

Grocery Outlet Inc

One Network Appointment Scheduler

User Guide: Transportation Management

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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

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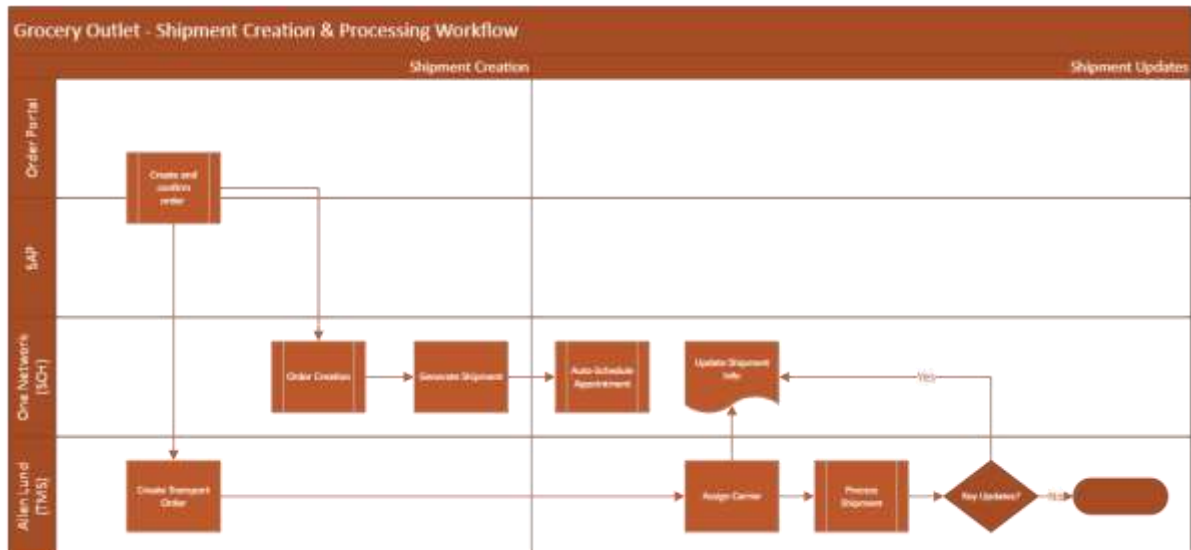
2 Transportation Management

2.1 Shipment Overview

2.1.1 Context

ACTIVITY PURPOSE	This activity enables system users (including partners) to access key shipment information and enable planning and scheduling activities
ACTIVITY INITIATORS	
ACTIVITY PREREQUISITES	Purchase Order is integrated to ONE
ACTIVITY PERFORMER(S)	Transportation Manager Role Users
OTHER PARTIES INVOLVED	
ADDITIONAL INFORMATION	
ACTIVITY OUTCOME	The users can search Shipments and perform Appointment Scheduling.

2.1.2 Process Flow



2.1.3 System Steps

The system will automatically create a standalone shipment for all the content of the purchase order for each order integrated to ONE.

Auto-ASN logic will be enabled on all suppliers to ensure that shipments get auto-generated in a "Awaiting" state upon order confirmation. This will ensure that the appointment scheduling engine can trigger appointment logic briefly after the order is created in ONE.

One order will be converted to a single shipment with all order line represented on it. Shipment Updates via Integration

Shipment updates will be integrated to ONE from the Grocery Outlet TMS solution. These updates will include activities such as carrier confirmation and shipment consolidation. This would help with shipment inbound interface from TMS to One network.

Only 3 **Shipment States** will be there for GO Users.

1. **Awaiting** – Shipment transaction awaiting LSP allocation
2. **Confirmed** – Shipment accepted by the LSP and Booking confirmation received
3. **Delivered** – Shipment delivered to delivery destination

Step 1: Searching a Shipment

A User can search Shipments in the ONE network system.

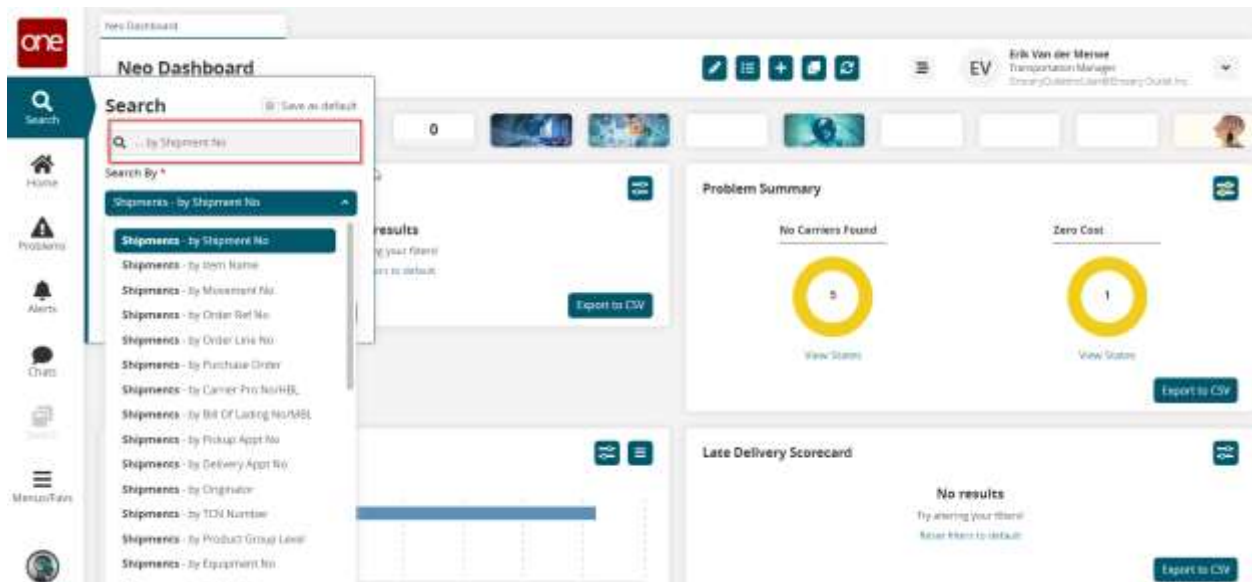
To Search for a Shipment :

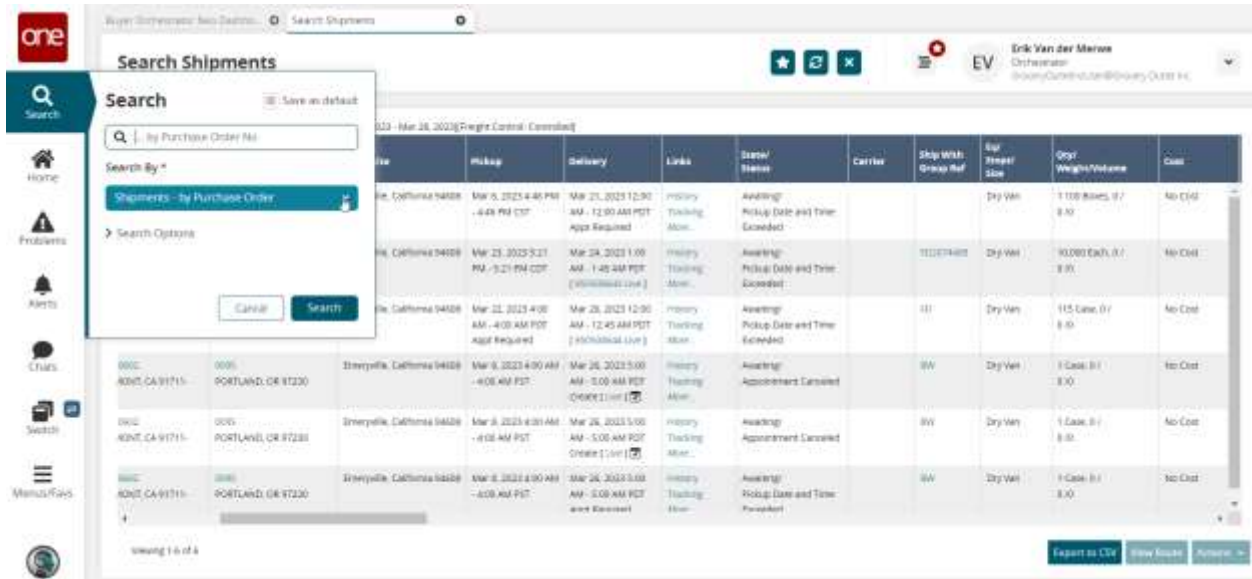
2.1.3.1 Global Search using NEO UI

The global search option on NEO UI provides the user the ability to search the shipment directly by variety of search keys for shipments.

Note – in the NEO UI, the main menu is now located on the left side bar Navigational panel.

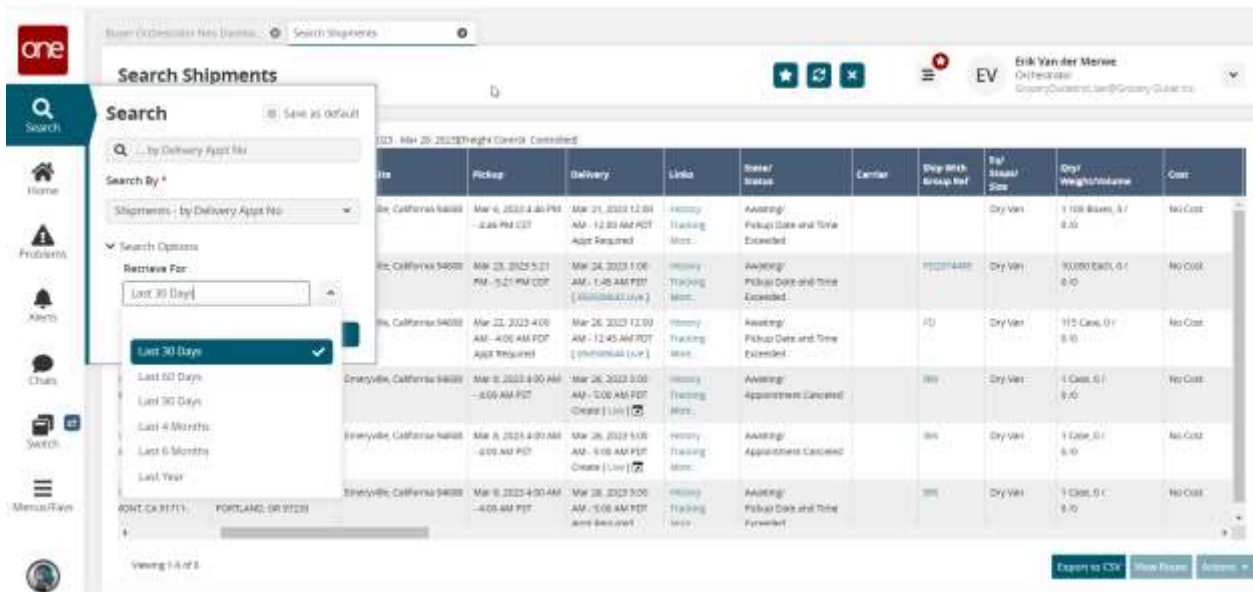
1. Login to the One Network system and use the NEO UI.





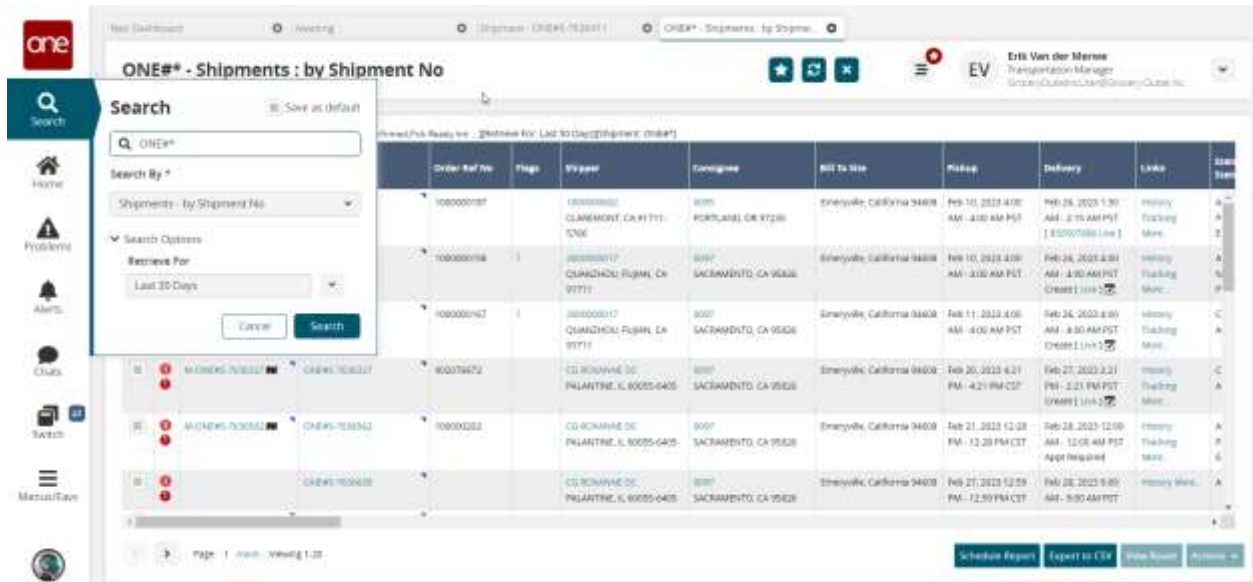
2. When you select the **Search** icon, a **Search** slide out appears for you to enter your search criteria.

In the Search By field, please choose the correct drop-down choice such as “Shipments - by Shipment No” or “Shipments - by Purchase Order No” or “Shipments- by Delivery Appointment No.”

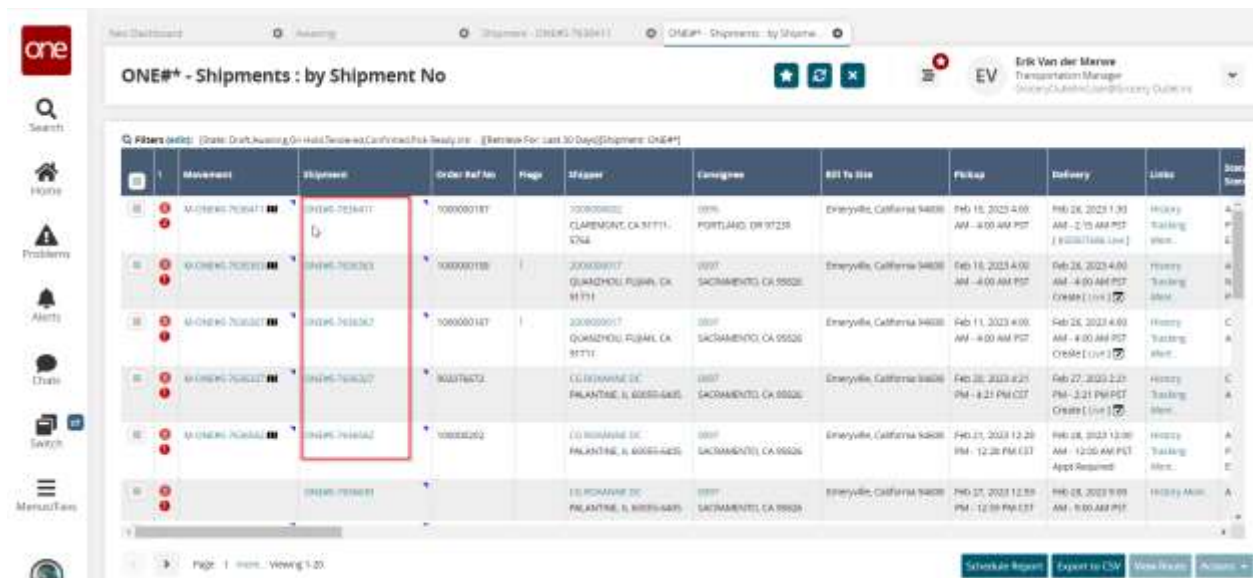


3. Click the **Search Options** link to see the **Retrieve For** field. The default choice is “Last 30 Days” – if you want to look for Shipments or Movements whose Pickup Date is older than 30 days, select one of the other choices from the drop-down list.

4. Enter your search value (i.e., Shipment Number or Movement Number) in the **Search** field and then press the **Search** button on the **Search** slide out or press the **Enter** key on your keyboard.
5. **IMPORTANT** – When entering your search value in the **Search** field, you can enter a wild card symbol if you do not know or do not want to enter the entire value. The wild card is the asterisk (*) symbol, and you can enter it either before or enter it after the value.



6. The **Movement/Shipment Summary** screen meeting the entered search criteria will appear.



2.1.3.2 Using "Search Shipment" Option

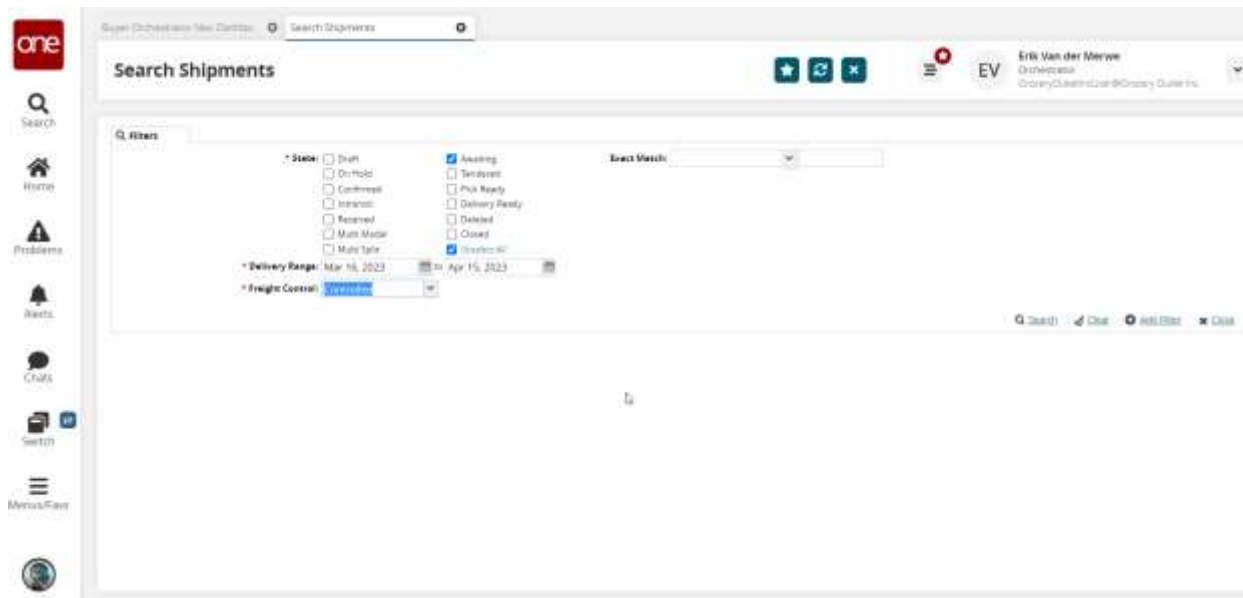
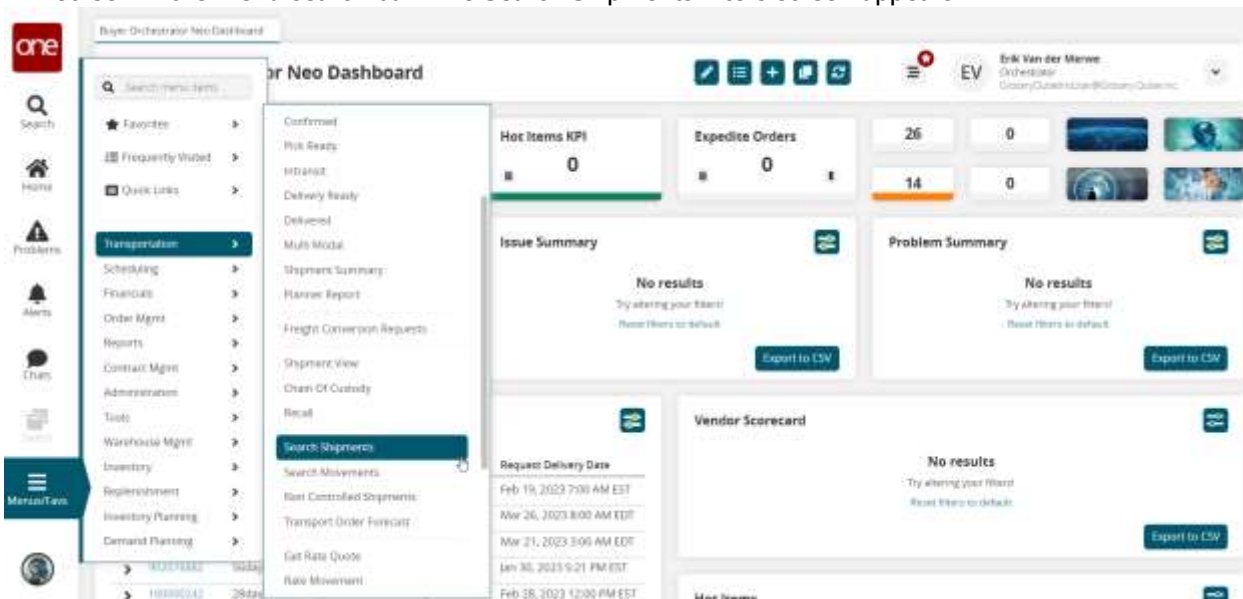
The Search Shipments option allows you to search for shipments using various filters. After, you can view a Shipment State report for all shipments in a state, view details of shipments and movements, apply actions, display shipments and movements in a geographical view, or export the search results to a spreadsheet.

Complete the following steps to search shipments:

1. Log in to the ONE system.

2. Click Menu/Favs > Transportation > Search Shipments.

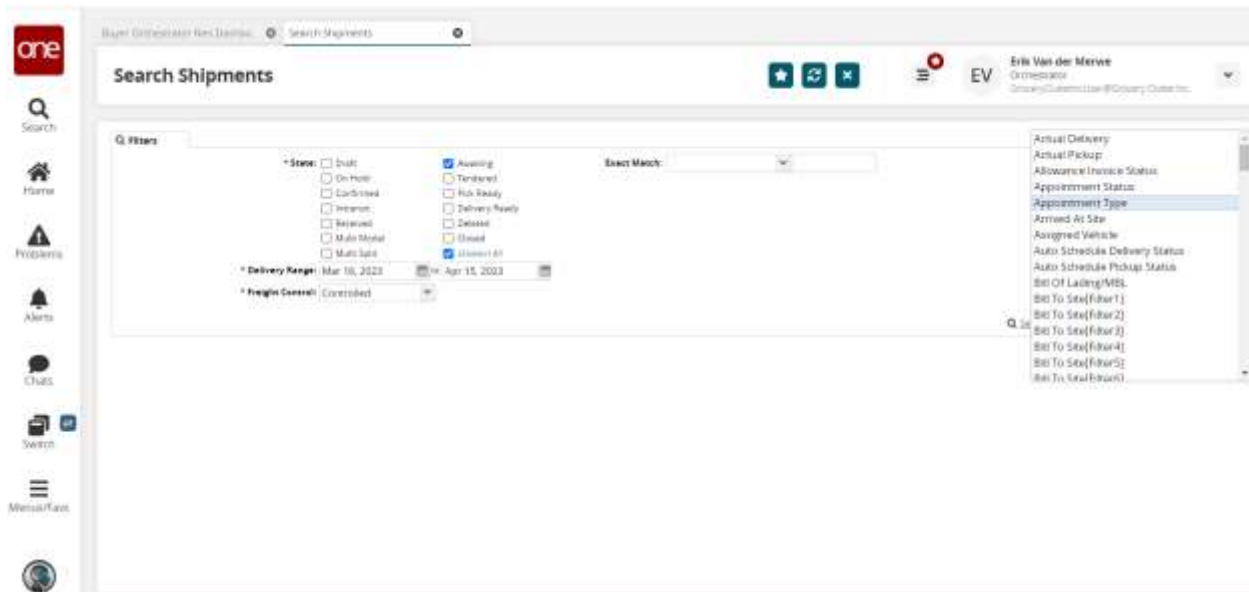
In the NEO UI, users can click on the Menu/Favs icon on the left sidebar and type in the name of the screen in the menu search bar. The Search Shipments filters screen appears.



3. Fill out the following fields. Fields with an asterisk (*) are required.

Field	Description
*State	Select one or more state checkboxes for the shipments. These checkboxes correspond to the different states of a shipment in the system.
*Delivery Range	Select a date range on which the shipments are delivered.
*Freight Control	Select an option from the dropdown menu.
Exact Match	Select an option from the dropdown menu.

4. To add more search filters, click the **Add Filter** link, and then click one or more filter options from the **Add Filter** list.



4. Fill out the filters as desired and click the Search link.

Shipment No.	Shipper	Consignee	Bill to Site	Pickup	Delivery	Links	Status
ONE#5-7636715	CO ROMARE DC PALANTRE, L 6055-8405	0007 SACRAMENTO, CA 95828	Emerysville, California 94608	Mar 6, 2023 4:48 PM -4:40 PM CST	Mar 21, 2023 12:00 AM -12:00 AM PDT Appt Requested	History Tracking Appt	A
ONE#5-7636715	CO ROMARE DC PALANTRE, L 6055-8405	0007 SACRAMENTO, CA 95828	Emerysville, California 94608	Mar 23, 2023 5:31 PM -5:21 PM CST	Mar 24, 2023 1:00 AM -1:45 AM PDT [E95000000 L001]	History Tracking Appt	A
ONE#5-7636715	0006 PORTLAND, OR 97238	0007 SACRAMENTO, CA 95826	Emerysville, California 94608	Mar 22, 2023 8:00 AM -8:00 AM PDT Appt Requested	Mar 26, 2023 12:00 AM -12:45 AM PDT [E95000000 L001]	History Tracking Appt	A
ONE#5-7636715	100000002 CLAREMONT, CA 91711-0766	0006 PORTLAND, OR 97238	Emerysville, California 94608	Mar 6, 2023 4:08 AM -4:30 AM PDT	Mar 26, 2023 5:00 AM -5:00 AM PDT Create [Link]	History Tracking Appt	A
ONE#5-7636715	100000002 CLAREMONT, CA 91711-0766	0006 PORTLAND, OR 97238	Emerysville, California 94608	Mar 6, 2023 4:08 AM -4:30 AM PDT	Mar 26, 2023 5:00 AM -5:00 AM PDT Create [Link]	History Tracking Appt	A
ONE#5-7636715	100000002 CLAREMONT, CA 91711-0766	0006 PORTLAND, OR 97238	Emerysville, California 94608	Mar 6, 2023 4:08 AM -4:30 AM PDT	Mar 26, 2023 5:00 AM -5:00 AM PDT Appt Requested	History Tracking Appt	A

5. User can click on any **Shipment No.** to get details of that particular shipment and attached appointment to it.

Shipment - ONE#5-7636715

Header: Contents, Copies, Other Info, Schedule, Carrier, Tracking, Documents, Holds, Milestones, History, Packing

Shipper: CO ROMARE DC
 Consignee: Grocery Outlet DC, Grocery Outlet 899 Transfer
 Custom Broker: [Search]

Shipment No: ONE#5-7636715
 Freight Terms: Collect
 Allowance: [Dropdown]
 Rating Type: [Dropdown]
 Routing Group: [Dropdown]

Ship From: CO ROMARE DC
 8077 CH 15400
 PALANTRE, L 6055-8405, US

Ship To: 5633 main St
 SACRAMENTO, CA 95826, US
 Bill To: Address: Emerysville, California 94608, US

Base Rating: [Dropdown]
 Equipment: Dry Van
 Transportation Mode: [Dropdown]
 Buyer Account: [Dropdown]
 Equipment No: [Dropdown]
 Shipment Type: [Dropdown]

Pickup: Mar 6, 2023 4:48 PM CST
 Target Pickup: Mar 6, 2023 4:40 PM CST
 Delivery: Mar 21, 2023 12:00 AM PDT
 Target Delivery: Mar 21, 2023 12:00 AM PDT
 Service Level: [Dropdown]

Buttons: Actions, Save, Print

2.2 Shipment Tracking

2.2.1 Context

ACTIVITY PURPOSE	
ACTIVITY INITIATORS	
ACTIVITY PREREQUISITES	
ACTIVITY PERFORMER(S)	
OTHER PARTIES INVOLVED	
ADDITIONAL INFORMATION	
ACTIVITY OUTCOME	

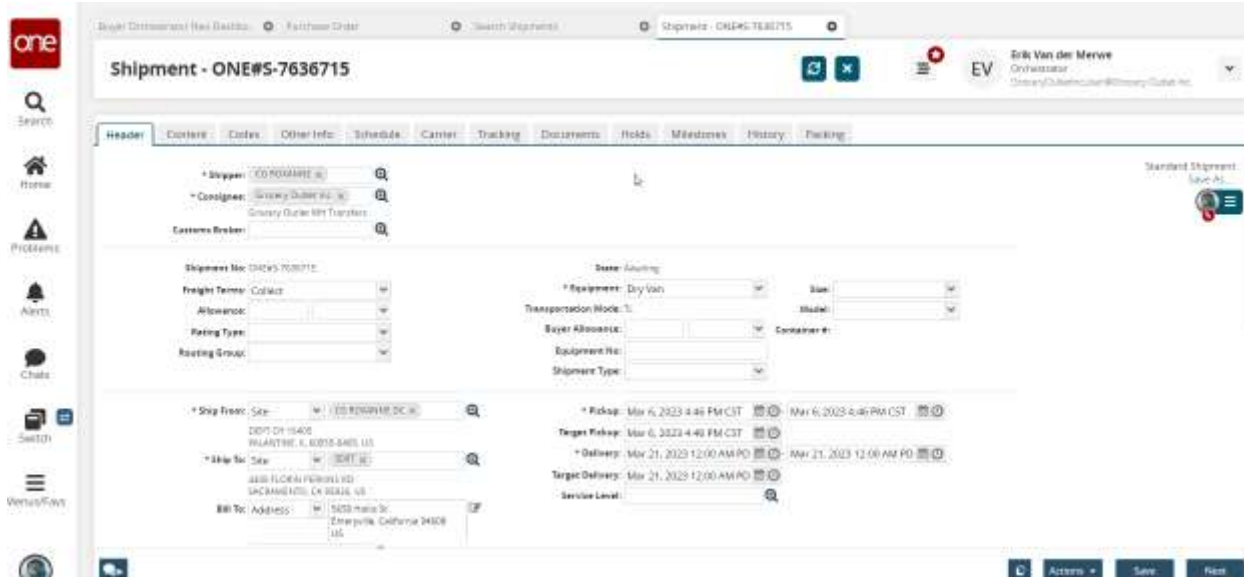
2.2.2 Process Flow

- *##Insert process flow here for the specific activity, if applicable. Else mark as not applicable, but never remove this heading*

2.2.3 System Steps

Step -1 : User can see details of the shipment and linked appointment to it.

1. After reaching to search Shipment screen , a user can see details of any shipment after clicking on the hyperlink.



Please find below the description of fields in the header of Shipment.

Field	Description
Shipper	Supplier Name from options
Consignee	Grocery Outlet Inc
Shipment Number	Shipment number identifies a shipment uniquely
Ship From Enterprise Name	Required if Ship From Site Name is provided
Ship From Organization Name	Required If Ship From Site Name is provided
Ship From Site Name	The name of the shipment's origination site. Either Ship From Site or Ship From Address is required
Ship To Enterprise Name	Required if Ship To Site Name is provided
Ship To Organization Name	Required if Ship To Site Name is provided
Ship To Site Name	The name of the shipment's destination site. Either Ship To Site Name of Ship To Address is required
Planned Delivery Date	Estimated Date For Delivery
Planned Ship Date	Estimated date to ship the goods from loading plant/factory
Bill Of Lading Number	Bill Of Lading Number
Trans Mode Name	Equipment Type / Transportation Mode used to for this Shipment
Service Level Name	Service Level of Shipment (E.g., Standard Delivery, Same day Delivery, etc.).
Total Volume	Total Volume of all shipment lines in the shipment
Volume Unit Of Measure	Volume Unit of Measure (E.g., CUFT, CUMT etc.)
Total Weight	Total Weight of all shipment lines in the shipment
Weight Unit Of Measure	Weight Unit of Measure (E.g., POUND, KG etc.)
Total Quantity	Total Quantity of all shipment lines in the shipment
Quantity Unit Of Measure	Quantity Unit of Measure (E.g., PALLET, CASE etc.)

Seal No	A unique identification code, required by the International Organization for Standardization, associated with a shipping container.
Equipment Number	The actual Id the Equipment that will be used to execute this Shipment. E.g., This could be the License Place No, or VIN, or an internal unique id.
Carrier Name	Carrier Name
Fulfillment Org Enterprise Name	Order fulfillment organization has access to create, ship and receive the shipment.
Fulfillment Org Name	Order fulfillment organization has access to create, ship and receive the shipment.
Inco Terms (Shipment Header)	The Incoterms rules or International Commercial Terms are a series of pre-defined commercial terms published by the International Chamber of Commerce (ICC) that are widely used in International commercial transactions or Procurement processes.
Shipment Line Number	Unique Identification Number for ASN Line
Order Owning Enterprise Name	Order Owning Enterprise Name
Order Owning Organization Name	Order Owning Organization Name
Order Number	Order Number
Order Line Number	Order Line Number
Order Request Schedule Number	Order Request Schedule Number
Order Delivery Schedule Number	Order Delivery Schedule Number
Item Enterprise Name	Required if Item Name is provided
Item Name	Shipment Line Item Name. Either item name or External Item Name is required
Item Description	Item Description
Planned Ship Qty	Planned Ship Qty
ShipmentLine.Quantity Unit Of Measure	Quantity Unit of Measure (E.g., PALLET, CASE etc.)
Country Of Mfg.	The country in which the item was manufactured.
Line Volume	Shipment line Volume
Line Volume Unit Of Measure	Volume Unit of Measure (E.g., CUFT, CUMT)
Line Weight	Shipment Line Item Weight
Line Weight Unit Of Measure	Weight Unit of Measure (E.g., POUND, KG etc.)
Primary HTS Code	Primary Harmonized Tariff Schedule code.
Secondary HTS Code	Secondary Harmonized Tariff Schedule code.
Service Level Org Name	Service Level of Shipment (E.g., Standard Delivery, Same day Delivery, etc.).
Transportation Controlling Enterprise Name	Transportation Controlling Enterprise Name
Transportation Controlling Organization Name	Transportation Controlling Organization Name
Item Dimensions Height	ItemDimensionsHeight. Required when ExternalItemName is present

Item Dimensions Length	ItemDimensionsLength. Required when ExternalItemName is present
Item Dimensions Width	ItemDimensionsWidth. Required when ExternalItemName is present
Item Dimensions UOM	ItemDimensionsUOM. Required when ExternalItemName is present
Special Instructions	Any Special Instructions on how to execute or handle the Shipment. This is an information only field.
Order Type	Order Type
Shipped Quantity	The quantity that was shipped as part of this line.

2.A User can see Appointments under Schedule tab of Shipment.

3. In this Shipment , appointment is required to be created.

The screenshot displays the Oracle One web interface for a shipment with ID ONE#5-7636715. The 'Schedule' tab is active, showing details for both Pickup and Delivery appointments and schedules.

Pickup Appointment: The 'Appt Required' checkbox is unchecked. Fields include Partner, Partner Profile, Connectivity Code, Appt Code, and Pickup Load Type.

Delivery Appointment: The 'Appt Required' checkbox is checked. Fields include Partner, Partner Profile, Connectivity Code, Appt Code, Delivery Load Type, and a field for 'No. of Appts' with a value of 1.

Pickup Schedule: Shows a 'Planned' status with an original period of Mar 6, 2023 4:45 PM CDT to Mar 6, 2023 4:46 PM CDT and a target of Mar 6, 2023 4:45 PM CST. An 'Appointment' section is present with an 'Actual' field.

Delivery Schedule: Shows a 'Planned' status with an original period of Mar 21, 2023 12:00 AM PDT to Mar 21, 2023 12:00 AM PDT and a target of Mar 21, 2023 12:00 AM PDT. An 'Appointment' section is present with an 'Actual' field.

The interface includes a top navigation bar with 'Shipment - ONE#5-7636715', a left sidebar with navigation icons (Search, Home, Problems, Alerts, Claims, Switch, Menu/Keys), and a bottom right area with 'Actions', 'Save', and 'Next' buttons.

4. In this other Shipment **ONE#S-7636835** Live Appointment is created

The screenshot shows the 'Schedule' tab for shipment ONE#S-7636835. It is divided into four main sections:

- Pickup Appointment:** Includes fields for 'Appt Required' (unchecked), 'Partner Profile', 'Commodity Code', 'Appt Code', and 'Pickup Load Type'.
- Delivery Appointment:** Includes fields for 'Appt Required' (checked), 'Partner Profile', 'Commodity Code', 'Appt Code', 'Delivery Load Type', and 'Reqd No Of Appts' (set to 1).
- Pickup Schedule:** Shows 'Planned' and 'Original' dates (Mar 23, 2023 3:21 PM EDT) and 'Target' date (Mar 23, 2023 3:21 PM EDT). Appointment is 'Annual'.
- Delivery Schedule:** Shows 'Planned' and 'Original' dates (Mar 24, 2023 3:21 PM PDT) and 'Target' date (Mar 24, 2023 3:21 PM PDT). Appointment is 'Small'.

5. On Clicking the Appointment Hyperlink, The scheduled Appointment specification can be seen.

The screenshot shows the 'View Live Delivery Appointment' page for reservation ID 852528943. Key details include:

- Shipment:** ONE#S-7636835
- Site:** 0977
- Reservation ID:** 852528943
- Appointment Type:** Confirmed
- Lead:** 10,000 Each
- Target:** Mar 24, 2023 3:21 PM PDT
- Supplier Partners:** CG ROWA/INE
- Appointment Date Change Reason Code:** (empty)

The 'Reservation Candidates' table is as follows:

* Start Time	* End Time	* Dock Door	Duration	Slot Type
Mar 24, 2023 1:00 AM PDT	Mar 24, 2023 1:45 AM PDT	DockDoor_009701	45M	Scheduled Regular Slot

6. Under **Tracking** tab of shipment, tracking event related to shipment creation and Shipments updates received from TMS can be seen.

The screenshot displays the Oracle ONE#5-7636835 shipment tracking interface. The 'Tracking' tab is active, showing a table of tracking events. The table columns include Shipment Number, Created By, Organization, Event Date, Event Local Time, Creation Date, Event Type, and Message. The events listed are:

Shipment Number	Created By	Organization	Event Date	Event Local Time	Creation Date	Event Type	Message
ONE#5-7636835	System	Grocery Outlet Inc.	Mar 21, 2023 10:47 AM PDT		Mar 21, 2023 10:47 AM PDT	Appointment Scheduled - Delivery	Shipment ONE#5-7636835 scheduled a Confirmed Delivery appointment of Mar 21, 2023 11:08 AM PDT Confirmation 05250043
ONE#5-7636835	System	Grocery Outlet Inc.	Mar 21, 2023 12:49 PM PDT		Mar 21, 2023 12:49 PM PDT	Appointment Rescheduled	Shipment ONE#5-7636835 rescheduled original Delivery appointment of Mar 21, 2023 12:09 AM PDT to Mar 21, 2023 01:03 AM PDT Confirmation 05250043 - Reason Code for Appointment Rescheduled Rescheduled by Carrier or Driver
ONE#5-7636835	System	Grocery Outlet Inc.	Mar 21, 2023 10:50 AM PDT		Mar 21, 2023 10:50 AM PDT	Appointment Scheduled - Delivery	Shipment ONE#5-7636835 scheduled a Soft Delivery appointment of Mar 21, 2023 12:06 AM PDT Confirmation 05250043
ONE#5-7636835	Transportation...	Grocery Outlet Inc.	Mar 21, 2023 10:56 AM PDT		Mar 21, 2023 10:56 AM PDT	Auto Schedule Failed - Delivery	Auto Schedule failed - appointment is not allowed when shipment is in Draft state
ONE#5-7636835	Transportation...	CG ICANN INC	Mar 21, 2023 10:56 AM PDT		Mar 21, 2023 10:56 AM PDT	Create Shipment	Shipment created

At the bottom of the table, there are buttons for 'Export to CSV' and 'Create Tracking Events'. The interface also includes a sidebar with navigation icons and a top navigation bar with various tabs like Header, Content, Dates, etc.