Operating Lease Support System Phase-2 Project for

DIPO STAR FINANCE
Solusi Kredit Otomotif Terpercaya

Functional Specification FC.AD.1.1 Monitoring and Print Unit Preparation Report

Revision 2.0

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Project Code :	TM15404A
Project Name :	Operating Lease Support System Phase-2

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Document Approval

By signing this document I acknowledge I have read the document and give the Project Management Team approval to proceed.

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Functional Specification

1 Introduction

1.1 Purpose

Functional Specification is a document to describe the detail of functions system which includes screen design, report, and logic formula. This document will be used for system development.

1.2 Scope

Functional Specification Document contains screen design, screen functionality, process flow, and data structure of AD.1.1 Monitoring Unit Preparation.

Here are the scope for AD.1.1 Monitoring Unit Preparation:

1. **AD.1.1.1 Display Monitoring Unit Preparation**

   To view schedule Supplier due date delivery unit to DSF based on purchase order and unit

2. **AD.1.1.5 Update Unit Preparation Progress Status**

   Update progress status of unit preparation at supplier after confirm to supplier

3. **AD.1.1.6 Print Monitoring Report Unit Preparation**

   Print monitoring unit preparation monthly report

<u>Output from this functions is:</u>

1. **RPT.AD.1.1 Unit Preparation report**

1.3 Definition, Acronyms, and Abbreviations

1. OPL = Operating Lease
2. PO = Purchase Order
3. BAST = Berita Acara Serah Terima / Handover Report

1.4 References

This functional specification document refers to **"To Be Design" BSI Unit/ Vehicle Management Process**, module:

1. AD.1.1 Monitoring Unit Preparation

2 Configuration

N/A

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3 Specification Detail: FC.AD.1.1 Monitoring and Print Unit Preparation Report

3.1 Purpose

Screen of Monitoring and Print Unit Preparation will be used by PIC Asset Management to monitor and update unit preparation progress at Supplier. This screen functions consist of display unit preparation data, update unit preparation progress status, and print monitoring unit preparation monthly report. Monitoring will be based on Purchase Order (PO).

This function covered by **"Monitoring Unit Preparation"** screen

3.2 Screen of Configuration Access

Here are the access right for **"Monitoring Unit Preparation"** screen users:

User	***Create***	***Read***	***Update***	***Print***	**Authorization**
DSF Authorize Person	-	V	-	V	V
PIC Asset Management	-	V	V	V	V
Admin	-	V	V	V	V

Legend: V = Have the access

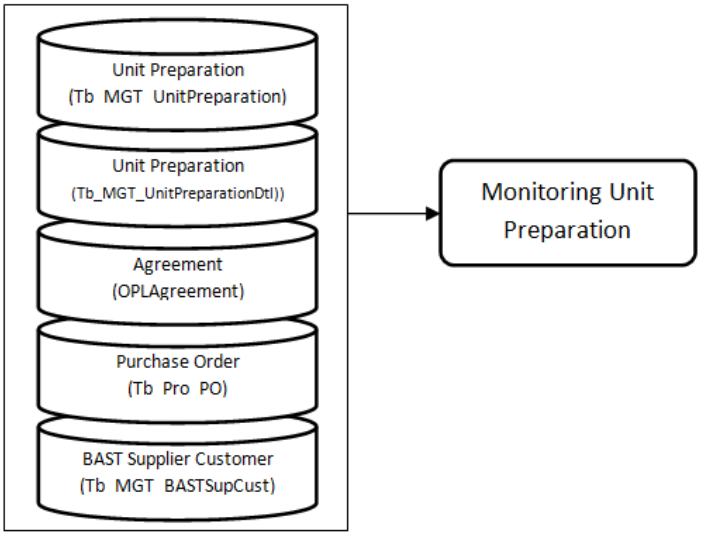
Note:
1. Read: related to read display data unit preparation
2. Update: related to update data unit preparation
3. Print: related to print unit preparation report
4. Authorization: related to access screen monitoring unit preparation – Outstanding unit tab

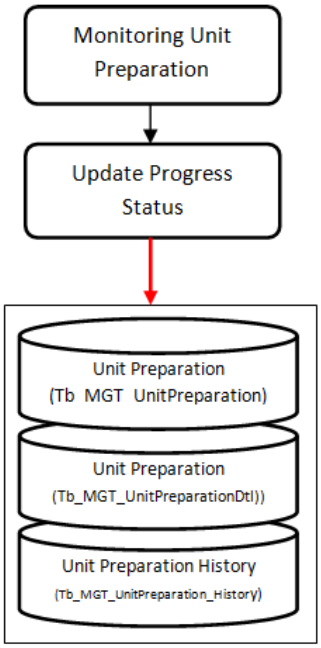
3.3 Screen Functionality

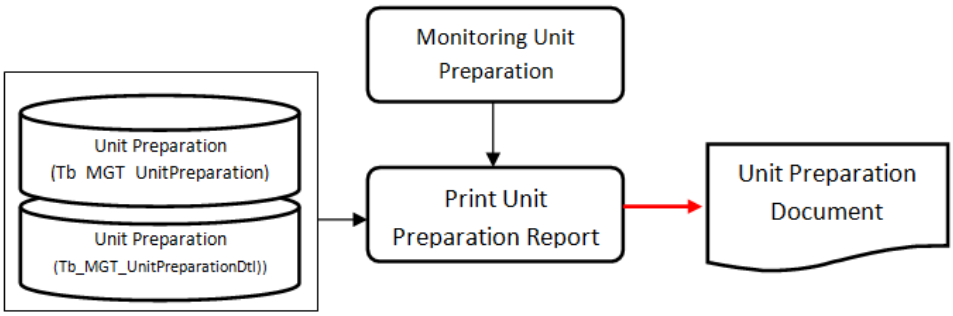
1. Display monitoring unit preparation
2. Update unit preparation progress status
3. Print monitoring report unit preparation

3.4 Operation Flow

Below is operation flow for Monitoring and print unit preparation process refer to **To Be Design Document Unit/ Vehicle Management**, AD.1.1. Monitoring Unit Preparation:

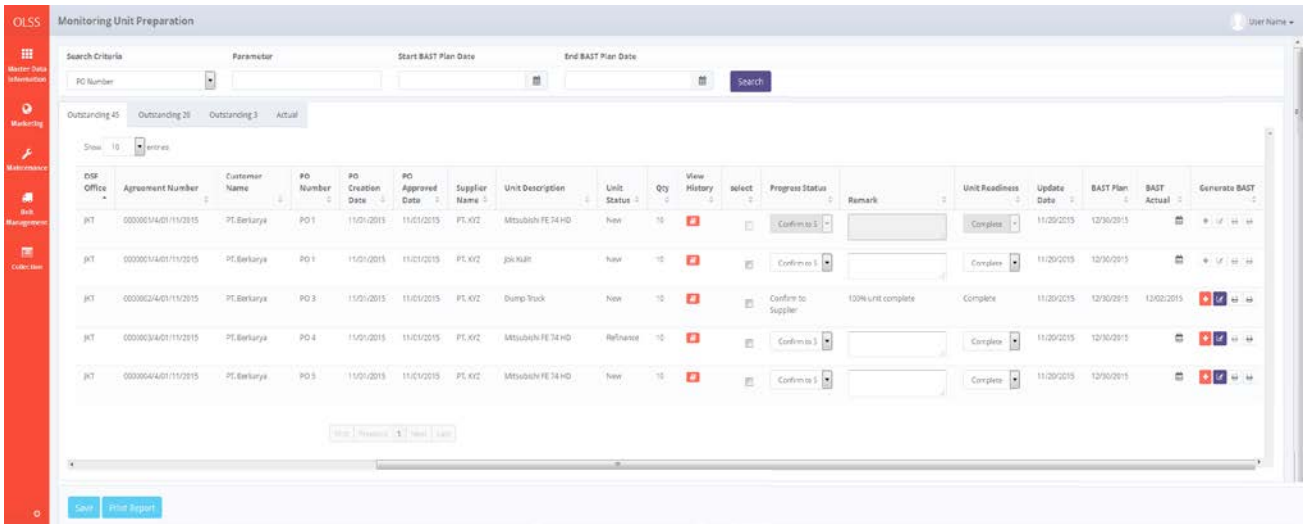
Roles	Display Monitoring Unit Preparation
PIC Admin	

Roles	Update Unit Preparation Progress Status
PIC Admin	

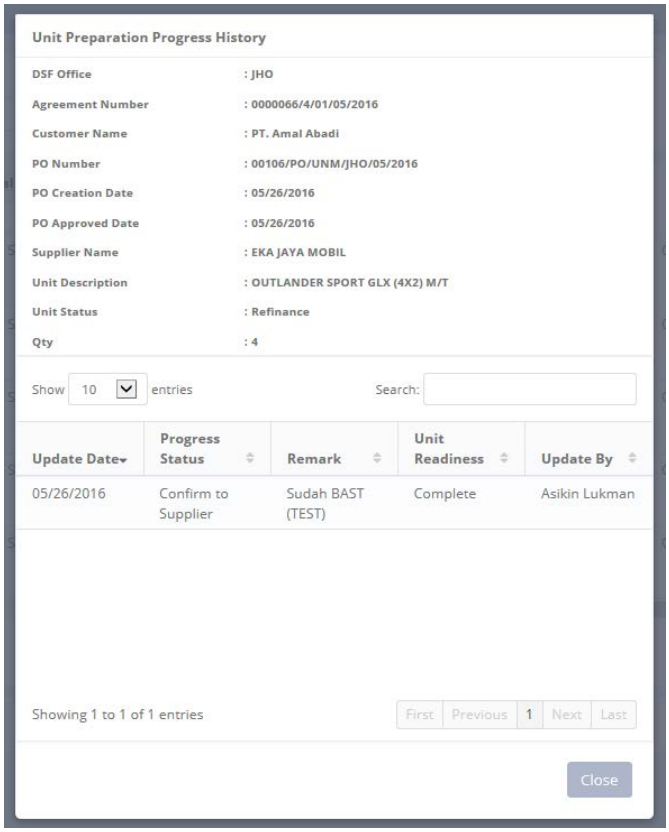
Roles	Print Unit Preparation Report and Form
PIC Admin	

3.5 Screen Design

- *Initial Screen Monitoring Unit Preparation*



Screen 1. Monitoring Unit Preparation – Outstanding Unit

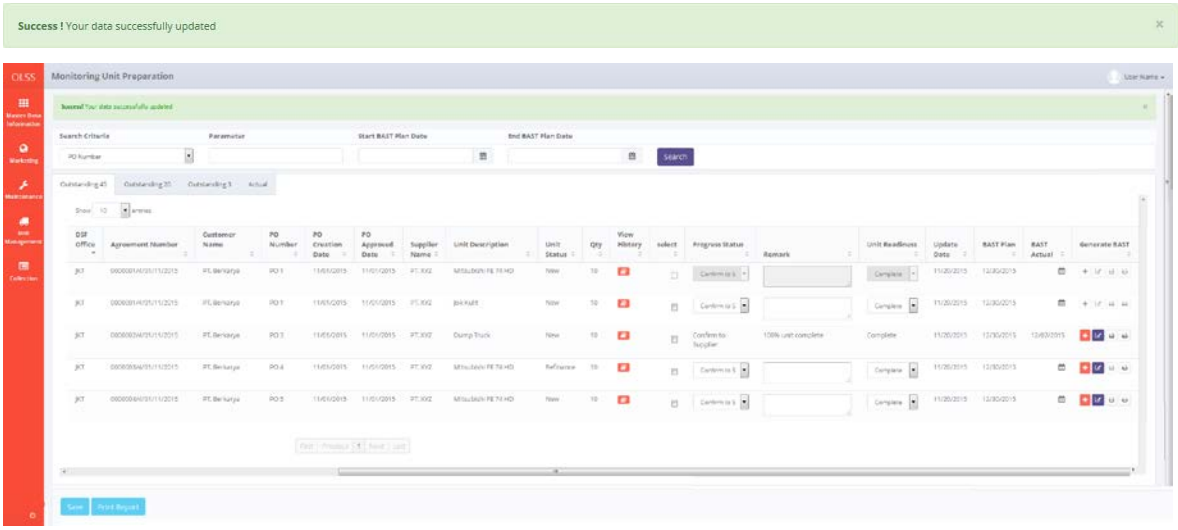


Screen 2. Unit Preparation Progress History

- *Confirmation Pop Up*

Screen 3. Confirmation Pop Up When Update Unit Preparation Progress Status

Notification Pop Up When Update Unit Preparation Progress Status



Screen 4. Notification Pop Up When Update Unit Preparation Progress Status

3.6 Component Screen Functionality

a. Monitoring Unit Preparation – Outstanding Unit

Here are the screen functions from each component in **Screen 1. Monitor Unit Preparation**:

No	Component	Name	Function
Header			
1	Label	Monitoring Unit Preparation	Monitoring Unit Preparation title
Search Criteria			
2	Drop down box	Search Criteria	To select category for searching unit preparation data
3	Text box	Parameter	To input parameter for searching unit preparation data
4	Date Picker	Start BAST Plan Date	To input start period based on BAST Plan Date when print unit preparation data report
5	Date Picker	End BAST Plan Date	To input end period based on BAST Plan Date when print unit preparation

			data report
6	Button	Search	To search preparation unit data based on selected criteria
List of Tab			
7	Tab	Outstanding 45	To display unit per PO number which has 45 days left before BAST calculated (calendar days) from BAST Plan Date
8	Tab	Outstanding 20	To display unit per PO number which has 20 days left before BAST calculated (calendar days) from BAST Plan Date
9	Tab	Outstanding 3	To display unit per PO number which has 3 days left before BAST calculated (calendar days) from BAST Plan Date
10	Tab	Actual	To display actual receiving unit (*refer to FC.AD.1.3 Monitoring and Print Unit Receiving Report document*)
11	Drop down	Show Entries	To select number of row data that will be displayed in one screen (paging)
12	Button	Sort	To sort data on table list of Unit Preparation ascending and descending
13	Label	DSF Office	To display DSF Office code of PO
14	Label	Agreement No	To display Agreement No
15	Label	Customer Name	To display Customer Name
16	Label	PO Number	To display PO number that already approved by Supplier
17	Label	PO Creation Date	To display PO creation date
18	Label	PO Approved Date	To display PO approval date
19	Label	Supplier Name	To display Supplier name
20	Label	Unit Description	To display unit purchased
21	Label	Unit Status	To display lease category (new or used)
22	Label	Qty	To display quantity of unit purchased
23	Button	View History	To display history of unit preparation progress (*refer to Screen 2 Detail Unit Preparation Progress History)*
24	Button	Checklist Select	To select data that will be update
25	Dropdown	Progress Status	To select progress status of unit preparation with value: Confirm to Supplier, Visit Supplier
26	Text field	Remark	To input progress status of unit preparation supplier
27	Dropdown	Unit Readiness	To input unit readiness status; complete, in progress, and no progress
28	Label	Update Date	To display last update date of unit preparation progress status
29	Label	BAST Plan	To input BAST plan date

30	Date Picker	BAST Actual	To display BAST actual date
31	Button	Create BAST	To create and print BAST print form
32	Button	Edit BAST	To update BAST print form based on BAST result
33	Button	Print BAST Supplier	To print BAST Supplier to DSF
34	Button	Print BAST Customer	To print BAST DSF to Customer
35	Label	Showing 1 to *n* of *n* entries	Display the entries generated by search engine
36	Link	First Page	To show the first page entry
37	Link	Previous Page	To show the previous page entry
38	Link	Page Number	To show the page screen according the number
39	Link	Next Page	To show the next page entry
40	Link	Last Page	To show the last page entry
Footer			
41	Button	Save	To save update unit preparation status progress
42	Button	Print Report	To print report unit preparation status as shown on the list

b. Unit Preparation Progress History

Here are the screen functions from each component in **Screen 2. Unit Preparation Progress History**:

List of Unit Preparation Progress History			
1	Label	Unit Preparation Progress History	Unit Preparation Progress History title
2	Label	DSF Office	To display DSF Office code of PO
3	Label	Agreement Number	To display Agreement No
4	Label	Customer Name	To display Customer Name
5	Label	PO Number	To display PO number that already approved by Supplier
6	Label	PO Creation Date	To display PO creation date
7	Label	PO Approved Date	To display PO approval date
8	Label	Supplier Name	To display Supplier name
9	Label	Unit Description	To display unit purchased
10	Label	Unit Status	To display lease category (new or used)
11	Label	Qty	To display quantity of unit purchased

12	Text Field	Search	To search unit preparation progress history data based on update date, progress stat, remark, unit readiness
13	Drop down	Show Entries	To select number of row data that will be displayed in one screen (paging)
14	Label	Update Date	To display update date of unit preparation progress status
15	Label	Progress Status	To display progress status of unit preparation
16	Label	Remark	To display progress status of unit preparation supplier
17	Label	Unit Readiness	To display unit readiness status; complete, in progress, and no progress
18	Label	Update By	To display user whom update progress unit preparation
19	Label	Showing 1 to *n* of *n* entries	Display the entries generated by search engine
20	Link	First Page	To show the first page entry
20	Link	Previous Page	To show the previous page entry
21	Link	Page Number	To show the page screen according the number
22	Link	Next Page	To show the next page entry
23	Link	Last Page	To show the last page entry
Footer			
24	Button	Close	To close window

3.7 Operation Description

<table>
<tr><th>No.</th><th>Operation Name</th><th>Description</th></tr>
<tr><td>1</td><td>Initial view of List Monitoring Unit – Outstanding unit</td><td>The screen for list of Monitoring Unit – Outstanding Unit:
1. Component Status;
<table>
<tr><th>Component</th><th>Name/Caption</th><th>Status</th><th>Remark</th></tr>
<tr><td>Label</td><td>Monitoring Unit Preparation</td><td>Not Active</td><td></td></tr>
<tr><td>Drop down box</td><td>Search Criteria</td><td>Active</td><td>As initial by default column name that will be display on drop down is DSF Office</td></tr>
<tr><td>Text box</td><td>Parameter</td><td>Active</td><td>Value:
- DSF Office
- Agreement Number
- Customer Name
- PO Number
- Supplier Name
- Unit Description
- Unit Status
- Qty
- Progress Status
- Remark</td></tr>
</table></td></tr>
</table>

						- Unit Readiness - BAST Plan
			Date Picker	Start BAST Plan Date	Active	
			Date Picker	End BAST Plan Date	Active	
			Button	Search	Active	
			Tab	Outstanding 45	Active	Will have same list column and component
			Tab	Outstanding 20	Active	
			Tab	Outstanding 3	Active	
			Tab	Actual	Active	*refer to FC.AD.1.3 Monitoring and Print Unit Receiving Report document*
			Drop down	Show Entries	Active	As initial by default number of show entries list that will be display is 10
			Button	Sort	Active	
			Label	DSF Office	Not Active	
			Label	Agreement No	Not Active	
			Label	Customer Name	Not Active	
			Label	PO Number	Not Active	
			Label	PO Creation Date	Not Active	
			Label	PO Approved Date	Not Active	
			Label	Supplier Name	Not Active	
			Label	Unit Description	Not Active	
			Label	Unit Status	Not Active	
			Label	Qty	Not Active	
			Button	View History	Active	
			Button	Checklist Select	Active	
			Dropdown	Progress Status	Not Active	
			Text field	Remark	Not Active	
			Dropdown	Unit Readiness	Not Active	
			Label	Update Date	Active	Automatically display last update date of unit per PO number
			Label	BAST Plan	Active	
			Date Picker	BAST Actual	Not Active	Will be active if TB_MGT_UnitPreparationDtl.UnitReadiness = Complete AND TB_MGT_UnitPreparation.BASTStatus = null Will be not active if Agreement (OPLAgreement.AgreementNumber) has multiple supplier (TB_PRO_PODtl.PONumber) AND TB_PRO_PODtl.Type = Carrosserie AND

						TB_PRO_PODtl.Type = Accessorie
			Button	Create BAST	Not Active	Will be active if TB_MGT_UnitPreparationDtl.UnitReadiness = Complete AND TB_MGT_UnitPreparation.BASTStatus = null Will be not active if Agreement (OPLAgreement.AgreementNumber) has multiple supplier (TB_PRO_PODtl.PONumber) AND TB_PRO_PODtl.Type = Carrosserie AND TB_PRO_PODtl.Type = Accessorie
			Button	Edit BAST	Not Active	Will be active if TB_MGT_UnitPreparationDtl.UnitReadiness = Complete AND TB_MGT_UnitPreparation.BASTStatus = 1 Will be not active if Agreement (OPLAgreement.AgreementNumber) has multiple supplier (TB_PRO_PODtl.PONumber) AND TB_PRO_PODtl.Type = Carrosserie AND TB_PRO_PODtl.Type = Accessorie
			Button	Print BAST Supplier	Not Active	Will be active if TB_MGT_UnitPreparationDtl.UnitReadiness = Complete AND TB_MGT_UnitPreparation.BASTStatus = 1 AND OPLAgreement.LeaseCategory != Refinance, where Tb_MGT_UnitPreparation.IdTb_PRO_PODtl = Tb_PRO_PODtl.IdTb_PRO_PODtl AND Tb_PRO_PODtl.IdTb_PRO_PODtl = Tb_PRO_PO.IdTb_PRO_P

					O AND Tb_PRO_PO.IdOPLAgreement = OPLAgreement.IdOPLAgreement
		Button	Print BAST Customer	Not Active	Will be active if TB_MGT_UnitPreparationDtl.UnitReadiness = Complete AND TB_MGT_UnitPreparation.BASTStatus = 1
		Label	Showing 1 to *n* of *n* entries	Active	
		Link	First Page	Active	
		Link	Previous Page	Active	
		Link	Page Number	Active	
		Link	Next Page	Active	
		Link	Last Page	Active	
		Button	Save	Active	
		Button	Print Report	Active	

2	Display Monitoring Unit Preparation	<u>Input:</u> 1. Access OLSS 2. Select menu Management 3. Select sub menu Monitoring Unit Preparation 4. Select Outstanding tab; bucket 45, 20, or 3 5. Select number of show list entries : 10, 25, 50, and 100 <u>Process:</u> 1. System displays data on selected List of Outstanding Unit; bucket 45, 20, or 3 2. System will get data PO where Tb_PRO_PODtl.isMaintenance != TRUE AND Tb_PRO_PO.POStatus = 3 then input several PO data to table Tb_MGT_UnitPreparation as below (if Sys.CurrentDate = Tb_PRO_PO.PODate + Tb_PRO_PO.DeliveryPeriode - 45 days): - IdTb_MGT_UnitPrep → automatically increment - IdTb_PRO_PODtl → Id table Tb_PRO_PODtl - BASTPlanDate → Tb_PRO_PO.PODate + Tb_PRO_PO.DeliveryPeriode - BASTActualDate → null - BASTTotal → null - BASTRemaining → Tb_PRO_PODtl.Qty - BASTStatus → null Note: *1 = Draft (BAST already created but has not been submited)* *2 = Submitted (BAST already submitted)* 3. System displays unit per PO number which based on the latest Update date (Tb_MGT_UnitPreparationDtl.LastModifiedDate): 3.1 Status of unit is In Progress and No Progress (Tb_MGT_UnitPreparationDtl.UnitReadiness != Complete) 3.2 Status of unit is complete AND BAST document has not been made yet or has not been submit yet (Tb_MGT_UnitPreparationDtl.UnitReadiness = Complete) AND (TB_MGT_UnitPreparation.BASTStatus != 2) 4. System sort PO number based on the oldest PO creation date 5. Based on **Screen 1. Monitoring Unit Preparation – Outstanding Unit**, information related to PO that will be display automatically are:

- DSF Office (source: Tb_OPL_Branch.BranchShortName)
  Where
  Tb_MGT_UnitPreparation.IdTb_PRO_PODtl = Tb_PRO_PODtl.IdTb_PRO_PODtl AND Tb_PRO_PODtl.IdTb_PRO_PODtl = Tb_PRO_PO. IdTb_PRO_PO AND Tb_PRO_PO.IdBranch = Tb_OPL_Branch.IdBranch
- Agreement No (source: OPLAgreement.AgreementNumber)
  Where Tb_PRO_PO.IdOPLAgreement = OPLAgreement.IdOPLAgreement
- Customer Name (source: Customer.CustomerName)
  Where OPLAgreement.CustomerCode = Customer.CustomerCode
- PO Number (source: Tb_PRO_PO.PONumber)
  Where
  Tb_MGT_UnitPreparation. IdTb_PRO_PODtl = Tb_PRO_PODtl. IdTb_PRO_PODtl AND
  Tb_PRO_PODtl. IdTb_PRO_PO = Tb_PRO_PO. IdTb_PRO_PO
- PO Creation Date (source: Tb_PRO_PO.PODate)
  Where
  Tb_MGT_UnitPreparation. IdTb_PRO_PODtl = Tb_PRO_PODtl. IdTb_PRO_PODtl AND
  Tb_PRO_PODtl. IdTbRemak_PRO_PO = Tb_PRO_PO. IdTb_PRO_PO
- PO Approved Date (source: TB_PRO_PO.POApprovalDate)
  Where
  Tb_MGT_UnitPreparation. IdTb_PRO_PODtl = Tb_PRO_PODtl. IdTb_PRO_PODtl AND
  Tb_PRO_PODtl. IdTb_PRO_PO = Tb_PRO_PO. IdTb_PRO_PO
- Supplier Name (source: Supplier.SupplierName)
  Where
  Tb_MGT_UnitPreparation. IdTb_PRO_PODtl = Tb_PRO_PODtl. IdTb_PRO_PODtl AND
  Tb_PRO_PODtl. IdTb_PRO_PO = Tb_PRO_PO. IdTb_PRO_PO AND Tb_PRO_PO.IdSupplier = Supplier.IdSupplier

- Unit Description

Source	Remark
Product. ModelName	*Where Tb_MGT_UnitPreparation.* IdTb_PRO_PODtl = *Tb_PRO_PODtl.* IdTb_PRO_PODtl *AND Tb_PRO_PODtl.IdProduct = Product.IdProduct*
Tb_PRO_PODtl.Name	*Where Tb_MGT_UnitPreparation. IdTb_PRO_PODtl = Tb_PRO_PODtl. IdTb_PRO_PODtl*

- Unit Status (source: OPLAgreement.LeaseCategory)
  Where
  Tb_MGT_UnitPreparation. IdTb_PRO_PODtl = *Tb_PRO_PODtl.* IdTb_PRO_PODtl *AND*
  Tb_PRO_PODtl.IdTb_PRO_PO = Tb_PRO_PO. IdTb_PRO_PO AND Tb_PRO_PO.IdOPLAgreement = OPLAgreement.IdOPLAgreement
- Qty (source: Tb_PRO_PODtl.Qty)
  Where

Tb_MGT_UnitPreparation. IdTb_PRO_PODtl = Tb_PRO_PODtl. IdTb_PRO_PODtl

- Update Date (source: Tb_MGT_UnitPreparationDtl.LastModifiedDate) *Where Tb_MGT_UnitPreparationDtl.IdTb_MGT_UnitPrep = Tb_MGT_UnitPreparation.IdTb_MGT_UnitPrep*
- BAST Plan (source: Tb_MGT_UnitPreparation.BASTPlanDate) Formula: Tb_PRO_PO.PODate + Tb_PRO_PO.DeliveryPeriod

Note:

- Outstanding tab; bucket 45, 20, and 3 have same fields number and component.
- Date will be display in format: MM/dd/yyyy

6. Number data row on list will be based on selected show number entries

<u>Output:</u>

1. Display data list of outstanding unit

<u>Alternative:</u>

1. Click Actual tab to display receiving unit (*refer to FC.AD.1.3 Monitoring and Print Unit Receiving Report document*)

3 Update Unit preparation Progress Status

<u>Input:</u>

1. Access OLSS
2. Select menu Management
3. Select sub menu Monitoring Unit Preparation
4. Select Outstanding tab; bucket 45, 20, or 3
5. Input search criteria category:

Search Criteria	**Constraint Input**
DSF Office	varchar
Agreement Number	varchar
Customer Name	varchar
PO Number	varchar
Supplier Name	varchar
Unit Description	varchar
Unit Status	varchar
Qty	Integer
Progress Status	value: Confirm to Supplier, Visit Supplier
Remark	varchar
Unit Readiness	value: Complete, In Progress, No Progress

6. Select start date and end date to filter data based on the range update date

Date Picker	**Constraint Input**
Start BAST Plan Date	Cannot greater than End BAST Plan Date
End BAST Plan Date	Cannot less than Start BAST Plan Date

7. Click button search

8. Select number of show list entries : 10, 25, 50, and 100
9. View History Unit Preparation Progress Status Detail (Optional)
10. Select data that will be update
11. Select progress status unit: Confirm to Supplier, Visit Supplier
12. Update remark

Text Box	**Constraint Input**
Remark	Varchar

13. Select unit readiness: Complete, In progress, No progress
14. Click button save

Process:

1. When user click Outstanding Tab

1.1.1 If user click tab Outstanding 45

System displays unit per PO number which has 45 days left before BAST calculated (calendar days) from BAST Plan Date.

Formula:

Sys.CurrentDate = Tb_MGT_UnitPreparation.BASTPlanDate - 45 days,

Condition:

- If current date has not reached 45 remaining days then unit PO will not be displayed on screen tab Outstanding 45
- If unit status has not complete yet (Tb_MGT_UnitPreparationDtl.UnitReadiness !=complete) and current date already reach 45 remaining days and/or has not reached 20 remaining days then unit PO will be displayed on screen tab Outstanding 45
- If unit status has not complete yet (Tb_MGT_UnitPreparationDtl.UnitReadiness !=complete) then current date already pass 45 remaining days and has reached 20 remaining days then unit PO will be displayed on screen tab Outstanding 20

1.1.2 If user click tab Outstanding 20

System displays unit per PO number which has 20 days left before BAST calculated from BAST Plan Date.

Formula:

Sys.CurrentDate = Tb_MGT_UnitPreparation.BASTPlanDate - 20 days,

Condition:

- If current date has not reached 20 remaining days, then unit PO will not be displayed on screen tab Oustanding 20
- If unit status has not complete yet (Tb_MGT_UnitPreparationDtl.UnitReadiness !=complete) and current date already reach 20 remaining days and/or has not reached 3 remaining days then unit PO will be displayed on screen tab Outstanding 20
- If unit status has not complete yet (Tb_MGT_UnitPreparationDtl.UnitReadiness !=complete) then current date already pass 20 remaining days and has reached 3 remaining days then unit PO will be displayed on screen tab Outstanding 3

1.1.3 If user click tab Outstanding 3

System displays unit per PO number which has 3 days left before BAST calculated from BAST Plan Date.

Formula:

Sys.CurrentDate = Tb_MGT_UnitPreparation.BASTPlanDate - 3 days,

Condition:

- If current date has not reached 3 remaining days, then unit PO will not be displayed on screen tab Outstanding 3
- If unit status has not complete yet (Tb_MGT_UnitPreparationDtl.UnitReadiness !=complete) and current date already reach 3 remaining days and/or has not/ already reached BAST plan date then unit PO will be displayed on

screen tab Outstanding 3

- If unit status has not complete yet (Tb_MGT_UnitPreparationDtl.UnitReadiness !=complete) then current date already pass 3 remaining days and has reached BAST plan date then unit PO will still be displayed on screen tab Outstanding 3

2. User can only select 1 criteria searching to display data
3. When user click button search, system will displays data on List of Outstanding Unit based on selected criteria searching, based on below formula:
   3.1 <u>Input search criteria as column name, start BAST Plan date, and end BAST Plan date:</u>
      3.1.1 If user input Criteria Searching, Start Date, and End Date period, system displays data based on selected criteria searching on selected range update date
      3.1.2 If user input both of Criteria Searching and Start Date, system displays data based on selected criteria searching start from selected update date until the latest update date
      3.1.3 If user input both of Criteria Searching and End Date, system displays data based on selected criteria searching start from the oldest update date until selected update date
      3.1.4 If user input Criteria Searching without Start and End Date, system displays data based on selected criteria searching start from the oldest update date until latest update date
      3.1.5 System displays unit per PO number which based on the latest Update date (Tb_MGT_UnitPreparation.LastModifiedDate):
         - Status of unit is In Progress and No Progress (Tb_MGT_UnitPreparationDtl.UnitReadiness != Complete)
         - or Status of unit is complete AND BAST document has not been made yet or has not been submit yet (Tb_MGT_UnitPreparationDtl.UnitReadiness = Complete) AND (Tb_MGT_UnitPreparation.BASTStatus != 2)
      3.1.6 System will display error notification, when:
         - If data that will be search is not available then system will display notification “Data not found”
         - If parameter input is not match with input constraint in data structure then system will display notification “Parameter is not valid”
4. System sort PO number based on the oldest PO creation date
5. Based on **Screen 1. Monitoring Unit Preparation – Outstanding Unit**, information related to PO that will be display automatically are: (refer to *Operation Name 2. Display Monitoring Unit PreparationProcess point 5)*
6. System will display data row based on selected show number entries
7. When user click button History Unit Preparation Progress Status, system will displays pop up of Detail list history unit preparation progress status per Purchase Order. **Based on Screen 2. Unit Preparation Progress Status History,** There are several informations that will be display (<u>system displays history of selected Tb_MGT_UnitPreparation.IdTb_MGT_UnitPrep</u>):
   - DSF Office (source: Tb_OPL_Branch.BranchShortName)
     Where Tb_MGT_UnitPreparation.IdTb_PRO_PODtl = Tb_PRO_PODtl.IdTb_PRO_PODtl AND Tb_PRO_PODtl.IdTb_PRO_PODtl = Tb_PRO_PO. IdTb_PRO_PO AND Tb_PRO_PO.IdBranch = Tb_OPL_Branch.IdBranch

- Agreement No (source: OPLAgreement.AgreementNumber)
  Where Tb_PRO_PO.IdOPLAgreement = OPLAgreement.IdOPLAgreement
- Customer Name (source: Customer.CustomerName)
  Where OPLAgreement.CustomerCode = Customer.CustomerCode
- Update Date (source: Tb_MGT_UnitPreparationDtl.LastModifiedDate)
  Where Tb_MGT_UnitPreparationDtl.IdTb_MGT_UnitPrep = _MGT_UnitPreparation.IdTb_MGT_UnitPrep
- PO Number (source: Tb_PRO_PO.PONumber)
  Where Tb_MGT_UnitPreparation. IdTb_PRO_PODtl = Tb_PRO_PODtl. IdTb_PRO_PODtl AND Tb_PRO_PODtl. IdTb_PRO_PO = Tb_PRO_PO. IdTb_PRO_PO
- PO Creation Date (source: Tb_PRO_PO.PODate)
  Where Tb_MGT_UnitPreparation. IdTb_PRO_PODtl = Tb_PRO_PODtl. IdTb_PRO_PODtl AND Tb_PRO_PODtl. IdTb_PRO_PO = Tb_PRO_PO. IdTb_PRO_PO
- PO Approved Date (source: TB_PRO_PO.POApprovalDate)
  Where Tb_MGT_UnitPreparation. IdTb_PRO_PODtl = Tb_PRO_PODtl. IdTb_PRO_PODtl AND Tb_PRO_PODtl. IdTb_PRO_PO = Tb_PRO_PO. IdTb_PRO_PO
- Supplier Name (source: Supplier.SupplierName)
  Where Tb_PRO_PO.IdSupplier = Supplier.IdSupplier
- Unit Description

Source	Remark
Product. ModelName	*Where Tb_MGT_UnitPreparation.* IdTb_PRO_PODtl = *Tb_PRO_PODtl.* IdTb_PRO_PODtl *AND Tb_PRO_PODtl.IdProduct = Product.IdProduct*
Tb_PRO_PODtl.Name	*Where Tb_MGT_UnitPreparation. IdTb_PRO_PODtl = Tb_PRO_PODtl. IdTb_PRO_PODtl*

- Unit Status (source: OPLAgreement.LeaseCategory)
  Where Tb_MGT_UnitPreparation. IdTb_PRO_PODtl = *Tb_PRO_PODtl.* IdTb_PRO_PODtl *AND Tb_PRO_PODtl. IdTb_PRO_PO = Tb_PRO_PO. IdTb_PRO_PO AND Tb_PRO_PO.IdOPLAgreement = OPLAgreement.IdOPLAgreement*
- Qty (source: Tb_PRO_PODtl.Qty)
  Where Tb_MGT_UnitPreparation. IdTb_PRO_PODtl = Tb_PRO_PODtl. IdTb_PRO_PODtl
- Progress Status (source: Tb_MGT_UnitPreparationDtl.ProgressStatus)
  Tb_MGT_UnitPreparationDtl.IdTb_MGT_UnitPrep = _MGT_UnitPreparation.IdTb_MGT_UnitPrep
- Remark (source: Tb_MGT_UnitPreparationDtl.Remarks)
  Tb_MGT_UnitPreparationDtl.IdTb_MGT_UnitPrep = _MGT_UnitPreparation.IdTb_MGT_UnitPrep

- Unit Readiness (source: Tb_MGT_UnitPreparationDtl.UnitReadiness)
  Tb_MGT_UnitPreparationDtl.IdTb_MGT_UnitPrep = _MGT_UnitPreparation.IdTb_MGT_UnitPrep
- Update By (source: Tb_MGT_UnitPreparationDtl.LastModifiedBy)
  Tb_MGT_UnitPreparationDtl.IdTb_MGT_UnitPrep = _MGT_UnitPreparation.IdTb_MGT_UnitPrep

8. When user click button save, system will save updated data based on PO number and unit purchased.
   Validation:
   - When user click button Save, then system will display **Screen 3. Confirmation Pop Up When Update Unit Preparation Progress Status**
   - Save process will be executed only for checked row on selected page
   - If user go to the next page, data on previous page will reseted.
   - When update data success, system will clear screen back into initial screen
   - System will check, whether Agreement (OPLAgreement.AgreementNumber) has multiple supplier (Tb_PRO_PODtl.PONumber), if the suppliers provide Carroserrie (Tb_PRO_PODtl.Type = Carroserie) and Accsesories (Tb_PRO_PODtl.Type = Accessorie) then the progress of Unit cannot be completed when Carroserrie and Accessories have not completed yet (TB_MGT_UnitPreparationDtl.UnitReadiness ! = Complete), then system will display error message:
     "Error! Accessories and/or Carrosserie have not completed yet"
   - Field Remark cannot blank, if remark is blank, then system will display information "Warning! Remark can not be blank"
   - If status of unit already complete (Tb_MGT_UnitpreparationDtl.UnitReadiness = complete), then several component screen status related to unit purchased will be :

Component	Name/Caption	Status
Dropdown	Progress Status	Not Active *Display latest information based on Update Date*
Field Text	Remark	Not Active *Display latest information based on Update Date*
Dropdown	Unit Readiness	Not Active *Display latest information based on Update Date*
Date Picker	BAST Plan Date	Active
Button	Create BAST	Not Active
Button	Edit BAST	Not Active
Button	Print BAST Supplier	Not Active
Button	Print BAST Customer	Not Active

   - If status of unit has not completed yet (Tb_MGT_UnitpreparationDtl.UnitReadiness != complete), then several component screen status related to unit purchased will be :

Component	Name/Caption	Status
Dropdown	Progress Status	Active
Field Text	Remark	Active
Dropdown	Unit Readiness	Active
Date Picker	BAST Plan Date	Not Active

Button	Create BAST	Not Active
Button	Edit BAST	Not Active
Button	Print BAST Supplier	Not Active
Button	Print BAST Customer	Not Active

- Unit preparation progress status only can be update once a day (Tb_MGT_UnitpreparationDtl.LastModifiedDate), for unit that has been update on current date the field text Remark will be Not Active.
- When save button is click then system will add a new log of Unit Preparation action to Tb_MGT_UnitPreparationDtl. Data that should be inserted are:
  - Tb_MGT_UnitPreparation.IdTb_MGT_UnitPrep
  - Progress Status → Tb_MGT_UnitPreparationDtl.ProgressStatus
  - Remark → Tb_MGT_UnitPreparationDtl.Remarks
  - Unit Readiness → Tb_MGT_UnitPreparationDtl.UnitReadiness
  - Update Date → Sys.CurrentDate
  - Update By → Sys.CurentUser
- When Save button is clicked, System will add a new Log of Unit Preparation action to Tb_MGT_UnitPreparation_History. Data which should be inserted are:

Field Name	Value
ProcessId	NewGUID
OriginalId	Tb_MGT_UnitPreparation.IdTb_MGT_UnitPrep
CreatedDate	Sys.CurrentDate
CreatedBy	Sys.CurrentUser
Action	Save

- History Data will be stored in the table Tb_MGT_UnitPreparation_History and Tb_MGT_UnitPreparation_History_Dtl where Tb_MGT_UnitPreparation_History_Dtl is Tb_MGT_UnitPreparation added Tb_MGT_UnitPreparation_History.IdTb_MGT_UnitPreparation_History as a foreign key

Output:
1. Display data list of outstanding unit based on selected parameter
2. Display success message when update successfully done on top of Dynamic Searching box:
   Screen 4. Notification Pop Up When Update Unit Preparation Progress Status

Alternative:
1. Click Actual tab to display receiving unit (*refer to FC.AD.1.3 Monitoring and Print Unit Receiving Report document*)

4	Print Monitoring Report Unit Preparation	Input: 1. *Operation Name 3. Update Unit Preparation Progress Status point 1 - 7* 2. Click button Print Report Process: 1. *Operation Name 3. Update Unit Preparation Progress Status point 1 – 4* 2. System will display file Unit Preparation Report in Ms. Excel with file name as below format: Unit Preparation Report_MMddyyyy_hhmm Then user can convert that file into pdf format and save file into selected

		path Note: MMddyyyy → month,day,year when report printed hhmm → hours, minute when report printed <u>Output:</u> 1. Print out report list **RPT.AD.1.1 Unit Preparation report**
5	System error message	<u>Process:</u> 1. Any kind of errors outside of application validation or that which cannot be handled by application such as errors when communication with Database, bugs, overloop, etc will generate error message: "System error. Please contact your administrator" <u>Output:</u> 1. A page with system error message will appear.

3.8 Data Structure

Tb_MGT_UnitPreparation

Field Name	*Data Type*	*Length*	*Source*	*Remarks*	*Nullable*	*Mandatory*
IdTb_MGT_UnitPrep	*integer*	*n/a*	Tb_MGT_UnitPreparation.IdTb_MGT_UnitPrep	***Primary key***	No	Yes
IdTb_PRO_PODtl	*integer*	*n/a*	Tb_MGT_UnitPreparation. IdTb_PRO_PODtl	***Foreign Key***	No	Yes
BASTPlan Date	*Date*	*n/a*	Tb_MGT_UnitPreparation.BASTPlanDate	*Formula:* Tb_PRO_PO.PODate + Tb_PRO_PO.DeliveryPeriode *Format display on screen: MM/dd/yyyy*	No	Yes
BASTActual Date	*Date*	*n/a*	Tb_MGT_UnitPreparation.BASTActualDate	*Format display on screen: MM/dd/yyyy*	Yes	No
BASTTotal	*integer*	*n/a*	Tb_MGT_UnitPreparation.BASTTotal	Tb_UnitPreparation.BASTTotal = Tb_PRO_PODtl.Qty	No	Yes
BAST Remaining	*integer*	*n/a*	Tb_MGT_UnitPreparation.BASTRemaining	Tb_MGT_UnitPreparation.BASTTotal - Tb_MGT_BASTSupCust. BASTPartial	No	Yes
BASTStatus	*integer*	*n/a*	Tb_MGT_UnitPreparation.BASTStatus	*1 = Draft (BAST already created but has not been submited)* *2 = Submitted (BAST already submitted)*	No	Yes

IsDelete	*Boolean*	*n/a*	Tb_ MGT_UnitPreparation.IsDelete		No	Yes
RemarkSys	*Varchar*	*100*	Tb_ MGT_UnitPreparation.RemarkSys		No	Yes
CreatedBy	*Varchar*	*50*	Tb_ MGT_UnitPreparation.CreatedBy		No	Yes
CreatedDate	*DateTime*	*n/a*	Tb_ MGT_UnitPreparation.CreatedDate		No	Yes
LastModifiedBy	*varchar*	*50*	Tb_ MGT_UnitPreparation.LastModifiedBy		No	Yes
LastModifiedDate	*DateTime*		Tb_ MGT_UnitPreparation.LastModifiedDate		No	Yes

Tb_MGT_UnitPreparationDtl

Field Name	*Data Type*	*Length*	*Source*	*Remarks*	*Nullable*	*Mandatory*
IdTb_MGT_UnitPrepDtl	*integer*	*n/a*	Tb_ MGT_UnitPreparationDtl. IdTb_MGT_UnitPrepDtl	***Primary key***	No	Yes
IdTb_MGT_UnitPrep	*integer*	*n/a*	Tb_ MGT_UnitPreparation. IdTb_MGT_UnitPrep	***Foreign Key***	No	Yes
ProgressStatus	*varchar*	*30*	Tb_ MGT_UnitPreparationDtl.ProgressStatus		No	Yes
Remark	*varchar*	*100*	Tb_ MGT_UnitPreparationDtl.Remarks		No	Yes
UnitReadiness	*varchar*	*20*	Tb_ MGT_UnitPreparationDtl.UnitReadiness		No	Yes
LastModifiedDate	*Date time*	*n/a*	Tb_ MGT_UnitPreparationDtl. LastModifiedDate		No	Yes
LastModifiedDateBy	*Varchar*	*25*	Tb_ MGT_UnitPreparationDtl. LastModifiedDateBy		No	Yes
IsDelete	*Boolean*	*n/a*	Tb_ MGT_UnitPreparati		No	Yes

			on.IsDelete			
RemarkSys	*Varchar*	*100*	Tb_ MGT_UnitPreparation.RemarkSys		No	Yes

3.9 Screen Item List

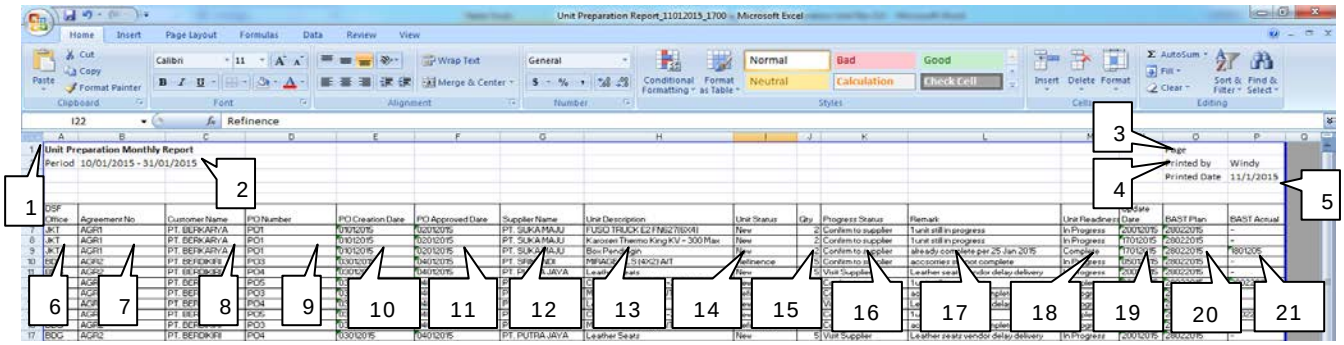
RPT.AD.1.1 Unit Preparation Report

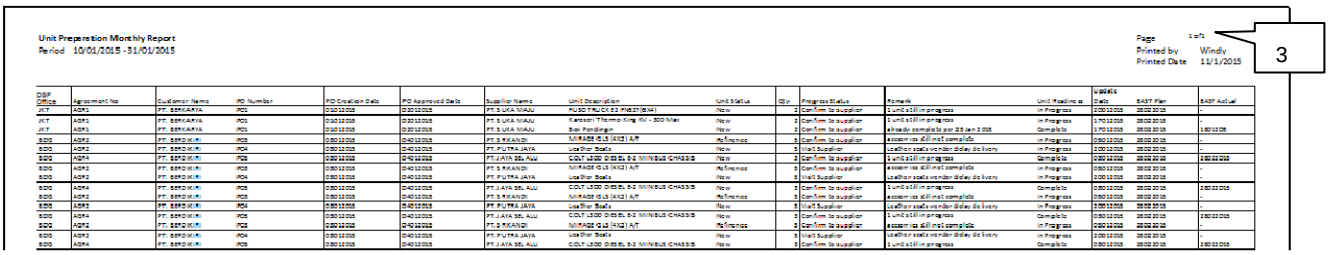
No.	*Content*	*Description*	*Source*	*Remarks*
1	Unit Preparation Monthly Report	Deafult Label	Static	
2	Period	Period Monthly Report	Based on selected Start Date and End Date that already select by User when print Report	*Format display on report: MM/dd/yyyy*
3	Page	Number of Report Page	Automatically count by number of page	*&[page] of &[total page]*
4	Printed By	Printed by	Sys.CurrentUser	User Name is the one who login to system
5	Printed Date	Printed Date	Use date at server when button Print Report is clicked	*Format display on report: MM/dd/yyyy*
6	DSF Office	Branch Short Name	Tb_OPL_Branch.BranchShortName	*Tb_MGT_UnitPreparation.IdTb_PRO_PODtl = Tb_PRO_PODtl.IdTb_PRO_PODtl AND Tb_PRO_PODtl.IdTb_PRO_PODtl = Tb_PRO_PO. IdTb_PRO_PO AND Tb_PRO_PO.IdBranch = Tb_OPL_Branch.IdBranch*
7	Agreement No	Agreement number	OPLAgreement.AgreementNumber	*Where Tb_PRO_PO.IdOPLAgreement = OPLAgreement.IdOPLAgreement*
8	Customer Name	Customer Name	Customer.CustomerName	*Where OPLAgreement.CustomerCode = Customer.CustomerCode*
9	PO number	PO number	Tb_PRO_PO.PONumber	*Where Tb_MGT_UnitPreparation. IdTb_PRO_PODtl = Tb_PRO_PODtl. IdTb_PRO_PODtl AND Tb_PRO_PODtl. IdTb_PRO_PO = Tb_PRO_PO. IdTb_PRO_PO*
10	PO creation date	PO date	Tb_PRO_PO.PODate	*Where Tb_MGT_UnitPreparation. IdTb_PRO_PODtl = Tb_PRO_PODtl. IdTb_PRO_PODtl AND Tb_PRO_PODtl. IdTb_PRO_PO = Tb_PRO_PO. IdTb_PRO_PO*

				Format display on report: MM/dd/yyyy
11	PO approved date	PO approval date	TB_PRO_PO.POApprovalDate	*Tb_MGT_UnitPreparation. IdTb_PRO_PODtl = Tb_PRO_PODtl. IdTb_PRO_PODtl AND Tb_PRO_PODtl. IdTb_PRO_PO = Tb_PRO_PO. IdTb_PRO_PO* *Format display on report: MM/dd/yyyy*
12	Supplier Name	Supplier Unit, Carrosserie, and Accessories name	Supplier.SupplierName	*Where Tb_PRO_PO.IdSupplier = Supplier.IdSupplier*
13	Unit Description	Unit, Carrosserie, and Accessories name	Product. ModelName	*Where Tb_PRO_PODtl.IdProduct = Product.IdProduct*
			Tb_PRO_PODtl.Name	*Tb_MGT_UnitPreparation.* IdTb_PRO_PODtl = *Tb_PRO_PODtl.* IdTb_PRO_PODtl
14	Unit Status	Status of unit; Refinance, Lease Back, Used Car, New	Tb_MGT_UnitPreparation.UnitStatus	*OPLAgreement.LeaseCategory*
15	Qty	Quantity of unit purchased	Tb_PRO_PODtl.Qty	*Where Tb_MGT_UnitPreparation. IdTb_PRO_PODtl = Tb_PRO_PODtl. IdTb_PRO_PODtl*
16	Progress Status	Status progress unit; Confirm to Supplier, Visit Supplier	Tb_MGT_UnitPreparationDtl.ProgressStatus	*Tb_MGT_UnitPreparationDtl.IdTb_MGT_UnitPrep = _MGT_UnitPreparation.IdTb_MGT_UnitPrep*
17	Remark	Remark update unit preparation progress status	Tb_MGT_UnitPreparationDtl.Remarks	*Tb_MGT_UnitPreparationDtl.IdTb_MGT_UnitPrep = _MGT_UnitPreparation.IdTb_MGT_UnitPrep*
18	Unit Readiness	Status readiness of unit; No progress, In complete, complete	Tb_MGT_UnitPreparationDtl.UnitReadiness	*Tb_MGT_UnitPreparationDtl.IdTb_MGT_UnitPrep = _MGT_UnitPreparation.IdTb_MGT_UnitPrep*
19	Update Date	Update date unit preparation progress status	Tb_MGT_UnitPreparationDtl.LastModifiedDate	*Where Tb_MGT_UnitPreparationDtl.IdTb_MGT_UnitPrep = _MGT_UnitPreparation.IdTb_MGT_UnitPrep* *Format display on report: MM/dd/yyyy*
20	BAST Plan Date	BAST plan date	Tb_MGT_UnitPreparation. BASTPlanDate	*Where Tb_MGT_UnitPreparationDtl.IdTb_MGT_UnitPrep = _MGT_UnitPreparation.IdTb_MGT_UnitPrep* *Format display on report: MM/dd/yyyy*
21	BAST Actual Date	BAST actual date	Tb_UnitPreparation. BASTActualDate	*Where Tb_MGT_UnitPreparationDtl.IdTb_M*

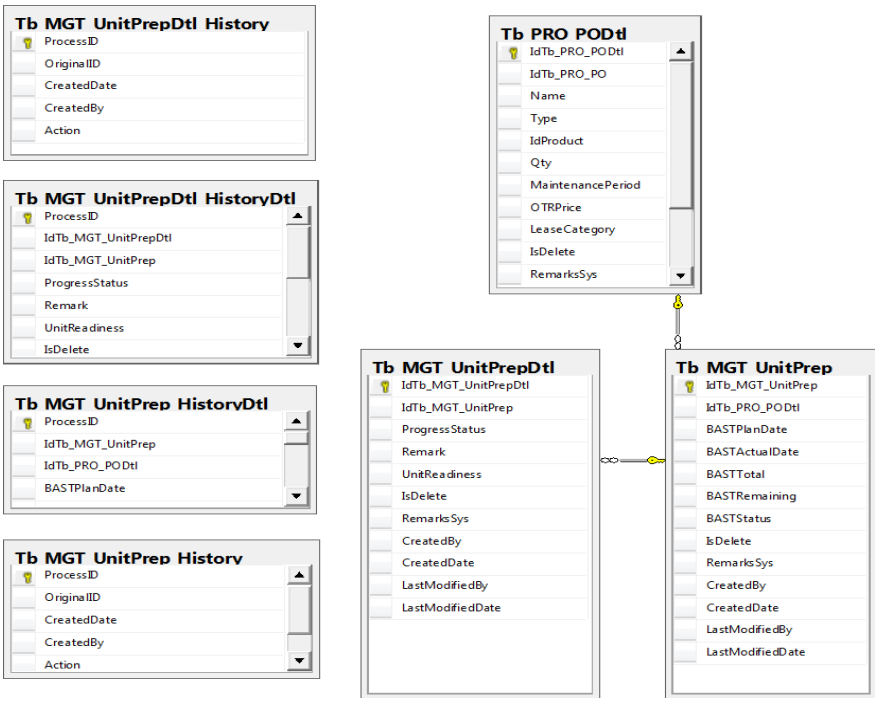
				GT_UnitPrep = _MGT_UnitPreparation.IdTb_MGT_UnitPrep *Format display on report: MM/dd/yyyy*

Note:
Content number 1,2,3,4,5, and Header of table will be repeatedly print on each page





3.10 Entity Relationship Diagram



APPENDIX

Configuration Access for Monitoring Unit Preparation:

User	DSF Office	Functions					
		Display List	Create	Edit	View	Print Form	Print Report
PIC OPL HO/Branch	One	V		V			V
	Area						
	All						
	Area						
	All						
Head of Branch	One	V					V
	Area						
	All						
Head of Department	One						
	Area						
	All	V					V
Regional Manager	One						
	Area	V					V
	All						
Advisor	One						
	Area						
	All	V					V
Director	One						
	Area						
	All	V					V
President Director	One						
	Area						
	All	V					V
Shareholder's Meeting	One						
	Area						
	All	V					V

Legend:
V = Have the access