



OTM Dock/Appointment Scheduling

July 2013

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Company Overview

- Privately owned and family-operated since 1931
- Region's number one supermarket with 229 supermarkets and 188 convenience/fuel stores
- Stores located in Pennsylvania, Ohio, West Virginia and Maryland
- Combination of company owned and independently owned and operated Giant Eagle supermarkets
- Operating 7 Distribution Centers



Transportation Systems Overview

- Implemented OTM(Glog) January 2003
- 10 Years using OTM
- Utilized 5 versions
 - V3.5 to V4.0 to V5.0 to V5.5 to V6.2
- Visibility of “All” inbound shipments to RSCs
 - Private Fleet
 - Contract Carriers
 - Delivered by Shipper

Transportation Process Changes

- 2003 – Visibility of All orders
- 2003 – Planning Contract Loads
- 2004 – Planning Private Fleet Loads
- 2006 – Buyer Visibility
- 2008 – **Centralizing Appointment Scheduling** – *Enter on Buy Shipment Stop*
- 2009 – Planning Produce Contract Loads
- 2012 – **Implement Dock Scheduling**

Appointment Scheduling

Where does the Appointment Scheduling Process fit your organization?

WMS

vs

TMS

Or should you have another special App for Scheduling?

Centralizing Appointment Scheduling

- Reduced Labor – requires less staff
- Utilized Customer Service Team
- Staffed to schedule 7 days a week
- Standardized Appointment process
- One number to call for Appointment
 - (or one email to send the request to)

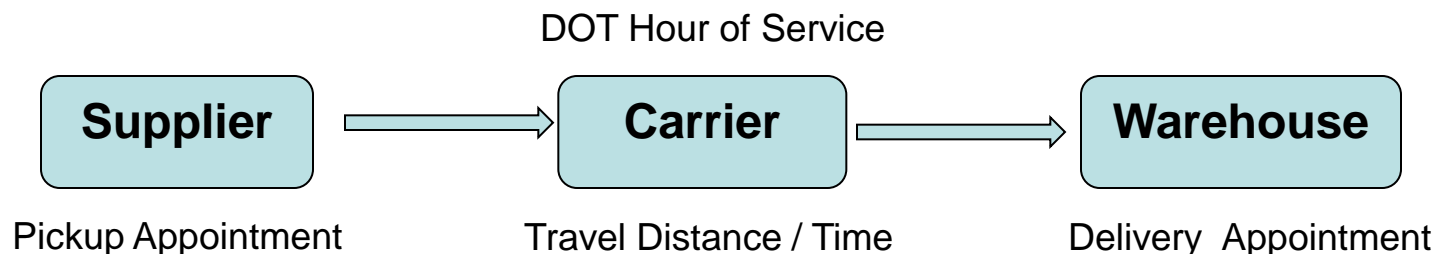
Some Reasons why we choose OTM

- One System with all Orders/Shipments
 - All in one place (instead of 7 WMS)
- OTM's Automation and Alerts
 - Integrates Appointment rules with planning rules
- OTM's Dock Scheduling functionality
 - Appointment rules and Limits
- OTM's Auto Data Assignment
 - Region (Location) based constraints
- Including the Appointment Assignment process with the load planning

Appointment Scheduling in a TMS

“Promotes collaboration between Buyers, Suppliers, Transportation, and Warehouse to improve how we manage appointments.”

“The appointment assignment focus shifts to create a more efficient balance for the Supply Chain.”



Preparing for Dock Scheduling

- 1) Upgrade to current release
 - a) V5.5.4 to V6.2.2
- 2) Research OTM Dock Scheduling
 - a) Release notes
 - b) Online Help notes
 - c) Learn from others experiences
- 3) Choose the right implementation team
 - a) Internal Team & Consulting

Scope of our project

- Set up 7 Locations on Dock Scheduling
- Limit Customizations to Base Functionality
- Include some automatic appointment assignment (~15%)
- Prevent Overbooking appointments
- Create wish list of Phase II items.

“Rapid Startup Approach”

Requirement Gathering

This was the most difficult task of the project!

- 1) Gather Current Receiving Schedules
- 2) Convert Schedule to OTM Dock Manager terms.
- 3) Review Multiple times with Receiving Managers
- 4) Clarify Limits and Constraints

Previous Schedule Summary

		FRIDAY	Appointment			Shipments Sched			Comment
		Appointment Time	Limit	Sched	Avail	BH	FB	PP	
Overbooked		01/27/2012 01:30	8	4	4	0	3	1	Any PO
		01/27/2012 01:32	4	0	4	0	0	0	RRPL's Only - Kraft Foods, Quaker Foods
		01/27/2012 05:00	6	10	0	0	7	3	Any PO
Minute Slot Types		01/27/2012 05:02	3	0	3	0	0	0	RRPL's Only - Smuckers, Purina Dry, Purina Wet, Kneuss Foods (Tuesday and Friday Only)
		01/27/2012 05:03	2	0	2	0	0	0	Backhaul Only (Non Fixed Replen PO)
	:00	01/27/2012 07:30	4	3	1	0	1	2	Any PO
	:02	01/27/2012 07:32	3	0	3	0	0	0	RRPL's Only - Kellogg's, Nestle (Sunday Only) and Kimberly Clark
	:03	01/27/2012 07:33	2	0	2	0	0	0	Backhaul Only (Non Fixed Replen PO)
Slot Full		01/27/2012 08:03	2	0	2	0	0	0	***Transfers Only***
		01/27/2012 10:30	4	4	0	0	1	3	Any PO
		01/27/2012 10:32	3	0	3	0	0	0	RRPL's Only - ES3 (Sunday only), Red Gold, Durin (Sunday Only) and Caterade
		01/27/2012 13:00	7	7	0	0	2	5	Any PO
		01/27/2012 13:02	2	0	2	0	0	0	RRPL's Only - Dad's Pet, P&G (Sunday's Only)
		01/27/2012 13:03	3	0	3	0	0	0	Backhaul Only (Non Fixed Replen PO)

Spreadsheet of new design

01_01		Friday																										
Slots	Door Name	12:30	1:00	1:30	3:00	3:30	5:00	5:30	7:00	7:30	8:00	9:00	9:30	11:00	11:30	13:00	13:30	15:00	15:30	17:00	17:30	18:00	19:00	19:30	20:00	21:00	21:30	23:00
1	1-GENERAL-#1	1		1		1		1			1	1		1		1		1			1			1			1	
2	1-GENERAL-#2	2		2		2		2			2	2		2		2		2			2			2			2	
3	1-GENERAL-#3	3		3		3		3			3	3		3		3		3			3			3			3	
4	1-GENERAL-#4	4		4		4								4		4		4			4			4			4	
5	1-GENERAL-#5	5		5										5		5		5			5			5			5	
6	1-GENERAL-#6	6		6												6		6			6						6	
7	1-GENERAL-#7	7																										
8	1-GENERAL-#8	8																										
9	2-RRPL-#1		1		1		1		1			1	1															
10	2-RRPL-#2		2		2		2		2			2	2															
11	2-RRPL-#3		3		3		3		3			3	3															
12	2-RRPL-#4		4		4		4		4			4	4															
13	2-RRPL-#5		5		5		5		5			5	5			5		5			5					5		5
14	2-RRPL-#6		6		6		6		6			6	6			6		6			6				6		6	
15	2-RRPL-#7		7		7		7		7			7	7			7		7			7				7		7	
16	2-RRPL-#8		8		8		8		8			8	8			8		8			8				8		8	
17	2-RRPL-#9		9		9		9		9			9	9			9		9			9				9		9	
18	2-RRPL-#10		10		10		10		10			10	10			10		10			10				10		10	
19	2-RRPL-#11																											
24	4-BACKHAUL-#1	1		1		1						1	1		1		1		1			1			1		1	
25	4-BACKHAUL-#2	2		2		2						2	2		2		2		2			2			2		2	

- Descriptive Door names
- Define Times
- Define Limits
- Relate Constraints

Dock Manager View

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Manage Appointments - PLAN.44_45

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

Shipment: Date: 07/23/2013 Confirm:

Shipments Without Appointments

Shipment ID	Shipment Type	Service Provider ID	Stop Number	Arrival Date	Departure Date	Activity	Activity Time	Wait Time	Appo Prior
1 PLAN.OTM0998414	SHIPMENT	DATA.VENDOR_CARR...	2	07/13/2013 09:45 EST	07/14/2013 00:00 EST	D	0M	14H 14M	
2 PLAN.OTM1000089	SHIPMENT	PLAN.TRIPLE T TRANSPORT	3	07/13/2013 13:23 EST	07/13/2013 13:23 EST		0M	4H 0M	
3 PLAN.OTM0998747	SHIPMENT	DATA.VENDOR_CARR...	2	07/15/2013 09:43 EST	07/28/2013 00:00 EST	D	0M	12D 14H 16M	
4 PLAN.OTM0998773	SHIPMENT	DATA.VENDOR_CARR...	2	07/15/2013 09:45 EST	07/16/2013 00:00 EST	D	0M	14H 14M	

DOCK DOOR

DOCK DOOR	04:00	04:30	05:00	05:30	06:00	06:30	07:00	07:30	08:00	08:30
1 1-GENERAL #01	OTM0999068: PRIME: 616026				OTM0999797: PURDY BROTHERS: 617012		OTM0997623: SUNFRESH: 611924		OTM0999743: MAST_TRUCK... 612281	
2 1-GENERAL #02	OTM0996974: PRIME: 613518		OTM1000806: AMERICAN DISPATCH: 617163		OTM0999852: WEL: 617057		OTM1001935: BESTWAY_TR... 618661		OTM0999850: SUNSTATE: 617056	
3 1-GENERAL #03	OTM1001935: BESTWAY_TR... 618661		OTM1002972: BOB PEARCE TRUCK: 619999		OTM0998641: TRIPLE_T: 615274		OTM1001058: FOGZ LOGISTICS: 617612		OTM0997950: ALL_FREIGHT... 615039	
4 1-GENERAL #04	OTM1003030: TRIPLE T TRANSPORT-				OTM0998642:		OTM0995656:		OTM1002411: POLYTHORSE-	

**30 Minute
Time Slots
Intervals**

Configured Properties to display values for each Appointment slot
Shipment ID , Carrier, Icon (mode), Refnum (Orders)

Defining Constraints - ADA

We had never used the Auto Data Assignment Rule before.

1) New ADA Rule with Auto Assignment Type of: Order Release Involved Party

Auto Assign Rule

Header Criteria Definition

* Auto Assign Rule ID
ORDER_SOURCE_INV_PARTY DOCK CONSTRAINT

* Auto Assign Type ID
ORDER_RELEASE_INVOLVED_PARTY

2) Listens for Order Release - Created

Events

Event

ORDER - CREATED

3) Define criteria: Order_Source_Region

Auto Assign Rule

Header Criteria Definition

Auto Assign Criteria ID
ORDER_SOURCE_REGION

4) Build Involved party assignment rule for source region

17

Assign: PLAN.HOSTESS BRANDS,MANUAL,PLAN.DOCK CONSTRAINT

When:

All

Source Region

One of

PLAN.ADA HOSTESS BRANDS

5) Create Source Regions

In our case, a specific set of source locations

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Region 1 of 1 New Edit

Region ID	Region Name	Loaded
ADA HOSTESS BRANDS	ADA HOSTESS BRANDS	Y

Geo Hierarchy ID	Location ID	City	Province Code	Postal Code
LOCATION	086411_17001_01			
LOCATION	081164_17001_61			

Defining Calendars

Calendars define the time of Day you can perform the RECEIVE activity.

Calendar 1 of 1 [New](#) [Edit](#)

Calendar ID	Start Date	Days in Cycle
44_45_GENERAL_1-5	01/01/2012	7

Activities		
Times	Activity	Activity Time Factor
Day 1 06:00 AM until 06:30 AM	Perform RECEIVE	
Day 1 07:00 AM until 07:30 AM	Perform RECEIVE	
Day 1 08:00 AM until 08:30 AM	Perform RECEIVE	
Day 1 09:00 AM until 09:30 AM	Perform RECEIVE	
Day 1 10:00 AM until 10:30 AM	Perform RECEIVE	
Day 2 04:00 AM until 04:30 AM	Perform RECEIVE	
Day 2 05:00 AM until 05:30 AM	Perform RECEIVE	
Day 2 06:00 AM until 06:30 AM	Perform RECEIVE	
Day 2 07:00 AM until 07:30 AM	Perform RECEIVE	
Day 2 08:00 AM until 08:30 AM	Perform RECEIVE	
Day 2 09:00 AM until 09:30 AM	Perform RECEIVE	
Day 2 10:00 AM until 10:30 AM	Perform RECEIVE	
Day 3 04:00 AM until 04:30 AM	Perform RECEIVE	
Day 3 05:00 AM until 05:30 AM	Perform RECEIVE	
Day 3 06:00 AM until 06:30 AM	Perform RECEIVE	
Day 3 07:00 AM until 07:30 AM	Perform RECEIVE	
Day 3 08:00 AM until 08:30 AM	Perform RECEIVE	
Day 3 09:00 AM until 09:30 AM	Perform RECEIVE	
Day 3 10:00 AM until 10:30 AM	Perform RECEIVE	
Day 4 04:00 AM until 04:30 AM	Perform RECEIVE	

Default Calendar to close any appointment slot

Calendar 1 of 1 [New](#) [Edit](#)

Calendar ID	Start Date
EXTRA_CLOSED_GLOBAL	01/01/2012

Activities	
Times	Activity
Day 1 12:00 AM until 12:00 AM	Perform CLOSED
Day 2 12:00 AM until 12:00 AM	Perform CLOSED
Day 3 12:00 AM until 12:00 AM	Perform CLOSED
Day 4 12:00 AM until 12:00 AM	Perform CLOSED
Day 5 12:00 AM until 12:00 AM	Perform CLOSED
Day 6 12:00 AM until 12:00 AM	Perform CLOSED
Day 7 12:00 AM until 12:00 AM	Perform CLOSED

Overrides		
Override Name	Date/Times	Activity

Delete the Calendar time instead of using “Do Not Perform” RECEIVE

Defining Location Resource

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Resource Type

* Resource Type: DOCK DOOR

Calendar: PRIMARY_GLOBAL

Auto Schedule:

Constraint Appointment:

Domain Name: PLAN

Location Resource Name	Calendar	Flex Commodity Profile ID	Flex Commodity Check Option	Contact Profile ID	Equipment Group Profile ID	Mode Profile ID	Service Provider Profile ID	Appointment Activity Type	Preference Level
1-GENERAL #01	44 45 GENERAL 1-5			44 45 DEFAULTS		NOT TALON LOGISTIC			0
1-GENERAL #02	44 45 GENERAL 1-5			44 45 DEFAULTS		NOT TALON LOGISTIC			0
1-GENERAL #03	44 45 GENERAL 1-5			44 45 DEFAULTS		NOT TALON LOGISTIC			0
1-GENERAL #04	44 45 GENERAL 5			44 45 DEFAULTS		NOT TALON LOGISTIC			0
1-GENERAL #05	44 45 GENERAL 5			44 45 DEFAULTS		NOT TALON LOGISTIC			0
1-GENERAL #06	44 45 GENERAL 6-8			44 45 DEFAULTS		NOT TALON LOGISTIC			0
1-GENERAL #07	44 45 GENERAL 6-8			44 45 DEFAULTS		NOT TALON LOGISTIC			0
1-GENERAL #08	44 45 GENERAL 6-8			44 45 DEFAULTS		NOT TALON LOGISTIC			0
1-GENERAL #09	44 45 GENERAL 9-10			44 45 DEFAULTS		NOT TALON LOGISTIC			0
1-GENERAL #10	44 45 GENERAL 9-10			44 45 DEFAULTS		NOT TALON LOGISTIC			0
2-DAIRY-#1	44 45 DAIRY 1			DAIRY OKP ONLY		NOT TALON LOGISTIC			0
2-DAIRY-#2	44 45 DAIRY 1 2			DAIRY OKP ONLY		NOT TALON LOGISTIC			0
2-DAIRY-#3	44 45 DAIRY 3-5			DAIRY OKP ONLY		NOT TALON LOGISTIC			0
2-DAIRY-#4	44 45 DAIRY 3-5			DAIRY OKP ONLY		NOT TALON LOGISTIC			0

Holiday / Short Term Changes

Blocking a Resource – Managed by Receiving Manager

Manage Appointments - PLAN.44_45

[Previous](#) | [Previous Unscheduled](#) | [Next Unscheduled](#) | [Next](#) | [Manage Yard](#)

Shipment



1 09/02/2013

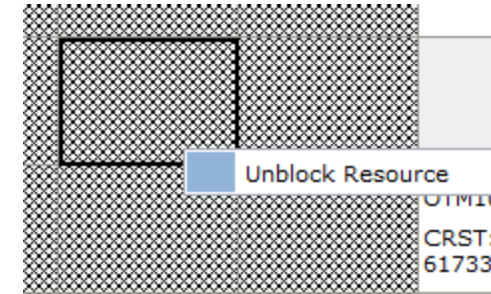
Confirmation

Shipments Without Appointments

Shipment ID	Shipment Type	Service Provider ID	Stop Number	Arrival Date
[Info Icon]				
DOCK DOOR				
1	1-GENERAL #01		06:00	06:30
2	1-GENERAL #02			
3	1-GENERAL #03			

2

Or Unblocking Resource



Right click cell to list option

Or Hold Control Key to change more than one Cell

3

Save every 50 Changes

Long Term Changes

- Receiving Manager Submits request.
- OTM Experienced user
 - Simple Changes
 - Add/Remove Slots, Add/Change Calendars
 - Similar constraint requirements
 - Complex Changes
 - Need for new constraint requirements – *Clearly Defined*
- Maintain Spreadsheet for “Summary View”

Tip # 1

Create Extra Appointment Slots

50	7-EXTRA-#1	
51	7-EXTRA-#2	
52	7-EXTRA-#3	

We have found many reasons why we need a few extra appointments. Seasonality, Promotions, Demand Spikes, etc.

Regular Appointments get filled up first, then Extra's can be opened if needed.

This was a very valuable suggestion we received from Kraft before our implementation!!!

Tip # 2

Understand Capacity Limits

Ask the Question, what should happen we need more appointments than defined?

We received many answers:

- It depends
- Overbook the appointment
- Use the next available time
- Use another slot with different constraints

Tip # 3

Understand how to Transition to a new schedule.

- **Calendar Overrides.** – Great for specific Day changes.
- **Phase out the old Appointment Slot and Start a New Appointment Slot** - Works Best when constraints are changing too.
- **Update the Calendar on Existing Slot.**
Block/Unblock times for the transition. – most common

Questions



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