom right. The interface includes a sidebar with navigation options like Search, Home, Problems, Alerts, Chats, Switch, and Menus/Favs. The top navigation bar shows the user's name, 'Erik Van der Merwe', and their role, 'Transportation Manager'.

10. Restrict Target Date

To restrict the Scheduling before delivery / Pick up target date

1. Click the **Restrict Target Date** tab.
2. The Restrict Target Date form appears.
3. Check the box for restricting the scheduling before Delivery Target date.
4. Check the box for restricting the scheduling before Pick up target date.

The screenshot shows the 'Scheduling Policies' interface in the Neo Dashboard. The user is Erik Van der Merwe, a Transportation Manager at Grocery Outlet Inc. The 'Restrict Target Date' tab is active, showing two checkboxes: 'Restrict Scheduling Before the Pickup Target Date' and 'Restrict Scheduling Before the Delivery Target Date'. The Explorer panel on the left shows a tree view of policies, including 'Grocery Outlet Inc.', '0093', '0094', '0095', 'Live', 'DDG_0095', 'Drop', '0096', '0097', '0098', '0993', '0994', '0996', and '0997'. A 'Save' button is visible in the bottom right corner.

11. Scheduling Sequence

A group of dock doors with a distinct scheduling preference has a sequence number. The sequence number indicates the order in which groups of doors will be filled when scheduling appointments.

To Schedule a Sequence

1. Click the **Scheduling Sequence** tab.
2. The Scheduling Sequence form appears.

The screenshot shows the 'Scheduling Policies' interface. The 'Scheduling Sequence' tab is active. The form includes a 'Method' dropdown set to 'MINIMIZE TIME', an 'Apply Shift Priority' checkbox, and two 'Doors' lists. The left list contains doors DR001 through DR005, and the right list is empty. Action buttons 'Add', 'Add All', 'Remove', and 'Remove All' are positioned between the lists. A 'Save' button is at the bottom right. The top navigation bar shows 'Scheduling Policies' and 'Dock Door' tabs. The user profile 'Erik Van der Merwe' is visible in the top right.

3. To add a scheduling sequence, click **NEW**. The scheduling sequence form appears.
4. Click the Method list, and then select a method option: Minimize Time or Minimize Door. Selecting Minimize Time means that the Appointment Scheduling engine will schedule multiple dock doors to use the least amount of time.
5. Selecting Minimize Door means that the Appointment Scheduling engine will schedule multiple appointments for a single dock door before scheduling another door.
6. To apply shift priority to the scheduling sequence, select the Apply Shift Priority check box. When selected, the Appointment Scheduling engine considers the shift priority that was assigned on the Work Shifts form when determining scheduling sequence. Otherwise, appointments start at the beginning of the day.
7. Select the doors that are affected by the scheduling sequence. Click one or more doors in the left-hand doors list, and then click **Add**. The selected doors for this scheduling sequence move to the right-hand doors list.
 - a. If you want to select all doors in the doors list, click **Add All**. All doors move to the right-hand list.
 - b. If you want to remove doors from the right-hand list of doors, click one or more doors,
 - c. and then click Remove.
 - i. If you want to remove all doors from the right-hand list of doors, click **Remove All**. All doors move to the left-hand list.
8. Click **Save**.

9. The new sequence appears in the **Scheduling Sequence** table.
10. To add another scheduling sequence, repeat the previous steps.
11. To change the sequence of multiple schedules, select a schedule, and then click the up or **down arrows to move the schedule up or down in sequence.**

After all changes have been made, click Save Sequence.

12. Preferred Times

Preferred times build upon the concept of standing appointments. The preferred time is a soft reservation that is applied if available and applicable for a partner, partner profile, appointment code, or load type. If a shipment matches one of these attributes, the Appointment Scheduling engine will try to locate a door that has these times available. A preferred time does not represent a reserved time slot.

To set Preferred Times

1. Click the **Preferred Times** tab. The **Preferred Times** form appears.
2. Click **New**. The preferred times form appears.
3. Select a **Date Range**.
4. In the **Type** list, click a *type* option for the preferred time:
 - **Shipping:** Shipments that are going from the dock door group.
 - **Receiving:** Shipments that are coming into the dock door group.
 - **All:** Both shipping and receiving that are coming into the dock door group and shipments that are going from the dock door group.
5. In the **Applies To** list, click an option to which the dock door setting applies.

For this option	Perform this step
Partner	Select a partner.
Partner Profile	Select a partner profile.
Delivery Load Type	Select a load type from the Delivery Load Type list.
Org Code	Select an Org Code

6. In the **Start Times** table, click the **Start Times** button for the first start time to display the **time list**, and then click a time from the list.

The screenshot shows the 'Scheduling Policies' interface in the Neo Dashboard. The 'Preferred Times' tab is active, displaying a configuration form. The form includes the following fields and values:

- Date Range:** Two empty date input fields.
- Type:** A dropdown menu set to 'Receiving'.
- Applies To:** A dropdown menu set to 'Partner'.
- Start Times:** A table with one entry:

Start Times
12:00 AM

A 'Save' button is located at the bottom right of the form. The interface also shows a sidebar with navigation options like Search, Home, Problems, Alerts, Chats, and Switch, and a top navigation bar with various tabs like Restrict Other Times, Restrict Next Candidates, etc.

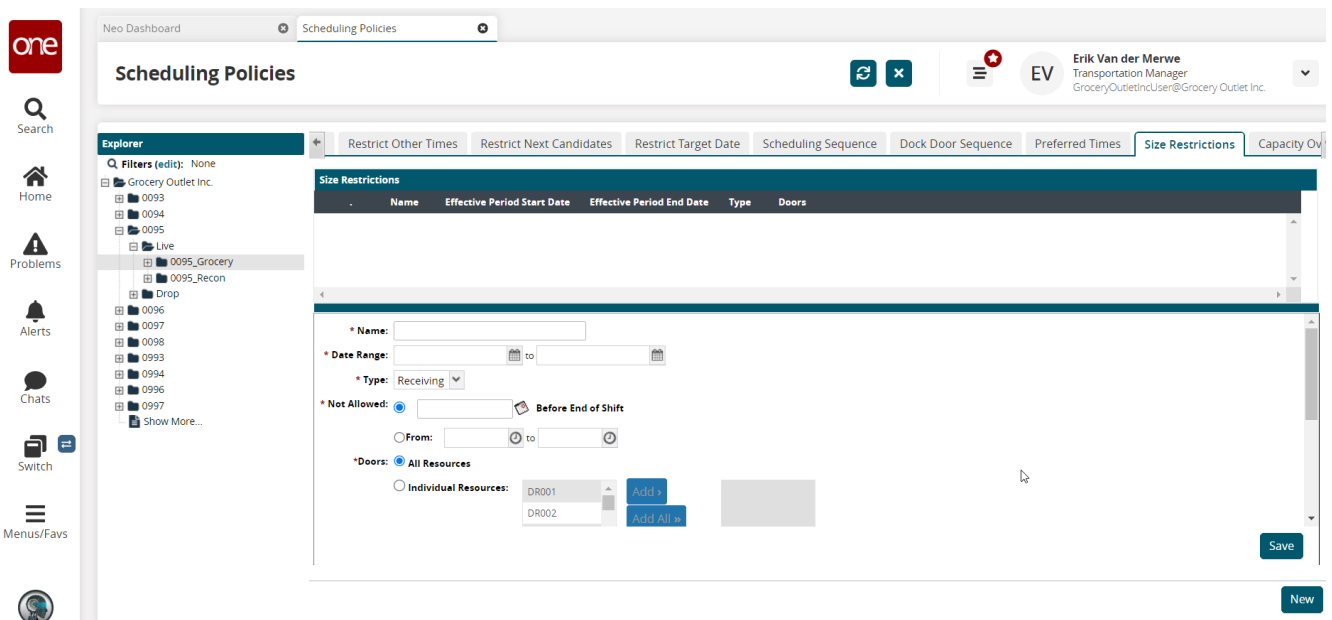
1. To add another start time, click **Add**, and repeat the previous steps for the new row.
2. To change the sequence of multiple preferred times, select a row, and then click the up or down arrows to move the row up or down in sequence.
3. To restrict appointment candidates to only the times defined on the Preferred Times tab, select the Use As Restricted check box. If this check box is not selected, other appointment candidates can be displayed.
4. After all changes have been made, click **Save**. A summary of the new preferred times setting appears in the **Preferred Times** table.
5. To add more preferred times, repeat the previous steps.
6. To delete a preferred times row, click the Delete Row button.

13. Size Restrictions

The Size Restriction policy does not allow a shipment with certain characteristics to be scheduled during a specified time frame. The shipment size rule states not to schedule shipments greater than or less than a certain size between specified times of day or not within a set number of hours before the end of a work shift. Shipment size is expressed by one or more quantities and pieces UOMs and rule operators (AND / OR). The shipment size rule can be applicable to specific doors or to the entire calendar. In case the appointment is associated with multiple shipments, combine the quantities for the pieces UOM to calculate the total shipment size.

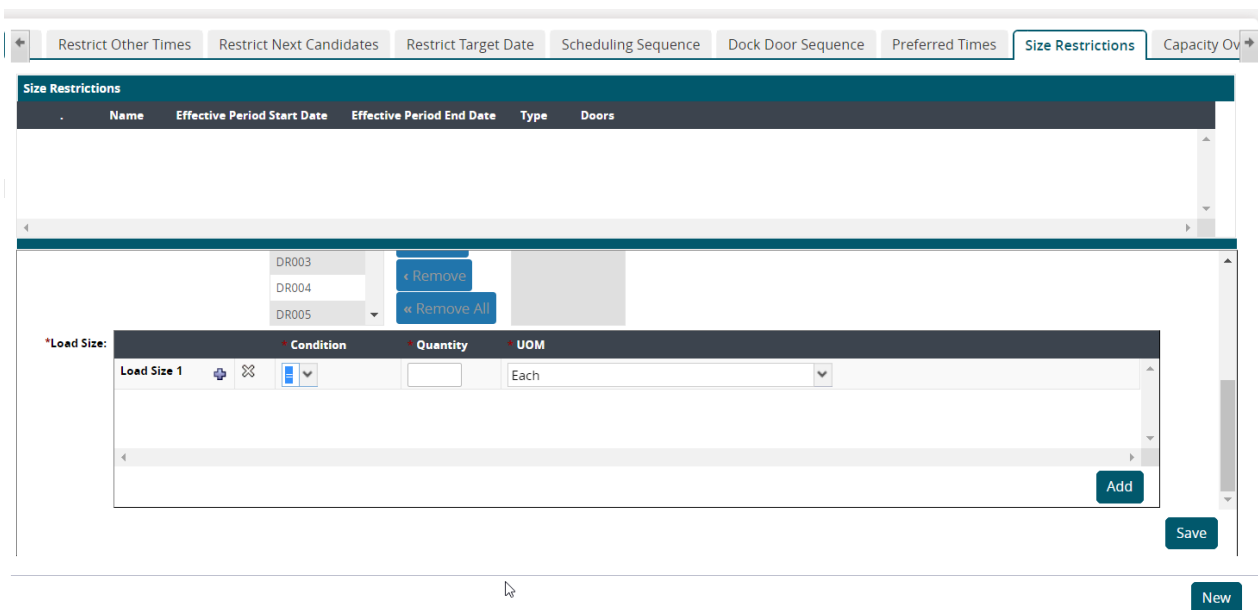
To set size restrictions:

1. Click the **Size Restrictions** tab.
2. The Size Restrictions form appears.
3. Click **New**. The size restriction form appears.



4. In the **Name** box, type a name for this size restriction.
5. Select **Date Range**.
6. In the **Type** list, click a type option for the preferred time.
 - **Shipping:** Shipments that are going from the dock door group.
 - **Receiving:** Shipments that are coming into the dock door group.
 - **Both:** Both shipments that are coming into the dock door group and shipments that are going from the dock door group.
7. Select a **Not Allowed** option for time range of the size restriction.
 - **Duration Before End of Shift:** Using the **Duration** button, select a duration before the end of the shift that the **Not Allowed** size restriction is valid.
 - Type values for **Hours** and **Minutes**, and then click **OK**.
 - **From Time Range:** To specify a **Not Allowed Start Time**, click the time button to display the time list, and then click a time from the list. Repeat this step for **End Time**.
8. Select the doors that are affected by the size restriction.
 - If the size restriction affects all doors in the dock door group, click the **Resources** option.
 - If the size restriction affects one or more doors in the dock door group, click the Individual Resources option.

9. Click one or more doors in the left-hand list, and then click **Add**. The selected doors for this block move to the right-hand list.
 - If you want to select all doors in the doors list, click **Add All**. All doors move to the right-hand list.
 - If you want to remove doors from the right-hand list, click one or more doors, and then **click Remove**.
 - If you want to remove all doors from the right-hand list, click **Remove All**. All doors move the left-hand list.
10. In the **Load Size** table, for **Load Size 1**, click the **Condition** list, and then select a condition: equal (=), greater than (>), or less than (<).
11. In the **Quantity** box, type a quantity for this load size rule.
12. Click the **UOM** list, and then select a unit of measure option.
13. To add an **AND** condition to the rule, click the **Add Pattern** button. Another row appears for the selected rule.



14. Repeat the previous to select **Condition**, **Quantity**, and **UOM** for the new AND condition.
15. To add another rule, click **Add**.
16. To delete a rule, click the Delete Row button.
17. Click **Save**.
18. The **Size Restrictions** table shows the new size restriction.
19. To add more size restrictions, repeat the previous steps.
20. To delete a size restriction, click the **Delete Row** button.

14. Capacity Override Settings

1. Click the **Capacity Override Settings** button. The **Capacity Override Settings** form appears.
2. Click **New**.
3. Select a **Date Range**.
4. In the **Applies To** list, click an option to which the dock door setting applies.

For this option	Perform this step
Partner	Select a partner.
Partner Profile	Select a partner profile.
Delivery Load Type	Select a load type from the Delivery Load Type list.
Org Code	Select an organization code.

5. In the **Override Capacity (%)** box, type a percentage value.
6. Click **Save**.
7. The **Capacity Override Settings** table shows the new setting.

The screenshot shows the 'Scheduling Policies' interface in the Neo Dashboard. The 'Capacity Override Settings' form is open, displaying the following fields:

- Effective Period Start Date:** [Empty]
- Effective Period End Date:** [Empty]
- Applies To:** [Partner]
- Override Capacity(%):** [Empty]
- Bypass Capacity Constraint:**

A 'Save' button is located at the bottom right of the form. The interface also shows a sidebar with navigation options like Search, Home, Problems, Alerts, Chats, Switch, and Menus/Favs.

8. To add more capacity override settings, repeat the previous steps To delete a capacity override setting, click the Delete Row button.

15. RSVN Lead Time Exceptions

To Set RSVN Lead Time Exceptions

1. Click the **RSVN Lead Time Exceptions** tab.
2. The RSVN Lead Time Exceptions form appears.
3. Click **New**. The reservation lead time exceptions form appears.
4. Select a **Date Range**.
5. In the **Applies To** list, click an option to which the dock door setting applies.

For this option	Perform this step
Partner	Select a partner.
Partner Profile	Select a partner profile.
Delivery Load Type	Select a load type from the Delivery Load Type list.
Org Code	Select an organization code.

6. Select a duration for the **Reservation Lead Time**. Type values for **Hours** and **Minutes**, and then click **OK**.
7. **Click Save**.
8. The Reservation Lead Time Exceptions table shows the new setting.

The screenshot shows the 'Scheduling Policies' interface in the Neo Dashboard. The 'Rsvn LeadTime Exceptions' tab is active, displaying a form for creating a new exception. The form includes the following fields:

- Effective Period Start Date**: A date picker field.
- Effective Period End Date**: A date picker field.
- Applies To**: A dropdown menu currently set to 'Partner'.
- Reservation Lead Time**: A field for entering the duration, with a 'Date Range' label above it.

At the bottom right of the form is a 'Save' button. The interface also shows a sidebar with navigation options like Search, Home, Problems, Alerts, Chats, Switch, and Menus/Favs. The top navigation bar includes 'Scheduling Policies' and a user profile for Erik Van der Merwe.

9. To add more reservation lead time exceptions, repeat the previous steps.
10. To delete a capacity override setting, click the **Delete Row** button.

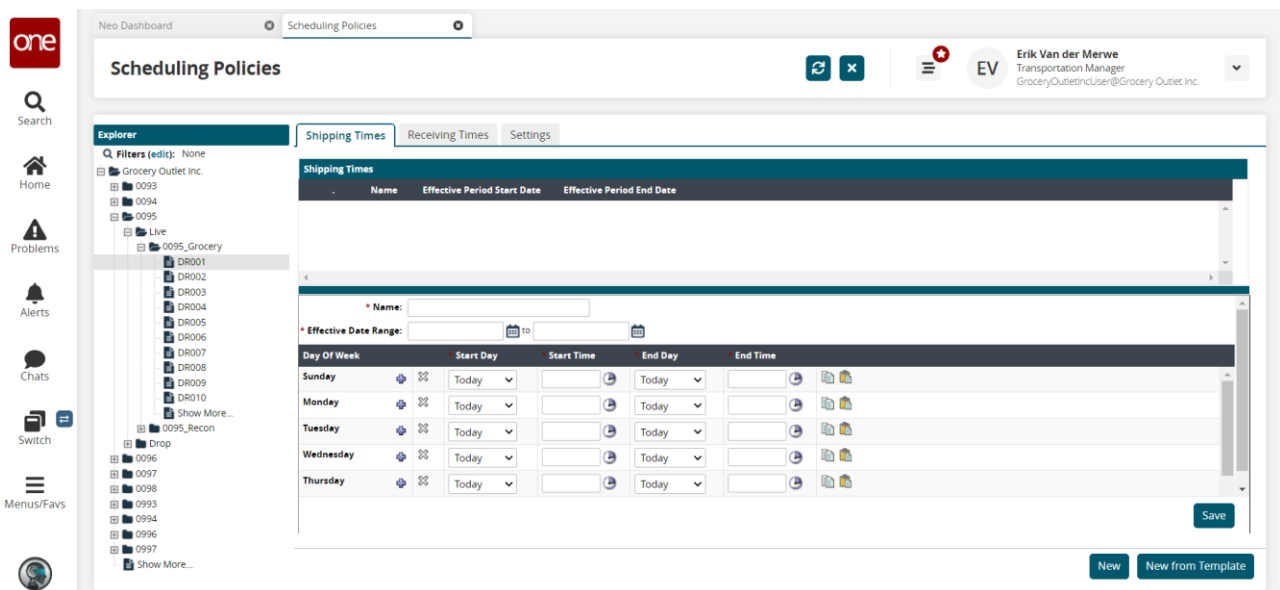
2.1.3.4 Setting Dock Door Policies

Policies at the dock door level allow for set up of shipping and receiving times and the application of dock door settings defined at the organization level. Setting dock door policies is typically performed by transportation manager roles.

To Set Dock Door Policies

1. Select the dock door level in the hierarchy.

The dock door settings appear. By default, the Shipping Times setting is selected.



2. Shipping times can be distinctly defined or applied from a template that has been defined at the organization level. Only one shipping time schedule will be in effect at any given time.
3. Add a shipping time schedule using one of the following options:
 - To add a new shipping time schedule, click **New**.
 - To add a new shipping time schedule based on an existing template, click **New from Template**, click the **Select from Template** list, and then select a template option. The template will populate the schedule.

The shipping times schedule form appears.

4. In the **Name** box, type a name for this shipping time schedule.
5. Select start and end dates for the **Date Range**.
6. For each date pattern under the **Day of Week**, click the **Start Time** button to display the time **list, and select a time from the list**.
7. Repeat the previous step for **End Time**.
8. To add a date pattern to a day of the week, click the **Add Pattern** button. Another date pattern row appears for the selected day of the week.
9. Repeat the previous steps to select **Start Time** and **End Time** for the new date pattern.
10. To delete a date pattern, click the **Delete Row** button.
11. Click **Save**. The new shipping time schedule name appears in the **Shipping Times** list.

Receiving Times

1. Click the Receiving Times tab.
2. The Receiving Times table appears. Define the receiving times schedule using the procedures for Shipping Times.

The screenshot shows the 'Scheduling Policies' interface with the 'Receiving Times' tab selected. On the left is an 'Explorer' pane showing a tree view of entities under 'Grocery Outlet Inc.', including '0095_Grocery' (DR001-DR010) and '0095_Recon'. The main area displays a table for 'Receiving Times' with columns for Name, Effective Period Start Date, and Effective Period End Date. A single entry is shown: '0095_DR001_WorkHours' from Dec 31, 2022, to Dec 30, 2032. Below this is a table for defining the schedule by day of week, with columns for Day Of Week, Start Day, Start Time, End Day, and End Time. The schedule is set for 12:00 AM to 12:00 AM for all days from Sunday to Friday. A 'Save' button is at the bottom right. At the bottom of the interface are 'New' and 'New from Template' buttons.

Settings

Dock door settings allow for definition of mixed attributes (one or more of vendor, vendor profile, carrier, load type, and appointment code).

1. Click the Settings tab.
2. The Settings form appears.

The screenshot shows the 'Scheduling Policies' interface with the 'Settings' tab selected. The 'Explorer' pane on the left is identical to the previous screenshot. The main area displays a table for 'Dock Door Setting' with columns for Start Date and End Date. A single entry is shown: 'Pallet Offload' from May 1, 2023, to May 31, 2023. At the bottom right of the main area are 'Add Setting' and 'Save' buttons.

3. Click Add Setting.
4. **The new setting row appears.**
5. **In the Dock Door Setting list, select a *dock door setting* option.**
6. Select a date for the **Start Date**. Repeat this step for the **End Date**.
7. Repeat the previous steps for each additional dock door setting.
8. Click **Save**.

