DDP USER GUIDE V 9.2

CHANGE LOG			
Version	*Description of Change*	*Date*	*By*
1.0	Initial Creation	25-Mar-2015	Kiru
2.0	Web link and Important Note added as per Deepak's input	14-Apr-2015	Kiru

3.0	Auto Email Documents(AED)	01-Feb-2015	Kiru
4.0	Export Documents Setup	07-Aug-2015	Dinesh
5.0	Consolidated Emailing of Docs(AED)	29-Feb-2016	Dinesh & Chaitanya
7.2	Phase 7.2 Changes included	30-May-2016	Dinesh & Chaitanya
7.3	Phase 7.3 Changes included	01-Jul-2016	Dinesh & Chaitanya
8.1	Phase 8.1 Changes included	01-Sep-2016	Dinesh & Chaitanya
8.2	Phase 8.2 Changes included in section 6	31-Oct-2016	Dinesh & Chaitanya
8.3	Phase 8.3 Changes included	09-Jan-2017	Dinesh & Chaitanya
9.1	Phase 9.1 Changes included	27-Feb-2017	Dinesh & Chaitanya
9.2	Phase 9.2 Changes included	24-Apr-2017	Dinesh & Chaitanya

Table of Contents

1.0 Introduction

DDP has been designed and developed as a standalone and independent system. Various special processing of DMS documents are combined into DDP, which decouples the dependency from other system such as Documentum, FormScape, Captiva and others. This also, allows any documents to be processed in virtually any method as per user defined instructions which will be maintained by the user.

2.0 Prerequisites

2.1 System Requirements

- Browser: Compatible with IE9, IE10 and IE11
- Java Version: JRE 1.6, 1.7 and 1.8

2.2 Logistics ID

- User should have Logistics ID to access DDP
- User/Country representative should request Service Desk to grant access for user to various DDP functionalities such as Auto Emailing Documents (AED), Consolidated Emailing of Docs (AED) & Export Documents Setup.
- Only upon access granted, user will be able to access the DDP functionalities

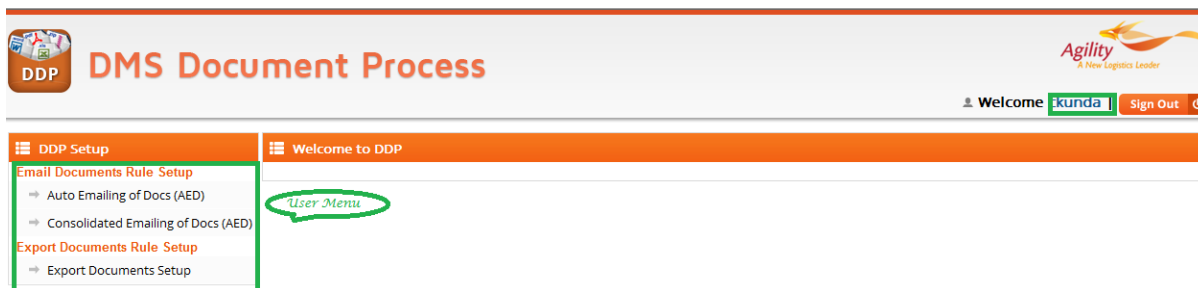## 2.3 Login, Logout and Interface

- URL: http://10.201.81.99/ddp
- Login Name : <<Logistics ID>>
- Password : <<email password>>

- Upon login, it will show home page.
- Left hand side will show the available menus

- Welcome message will be displayed on Top right side along with Sign Out button.
- To logout, click on Sign Out button

2.4 List of generating sources:

> **Control**
> **3rd party**
>> Below generating sources treated as 3rd party
>>> 1. MOBIGEN
>>> 2. Agility-Scanned
>>> 3. Brazil-Invoicing
>>> 4. HBU
>>> 5. Chemicals
>>> 6. Brazil-Invoicing
>>> 7. FOCiS QM
>>> 8. Mexico-Invoicing
>>> 9. TOP
>>> 10. TOP-DMS
>>> 11. TOP-E2E
>>> 12. TOP-E2E-IMP
>>> 13. TOP-PIV
>>> 14. Dakozy
>>> 15. Tracking
>>> 16. User Created in Documentum
>>> 17. Agility-Scanned-DD
>>> 18. Agility-Scanned-SC

> **Any**
>> Generating source may be control or 3rd party.

3.0 Auto Emailing Documents (AED)

AED feature in DDP replaces WebTop AED functionality that was initially used for this purpose and all existing rules from WebTop AED will be migrated to DDP. Once DDP is activated, WebTop AED will not be available for users and any new/update of AED rules will be done through DDP only.

Additionally, DDP will allow adding rules instantly for any country and no more development required. Once country and users are activated, they can login and create new rules for AED.

Important Note: While creating/updating AED rules, please ensure that the email address & document types must be carefully chosen. Otherwise, incorrect documents may get emailed to the wrong customer.

3.1 Create New AED Rule

To create a new AED rule, follow the below steps:

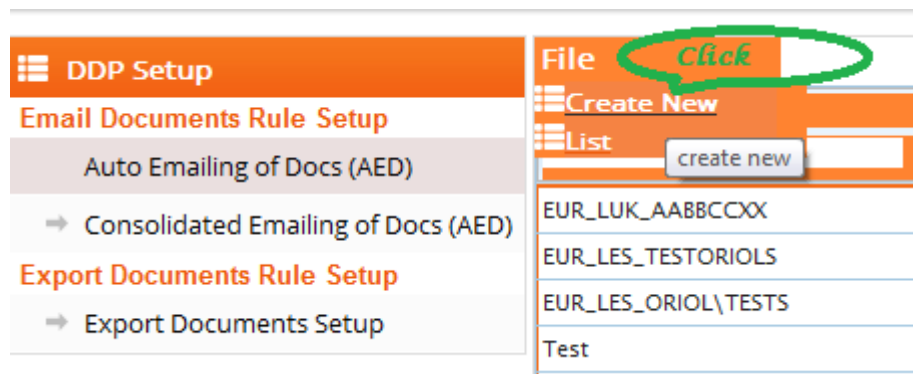- Click on '***Auto Emailing of Docs (AED)***' menu in right hand side

- It will list all the existing rules in right side working area
- Also shows File menu

Rule Description	Client ID	Email To	Email Cc	Company	Branch
				ALL	ALL
MANDCTRANS	MANDCTRANS	kv@agility.com,troda@agility.com	ckunda@agility.com,SFouzdar@agility.com;dguntha	LUK	ALL
EUR_LDE_Test	Test	mjellinghaus@agility.com, kkrebs@agilty.com		LDE	DUX
EUR_LDE_Testing for new r	AANNBBXXX	pmariares@agility.com	kv@agility.com,pgangadurai@agility.com,ckunda@a	LDE	DUX
EUR_LUK_AAACCCCBB	AAACCCCBBTEST	kv@agility.com; dguntha@agility.com;	ckunda@agility.com;	LUK	ALL

- Click ***File -> Create New***

Fill the form according to rule

- *Rule Description*: (**Optional**) Enter the description. If left blank, system will replace with default generated value. <<Region_CompanyCode>> e.g. *APR_LSG*
- *Customer Id*: (**Required**) Enter the client id to be configured
- *Activation date:* (**Optional**) Rule activation date for the rule to be activated. (Blank date will make today's date act as activation date)
- *Country*: (**Required**) Select country
- *Branch*: (**Required**) Select one or more branches by clicking right arrow. Right side shows the list of selected branches list
- *Email From*: (**Optional**) if email need to be sent *from a specific email address*, check the 'Check to Enable From Address field' and enter email address, otherwise leave as blank. If you choose to use specific email from address, please ensure the entered email address exists in exchange server.
- *Email To*: (**Required**) Enter multiple email addresses with comma separator
- *Email CC*: (**Optional**) Enter multiple email addresses with comma separator
- *SLA Information notification*: Enter multiple email addresses with comma separator for SLA configuration. If the *Service Level Agreement (SLA)* details are entered under each document types, then this mandatory field.
- Click '*Add Row*' to include document type, Party Code and other details.
- User can specify the Maximum/Minimum number of times that invoices/document types *Service Level Agreement (SLA)* that could be sent for a given *Client ID* in a day/week/month. When creating AED rule for a Client ID, user can set Max SLA and Min SLA for each Document type as None/day/week/month.

  None   :   No SLA is setup and no notification will be sent
  Day   :   Max/Min number of documents to be sent for this *Client ID* in a day
  Week   :   Max/Min number of documents to be sent for this *Client ID* in a week
  Month   :   Max/Min number of documents to be sent for this *Client ID* in a month
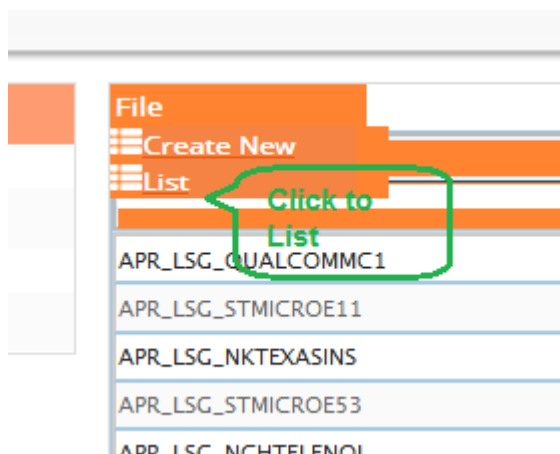
If user generated invoices/document types doesn't reach SLA target, notification will sent out to the user at the end of the day/week/month.

- User could include as many as document types for the entered *Customer Id*.
- Upon entered all necessary fields, click *Save* button to create rule.
- It will display the summary page as shown below.

File

Show Auto Emailing Rule

Rule Description : APR_LPK_YUNUSTEXT1
Client ID : YUNUSTEXT1
Email To : ckunda@agility.com,dguntha@agility.com
Email CC : kv@agility.com
Company : LPK
Branch : ALL

Document Type	Party Code	Generating Source	Rate Option	Printing	Service Level Aggreement(SLA)		
BOL	SHIPPER	Control	Non-Rated	No	none	0	0
SALESINV	CLIENT_ID	Control	Not Applicable	Yes	none	0	0
AWB	CONSIGNEE	Control	Non-Rated	No	none	0	0
BOLCNT	SHIPPER	Control	Not Applicable	No	none	0	0
AOA	CONSIGNEE	Any	Not Applicable	No	none	0	0
CUSTOMSSET	CONSIGNEE	3rd Party	Not Applicable	Not Applicable	none	0	0

3.2 List/View/Update/Copy/delete exiting Rule

- To view the existing rules, click on '*Auto Emailing of Docs (AED)*' menu in right hand side
- Also rule can be viewed from *File -> List*

File
Create New
List

Click to List

APR_LSG_QUALCOMMC1

APR_LSG_STMICROE11

APR_LSG_NKTEXASINS

APR_LSG_STMICROE53

APR_LSG_NCHTELENOI

- Double click on the rule to view summary.

File

Rule Description	Client ID	Email To	Email Cc	Company	Branch
EUR_LTR_	DHJBERTERO	dguntha@agility.com	ckunda@agility.com	LTR	ALL
APR_LMY	CELESTICAT	ckunda@agility.com,dguntha@agility.com	sfouzdar@agility.com	LMY	ALL
APR_LTH_	GEOUS/DTW	dguntha@agility.com	ckunda@agility.com	LTH	BKK
APR_LAU	CASHSYDNEY	dguntha@agility.com	ckunda@agility.com	LAU	SYD
NAM_LCA_CA customs NIMA	JOSEFSEIB3	john@xyzco.com	rgunturu@agility.com	LCA	VCR
APR_GIN_	TESTONSCH	ckunda@agilty.com	dguntha@agility.com	GIN	ALL
APR_LVN_	GEOKR/ICN	ckunda@agility.com,dguntha@agility.com	kv@agility.com	LVN	ALL

double click to view summary

- Summary will be displayed as shown

File

Show Auto Emailing Rule

Rule Description :	APR_LPK_YUNUSTEXT1
Client ID :	YUNUSTEXT1
Email To :	ckunda@agility.com,dguntha@agility.com
Email CC :	kv@agility.com
Company :	LPK
Branch :	ALL

Document Type	Party Code	Generating Source	Rate Option	Printing	Service Level Aggreement(SLA)		
BOL	SHIPPER	Control	Non-Rated	No	none	0	0
SALESINV	CLIENT_ID	Control	Not Applicable	Yes	none	0	0
AWB	CONSIGNEE	Control	Non-Rated	No	none	0	0
BOLCNT	SHIPPER	Control	Not Applicable	No	none	0	0
AOA	CONSIGNEE	Any	Not Applicable	No	none	0	0
CUSTOMSSET	CONSIGNEE	3rd Party	Not Applicable	Not Applicable	none	0	0

- Click [edit icon] button to update existing rule
- Existing rule will be displayed as shown below with edit option to update.

Update Auto Emailing Rule

| Rule Name :	APR_LAU_GEODE/FRA
Rule Description :	testing in Australia
Rule Status	Active
Client ID* :	GEODE/FRA
Rule Active date :	Jun 11, 2015 10:43:38 AM
Company* :	LAU

Branch :

ALL
ADL
BNE
BTC
EST
HBA
LST

< >

Selected Branch* :

SYD

☐ Check to Enable From Address field

Email From :

om=MSN

Email To* : ckunda@agility.com

- Upon updated necessary fields, click **Save** button to update rule.

Show Auto Emailing Rule

Rule Description :   APR_LPK_YUNUSTEXT1
Client ID :   YUNUSTEXT1
Email To :   ckunda@agility.com,dguntha@agility.com
Email CC :   kv@agility.com
Company :   LPK
Branch :   ALL

Document Type	Party Code	Generating Source	Rate Option	Printing	Service Level Aggreement(SLA)		
BOL	SHIPPER	Control	Non-Rated	No	none	0	0
SALESINV	CLIENT_ID	Control	Not Applicable	Yes	none	0	0
AWB	CONSIGNEE	Control	Non-Rated	No	none	0	0
BOLCNT	SHIPPER	Control	Not Applicable	No	none	0	0
AOA	CONSIGNEE	Any	Not Applicable	No	none	0	0
CUSTOMSSET	CONSIGNEE	3rd Party	Not Applicable	Not Applicable	none	0	0

- Click button to copy the rule. This will allow user to create similar rule quickly by copying all rule data from origin rule to the new rule. User can keep the common data but modify only the necessary data in the copied rule.
- This display update screen as shown below for users to modify any details.
- Copied rule has all data as origin except the rule name. It will be changed as *<<Original Rule Name>>_copy*. If required user can change the name as per their requirement.

File

Update Auto Emailing Rule

Rule Name* :   APR_LPK_YUNUSTEXT1_cop
                          y

Rule Description :   APR_LPK_YUNUSTEXT1

Rule Status   Active ⌄
Client ID* :   YUNUSTEXT1
Rule Active date :   Aug 30, 2016 2:14:02 PM
Company* :   LPK ▼
Branch :   FSD   Selected Branch* :   ALL
                          ISB
                          KHI
                          LHE   < >
                          PEW
                          SKT
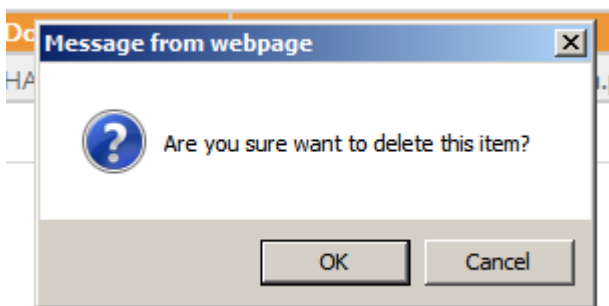
                          ☐ Check to Enable From Address field
Email From :
Email To* :   ckunda@agility.com,dguntha@ag

- User can modify the fields according to the requirement
- Upon updated necessary fields, click *Save* button to create new rule quickly.

Show Auto Emailing Rule

Rule Description : APR_LPK_YUNUSTEXT1_copy
Client ID : YUNUSTEXT1
Email To : ckunda@agility.com,dguntha@agility.com
Email CC : kv@agility.com
Company : LPK
Branch : ALL

Document Type	Party Code	Generating Source	Rate Option	Printing	Service Level Aggreement(SLA)		
BOL	SHIPPER	Control	Non-Rated	No	None	0	0
SALESINV	CLIENT_ID	Any	Not Applicable	No	None	0	0
AWB	CONSIGNEE	Control	Non-Rated	No	None	0	0
BOLCNT	SHIPPER	Control	Not Applicable	No	None	0	0
AOA	CONSIGNEE	Any	Not Applicable	No	None	0	0
CUSTOMSSET	CONSIGNEE	3rd Party	Not Applicable	Not Applicable	None	0	0

- Click [🗑] button to delete existing rule
- It will prompt alert message to confirm the delete as shown below.

- Click OK to confirm the deletion.

3.3 Avoiding duplicate email sent for Auto Emailing of Docs

When user prints the invoice/other document type multiple times, DDP will generate notification to user and request confirm that it is not a mistake. This validation is *not to send duplicate documents* to customers. Email notification will be sent *ONLY* when *Document Type*, *Rule ID*, *Job Number*, *Consignment ID* and *Document Reference* (*Invoice number* in case of invoices) are matched to pervious trigger.

- When DDP triggers Auto Email for first time, it will be sent to configured customer email address and for subsequent duplicate documents (for same *Document Reference/Invoice number),* a notification will be sent to users (Control/Scanned user email ID).
- Control/Scanned user will receive an email with process link as shown below and they can click to proceed further.

   Please reconfirm that you want to reprocess this document by clicking here

- When user click the above link, it will take to below screen

- To process duplicate document press *Process* button.

3.4 Summary page of Auto Emailing of Docs

Rule Description	Client ID	Email To	Email Cc	Company	Branch
				LSG	ALL
APR_LSG_NKQUALCOMM	NKQUALCOMM	sfozdar@agility.com	kv@agility.com,ckunda@agility.com	LSG	SIN
APR_LSG_NKSTMICRO1	NKSTMICRO1	sfozdar@agility.com	kv@agility.com,ckunda@agility.com	LSG	SIN
APR_LSG_NKSTMICROE	NKSTMICROE	sfozdar@agility.com	kv@agility.com,ckunda@agility.com	LSG	SIN
APR_LSG_NKTEXASINS	NKTEXASINS	sfozdar@agility.com	kv@agility.com,ckunda@agility.com	LSG	SIN
APR_LSG_NOKPRECISI	NOKPRECISI	sfozdar@agility.com	kv@agility.com,ckunda@agility.com	LSG	SIN
APR_LSG_ONSEMICON3	ONSEMICON3	sfozdar@agility.com	kv@agility.com,ckunda@agility.com	LSG	SIN
APR_LSG_OSIMINTERN	OSIMINTERN	sfozdar@agility.com	kv@agility.com,ckunda@agility.com	LSG	SIN
APR_LSG_QUALCOMMC1	QUALCOMMC1	sfozdar@agility.com	kv@agility.com,ckunda@agility.com	LSG	SIN
APR_LSG_RENESASTEC	RENESASTEC	sfozdar@agility.com	kv@agility.com,ckunda@agility.com	LSG	SIN
APR_LSG_ROHMELECT2	ROHMELECT2	sfozdar@agility.com	kv@agility.com,ckunda@agility.com	LSG	SIN
APR_LSG_SHOWADENK6	SHOWADENK6	sfozdar@agility.com	kv@agility.com,ckunda@agility.com	LSG	SIN
APR_LSG_STMICOELE	STMICOELE	sfozdar@agility.com	kv@agility.com,ckunda@agility.com	LSG	SIN
APR_LSG_STMICRBULK	STMICRBULK	sfozdar@agility.com	kv@agility.com,ckunda@agility.com	LSG	SIN
APR_LSG_STMICROE11	STMICROE11	sfozdar@agility.com	kv@agility.com,ckunda@agility.com	LSG	SIN
APR_LSG_STMICROE53	STMICROE53	sfozdar@agility.com	kv@agility.com,ckunda@agility.com	LSG	SIN
APR_LSG_WDMEDIASI2	WDMEDIASI2	sfozdar@agility.com	kv@agility.com,ckunda@agility.com	LSG	SIN
APR_LSG_WURTHELECT	WURTHELECT	sfozdar@agility.com	kv@agility.com,ckunda@agility.com	LSG	SIN

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4.0 Consolidated Emailing of Docs (AED)

This feature allows consolidating documents related to a Job Number and sends to customers. These consolidated documents will be compressed (zip) OR merged as a single PDF OR individually attached and sends as a single email to customers based on the requirement.

Following steps explains the setup needed for Consolidated Emailing:

1. This feature requires a "Triggering Document Type" and "Triggering Criteria" to initiate the email process.

2. Whenever this "Triggering Document Type" is printed / scanned, it will reach DDP and DDP will get triggered.

3. If "Triggering Criteria" chosen as **Job Number/Multiple Job Number/Consignment ID**, DDP will fetch all related documents for Triggering Document Job number/Job Numbers.

4. Additionally, users can add Mandatory & optional documents to be sent along with the "Triggering Document".

5. If all Mandatory documents are available, System will fetch details from DMS and also fetches all other available Optional documents.

6. Then email will be sent based on configuration of Attachment Type.
   a. If Consolidation type is "Merge" then all documents will be merged into single PDF based on sequence number and this single PDF will be sent as an attachment
      OR
   b. If Consolidation Type is Zip, all documents will be zipped and email will be sent
      OR
   c. If type is Individual then all documents will be attached separately in a single email with multiple attachments and sent. (one email with multiple attachments – one attachment for each document)

7. At the time of email triggering, if not all 'Mandatory' documents are available:
   a. Email will not be sent and DDP system will reprocess either 12AM or 12PM (whatever comes first).
   b. Also, system will send the email notification to configured "Email Failure Receivers" to inform the Missing documents as shown below screenshot.

Email Reply To :		
Email Failure Receivers :		Notification for missing documents
Triggering Document Type :	SALESINV	
Triggering Criteria :	Consignment ID	

8. At the time of email triggering, if 'Optional' documents are not available, still email will be sent with all mandatory and available optional documents.

9. DDP System will reprocess for missing documents at every 12.00 AM & PM as per GMT.

10. During Reprocess,
    a. If all mandatory documents are available then check for any optional document and send the mail with all available documents
    b. If any mandatory documents still missing, system will send another notification and will wait for next reprocess run (either 12AM or 12PM).
    c. When reties count reaches the configured "Retries" but still missing mandatory documents then system will terminate the reprocess and send the termination notifications.

4.1 Create Consolidated Emailing of Docs

- Click on Consolidated Emailing of Docs (AED) in right hand side menu

- Click on the **File** option. In the dropdown select the "**Create New**" option.

- By clicking the **Create New** option, Create new Consolidated Emailing of docs page will be displayed as seen below image.

- **Rule Description**: Description of Rule (optional)
- **Client ID**   :   Enter the client id to be configured.
- **Rule Activation Date**: optional (If user does not select the Activation Date then system takes current date of server as default date)
- **Country**   :   select country (required)
- **Branch**   :   select one or more branches by click right arrow. Right side list shows selected branches.
- **Department (optional)** : Enter Department (can give multiple departments with comma separator)
- **Email From (optional)** : from address (optional)

- **Email Setup By Source/Destination:** Provide the Recipient mail Addresses as To Address, CC Address.

➢ If you choose **Email setup by source**, mail will trigger based on the source company.

➢ If you choose **Email setup by Destination**, mail Recipient will be depends upon the destination company/region of the triggering document.

- **Email to (require)**   : to address (can give multiple email ids with comma or semicolon as separator),
- **Email CC (optional)**   : cc mail address (can give multiple email ids with comma or semicolon as separator).
- **Email BCC (optional)** : email BCC(can give multiple email ids with comma or semicolon as separator)
- **Email Reply To (optional)**   : Reply to address

- **Email Failure Receivers**: in case mandatory documents not received when triggering documents came, DDP will send the notification to print/scan the mandatory documents.

- **Triggering Document Type**: It specifies the Triggering document type. Default we set as SALESINV, it can be changed, automatically triggering document added to the documents table as Mandatory document.

- **Triggering Criteria:** Job Number, Multiple Job Numbers & Consignment ID are options available. Fetching the documents based on the selection of Triggering Criteria.

- If you choose triggering criteria as **Job Number**, system take the job number of triggering document .Based on Job number, it fetches all backup documents & sends the Email.

- If you choose triggering criteria as **Multiple Job Numbers** (triggering document should be **BULKINV** or **BULKCRD**), system fetch the job numbers of triggering document. Once all backup documents of all job numbers arrived to DMS & mail will trigger to configured mail address.

- If you choose triggering criteria as **Consignment ID,** again user could choose include option as shown below.

I. If **All** option is selected, all backups documents will fetched based on triggering document Consignment ID.

II. If **My Country** option is selected, based on Consignment ID of triggering document, system will fetch the Origin job number. Based on Origin Job number, it fetches all backup documents & sends the Email.

III. If **Other Country** option is selected, based on Consignment ID of triggering document, system will fetch destination job number. Based on destination Job number, it fetches all backup documents & sends the Email.

- **Retries**: Number of times to be reprocessed for missing documents.

- **Attachment Type   :   Individual/Consolidated**

Email Attachment Configuration :

Attachment Type : [Individual ▼]
[**Individual**]
[Consolidated]

- ➢ If you choose **individual**, Single Mail will trigger with multiple attachments.
- ➢ If you choose **consolidated**, file compression will appear. user need to choose **Merge**/**compression**
  1. **Merge**: ALL documents merged into single pdf.
  2. **Compression**: all documents will send in zip format.

Email Attachment Configuration :

Attachment Type : [Consolidated ▼]

File Compression : [Merge ▼]
[**Merge**]
[Compression(Zip)]

- • **Add document details to the table:**

Document Type		Generating Source		Rated/Not Rated		Require Flag		Version		Exclude		Sequence	Add
SALESINV	▼	Control	▼	Not Applicable	▼	Mandatory	▼	Latest	▼	None	▼	1	
HAWB	▼	Control	▼	Non-Rated	▼	Mandatory	▼	Latest	▼	My Country	▼	2	Remove
MAWB	▼	Control	▼	Non-Rated	▼	Mandatory	▼	Latest	▼	None		3	Remove
										My Country			
										Other Country			

1. Based on user selection of "Triggering Document Type", by default this document type will be added as first record in the Document type table.
   User could change the options of **Exclude** column if triggering criteria is **Consignment ID,** Otherwise default option is **None.**

2. Sequence number will be considered based on user selection of the document type's in table
   For example from the image:

Document Type	Sequence
SALESINV	1
HAWB	2
POD	3

4.2 List/view/update/delete Consolidated Emailing of Docs

- ➢ **List Consolidated Emailing of Docs (AED):**

- Click on Consolidated Emailing of Docs (AED) of Right menu as highlighted in below image.

Rule Description	Client ID	Email To	Email Cc	Company	Branch
APR_LTW_	KAAHOINTE1	ckunda@agility.com;dguntha@agility.com	kv@agility.com	LTW	ALL
EUR_LDE_Scheduler Rule in LDE	PRISMPAYME	ckunda@agility.com	kv@agility.com	LDE	ALL
EUR_LDE_testconlde	testconlde	ckunda@agility.com		LDE	AGB

➢ **Updating Consolidated Emailing of Docs (AED):**

- Double click on the record to be modified in List page then summary page will displayed

Show Consolidated Emailing Rule

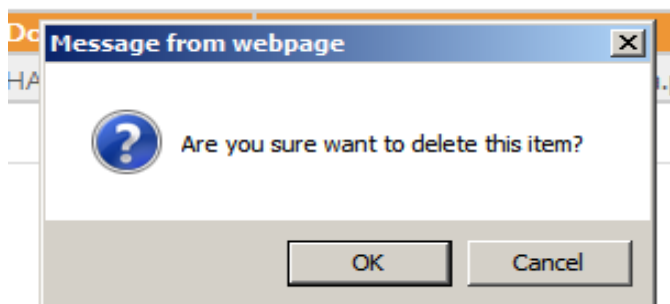|	
Rule Description :	APR_LMY_
Client ID :	CELESTICAM
Party Code :	SHIPPER
Email To :	ckunda@agility.com;dguntha@agility.com
Email CC :	dguntha@agility.com
Company :	LMY
Branch :	ALL
Email failure Recipient :	ckunda@agility.com;dguntha@agility.com
Triggering document type :	SALESINV
Triggering criteria:	Job Number
Number Of Retries :	3
Attachment type :	Compression
Compression Type :	Merge
Active status :	Active

Document Type	Generating Source	Rate Option	Version	Exclude	Mandatory/Optional
SALESINV	Control	Not Applicable	Latest	none	Mandatory
CDN	Control	Non-Rated	Latest	none	Optional
HAWB	Control	Non-Rated	Latest	none	Optional
CM	Control	Non-Rated	Latest	none	Optional

- Click ⬜ button to update existing rule as seen summary page
- If Rule is under process, then a popup information message displayed to user. For further continuation user need to click "OK" button.
- In the update Consolidated Emailing Rule page, all fields will be filled with existing information if it consists as seen below image.

DMS Document Process

File

Update Consolidated Emailing Rule

Field	Value
Rule Name :	APR_LMY_CELESTICAM
Rule Description :	APR_LMY_CELESTICAM
Rule Status	Active
Client ID* :	CELESTICAM
Party Code :	SHIPPER
Rule Active date :	Feb 8, 2016 3:08:38 PM
Company :	LMY

Branch : JHB KCH KUA KUL MK1 MKZ PEN   Selected Branch : ALL

Department :

DDP Setup
Email Documents Rule Setup
→ Auto Emailing of Docs (AED)
   Consolidated Emailing of Docs (AED)
Export Documents Rule Setup
→ Export Documents Setup
Administration
User Setup
→ Add/View Users
→ Add/View Groups
→ Add/View Roles
→ Assign Groups to Users
→ Assign Roles to Users
DMS Data Setup
→ Add/View Company
→ Add/View Branch
→ Add/View Doctype
→ Add/View Party
→ View Categorized Doc
→ View Categorized Docs Details
→ View Audit Logs

- Update necessary fields, click *Save* button for information to be saved.

➢ **Deleting Consolidated Emailing of Docs (AED):**

- Double click on the record to be deleted in List page then summary page will displayed

Show Consolidated Emailing Rule

Field	Value
Rule Description :	APR_LMY_
Client ID :	CELESTICAM
Party Code :	SHIPPER
Email To :	ckunda@agility.com;dguntha@agility.com
Email CC :	dguntha@agility.com
Company :	LMY
Branch :	ALL
Email failure Recipient :	ckunda@agility.com;dguntha@agility.com
Triggering document type :	SALESINV
Triggering criteria:	Job Number
Number Of Retries :	3
Attachment type :	Compression
Compression Type :	Merge
Active status :	Active

Document Type	Generating Source	Rate Option	Version	Exclude	Mandatory/Optional
SALESINV	Control	Not Applicable	Latest	none	Mandatory
CDN	Control	Non-Rated	Latest	none	Optional
HAWB	Control	Non-Rated	Latest	none	Optional
CM	Control	Non-Rated	Latest	none	Optional

- Click 🗑 button to delete existing rule
- It will prompt alert message to confirm the delete as shown below.

Message from webpage

? Are you sure want to delete this item?

OK   Cancel

- Click OK to confirm the deletion.

4.3 Summary Page of Consolidated Emailing of Docs

5.0 Export Documents Setup

Exporting the Documents based on the configured schedule time by the user to the particular location using FTP or UNC protocols.

Documents are exported as per configured naming conventions. Once the documents are successfully exported or failed to export, users will receive the notifications based on the configured Email IDs.
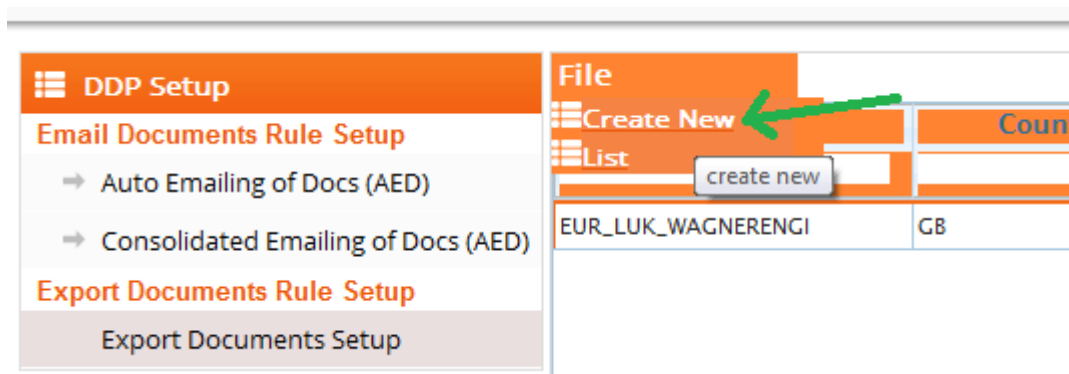
There are two categories for exporting documents rule setup and named as below:

Rule By Party ID: By default this option is chosen. When this is chosen, documents will be exported based on Party ID (Client ID) for the give frequency.

Rule By Query: When this option is selected, need additional configuration required based on the specific customer (client) requirement. These queries and additional details are configured in a properties file and individual client id will be added into the drop down list for rule configuration.

5.1 Create New Export Rules

Choose create new to create Export Rule

When "Rule By Party ID" is selected:

- **Rule Description**: Description of Rule (optional)
- **Client ID**   :   Enter the client id to be configured.

When "Rule By Query" is selected:

- **Client ID:** Based on the properties file configuration following application are displayed. Based on the application document types can be configured in the properties file or UI.

- **Export Query Source:** For **"Rule By Query",** Query can be configured in three ways

  ➢ **Query from Properties:** By Default this option will be selected in creation mode. Query can be configured in the properties file. For configuring the Query need to contact DDP Dev team.

  ➢ **Query by UI:** Multiple **Party Codes** can be entered by comma separator. 'and/or' operations need to provide for each Party Code. At least one Party value should be entered in text box. For adding need new property click **Add** button. For removing the property click **Remove** button.

> **Query by Textarea:** Query can be entered in the text area. Only from the where clause should be entered. By default the select clause will be added in the background.

Common fields for "Rule By Client Id" & "Rule By Query":

- **Rule Activation Date**: optional (system takes current date of server)
- **Frequency**:   choose the frequency to export the documents. Frequency runs as per Specify time in GMT.

For Every one hour

Every day at 10:30 AM

Every day at 8:30 PM

Every week on Friday at 4.30 PM

First day of every month at 4:30PM

Every Last Day of Month at 10:30 PM

- **Prior to**:

Frequency (Specify time in GMT)   Every   Week ▾ on SUNDAY ▾ at 0 ▾ : 0 ▾   Prior to 0 ▾ weeks ⓘ

'Prior to' specify the period of range documents should pick up.

Prior to 0 day: Export rule is running **today** and System picks the documents which are created in the period of yesterday and today.

Prior to 1 *day*: Export rule is running **today** but System picks the documents which are created in the **period of day before yesterday and yesterday**.

Prior to 1 *week*: Export rule is running **this week on specified day** but System picks the documents which are created in the **period of before last week**.

Prior to 1 *Month*: Export rule is running **this month on specified day** but System will pick the documents which are created in the **period of before last month**.

- **Choose FTP /UNC/Email configuration**

Multiple FTP/UNC configurations can be created. Maximum 3 communication details can be configured and minimum 1 export location is required. First configuration setup (primary setup) will have three options FTP (Protocol), UNC and Email.

If Email setup is required, it should be configured in this first setup (primary setup). To configure additional transfer protocols, click on **Add Details** button, which will allow configuring

either **FTP** or **UNC**. There will not be option to configure **Email** in additional configurations setup.

- For removing the additional transfer protocol details, click on Remove Details button.
    - **Protocol Type:** Used for type of transfer based on Protocol. Available options are "FTP", "SFTP" & "FTPS". By Default "FTP" is selected.
    - **Ftp Server:** Ftp server name
    - **Folder :** Folder & Subfolders
    - **User Name & Password:** Mandatory fields used for secure way of transfer.
    - **Port:** By default 21 for FTP protocol type, 22 for SFTP protocol type & 990 for FTPS protocol type (it can be changed).

- **Unc path**: Full path with sub folders
- **Unc User Name & Password**: Optional field
- **Test Connection**: Once the details are entered user need press *Test Connection* button for testing the connection details. Based on user can know the connection is successfully or failure.

- **Email Configuration:** Using Email Configuration, document will received via Email in single attachment. Email To is mandatory field and rest of fields are optional.

- **Adding Document Types and choosing their version (All/Latest)**

Document Type	Generating Source	Rated/Not Rated	Version	Add
SALESINV ▼	Control ▼	Not Applicable ▼	All ▼	Remove
HAWB ▼	Control ▼	Non-Rated ▼	All ▼	Remove
MAWB ▼	Control ▼	Non-Rated ▼	All ▼	Remove

- **Notification:** "Success Email Address" & "Failure Email Address" used for sending the notification on successfully export & failure export.

Notification	
Success Email Address* :	
Failure Email Address* :	

- **providing the Naming Convention Specification:** (click header to Expand the widget)
  - ➢ **Generic naming convention:** specify the file name to the generic files.

1) %%ENTRY_NUM%%_%%DOC_TYPE%%_%%CONS_ID%%_%%JOB_NUM%%
2) AGILITY_%%DATE_DDMMMYY%%_%%DELIVERY_DOC_NUM%%

  - ➢ **Duplicate document naming convention**: specify the file name for duplicate file.

1)Copy%%SEQ%%_%%ENTRY_NUM%%_%%DOC_TYPE%%_%%CONS_ID%%_%%JOB_NUM%%
2) AGILITY_%%DATE_DDMMMYY%%_%%DELIVERY_DOC_NUM%%_COPY%%SEQ%%

Naming Convention Specifications

☐ Check to Enable Naming Convention field

Generic Naming Convention :

Note:
- Static labels will be used as specified
- Meta-data should start and end with %%
- Meta-data entries will be replaced by actual values
- Allowed Meta-data:
  JOB_NUM
  CONS_ID
  DOC_TYPE
  COMPANY
  BRANCH
  SHIP_REF
  PARTY_REF
  ENTRY_NUM
  DELIVERY_DOC_NUM
  CONS_LOAD_NUM
  JOB_LOAD_NUM
  INVOICE_NUM(only for SALESINV)
  DATE_DDMMYY (e.g. DATE_YYYYDDMM)
  SEQ (Duplicate document sequence)
  SUPP_NAME(only for Vendor documents)
  C2C_NUM(only for Vendor documents)

Eg.1.
%%DATE_DDMMYY%%_%%DOC_TYPE%%_%%CONS_ID%%_%%JOB_NUM%%

Eg.2.
AGILITY_%%DATE_DDMMMYY%%_%%JOB_NUM%%

☐ Check to Enable Duplicate Naming Convention field

Duplicate Document Naming Convention :

Eg.1.
Copy%%SEQ%%_%%DATE_DDMMYY%%_%%DOC_TYPE%%_%%CONS_ID%%_%%JOB_NUM%%

- **Frequency Report:** Choose the Frequency (Specify time in GMT) to fetch reports for exported documents. Frequency runs as per Specify time in GMT.
- To Email Address and CC Email Addresses are mandatory if the frequency is not selected as *none* option.

Frequency Report

Frequency (Specify time in GMT)   Every   None ▾

TO Email Address :   [   ]

CC Email Address :   [   ]

For Example: Report will be generated based on the selection of time in GMT.

Every day at 10:30 AM

Every day at 8:30 PM

Every week on Friday at 4.30 PM

First day of every month at 4:30PM

5.2 List/View/Update/Delete Export Rules

➢ **List of Export Rules**
  • Select the Export Documents Setup on right side menu to view the List of Export Rules

Rule Description	Client ID	Country Code	Company	Branch	OnDemand
EUR_LUK_	WAGNERENGI	GB	LUK	LHR	↩
DDP_CUSTOM_NOV					↩
EUR_LHU_	CONTITECHR	HU	LHU	BUD	↩
APR_LSG_	TESTLSGEXP	SG	LSG	ALL	↩
DDP_AutoLiv_					↩
APR_LPH_RAFLATACMS	RAFLATACMS	PH	LPH	ALL	
EUR_LCH_AAAARBEITS	AAAARBEITS	CH	LCH	ALL	↩
EUR_LES_CASAMEVA EXPORT DOCS	CASAMEVASA	ES	LES	ALL	
APR_GIN_Multi	ABBINC19	IN	GIN	BOM	↩
EUR_LES_ORIOLBCNSA	ORIOLBCNSA	ES	LES	ALL	
NAM_LUS_test ABBOTT	ABBOTTL149	US	LUS	ALL	
NAM_USC_testUSC	testUSC	US	USC	CHI	↩

Choose on Demand action to export documents immediately (last column). For On Demand Action refer to 5.4 sections.

➢ **Updating Export rule**
  • Double click the existing record in list page of export rule. Then summary page will be displayed as seen below image.

Show Export Document Setup

Rule Name :	MEA_DAE_testClientID
Client ID :	CLIENTIDTEST
Party Code :	CONSIGNEE
Company :	DAE
Branch :	DXA,DXP,JEA
Naming Covention :	AGILITY_%%DATE_DDMMMYY%%_%%DELIVERY_DOC_NUM%%
Duplicate File Naming Covention :	
job scheduler :	0 0 10 1 * ?
Communication Details	
FTP Location :	ftp://scandoc.agilitylogistics.com/DDPDATA-UAT
Success Email Address :	ckunda@agility.com
Failure Email Address :	ckunda@agility.com
Active status :	Active

Document Type	Generating Source	Rate Option	Version
ACM	Control	Non-Rated	All
A8A	3rd Party	Non-Rated	All

- Click ✎ button to update existing rule as seen summary page

Update Export Document Setup

Rule Description :	EUR_LCH_AAAARBEITS
Rule Status	Active
● Rule By Client Id	○ Rule By Query
Party Code* :	CONSIGNEE
Client ID* :	AAAARBEITS
Company* :	LCH
Branch :	BSA BSF BSL BSV BSW GVA GVB	Selected Branch* : ALL
Rule Activate date :	Mar 28, 2016 12:00:00 AM
Frequency (Specify time in GMT)	Every day at 15 : 45 Prior to 0 days

Communication Details

○ Protocol Configuration   ○ UNC Configuration   ● Email Configuration

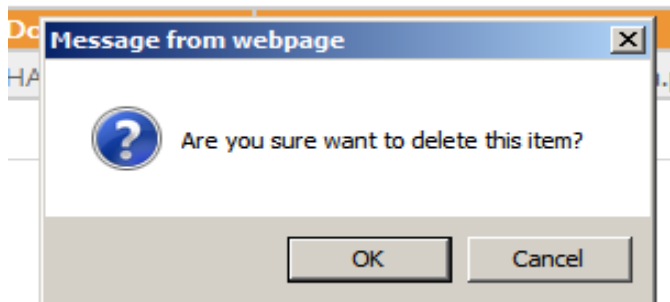- Update necessary fields, click *Save* button for information to be saved.

➢ **Deleting Export rule:**

- Double click on the record to be deleted in List page then summary page will displayed

Show Export Document Setup	
Rule Name :	MEA_DAE_testClientID
Client ID :	CLIENTIDTEST
Party Code :	CONSIGNEE
Company :	DAE
Branch :	DXA,DXP,JEA
Naming Covention :	AGILITY_%%DATE_DDMMMYY%%_%%DELIVERY_DOC_NUM%%
Duplicate File Naming Covention :	
job scheduler :	0 0 10 1 * ?
Communication Details	
FTP Location :	ftp://scandoc.agilitylogistics.com/DDPDATA-UAT
Success Email Address :	ckunda@agility.com
Failure Email Address :	ckunda@agility.com
Active status :	Active

Document Type	Generating Source	Rate Option	Version
ACM	Control	Non-Rated	All
A8A	3rd Party	Non-Rated	All

- Click 🗑 button to delete existing rule
- It will prompt alert message to confirm the delete as shown below.

- Click OK to confirm the deletion.

5.3 Summary of the Export Rules

5.4 On Demand Export process

- On Demand Export process is used for exporting documents on ad-hoc basis i.e. export immediately.
- Following fours ways could be used to export documents for on demand

1. General Export
2. Export By Job Number
3. Export By Consignment Id.
4. Export By Document Reference

- Additionally, there is an option provided to fetch a report for exported documents
- User could navigate to these four ad-hoc exports and report options form the following screens
    a. On-Demand Process from List Page
    b. On-Demand Process from Summary Page

a.   **On-Demand Process from List Page:**

- Select on the right menu "Export Rule Setup", then you can view the list page. In the list page as highlight below image see the On-Demand export option.

File					
Rule Description	**Client ID**	**Country Code**	**Company**	**Branch**	**OnDemand**
EUR_LUK_	WAGNERENGI	GB	LUK	LHR	⇌
DDP_CUSTOM_NOV					⇌
EUR_LHU_	CONTITECHR	HU	LHU	BUD	⇌
APR_LSG_	TESTLSGEXP	SG	LSG	ALL	⇌
DDP_AutoLiv_					⇌
APR_LPH_RAFLATACMS	RAFLATACMS	PH	LPH	ALL	
EUR_LCH_AAAARBEITS	AAAARBEITS	CH	LCH	ALL	⇌
EUR_LES_CASAMEVA EXPORT DOCs	CASAMEVASA	ES	LES	ALL	

- Click on ⇌ On-Demand export option, and then you can view the On-Demand Action page.

b.   **On-Demand Process from Summary Page:**

- Double click selected record on the Summary Page for export. Then summary page will displayed as below image

File				
☰ **Show Export Document Setup**				

Rule Name :   MEA_DAE_testClientID
Client ID :   CLIENTIDTEST
Party Code :   CONSIGNEE
Company :   DAE
Branch :   DXA,DXP,JEA
Naming Covention :   AGILITY_%%DATE_DDMMMYY%%_%%DELIVERY_DOC_NUM%%
Duplicate File Naming Covention :
job scheduler :   0 0 10 1 * ?
Communication Details
FTP Location :   ftp://scandoc.agilitylogistics.com/DDPDATA-UAT
Success Email Address :   ckunda@agility.com
Failure Email Address :   ckunda@agility.com
Active status :   Active

Document Type	Generating Source	Rate Option	Version
ACM	Control	Non-Rated	All
A8A	3rd Party	Non-Rated	All

- Click **D** to run the On-Demand Export and then you can view the On-Demand Action page.

1. On Demand General Export:

- On Demand General Export process is used for exporting documents on ad-hoc basis i.e. export immediately. To export document, it requires Start Date & End Date of export.
- Start Date can be selected only last one year. End Date should be greater than the Start Date.
- Pre-validate is the option where user could get the list of Missing documents before running the on-demand.

File

Rule Name :	EUR_LCH_AAAARBEITS
Client ID :	AAAARBEITS
Party Code :	CONSIGNEE
Company :	LCH
Branch :	ALL
Email To :	dguntha@agility.com
Email CC :	ckunda@agility.com

Document Type	Generating Source	Relevant Type	Require Flag	Sequence
AOA	Control	Primary	Mandatory	none
CUSTOMSSET	3rd Party	Secondary	Mandatory	none

| On-Demand Export | Export By JobNumber | Export By Consignment Id | Export By Document Reference | Reports |

From Date (inclusive)* :

To Date (inclusive)* :

Pre-Validate **Export** **Cancel**

- Select the From Date & To Date for export the document. Click on *Export* button for exporting the documents.
- Pre-validate is used to get a report of all missing documents before run an on demand export.

2. **On Demand Export By Job Number:**

- On Demand *Export By Job Number* process is used for exporting documents based on Job Numbers. To export document, it requires Job numbers, Start Date & End Date of export.
- Start Date can be selected only last one year. End Date should be greater than the Start Date
- Multiple Job Number(s) are allowed with comma separator.
- Job Number(s) field allows only alphanumeric & comma.
- Click on *Export* button for exporting the documents.

Company	Branch	Party Code	Document Type	Generating Source	Relevant Type	Require Flag	Sequence
LCH	ALL	CONSIGNEE	AOA	Control	Primary	Manditory	none
LCH	ALL	CONSIGNEE	CUSTOMSSET	3rd Party	Secondary	Manditory	none

File
Rule Name : EUR_LCH_AAAARBEITS
UNC Path : //scandoc.agilitylogistics.com/svc-dmsddp/DDPDATA-UAT/testing

General Export* | Export By JobNumber | Export By Consignment Id | Export By Document Reference | Reports

Job Number(s)* :

From Date (inclusive)* :

To Date (inclusive)* :

Export   Cancel

3. **On Demand Export By Consignment Id:**

- On Demand *Export By Consignment Id* process is used for exporting documents based on Consignment Id. To export document, it requires Consignment Id, Start Date & End Date of export.
- Start Date can be selected only last one year. End Date should be greater than the Start Date
- Multiple Consignment Ids are allowed with comma separator.
- Consignment Id field allows only alphanumeric & comma.
- Click on *Export* button for exporting the documents.

File
Rule Name : EUR_LCH_AAAARBEITS
UNC Path : //scandoc.agilitylogistics.com/svc-dmsddp/DDPDATA-UAT/testing

Company	Branch	Party Code	Document Type	Generating Source	Relevant Type	Require Flag	Sequence
LCH	ALL	CONSIGNEE	AOA	Control	Primary	Manditory	none
LCH	ALL	CONSIGNEE	CUSTOMSSET	3rd Party	Secondary	Manditory	none

General Export | Export By JobNumber | Export By Consignment Id | Export By Document Reference | Reports

Consignment ID* :

From Date (inclusive)* :

To Date (inclusive)* :

Export   Cancel

4. **On Demand Export Document Reference (For invoices, it will be Invoice Numbers):**

- On Demand *Export By Document Reference* process is used for exporting documents based on Document Reference. To export document, it requires Document Reference, Start Date & End Date of export.
- Start Date can be selected only last one year. End Date should be greater than the Start Date
- Multiple Document Reference (For invoices, it will be Invoice Numbers) are allowed with comma separator.
- Document Reference field allows only alphanumeric & special characters (space, comma & hyphen).
- Click on *Export* button for exporting the documents.

File

| Rule Name : | EUR_LCH_AAAARBEITS |
| UNC Path : | //scandoc.agilitylogistics.com/svc-dmsddp/DDPDATA-UAT/testing |

Company	Branch	Party Code	Document Type	Generating Source	Relevant Type	Require Flag	Sequence
LCH	ALL	CONSIGNEE	AOA	Control	Primary	Manditory	none
LCH	ALL	CONSIGNEE	CUSTOMSSET	3rd Party	Secondary	Manditory	none

| ☰ General Export | ☰ Export By JobNumber | ☰ Export By Consignment Id | ☰ Export By Document Reference | ☰ Reports |

Document References* :

From Date (inclusive)* :

To Date (inclusive)* :

Export   **Cancel**

5. **Reports:**
- Reports option is used create a report of all the exported documents for this rule within the given date range.
- To get a report, it requires Start Date & End Date of export.
- Start Date can be selected only last one year. End Date should be greater than the Start Date.
- Click "*Generate*" button to generate an export report for selected time period.

File							
Rule Name :		EUR_LCH_AAAARBEITS					
UNC Path :		//scandoc.agilitylogistics.com/svc-dmsddp/DDPDATA-UAT/testing					

Company	Branch	Party Code	Document Type	Generating Source	Relevant Type	Require Flag	Sequence
LCH	ALL	CONSIGNEE	AOA	Control	Primary	Manditory	none
LCH	ALL	CONSIGNEE	CUSTOMSSET	3rd Party	Secondary	Manditory	none

General Export | Export By JobNumber | Export By Consignment Id | Export By Document Reference | Reports

From Date (inclusive)* :

To Date (inclusive)* :

Export **Cancel**

6.0 Reports

Report feature allows admin user to fetch basic reports such as number of clients are setup for AED to send invoices and other freight documents. It also allows getting the report on processed documents for a given period.

Report will be generated in CSV format.

- **Download**

    Report will be downloaded as CSV file format.

- **Send Report in Mail**

    Report will be sent as an attachment to the configured email address

6.1 AED Reports

AED volume report generates the documents that are processed through DDP using AED feature for the given period.

- Click on '**AED Rule Reports**' menu in left hand side

- It will take you to below Form

Fill the form according to the requirement

Company: (**Required**) Select one or more countries
Document Type: (**Required**) Select one or more document types
Status:

Success: Email Triggered with attachment
Duplicate: Same invoice printed multiple times
Failed: Email not triggered
Pending: Email Trigger under process.

Start Date: (optional): Enter start date

If no date selected, start date will pick from year start day

End Date: (optional): Enter end date

If no date selected, start date will pick till today

6.2 Consolidated AED Reports

Form for Consolidate AED Report

Fill the form according to requirement

Company: (**Required**) Select one or more countries.
Document Type: (**Required**) Select one or more document types.
Status:
> **Success:** Consolidated and email triggered.
> **Failed:** Failed due mandatory documents missing.
> **Pending:** Consolidation is under process and waiting for either trigger or mandatory documents.

Start Date: (optional): Enter start date
> If no date selected, start date will pick from year start day

End Date: (optional): Enter end date
> If no date selected, start date will pick till today

6.3 Export Rule Reports

Form for Export Rule Report

Fill the form according to requirement

Company: (**Required**) Select one or more countries.
Document Type: (**Required**) Select one or more document types.
Status:

> **Success:** Exported.
> **Pending:** Under process or waiting for configured time to export
> **Failed:** Export is failed due to network or unable access Export location.

Start Date: (optional): Enter start date

> If no date selected, start date will pick from year start day

End Date: (optional): Enter end date

> If no date selected, start date will pick till today