Implementing OTM Dock Scheduling

Paolo Magini
Manager
Agenda

- Company overview
- What is OTM Dock Scheduling
- How it works
- Can it be customized?
- Q&A
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Reply

Reply combines culture, competence, proactivity with vertical specialization to achieve excellence on new technology services and solutions tailored to help customers in reaching their business goals.

Reply Key Drivers:

- Specialized competence on Consulting, System Integration, Service Management (Application & Operation).
- Vertical markets Core Processes knowledge.
- Network Model: autonomous and specialized companies that share philosophy, goals and functional standards.
- Focus on Digital Transformation and continuous investments on Innovation and Know-How.
- Strategic Partnership with Leading Market Vendors.

- Founded in 1996 to achieve excellence within the internet consulting market, Reply is today a leading IT Services Company.
- Impressive track record: from €18,6m in 1999 to €494,8m revenue in 2012. The revenue in Q3 2013 was €404,6m, +12% compared with Q3 2012.
- Constant two digit Ebit.
- Now more than 4000 employees distributed across a network of specialized companies.
- Large customers, with a very high customer retention.
Main Locations

DE
- Düsseldorf
- Frankfurt
- Gütersloh
- Hannover
- Munich

UK
- London
- Edinburgh

Benelux
- Amsterdam
- Brussels
- Luxembourg

IT
- Turin
- Milan
- Rome
- Parma
- Treviso
- Trieste
- Bari

US
- Chicago
- Detroit

BR
- Belo Horizonte
- San Paolo
OTM – Business Reply Experience

- Oracle Platinum partnership level and OTM Specialized Partner
- More than 30 consultants specialized in OTM implementations, with proven experience in international projects
- AMS service provided 24/7, multi-language and covering different time-zones
- Expertise with the most advanced Oracle middleware and frameworks: BPEL, ODI, ADF 11g
- Proprietary tools developed for OTM: Rate Management Tool, Custom External Distance Engine integration, TomTom Integration, …
- Internal Logistics Command Center competence center and demo environment
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OTM Dock Scheduling

Location appointment scheduling is a functionality of OTM that:

- provides a **centralized and shared visibility** of the appointments managed at shipments stops;
- enables **active cooperation** between customers, suppliers and carriers;
- supports the **standardization of the processes** among the different sites, plants, warehouses of the logistic network, thus reducing labor cost and improving overall performances.

An effective dock appointment management can be helpful to:

- **reduce detention** charges;
- **decrease the risks** of overbooking;
- **support the operations** at the yards and warehouses.
Process example

A classic OTM workflow:

Order entry → Planning → Carrier confirmation → Execution → Settlement
Process example

…with the introduction of dock scheduling:

The solution is fully integrated with OTM shipment management process:

- appointments can be managed on OTM locations after shipment creation;
- typical approach is to set appointments after shipment’s tender has been sent;
- standing appointments can be used to reserve time slots;
- manual appointments can be created if shipments are not available.
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### Location appointment scheduler

#### Shipments Without Appointments

<table>
<thead>
<tr>
<th>Shipment ID</th>
<th>Shipment Type</th>
<th>Service Provider ID</th>
<th>Stop Number</th>
<th>Arrival Date</th>
<th>Departure Date</th>
<th>Activity</th>
<th>Activity Time</th>
<th>Wait Time</th>
<th>Appointment Priority</th>
<th>Total Weight</th>
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</table>

#### DOCK DOOR

<table>
<thead>
<tr>
<th>DOCK DOOR</th>
<th>09:30</th>
<th>10:00</th>
<th>10:30</th>
<th>11:00</th>
<th>11:30</th>
<th>12:00</th>
<th>12:30</th>
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<th>13:30</th>
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<tbody>
<tr>
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<td>PASCAL:</td>
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<td>01200: 29</td>
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**Legend:**  
- Unsaved Appointment  
- Italic Text - Fixed Appointment  
- Bold Text - Working Appointment  
- Blocked Slot  
- Infeasible Appointment  
- Unavailable Appointment  
- Standing Appointment

Save | Refresh | Create Appointment
Location appointment scheduler

### Manage Appointments - REPLY_PLANT 001

#### Previous | Previous Unscheduled | Next Unscheduled | Next | Manage Yard

<table>
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<th>Shipment ID</th>
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**Selected date:** 2014-04-08

**Shipments with appointments to be scheduled:**

**Resource availability and scheduled shipment appointments:**
The setup required: main steps

1. LOCATION RESOURCES

2. APPOINTMENT PREFERENCES

3. PROPERTIES AND PARAMETER SET
Location Resource Tab

To enable the dock scheduling functionality on a specific location, the “resource” tab needs to be properly set up.

There are three main sections in the page:

1. Appointment scheduler user interface and appointment assignment parameters
2. Location resources definition (e.g. dock doors)
3. Location appointment scheduling preferences (used also for standing appointments)
To enable the dock scheduling functionality on a specific location, the “resource” tab needs to be properly set up.

There are three main sections in the page:

1. Appointment scheduler user interface and appointment assignment parameters
2. Location resources definition (e.g. dock doors)
3. Location appointment scheduling preferences (used also for standing appointments)
Resource types assigned to a location and resources specifications are entered on the above page.

Typical examples of resource types are warehouses’ dock doors and dock workers.

For each resource type it is possible to define multiple resources (e.g. different dock doors with different constraints).

Each resource can be associated to different constraints (e.g. Service Provider profile or Calendar).
Resource Types and Location Resources

- It is possible to define a default calendar or to setup a different calendar for each location resource.
- LOAD and RECEIVE calendar activities are used to determine the feasibility of an appointment of pickup or delivery.
Calendar configuration for over-booking management

- By setting up a calendar as in the example below it is possible to create a location resource with all the blocked slots:

- This setup can be very useful to manage over-booking exceptions.
Location appointment scheduling preferences

- Appointments preferences can be entered on the above page for specific combinations of:
  1. Service providers;
  2. Day;
  3. Start/end time.

- Service location can be used in place or in combination with service provider;

- This functionality is very useful to define **standing appointments**, e.g. time slots reserved to specific service providers.
OTM Appointment Management Properties & Parameters

- Part of the appointment management configuration is performed on OTM property files.
- Starting from 6.3.1, some of these properties have been moved to parameters to allow more flexibility.

Some important properties to set up:

- **glog.appointment.displayString.shipment** → used to configure the text displayed in a resource slot when an appointment is saved.

- **glog.appointment.enforceServprovRule** → used to force service providers to respect certain cutoff times when setting appointments.

- **glog.appointment.searchDays** → defines the number of days to look forward for the first feasible appointment (don’t set it too high, it can have negative impacts on performances!)
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User Interface and VPD (1/2)

- The appointments scheduler:
  - xsl-based page (uic/location/AppointmentManager.xsl);
  - appointment information displayed can be configured using OTM properties;
  - action checks not supported on this page (tested on 6.2.5 and 6.3.2), but can be added on shipment or appointment screensets;
  - list of available power actions can be set up using “Manage User Access” page (this can be used also if you do not want to allow drag-and-drop functionality);

- standard OTM workflow requires shipment tender to be sent in order to let Service Providers schedule appointments.
User Interface and VPD (2/2)

- Appointments and shipments manager layout and screensets:
  - customizable using OTM standard tools (search criteria, shown fields, view and edit manager layouts, ...);
  - appointment manager layout is useful to add remarks;
  - appointments or shipment screensets are useful to filter data to display or add action checks;

- VPD:
  - can be used to define filtering criteria to show shipments to specific users/user roles.
Automation agents

- It is possible to configure agents of Shipment type in order to automate specific actions on appointments;
- Agents can be triggered by specific events related to appointments.

**Examples of agent actions:**
- schedule appointment (uses best option);
- remove appointment;
- set appointment priority;
- send notifications about scheduled appointments.
Notifications

- OTM provides standard notification stylesheets for appointments;
- Notifications can be sent using \textit{shipment} automation agents;
- Stylesheet can be edited to adjust layout and add/remove relevant information.
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Thanks

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