



DDP USER GUIDE V9.3

CHANGE LOG			
<i>Version</i>	<i>Description of Change</i>	<i>Date</i>	<i>By</i>
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
9.3	Phase 9.3 Changes included	10-July-2017	Dinesh & Chaitanya



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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

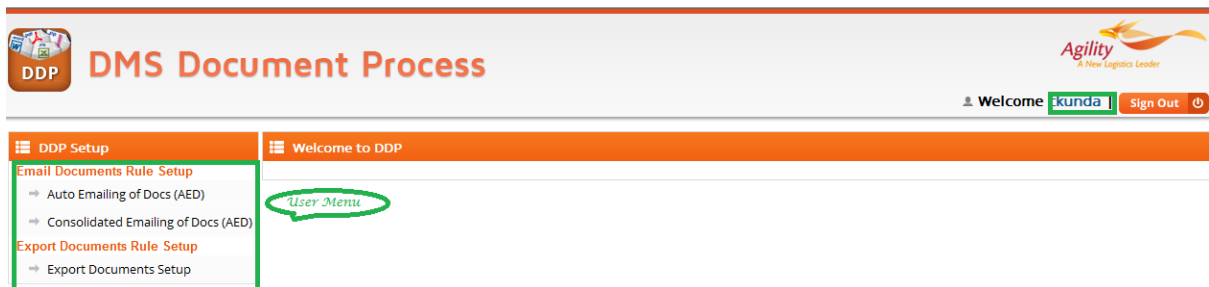
- URL: <http://10.201.81.95/ddp>
- Login Name : <<Logistics ID>>
- Password : <<email password>>



The screenshot shows a web-based login interface for DDP. At the top, there is an orange banner with the text "DDP LOGIN". Below this, there are two input fields: "Login Name" and "Password". A blue "SUBMIT" button is positioned below the password field. At the bottom of the interface, there is a blue banner with the text "WELCOME TO DDP (Version 9.3.0)" and a link labeled "User Guide" in blue text.

- 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

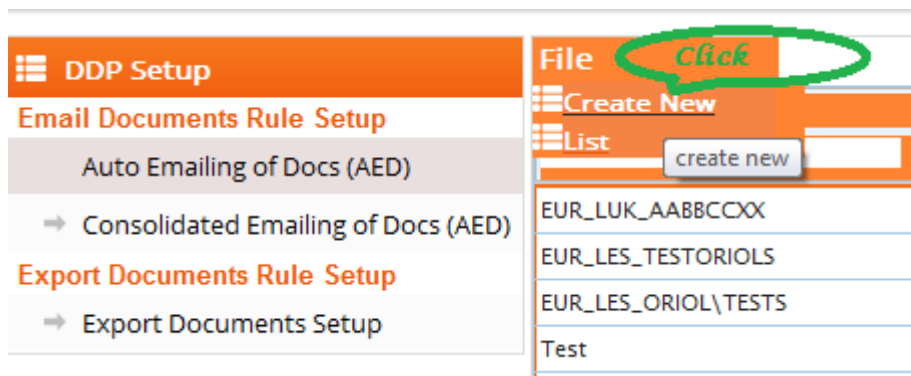


- It will list all the existing rules in right side working area
- Also shows File menu

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@agility.com		LDE	DUX
EUR_LDE_Testing for new r	AANNBBXXX	pmariars@agility.com	kv@agility.com,pgangadurai@agility.com,ckunda@	LDE	DUX
EUR_LUK_AAACCCBB	AAACCCBBTEST	kv@agility.com; dguntha@agility.com;	ckunda@agility.com;	LUK	ALL

- Click **File -> Create New**



File

Create new Auto Emailing Rule

Rule Description* :

Client ID* :

Rule Active date :

Company* :

Branch* :

ALL
AGB
AUL
BEF
BER
BRE
BRM

Selected Branch :

☐ Check to Enable From Address field

Email From :

Email To* :

Email CC :

Notification

SLA Information Receivers :

Document Type	Party Code	Generating Source	Rated/Not Rated	Printing	Service Level Agreement (SLA)		
SALESINV	CONSIGNEE	Control	Not Applicable	No	None	Min	Max
							Remove

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)
- **Company: (Required)** Select company
- **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 Agreement(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

3.1.1 Wildcard Rule for document types in selected Branch

System shall allow users to create AED rule with client ID as single '*' for a Company or Branch. This rule will be triggered based on the configured Company/Branch and document types regardless of the customer (Client ID).

Rule Description* :

Wild card Rule for LAX branch

Client ID* :

*

Rule Active date :

Company* :

LUS

Branch* :

KC1
KC2
KC3
LAG
LRD
MIA
MIG

<

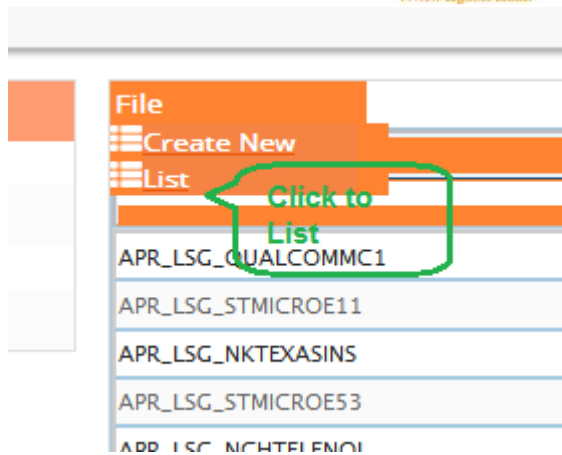
>

Selected Branch :

LAX

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**




- Double click on the rule to view summary.

File					
Rule Description	Client ID	Email To	Email Cc	Company	Branch
EUR_LTR_	DHJBTERO	dguntha@agility.com	ckunda@agility.com	LTR	ALL
APR_LMY_	CELESTICAT	ckunda@agility.com,dguntha@agility.com	sfouzdard@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@agility.com	dguntha@agility.com	GIN	ALL
APR_LVN_	GEOKR/ICN	ckunda@agility.com,dguntha@agility.com	kv@agility.com	LVN	ALL

- 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 Agreement(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 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 : ckunda@agility.com

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 Agreement(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 **C** 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_copy

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
ISB
KHI
LHE
PEW
SKT

Selected Branch* : ALL

☐ 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.

File **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

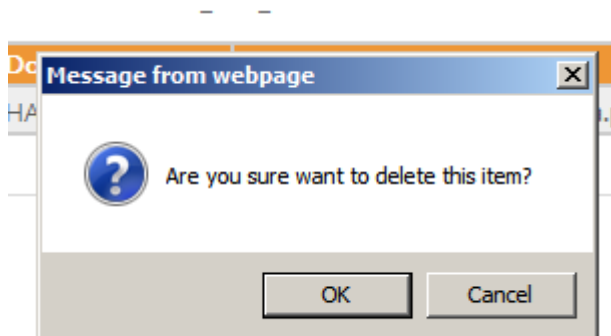
Company : LPK

Branch : ALL

Document Type	Party Code	Generating Source	Rate Option	Printing	Service Level Agreement(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.

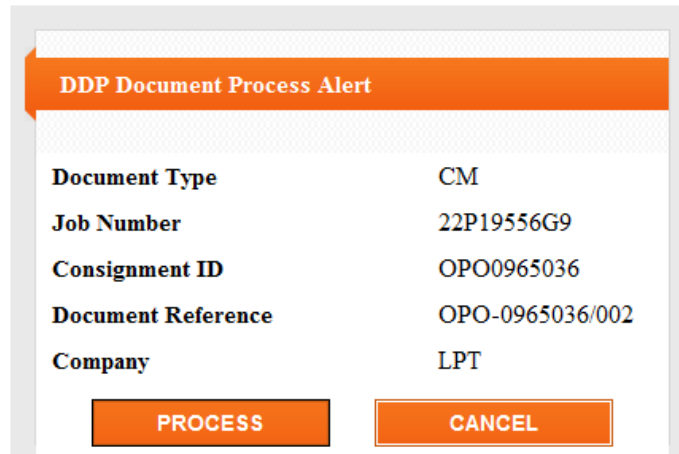
3.3 Avoiding duplicate email sent for Auto Emailing of Docs

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



The screenshot shows a dialog box titled "DDP Document Process Alert". It contains a table with the following information:

Document Type	CM
Job Number	22P19556G9
Consignment ID	OPO0965036
Document Reference	OPO-0965036/002
Company	LPT

At the bottom of the dialog box, there are two buttons: "PROCESS" and "CANCEL".

- To process duplicate document press ***Process*** button.

3.4 Summary page of Auto Emailing of Docs

File					
Rule Description	Client ID	Email To	Email Cc	Company	Branch
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	RENASASTEC	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_WDMEDIASIZ	WDMEDIASIZ	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

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 explain 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 :

Triggering Document Type :

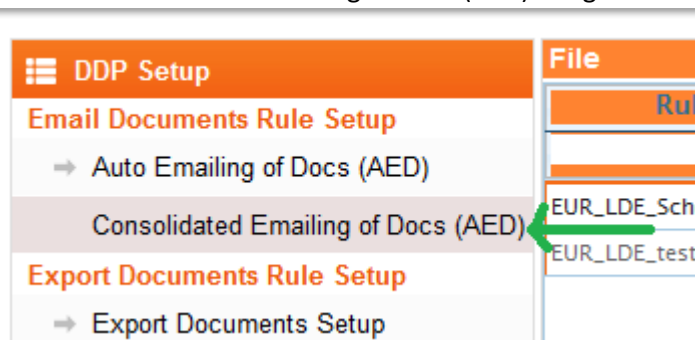
Triggering Criteria :

Notification for missing documents

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 retries 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.

DDP Setup	File	Client ID	Email To	Email Cc	Company	Branch
Email Documents Rule Setup → Auto Emailing of Docs (AED) Consolidated Emailing of Docs (AED) Export Documents Rule Setup → Export Documents Setup	Create New List					
	APR_LTW_	KAHOINTE1	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_testconide	testconide	ckunda@agility.com		LDE	ACB

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

DDP DMS Document Process

Welcome ckunda | Sign Out

DDP Setup

- Email Documents Rule Setup
 - Auto Emailing of Docs (AED)
 - Consolidated Emailing of Docs (AED)
- Export Documents Rule Setup
 - Export Documents Setup

Reports

- Reports
 - AED Rule Reports
 - Consolidated AED Rule Reports
 - Export Rule Reports

Administration

Create new Consolidated Emailing Rule

Rule Description :

Client ID* :

Party Code* : CONSIGNEE

Rule Active date :

Company* : AAE

Branch* : ALL AUH

Selected Branch :

Department :

Email From :

☒ Email Setup By Source ☐ Email Setup By Destination

Email To* :

Email CC :

Email Bcc :

Email Reply To :

Failure Email Receivers* :

Triggering Document Type : SALESINV

Triggering Criteria : Job Number

Re-Process of missing documents (Runs at 12.00 AM & 12.00 PM GMT)

Number of Retries : 0

Email Attachment Configuration :

Attachment Type : Individual

Document Type	Generating Source	Rated/Not Rated	Require Flag	Version	Exclude	Sequence	Add
SALESINV	Control	Not Applicable	Mandatory	Latest	None	1	

Save Cancel

- **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)
- **Company** : select company (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.

☒ Email Setup By Source

☐ Email Setup By Destination

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

☒ Email Setup By Source

☐ Email Setup By Destination

Email To* :

Email CC :

Email Bcc :

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

☐ Email Setup By Source
 ☒ Email Setup By Destination

Region	APR	To Address		
		CC Address		add
Company	LUS	To Address		
		CC Address		Remove

- **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.

Triggering Criteria

Job Number

Job Number

Multiple Job Numbers

Consignment ID

- 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.

Triggering Document Type :	POD
Triggering Criteria	Consignment ID
Include	<div> <div>All</div> <div>My Country</div> <div>Other Country</div> </div>

- 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.

Re-Process of missing documents(Runs at 12.00 AM & PM)

Retries :

- **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		

- 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**.
- 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.

DDP Setup	File
Email Documents Rule Setup	
⇒ Auto Emailing of Docs (AED)	
Consolidated Emailing of Docs (AED)	
Export Documents Rule Setup	
⇒ Export Documents Setup	

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_testconide	testconide	ckunda@agility.com		LDE	ACB

➤ 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.

DDP DMS Document Process

Welcome dguntha | Sign Out

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

File

Update Consolidated Emailing Rule

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 :

- 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

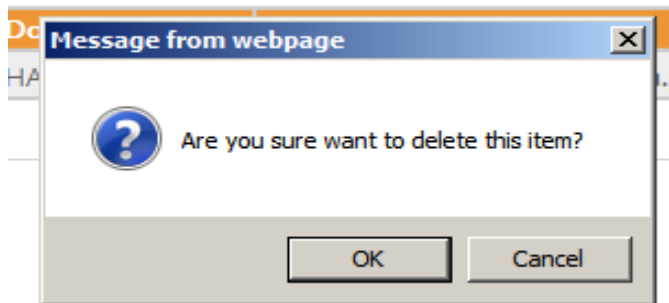
Show Consolidated Emailing Rule

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.



- Click OK to confirm the deletion.

4.3 Summary Page of Consolidated Emailing of Docs

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



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.

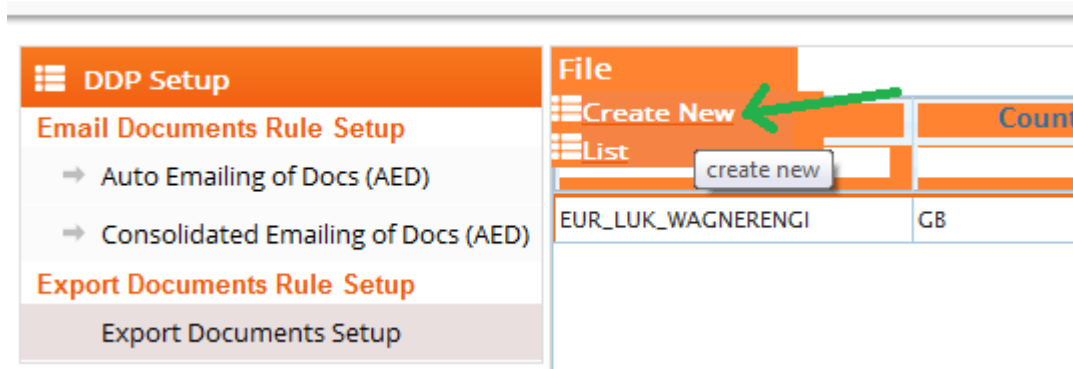
There are two categories for exporting documents rule setup and named as below:

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:

File
Create new Export Document Setup

Rule Description* :

☒ Rule By Client Id ☐ Rule By Query

Party Code* :

Client ID* :

Company* :

Branch* :

Selected Branch :

Rule Start date :

Frequency (Specify time in GMT) : Every on at : Prior to weeks

Communication Details

☒ Protocol Configuration ☐ UNC Configuration ☐ Email Configuration

Protocol Type :

Ftp Server* :


Folder :

User Name* :

Password* :

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

When “Rule By Query” is selected:



☐ Rule By Client Id
 ☒ Rule By Query

Client ID:

Batching Criteria:

Rule Start date:

Frequency (Specify time in GMT) Every on at : Prior to weeks

Export Query Source

☒ Query from Properties
 ☐ Query by UI
 ☐ Query by Textarea

Export query has been taken from property file. Please contact DDP team to configure export query.

[Download Query](#)

Communication Details

☒ Protocol Configuration
 ☐ UNC Configuration
 ☐ Email Configuration

Protocol Type:

Ftp Server*:

Folder:

User Name*:

Password*:

Port:

[Test Connection](#)
[Add Details](#)

- **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.

Client ID:

- WD
- NOV
- AutoLiv**
- MS-TMC
- AutoLiv-SALESCRD
- NSN

- **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.

Export Query Source

☒ Query from Properties
 ☐ Query by UI
 ☐ Query by Textarea

Export query has been taken from property file. Please contact DDP team to configure export query.

[Download Query](#)

- **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.

Export Query Source

☐ Query from Properties
 ☒ Query by UI
 ☐ Query by Textarea

Properties :	CONSIGNEE		Add
	and		
	DEBITS_FORWARD		Remove
	and		
	NOTIFY_PARTY		Remove

[Download Query](#)

- **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.

Export Query Source

☐ Query from Properties
 ☐ Query by UI
 ☒ Query by Textarea

Query* :

Note*: please provide where clause in query, system will append the meta data columns and table name from property file.
 If you want to give complete query please mention the complete query start with 'SELECT *****'

[Download Query](#)

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 Hour

Every day at 10:30 AM

Every day at 10 : 30

Every day at 8:30 PM

Every day at 20 : 30

Every week on Friday at 4.30 PM

Every week on FRIDAY at 16 : 30

First day of every month at 4:30PM

Every month on 1 day at 16 : 30

Every Last Day of Month at 10:30 PM

Every month on last day at 20 : 30

- **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**

Communication Details

☐ Protocol Configuration
 ☐ UNC Configuration
 ☒ Email Configuration

Email From :
Email To* :
Email CC :
Email Bcc :
Email Reply To :

Add Details

☒ Protocol Configuration
 ☐ UNC Configuration

Protocol Type :
Ftp Server* :
Folder :
User Name* :
Password* :
Port :

Test Connection
Add Details
Remove Details

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).

Communication Details

☒ Protocol Configuration
 ☐ UNC Configuration
 ☐ Email Configuration

Protocol Type:

Ftp Server*:

Folder:

User Name*:

Password*:

Port:

- 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.

Communication Details

☐ Protocol Configuration
 ☒ UNC Configuration
 ☐ Email Configuration

Unc Path*:

User Name:

Password:

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

Communication Details

☐ Protocol Configuration
 ☐ UNC Configuration
 ☒ Email Configuration

Email From:

Email To*:

Email CC:

Email Bcc:

Email Reply To:

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

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

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

Notification	
Success Email Address* :	<input type="text"/>
Failure Email Address* :	<input type="text"/>

- **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_DDMMYY%%_%%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_DDMMYY%%_%%DELIVERY_DOC_NUM%%_COPY%%SEQ%%

Naming Convention Specifications

☐ Check to Enable Naming Convention field

Generic Naming Convention :

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

Eg.2.
AGILITY_%%DATE_DDMMYY%%_%%JOB_NUM%%

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)

☐ 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.


File

Show Export Document Setup

Rule Name : MEA_DAE_testClientID
 Client ID : CLIENTIDTEST
 Party Code : CONSIGNEE
 Company : DAE
 Branch : DXA,DXP,JEA
 Naming Convention : AGILITY_%%DATE_DDMMYY%%_%%DELIVERY_DOC_NUM%%
 Duplicate File Naming Convention :
 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

File

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

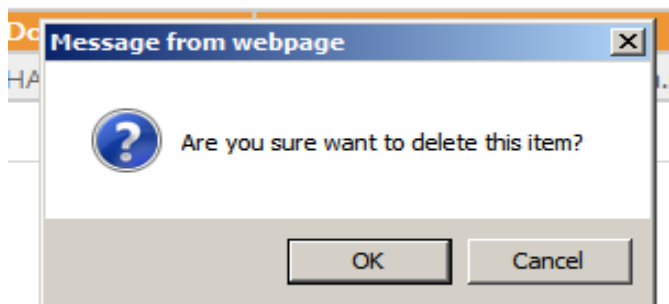
File

Show Export Document Setup

Rule Name : MEA_DAE_testClientID
 Client ID : CLIENTIDTEST
 Party Code : CONSIGNEE
 Company : DAE
 Branch : DXA.DXP.JEA
 Naming Convention : AGILITY_%%DATE_DDMMYY%%_%%DELIVERY_DOC_NUM%%
 Duplicate File Naming Convention :
 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

DDP Setup	File
Email Documents Rule Setup	Rule Description
→ Auto Emailing of Docs (AED)	Client ID
→ Consolidated Emailing of Docs (AED)	Country Code
Export Documents Rule Setup	Company
Export Documents Setup	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 

5.4 On Demand Export process


- On Demand Export process is used for exporting documents on ad-hoc basis i.e. export immediately.
- Following four 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	OnDemand
DDP_CUSTOM_NOV					OnDemand
EUR_LHU_	CONTITECHR	HU	LHU	BUD	OnDemand
APR_LSG_	TESTLSGEXP	SG	LSG	ALL	OnDemand
DDP_AutoLiv_					OnDemand
APR_LPH_RAFLATACMS	RAFLATACMS	PH	LPH	ALL	OnDemand
EUR_LCH_AAAARBEITS	AAAARBEITS	CH	LCH	ALL	OnDemand
EUR_LES_CASAMEVA EXPORT DOCs	CASAMEVASA	ES	LES	ALL	OnDemand

- 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 Convention :	AGILITY_%%DATE_DDMMYY%%_%%DELIVERY_DOC_NUM%%		
Duplicate File Naming Convention :			
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  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.

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	Mandatory	none
LCH	ALL	CONSIGNEE	CUSTOMSSET	3rd Party	Secondary	Mandatory	none

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

Job Number(s)* :

From Date (inclusive)* :

To Date (inclusive)* :

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	Mandatory	none
LCH	ALL	CONSIGNEE	CUSTOMSSET	3rd Party	Secondary	Mandatory	none

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

Consignment ID* :

From Date (inclusive)* :

To Date (inclusive)* :

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	Mandatory	none
LCH	ALL	CONSIGNEE	CUSTOMSSET	3rd Party	Secondary	Mandatory	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	Mandatory	none
LCH	ALL	CONSIGNEE	CUSTOMSSET	3rd Party	Secondary	Mandatory	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

6.1.1 Transmitted document details processed through DDP

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



Reports

Reports

→

AED Rule Reports

←


→

Consolidated AED Rule Reports


→


Export Rule Reports

- It will take you to below Form
- Please choose Transmitted Documents Report tab.



Generate AED Report

 Transmitted Documents Report

 AED Rules Report

Company
↑

select company ▼

Document Type
↑

select documents ▼

Client ID
↑

select client ID ▼

Status

☐ ALL
 ☐ Failed
 ☐ Pending
 ☐ Success
 ☐ Duplicate

Start Date :

End Date :

☒ Download Report

☐ Send Reports in Mail

Generate

Cancel

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.

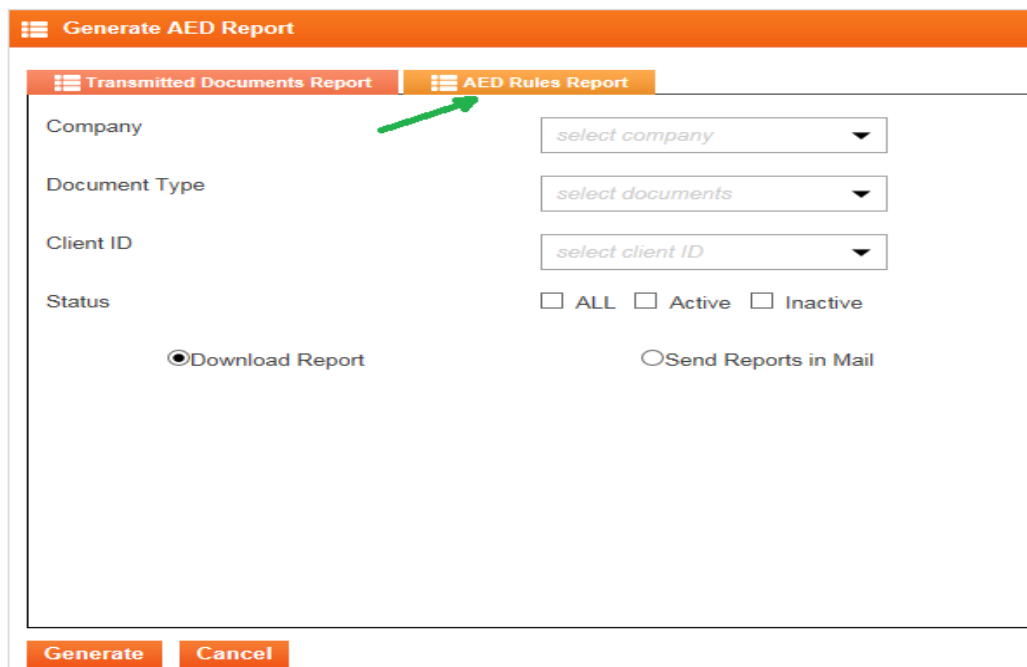
6.1.2 Clients that are setup for AED to send invoices and other freight documents

AED client setup report generates the documents that are setup for Auto Emailing of documents

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



- It will take you to below Form
- Please choose Transmitted Documents Report tab.



Fill the form according to the requirement

Company: (Required) Select one or more countries

Document Type: (Required) Select one or more document types

Status:

All: All AED rules

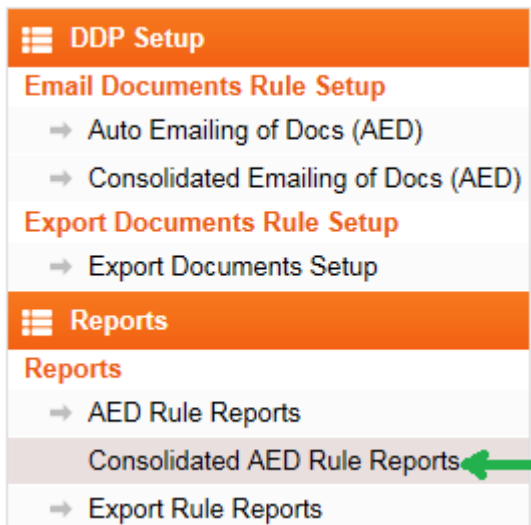
Active: AED rules which are in Active state

Inactive: AED rules which are in Inactive state

6.2 Consolidated AED Reports

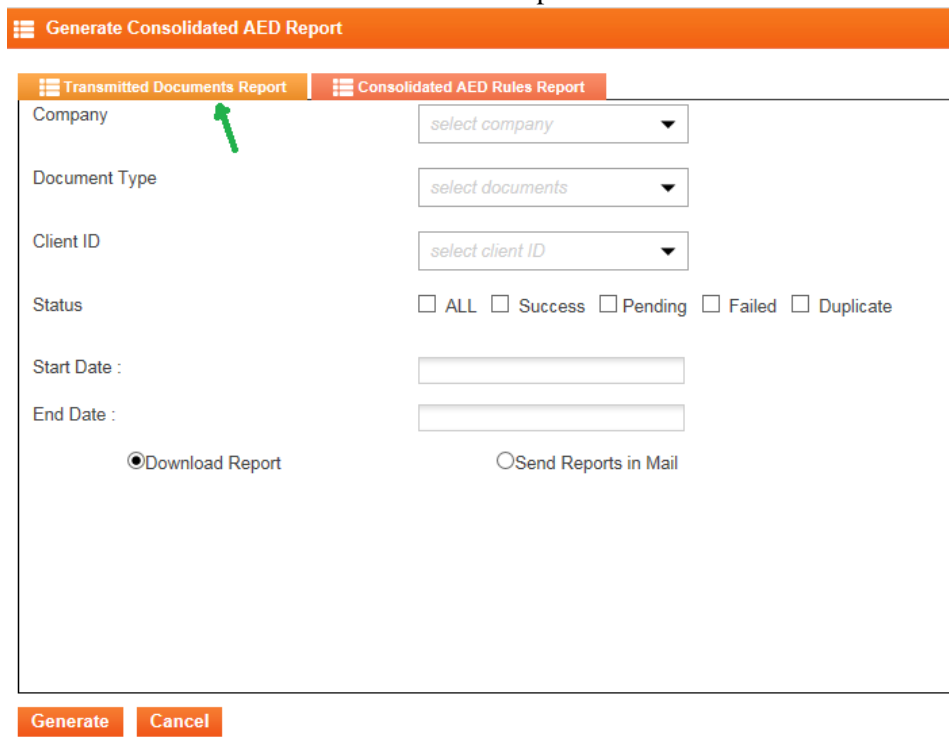
6.2.1 Transmitted Documents detail report

Form for Consolidate AED Report



The screenshot shows a sidebar menu for the 'Generate Consolidated AED Report' section. The menu is organized into three main categories: 'DDP Setup', 'Reports', and 'Export Documents Rule Setup'. Under 'DDP Setup', there are two options: 'Auto Emailing of Docs (AED)' and 'Consolidated Emailing of Docs (AED)'. Under 'Export Documents Rule Setup', there is one option: 'Export Documents Setup'. Under 'Reports', there are three options: 'AED Rule Reports', 'Consolidated AED Rule Reports' (which is highlighted with a green arrow), and 'Export Rule Reports'.

- It will take you to below Form
- Please choose Transmitted Documents Report tab.



The screenshot shows the 'Generate Consolidated AED Report' form. At the top, there is a tab bar with two tabs: 'Transmitted Documents Report' (which is selected and highlighted with a green arrow) and 'Consolidated AED Rules Report'. Below the tabs, there are several input fields and checkboxes. The 'Company' field is a dropdown menu with the placeholder text 'select company'. The 'Document Type' field is a dropdown menu with the placeholder text 'select documents'. The 'Client ID' field is a dropdown menu with the placeholder text 'select client ID'. The 'Status' field has five checkboxes: 'ALL', 'Success', 'Pending', 'Failed', and 'Duplicate'. The 'Start Date' and 'End Date' fields are text input boxes. At the bottom, there are two radio buttons: 'Download Report' (which is selected) and 'Send Reports in Mail'. At the very bottom, there are two buttons: 'Generate' and 'Cancel'.

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

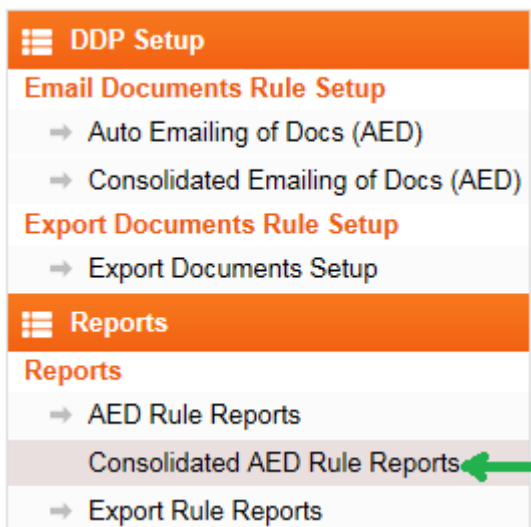
If no date selected, start date will pick from year start day

End Date: (optional): Enter end date

If no date selected, start date will pick till today

6.2.2. Clients that are setup for Consolidate AED rule.


Form for Consolidate AED Report



The screenshot shows a sidebar menu with the following structure:

- DDP Setup**
 - Email Documents Rule Setup
 - Auto Emailing of Docs (AED)
 - Consolidated Emailing of Docs (AED)
 - Export Documents Rule Setup
 - Export Documents Setup
- Reports**
 - Reports
 - AED Rule Reports
 - Consolidated AED Rule Reports** (highlighted with a green arrow)
 - Export Rule Reports

- It will take you to below Form
- Please choose Consolidate AED Rules report tab.



Generate Consolidated AED Report

Transmitted Documents Report

Consolidated AED Rules Report

Company

Document Type

Client ID

Status

select company

select documents

select client ID

☐ ALL
☐ Active
☐ Inactive

☒ Download Report
☐ Send Reports in Mail

Generate

Cancel

Fill the form according to requirement

Company: (Required) Select one or more countries.

Document Type: (Required) Select one or more document types.

Status:

All: All Consolidated AED rules

Active: Consolidated AED rules which are in Active state

Inactive: Consolidated AED rules which are in Inactive state

6.3 Export Rule Reports

6.3.1 Transmitted Documents detail report

Form for Export Rule Report

DDP Setup

Email Documents Rule Setup

→ Auto Emailing of Docs (AED)

→ Consolidated Emailing of Docs (AED)

Export Documents Rule Setup

→ Export Documents Setup

Reports

Reports

→ AED Rule Reports

→ Consolidated AED Rule Reports

Export Rule Reports

- It will take you to below Form
- Please choose Transmitted Documents Report tab.

Generate Export Rules Report

Transmitted Documents Report

Export Rules Report

Company

Document Type

Client ID

Status

Start Date :

End Date :

☒ Download Report

select company ▼

select documents ▼

select client ID ▼

☐ ALL
☐ Success
☐ Pending
☐ Failed
☐ Duplicate

☐ Send Reports in Mail

Generate

Cancel

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

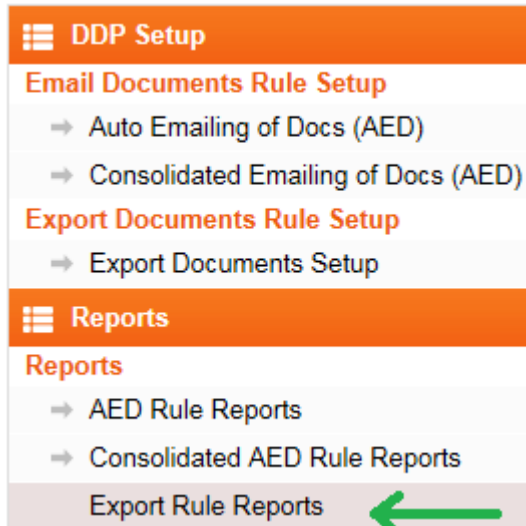
If no date selected, start date will pick from year start day

End Date: (optional): Enter end date

If no date selected, start date will pick till today

6.3.2 Clients that are setup for Export rule.

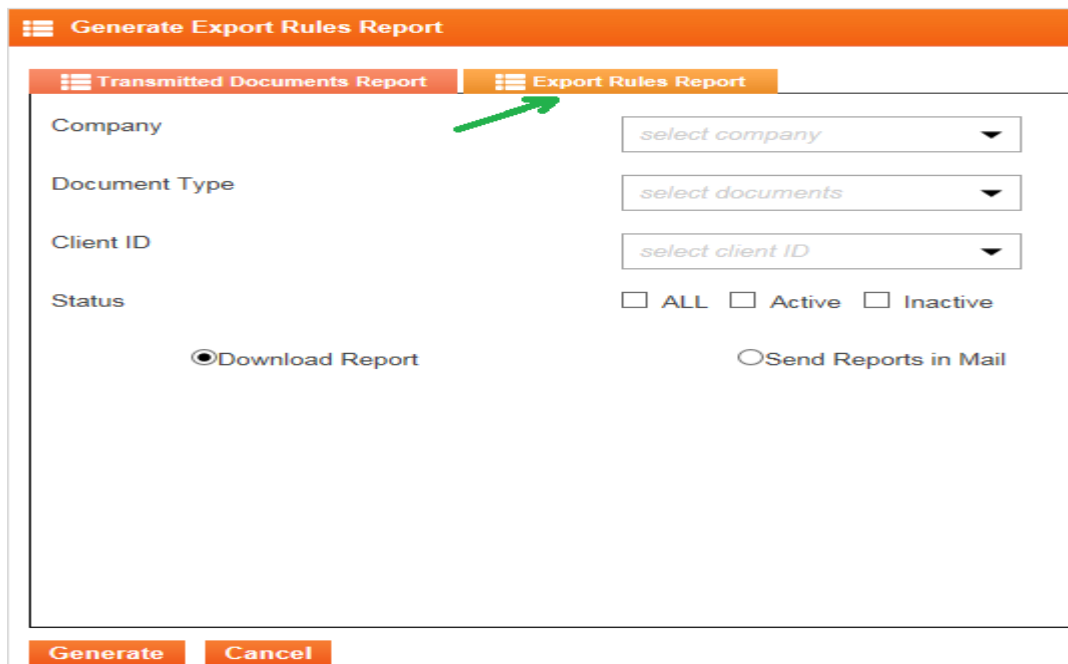
Form for Export Rule Report



The screenshot shows a sidebar menu with the following structure:

- DDP Setup
 - Email Documents Rule Setup
 - Auto Emailing of Docs (AED)
 - Consolidated Emailing of Docs (AED)
 - Export Documents Rule Setup
 - Export Documents Setup
- Reports
 - AED Rule Reports
 - Consolidated AED Rule Reports
 - Export Rule Reports (highlighted with a green arrow)

- It will take you to below Form
- Please choose Export rules Report tab.



The screenshot shows the 'Generate Export Rules Report' form. It has two tabs: 'Transmitted Documents Report' and 'Export Rules Report' (highlighted with a green arrow). The form contains the following fields and options:

- Company:
- Document Type:
- Client ID:
- Status: ☐ ALL ☐ Active ☐ Inactive
- ☒ Download Report ☐ Send Reports in Mail

At the bottom, there are two buttons: 'Generate' and 'Cancel'.

Fill the form according to requirement

Company: (Required) Select one or more countries.

Document Type: (Required) Select one or more document types.

Status:

All: All Export rules



Active: Export rules which are in Active state

Inactive: Export rules which are in Inactive state