GETTING STARTED GUIDE

Descartes® Dock Appointments Scheduling™

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Descartes® Dock Appointments Scheduling™

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Welcome to Descartes® Dock Appointments Scheduling™

The goal of Descartes Dock Appointments Scheduling is to optimize receiving operations for inbound shipments to a distribution center (DC) or warehouse. Best practices for receiving operations include establishment of appointments (reservations) for deliveries and improving knowledge of what is arriving (the contents of the deliveries). Many DCs may implement a policy requiring pre-approved appointments for each delivery. Descartes Dock Appointments Scheduling provides a collaborative tool to create and approve delivery appointments for use by carriers, suppliers, and distribution center personnel. Descartes Dock Appointments Scheduling is built to minimize data entry and optimize data quality. This is accomplished by interfaces to the Descartes Visibility & Event Management™ product to validate and lookup information from purchase orders and through a flexible, configurable web interface.

Features

- Enables collaboration between shippers, consignees, and carriers
- Streamlines the manual processes associated with appointing
  - Intuitive screen layout
  - Minimal data entry
- Automated, configurable notifications as appointments are requested, scheduled, and rescheduled
- Optimizes data quality and visibility to inbound receipts
- Enables compliance reporting and score-carding of the receiving process

Benefits

- **Improve Inventory Turns**
  - Ensure that goods are scheduled for delivery on days where the goods can be received promptly
  - Optimize receipt of goods related to promotions in a timely manner
- **Address Hours of Service**
  - Reduce wait time for load/unload activities
  - Reduce detention charges
- **Improve Warehouse Efficiency**
  - Optimize peak labor needs through better allocation of appointments within regular working hours. Review put-away needs by appointments to plan ahead. Enable prioritization of receipts and pickups ensuring that scarce resources are used effectively.
- **Automate the collection of data**
  - Gain management insight into bottlenecks and trading partner compliance
  - Analyze operations for process improvement opportunities
Learning to Use Descartes Dock Appointments Scheduling

Descartes Dock Appointments Scheduling User Guide

Once users have covered the basics in the Getting Started Guide, the tasks covered in the User Guide become progressively more advanced — focusing on the features and functionality of Descartes Dock Appointments Scheduling itself.

Descartes online help

Online help provides users with an understanding of how to use the features and functions of Descartes Dock Appointments Scheduling. To receive the maximum benefit from the online help, ensure that users are familiar with the basic tasks covered in the Descartes Dock Appointments Scheduling Getting Started Guide.

About This Guide

The Getting Started Guide is task-oriented, with screen shots interspersed throughout. The guide provides an overview of the features and benefits of Descartes Dock Appointments Scheduling. Users will initially focus on understanding the Descartes Dock Appointments Scheduling user interface and navigating in it. Topics include:

- Logging In
- Using the Interface
- Managing User Profiles
- Appendix A: Using the Main Menu
Document Conventions

This document uses the following conventions:

- Names of windows, frames, dialogs, menus, list boxes, and lists begin with uppercase and bolded. (Tools menu, Save dialog)
- Key combinations appear in mixed case. If the keys are joined by a plus sign (+), press and hold the first key simultaneously with the remaining keys (for example, CTRL+ALT+DEL).
- Typed text appears in Courier New font. (Enter USERID in the login field.)
- Cross-references to other documents, or to sections within the current document, appear in italics. (See Saving a File for details.) Italic is also used for emphasis.

⚠️ Note — Information important to a particular task or function is introduced with the note format and icon.

💡 Tip — Information that may make completing a task easier, but isn’t essential to the task, is introduced with the tip format and icon.

⚠️ Warning — This warning format indicates information needing particular attention. Ignoring information presented as a warning could lead to damage to software or data. Disregarding information presented as a warning may result in damage to your software or data.
Logging In

To log on to Descartes Dock Appointments Scheduling:

1. From the Microsoft Internet Explorer® or Google Chrome™ browsers, type in the URL for Descartes Dock Appointments Scheduling.

   ➔ Note—The URL is specific to the client’s deployment and is defined at the time of installation.

The Login dialog appears:

2. Enter the user’s company name.
3. Enter the user’s Login Name and Password.
4. Click Login.

   ➔ Note—It is important to note that available menu options vary according to access role. See Appendix A: Using the Main Menu for details.

User Names and Passwords

User names are formatted according to the following parameters:
- 1-64 characters in length
- not case sensitive
- can use special characters as well as standard alphanumeric characters

Passwords are formatted according to the following parameters:
- 0-128 characters in length
- case sensitive
- can use special characters as well as standard alphanumeric characters
User Types

There are six types of users in Descartes Dock Appointments Scheduling. Each user type has tasks relevant to that particular login based on a set of predefined roles assigned to the type, i.e. when a new user is created and assigned, it comes preloaded with user roles allowing the user access to certain tasks in the system.

The six user types are:

- DC Admin User
- Coordinator User
- Carrier User
- Supplier User
- Check In User
- View Only User

The DA Admin is a global super user with access to all data and functions in the system.

All users can perform the following tasks:

- View appointments
  
  Note— Users can only view the appointments that they are authorized to see.

- Search appointments
- Print the following appointments:
  - Created (Draft)
  - Submitted
  - Refused/Cancelled
  - Approved
  - Arrived
  - No Show
  - Departed

DC Admin

A DC Admin user can perform the following tasks, restricted to appointments and other data in his or her related distribution center:

- Set up Distribution Centers (DC's), Carriers, Suppliers, and Global Settings
- Set up users for the parties (DC's, Carriers, and Suppliers)
- View DC's, Carriers, and Suppliers information
- Delete users from DC's, Carriers, and Suppliers
- Delete DC's, Carriers, and Suppliers
- Perform all tasks that a Coordinator user can perform
Coordinator

A Coordinator user can perform the following tasks:

- Create regular and standing appointments
- View door assignments
- View Distribution Center, Carrier, and Supplier details
- View appointments including door assignment and additional order information
- Manually Approve the following appointments:
  - Created (Draft)
  - Submitted
- Refuse submitted appointments
- Cancel the following appointments:
  - Submitted
  - Approved
  - Arrived
  - No Show
- Delete the following appointments:
  - Standing
  - Created
  - Submitted
  - Refused/Cancelled
  - Approved
  - Arrived
  - Departed
  - No Show
- Submit the following appointments:
  - Created
  - Refused/Cancelled
- Reschedule the following appointments:
  - Standing
  - Approved
  - No Show
- Show related appointments for standing appointments
- Check in/out the following appointments:
  - Approved
  - Arrived
  - No Show
- Undo Check out the following appointments:
Coordinator/YM

Users of this type can perform the tasks of both the Coordinator and YM Shipping Receiving user types. With this user type, DC Admin users can assign all rights to a user without the need to log in as a user administrator to add specific Descartes Yard Management™ permissions to a Coordinator user.

- Create regular and standing appointments
- View door assignments
- View Distribution Center, Carrier and Supplier details
- View appointments including door assignment and additional order information
- Manually Approve the following appointments:
  - Created (Draft)
  - Submitted
- Refuse submitted appointments
- Cancel the following appointments:
  - Submitted
  - Approved
  - Arrived
  - No Show/Delivery Failure
- Delete the following appointments:
  - Standing
  - Created
  - Submitted
  - Refused/Cancelled
  - Approved
  - Arrived
  - Departed
  - No Show/Delivery Failure
- Submit the following appointments:
  - Created
  - Refused/Cancelled
- Reschedule the following appointments:
  - Standing
  - Approved
  - No Show/Delivery Failure
• Show related appointments for standing appointments
• Check in/out the following appointments:
  o Approved
  o Arrived
  o No Show/Delivery Failure
• Undo Check out the following appointments:
  o Departed
• Move the following appointments to No Show/Delivery Failure:
  o Approved
  o Arrived
• Arrive and depart trailers
• Move and update trailers
• View trailer details and history

Carrier

A Carrier user has access to appointment requests that identify the respective carrier in the request header, and can perform the following tasks:

• View Carrier details and add more Carrier terminals
• Create appointment requests
• Create appointment requests against standing appointments
• View appointment progress without access to door assignment and additional order information
• Submit the following appointments:
  o Created (Draft)
  o Refused/Cancelled
• Re-submit the following appointments with a new date or changed contents:
  o Refused/Cancelled
  o Approved
  o No show
• Cancel the following appointments:
  o Submitted
  o Approved
  o Arrived
  o No Show

Supplier

A Supplier user has access to appointment requests that identify the respective supplier in the request header. For certain clients, Supplier users also have access to
appointments when specified at the appointment line item level. Supplier users can perform the following tasks:

- View Supplier details and add more Carrier terminals from the **Appointment Request** page
- Create appointment requests
- Create appointment requests against standing appointments
- View appointment progress without access to door assignment and additional order information
- Submit the following appointments:
  - Created (Draft)
  - Refused/Cancelled
- Re-submit the following appointments with a new date or changed contents:
  - Refused/Cancelled
  - Approved
  - No Show
- Cancel the following appointments:
  - Submitted
  - Approved
  - Arrived
  - No Show

**Check-in**

The Check-In user is assigned to a DC. A Check-In user can perform the following tasks:

- View door assignments
- Check In/Out the following appointments:
  - Arrived
  - No show
- Undo Check-Out of the following appointments:
  - Departed
- Move the following appointments to No Show:
  - Approved
  - Arrived

**View Only**

The View Only user is assigned by DC. A View Only user only has permission to view appointment across all statuses.
Using the Interface

This section provides instructions on the following topics:

• The Main Menu
• Getting Help
• Examining the Page Layout
• Re-sizing the Descartes Logo
• Setting Up Columns
• Using Results Lists

The Main Menu

The main menu, located directly beneath the Descartes logo, provides users with options for performing the various functions within Descartes Dock Appointments Scheduling:

| Dock Appointments | User Profile | Help |

⚠️ Note— Main menu options vary according to access role. See Appendix A: Using the Main Menu for details.

Getting Help

Descartes Dock Appointments Scheduling includes an online HTML help system. It contains explanations of many features and functions within the Descartes Dock Appointments Scheduling application, and procedures to guide users through the application’s basic functionality.

To access online help for Descartes Dock Appointments Scheduling, select Help > Contents from the main menu.

The Dashboard/Home Page

The following image illustrates a typical view of the Descartes Dock Appointments Scheduling Dashboard/Home Page:
Re-sizing the Descartes Logo

Users can maximize or minimize the size of the logo to provide more or less space for viewing data and performing tasks. The following illustrations show the logo in minimized and maximized states.

Maximized Logo

Minimized Logo

To minimize the maximized logo, click the small minus sign (⁻) button beside the logo.

When the logo is maximized, the title of the current page, the logged in user’s name, and the user’s log in time appears. To maximize the minimized logo, click the small plus sign (⁺) button beside the logo.

When the logo is minimized, the title of the current page, the logged in user’s name, and the time the user logged in disappears.
Setting up Columns

When setting up columns within a window on the Dashboard, users can:

- Add a column
- Remove a column
- Reset columns to the default order

Adding a Column

To add column to the Dashboard:

1. Right-click anywhere in the appointment list to display the right-click menu.
2. Select Select Columns from the right-click menu. The Select Columns page appears.

3. Under the Available Columns, click the + sign next to Columns. The Columns table expands to show all available columns.

   Note—Column labels in the Selected Columns section of the page have an asterisk (*) adjacent to it in the Available Columns section.

4. To add a column, drag and drop the column name(s) onto the Selected Columns section.

5. To save the change and return to the Dashboard, click Save; otherwise click Cancel.
Removing a Column

To remove an unwanted column from the list area on the Dashboard:

1. Right-click anywhere in the appointment list to display the right-click menu.
2. Select Select Columns from the right-click menu. The Select Columns page appears.

3. Under the Available Columns, click the + sign next to Columns. The Columns table expands to show all available columns.

   Note—Column labels in the Selected Columns section of the page have an asterisk (*) adjacent to it in the Available Columns section.

4. To remove a selected column, drag and drop it back into the Available Columns section of the page.
5. To save the change and return to the Dashboard, click Save; otherwise click Cancel.

Resetting Columns to Default Order

To reset columns to the default view on the Dashboard:

1. Right-click anywhere on the appointment list to display the right-click menu.
2. Select Reset Columns from the right-click menu. The columns revert to their default settings.
Using Lists

When performing a function in Descartes Dock Appointments Scheduling, such as viewing a Created (Draft) Appointments, a results list appears:

This section covers the following topics:

- Navigating in lists
- Refreshing list data
- Finding items in a list
- Exporting results
- Printing Results

Navigating in Lists

With items in a results list, the following can be performed:

- **Highlight** an item by right-clicking it. To highlight multiple list items in a series, hold the SHIFT key while right-clicking the first item and the last item, in the series. To highlight multiple list items at random, hold the CTRL key while right-clicking the first item, then the last item.

- **Right-click** an item to display a pop-up menu of options relative to the highlighted item, or columns on the page. The bold item in the right-click menu represents the default action.

- **Double-click** an item to perform its default action, as per the bold item listed in the right-click menu.

- **Select the entire list** by right-clicking a list item and selecting **Select All** from the right-click menu.

**Note**—**Select All** selects the entire list — including those list items appearing on pages preceding and following the currently displayed page.

Descartes Dock Appointments Scheduling provides a number of tools for navigating in long lists.
As per the illustration, these tools include the following:

- **Rows per Page Selector** (Rows per Page: 10 / 20 / 50)
  Enables users to select the number of list items (10, 20, or 50) displayed on a single page in the list. The current selection is in bold. Click one of the other selections to change the number of items displayed on each page.

- **Page Selector** (Page 12)
  Enables users to jump directly to another page in the list. The current page number is in bold. Click a page number to view that page in the list.

- **List Navigator**
  Enables users to move through the list page-by-page. The four buttons in the list navigator are:
  - Jump to the first page
  - Jump to the previous page
  - Jump to the next page
  - Jump to the last page

**Refreshing List Data**

Descartes Dock Appointments Scheduling is continuously updated by Coordinator, Check-in, Supplier, and Carrier users’ actions. If users work with the list items on one page for a long period, the data in the page may become out-of-date. To ensure access to current data, click the **Refresh** button.

**Finding Items in Lists**

When looking through a long list of documents for a specific document, users can use the **Find** box.

To find a document using the **Find** box:

1. Click inside the **Find** box.
2. Type the search term desired.

   ❗️ **Note**— The search term can correspond to any column currently displayed in the list.

3. Click **Find**. The results will be displayed in the same screen and are highlighted:
To display all the items in the list again, click **Show All**.

**Note**— The **Show All** button appears beside the **Find** button after selecting the **Find** box.

### Exporting Results

You can transfer data displayed in a window, including any additional data available but not immediately visible, to a new browser window in the format of a spreadsheet or to an HTML webpage.

**Note**— Many result listing views enable the export data capability described here.

1. Highlight the document to export and right-click anywhere within the results listing. The right-click menu appears as shown previously.
2. From the right-click menu, select **Export List as Tab-Delimited**. A new window opens, showing data has been exported to a spreadsheet.

3. Click **File**, select **Save As** and select the appropriate format from the drop-down field **Save as type** to store the data as an spreadsheet file.
**Note**—The entire results content is exported to the spreadsheet, even if the page currently displays only part of the results.

To export the results to an HTML webpage:

1. Highlight the document you want to export and right-click anywhere within the results listing.
2. From the right-click menu, select **Export List as HTML**. A new web page will display with your selected data formatted in a table.

### Printing Results

Users can create a print version of the results in a new browser window. To create the print version:

1. Highlight the document to export and right-click anywhere within the results listing. The right-click menu appears as shown previously.
2. From the right-click menu, select **Print**. A new browser window opens displaying the results in a printable format.

3. To print the results, from the browser’s menu bar, select **File > Print**.
Using Forms

When working with Descartes Dock Appointments Scheduling, the user is often required to enter data using forms. When using forms, it is useful to be aware of:

- Field values
- Wildcards
- Keyboard shortcut keys
- Date and time format
- Saving changes

Field Values

Fields are displayed using three styles, and these styles provide a visual guide to which fields users can edit, and which fields must contain information.

- Fields outlined in red are required, and users cannot save users' data or changes unless users have entered an appropriate value in all of the fields outlined in red.
- Fields outlined in gray are optional.
- Fields that are solid gray are used for display purposes only and cannot be changed.

Tip—Fields that cannot be edited on one page, may be required or optional on another page.

Using Wildcards

The wildcard character, using the “Starts with” approach, is implicitly implied such that; if users enter a search term for a document key, the search includes all documents that begin with that key. For example, if users enter 50 for a number, the search includes 50, 4.7500, 4.0500, and any other numbers that begin with those characters. However, the search term 50 does not return just the number 5.

Keyboard Shortcuts

These keyboard shortcuts can help you to move around within Descartes Dock Appointments Scheduling quickly.

- To navigate to the next field, press Tab.
- To navigate to the previous field, press Shift + Tab.
- To scroll through the entries in a list field, press the up-arrow and down-arrow keys.

These keyboard shortcuts may help you

- To select text for copying, select the text and press ALT.
- To refresh the page, press Shift + F5.
Date and Time Format

Users can use the date/time dialog to quickly enter dates and times in Descartes Dock Appointments Scheduling fields.

To open the date/time dialog, click the calendar icon to the right of the field. To enter a date, select the year, month, and day on the dialog. To enter a time, use the arrow keys to increase or decrease the hours and minutes, and select AM or PM to set the time of day.

The date and time value appears in the field, and changes as users adjust the values on the dialog.

Saving Changes

If you are adding or editing information in Descartes Dock Appointments Scheduling, you may see the following buttons at the top of the screen:

- Click **Save and Close** to save your changes and close the form.
- Click **Save** to save your changes, but keep the form open.
- Click **Close** to close the form. You can also close the window by clicking the X in the upper right corner of the form.
Managing User Profiles

Descartes Dock Appointments Scheduling provides the following tools for managing user profiles:

- Changing user passwords
- Changing the color scheme
- Resetting columns to default order
- Setting user preferences
- Changing user groups

Changing the User Password

To change a user’s password:

1. From the main menu, select User Profile > Change Password. The Change Password dialog box appears:

2. In the Old Password field, enter the user’s current password.
3. In the New Password field, enter the user’s new password.
4. In the Confirm Password field, re-enter the new password.
5 You can also optionally enter a Recovery Question/Answer and an email address used to reset your password. For more information on resetting your password, please see the *Descartes Dock Appointments Scheduling User’s Guide*.

6 Click **Save** to save keep the new password. The new password will be required the next time the user logs in.

Warn— If users do not want to save the password change, click **Close**.

**Changing the Color Scheme**

To change a user’s color scheme:

1 From the main menu, select **User Profile > Color Scheme**. The **Colors** page appears:

![Color Scheme Options]

2 Click the color scheme desired. The color scheme will be immediately applied to the application user interface.

**Resetting Columns to Default Order**

To reset the order of the columns to their default order, right-click a list item and select **Reset Columns**.

OR

From the main menu, select **User Profile > Reset All Columns**.

**Setting User Preferences**

In Reporting Services, users can set preferences for currency, language, measurement system and time zone. To set **preferences**:
1. From the main menu, select **User Profile > Preferences**. The **Preferences** page appears:

![Preferences page](image)

2. From the drop-down lists, select the desired:
   - **Date Format**
     The three date formats are: M/D/YYYY (Month, Day, Year) and D/M/YYYY (Day, Month, Year), and D-MMM-YYYY (Day, Month, Year; 3-Mar-2006).
   - **E-Mail Address**
     You can enter your e-mail address in Descartes Dock Appointments Scheduling to store with your User ID for future use.
   - **Screen Font**
     You can modify the font attributes in Descartes Dock Appointments Scheduling.

3. Click **Save**. The **Preferences Saved** dialog box appears:

![Preferences Saved dialog box](image)

4. Click **OK**.

   **Note**— From the **Preferences** page, users can also reset columns to their default setting. To do so, click **Reset Default Column Settings**.

### Changing User Groups

Depending on your security level, you may have access to more than one user group. If so, you can change which user group you are viewing in Descartes Dock Appointments Scheduling.