

Base

QAD GTTE's suite of transportation solutions gives enterprises the ability to plan and execute shipments across all modes of transportation, seamlessly switch between carriers, track all deliveries from a single portal, proactively manage delivery exceptions, standardize production and non-production shipping across all locations, verify freight costs and get real-time insight into transportation operations.

The topics in this section provide information on the Base functionality and configuration options available in QAD GTTE for users and administrators.

Using Base

This section describes the Base functionality that is available to you, the user, in QAD GTTE.

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Getting Started

This section describes how to get started using the Web UI.

- [Prerequisites on page 46](#)
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Prerequisites

Before logging in to QAD GTTE:

- Be sure that JavaScript is activated and that your browser can accept cookies.
- Check if your workplace has Internet rules that restrict access. These rules could block access to QAD GTTE.
- Contact your system administrator to check if any firewall or proxy settings prevent access to QAD GTTE.
- Ensure that you have your screen resolution set to 1024 x 768 or higher, so that you can view all of the Web UI screens clearly.

Note The supported browser is Google Chrome running on a desktop or laptop.

To enable you to log in to the Web UI, your administrator provides you with a user ID and password. The [Logging In on page 46](#) section lists the fields that form part of the default login page.

Logging In

If the administrator has assigned a default profile to you, then you may not see all of these fields. You may only see the *User Id* and *Password* fields. The appearance of the login page also varies depending on the design that the administrator applies.

After you complete the necessary fields, click *Login*.

Login Page Fields

Field	Function
User Id	Your user identification (ID).
Password	A unique password. It is case sensitive and can be alphanumeric.
Client	Defaults from the user ID profile. This client is the transaction client in the database where shipping transactions are stored.
Locale	Defaults from the user ID profile. The locale determines where printer/device documents are sent.

Field	Function
Packing Location	Defaults from the user ID profile. A packing location is the logical area from where users ship their shipments.
Language	The default is English. You can select another available language.
Use default values for this user	When this field is selected, only the User Id and Password fields are displayed. The defaults configured for your account by the administrator are applied to the other fields.

Login Page



User Id:

Password:

Client:

Locale:

Packing Location:

Language:

Use default values for this user.

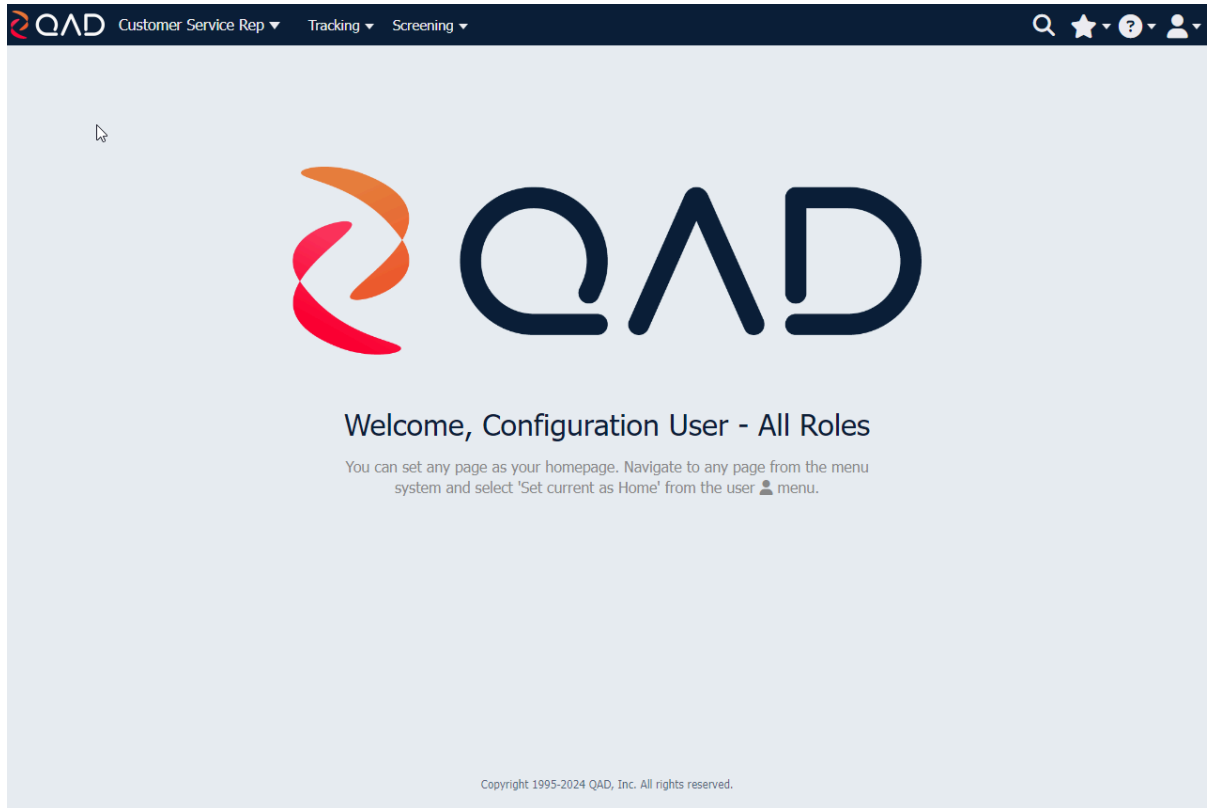
[Login](#)

Important The login page displays a message regarding cookies. Ensure that you read this message before proceeding.

Home Page

After you log in, a welcome page provides you with new or important information. Your administrator may configure the screen to display your company logo and colors, instead of the QAD GTTE logo and colors.

Welcome Page



If you or your administrator has set another page as your home page, then this page displays on login, instead of the welcome page.

Using QAD GTTE For Your Role

QAD GTTE provides efficient access to what you need for your job role. This section describes the default roles available in the QAD GTTE Web UI.

Administrator

An Administrator is responsible for managing and overseeing the technical aspects and security of GTTE. The Administrator's responsibilities include configuring system settings, managing user accounts, implementing authorization, and accessing low-level logging data for technical analysis.

Customer Service Manager

A Customer Service Manager consumes information from the system, such as the status of transactions. A Customer Service Manager may also be known as a Sales Manager, Supply Chain Manager, Logistics Manager, or Traffic Manager.

Export Compliance Manager

An Export Compliance Manager is an expert in export trade regulations, and is responsible for the export compliance program of a company. An Export Compliance Manager may also be known as a Customs Manager, Export/Import Manager, Global Trade Manager, or Trade Compliance Manager.

Supply Chain Manager

A Supply Chain Manager has overall responsibility for the supply chain, and is interested in performance metrics. A Supply Chain Manager may also be known as a Supply Chain Manager, Logistics Manager, or Transportation Manager.

Warehouse Manager

A Warehouse Manager is responsible for overall warehouse operations. A Warehouse Manager may also be known as a Distribution Center Manager, Inventory Manager, or Stock Control Manager.

Super User

The Super User role applies to the business owners of the application. They are trained in application configuration, and are experts in the application.

Warehouse Supervisor

A Warehouse Supervisor supervises the Warehouse Operatives, and handles any exceptions that occur in the pick, pack, and ship process. A Warehouse Supervisor may also be known as a Shift Supervisor, Distribution Centre Supervisor, or Warehouse Leader.

Customer Service Representative

A Customer Service Representative consumes information from the system, such as the status of transactions. The representative may also screen potential customers against Denied Party Lists. A Customer Service Representative may also be known as a Sales Representative, Accounts Receivable Clerk, or Order Entry Clerk.

Desktop Shipper

A Desktop Shipper creates shipments to facilitate their business role, which may be that of marketing assistant, personal assistant, or office administrator. In addition to creating shipments, desktop shippers can track shipments to destinations and maintain a history of created shipments. A Desktop Shipper can also be responsible for handling non-production shipments and intercompany transactions.

Export Compliance Officer

An Export Compliance Officer is an expert in export trade regulations, with comprehensive knowledge of the company export compliance program. The officer makes decisions related to product classifications and export license requirements. The officer can override the results of compliance checks, and change compliance configuration within the system. An Export Compliance Officer may also be known as Export Control Officer, Export Specialist, Trade Compliance Analyst, and Trade Compliance Officer.

Mailroom User

A Mailroom User is responsible for a company's incoming and outgoing mail. Outgoing mail and packages are prepared before they proceed to the carrier. Incoming mail is accepted from carriers and processed, sorted, and delivered to the proper recipients.

Shipping Clerk

A Shipping Clerk prepares orders and paperwork for shipping—typically for international or hazardous shipping. A Shipping Clerk may also be known as a Shipping Officer, Export Clerk, Order Clerk, or Freight Clerk.

Transportation Analyst

A Transportation Analyst is responsible for managing transportation resources. The analyst deals with carriers on a daily basis for bookings and rates, and processes payments for freight. A Transportation Analyst is also known as a Transportation Coordinator, Traffic Manager, Transportation Consultant, Logistics Analyst, Logistics Coordinator, or Freight Analyst

Warehouse Operative

A Warehouse Operative works in the warehouse or distribution center, picking, packing, and dispatching products. A Warehouse Operative is also known as a Picker, Packer, Dispatcher, Shipper, Warehouse Clerk, or Distribution Clerk.

Import Compliance Supervisor

An Import Compliance Supervisor is an expert in import trade regulations, and is generally responsible for the day-to-day operations of a company's import compliance program and supervision of the department. An Import Compliance Supervisor may also be known as a Customs Manager, Import Manager, Global Trade Manager, or Trade Compliance Manager.

Import Compliance Analyst

An Import Compliance Analyst generally has less experience as an Import Compliance Supervisor, and, as part of a larger group, may either be responsible for all tasks associated with a customs transaction, or act as a specialist for a specific activity or program, such as product classification, free trade agreements, or duty drawback. An Import Compliance Analyst may also be known as a Trade Compliance Analyst or Import Compliance Specialist.

Import System Admin

An Import System Administrator role applies to the business owners of the application. They are responsible for application configuration.

Learning QAD GTTE

This section describes how you can use the QAD GTTE Web UI. The role-based menu bar provides a navigation experience tailored to your needs. QAD GTTE provides a default set of role menus, but each role menu can be configured by an administrator to best align with your company's needs. For quick access to the menu items you use most often, you can also set the menu bar to display your favorites.

Main Menu

The main menu bar starts with the QAD GTTE icon or your company logo, located in the upper right. Clicking on the icon takes you to your home page.

Main Menu



After the company icon, the menu bar includes:

- Role menu — choose your role from the drop-down menu listing the roles available to you.
- Role menu options — the role menu options vary depending on your current role, as selected from the role menu. Your administrator can configure roles and role menu options based on your job description; for example, if your role is Customer Service Representative, the role menu options could include *Tracking* and *Screening*, to enable you to track shipments and run compliance checks. Your administrator can configure the role menu options to include an icon that represents the purpose of the option; for example, a pencil icon to represent maintenance screens that allow you to edit values.

Note If only one role is available to you, your administrator can configure the main menu to hide the role menu.

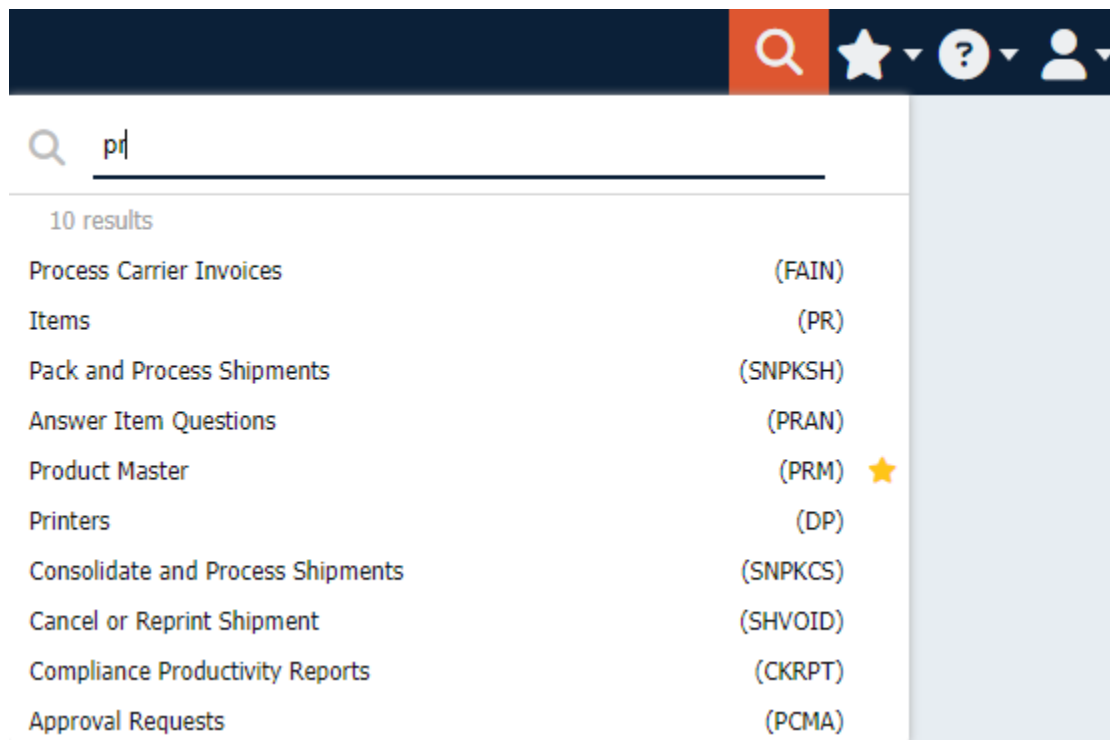
- Menu Search — select the *Menu Search* icon to search for menu items based on the menu description or option code. For more information, see [Menu Search on page 53](#).
- Favorites Menu — you can use this menu to view a list of menu options marked as favorites. For more information, see [Favorites on page 54](#).
- User Menu — this menu allows you to:
 - View your user profile settings and information about the current session, which display in a pop-up window. Your administrator can specify the description that appears in the Environment field in this pop-up window.
 - Set the current page as your home page.
 - Reset the home page to the default home page.

- Sign out of the Web UI.
- Clear the cache, if enabled by your administrator.

Menu Search

The menu search compares search text with all menu options related to your roles, and to other available options, such as the welcome page, specified by your administrator.

Menu Search



Your administrator can configure the menu search to display a specified number of recently accessed options, and to display option codes in addition to option descriptions.

Click the search or magnifying glass icon, or use Ctrl+M to access the search feature. The menu search features typeahead behavior, based on two or more typed characters, so that you can easily find items with similar menu descriptions or option codes.

If there is only one option in the search results list, or if you specify a valid option code in the search field, then you can press Enter to access the related screen. Otherwise, you can click the relevant option from the search results list to access it.

If you search for a menu option for which you do not have access, and press Enter, an exclamation mark icon displays to the right of the search field. If you mouseover the exclamation mark, an *Access Denied* message appears.

If you search for a menu option that does not exist, and press Enter, an exclamation mark icon displays to the right of the search field. If you mouseover the exclamation mark, an *Invalid Option* message appears.

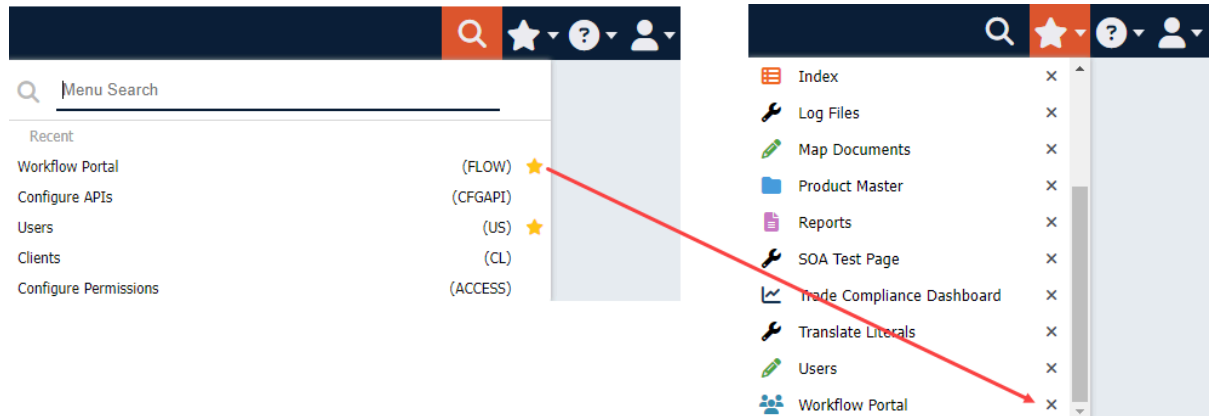
Favorites

The Favorites menu allows you to access a menu option from a list of options marked as favorites.

You can use the Menu Search results list to update the list of Favorites. Menu options that appear in the Menu search results list with a yellow star to the right of the option code are already in the Favorites menu. To add a menu option to the Favorites menu, mouseover the menu option and click the star outline that appears to the right of the option. To remove a menu option from the Favorites menu, click the yellow star that appears to the right of the option code, and confirm the removal when prompted.

You can also remove options from the Favorites menu by clicking the X that appears to the right of the menu option text, and confirm the removal when prompted. You can also add the current option as a favorite using the star icon on the option title area, which is described in [Title Area on page 54](#).

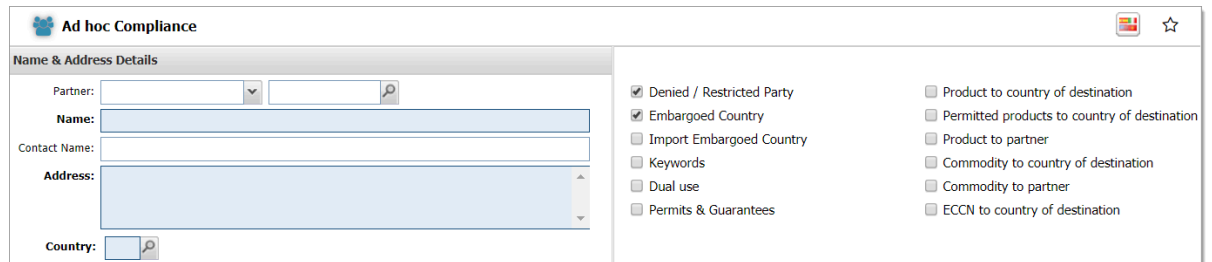
Adding and Removing Favorites



Title Area

When you access a menu option, the menu option displays with a title area below the main menu.

Title Area in the CKADH Option



Depending on the permissions assigned to you, and the configuration of the Web UI by the administrator, the title area can contain:

- An icon representing the purpose of the option.
- The menu option code if you mouseover the icon.
- The title of the option.
- The *Favorites* icon, which allows you to add or remove an option from the Favorites menu.
- The *Translate* button, which allows you to access the Translate Web UI Literal area described in [Translating Web UI Literals on page 483](#).

Depending on the particular functionality provided by the option, the title area may contain tabs, as in the RULES option. It may also contain a progress bar, as in option DTS, and additional buttons, such as the *Consolidating* button in option SNPKSH.

RULES Option with Rules and Rulebooks Tabs in the Title Area

The screenshot displays the 'Rules & Rulebooks' interface. The title bar includes tabs for 'Rules' and 'Rulebooks', with 'Rules' currently selected. Below the tabs is a search bar and a 'Configure Engine' button. The main area contains a table of rules with the following columns: Rule, Start Date, Description, End Date, Workflow, Workflo..., and User Id. The table lists several rules, including A_MENU, A_SEARCH, AUTO_DOC, AUTO_RULE, AUTO_SF, AUTO_SUBOP, C88_UPD, CHRГ_TB, and CHRГ_TBUP. To the right of the table is a configuration panel with fields for Rule, Start Date, Description, End Date, and Workflow, along with an 'Update' button.

Rule	Start Date	Description	End Date	Workflow	Workflo...	User Id
A_MENU	2018/09/13	Automated Test for Drop d...				LKN
A_SEARCH	2018/09/10	Rule to test search fields				LKN
AUTO_DOC	2018/06/11	Auto Test - Rule with docu...				QATE
AUTO_RULE	2018/06/11	Rule for Automated Testing				QATE
AUTO_SF	2018/06/15	Auto Test - Rule to test su...				QATE
AUTO_SUBOP	2018/06/12	Rule for Automated Testin...				QATE
C88_UPD	2018/09/21	Automated Test Add C88 ...				LKN
CHRГ_TB	2018/03/22	Automated Test Add Char...				LKN
CHRГ_TBUP	2018/03/22	Automated Test Update C...				LKN

Workflow

Workflow describes a set of tasks performed on a transaction from the time it is created to its delivery to the customer. The set of tasks, or workflow, that you can perform on a transaction depends on the type of transaction and on your user profile.

In addition, some tasks need to be completed at a particular time or in a certain sequence. Therefore, Workflow not only controls the tasks that you are allowed to perform, but also the sequence in which you can perform them.

The types of transactions that you can view and update in Workflow are:

- Shipments
- Consolidations
- Orders
- Loads

Loads allow you to group shipments for transportation purposes. QAD GTTE calculates gross weight and volume totals for the load, regardless of conflicting units of measure on the shipments within the load. After transportation, you can remove shipments from the load for onward delivery. Your administrator uses rules to apply unit of measure settings and other default values to the load header.

You can only add open shipments to a load, and shipments added to a load are automatically closed. If you remove a shipment from a load, then the shipment is automatically reopened.

In Workflow, you can create, update, and close loads. You can also attach load-level documents to loads and then view and print these documents.

For a list of the available Web UI tasks and the transactions that they apply to, see [Web UI Workflow Tasks on page 535](#).

Workflow Portal

To open the Workflow Portal, access option FLOW. On the *Workflow Portal* page, you can search for a transaction and work on it. Consider a transaction to be a type of workflow with tasks associated with it. Examples of transactions are orders, shipments, and invoices.

The Workflow Portal can be divided into three main parts:

- View list
- Search panel
- Transaction panel, including the Tasks area

Workflow Portal

The screenshot displays the Workflow Portal interface. At the top, there is a search section with various filters: Open (Shipment), Group (QTGLUSER), Client (TGL), Reference No., Carrier, User ID, Customer, Consignee, Workflow, Despatch Date (From/To), Status, Invoice No., and Booking Number. A Template Search section is also present. Below the search section is a table of Shipments with columns for Workflow, Type, Consignor, Reference, Carrier, Route, and Pla. The table lists several shipments, including QDEMOTMS and QDEMOTMS with various reference numbers and carriers. To the right of the shipment table is a Tasks panel with columns for Stat., Note, Description, Completed By, Completed On, and Audit. The tasks list includes items like BASIC PACKING, CHANGE ADDRESS, AUTO ASSIGN CARRIER..., RATE SHOP, AUTO MANIFEST, MANIFEST, AUTO PRINT PACKING L..., PRINT DOCUMENTS & L..., and SUMMARY INFORMATION. The interface also includes a footer with navigation controls and a 'Ready' status.

You can hide the *Search* panel and *Tasks* area by clicking the double arrow on the top right corner of each of these areas. Click the arrows again to display the areas once more.

Workflow Portal with Minimized Search Panel and Tasks Area.

The screenshot shows the Workflow Portal interface with the search and task panels minimized. The main table is visible, showing columns for 'Of Dest...', 'Gross Weight', 'Status', 'Compliance Sta...', and 'Booking Num'. The table contains five rows of data:

Of Dest...	Gross Weight	Status	Compliance Sta...	Booking Num
	8,000000 KG	00		
	7,000000 KG	00		
	8,000000 KG	00		
	5,000000 KG	00		
	4,000000 KG	00		

Red boxes highlight the double arrow icons in the top right corner of the search panel and the top right corner of the table area, indicating how to minimize these sections.

The administrator configures the appearance of the Workflow Portal, but you can change the appearance by resizing panels, and adding, deleting, or resizing columns and fields. Changes that you make are automatically saved and apply each time you log in.

View List

The View list is located at the top of the page. It allows you to specify what type of transaction you want to search for. The list available depends on your user settings. By default, the list includes the following transactions:

- Shipment
- Order
- Invoice
- Consolidation

It is important that you select the correct transaction type before you perform a search. The *Transaction* panel heading changes to reflect your choice. In some cases, the administrator configures the system to automatically display a specific transaction type.

Search Panel

The Workflow Portal *Search* panel allows you to search for a transaction or group of transactions. To perform a basic search, you complete the relevant search fields and click the Search button.

Search Panel

There are five columns on the Search panel. The first column contains the following fields that are always displayed:

- *Reference No.* You can type the full transaction number in this field. If you are searching for a series of transactions or you only know a partial number, you can use the * wildcard. For example, if you are searching for all shipments beginning with 004, type 004* and click Search. In some environments, especially those using scanner input, the Reference No field can be set to trigger an autosearch after you input a particular number of characters.
- *Group.* This list displays the user groups that you belong to. You can search for transactions for a particular group. You only see the user groups you belong to.

Note In the Windows UI, it is possible to use a wildcard character in this field. In the Web UI, you can only select from the list.
- *Client.* You are assigned a default client by your administrator. However, you may have access to other clients, depending on your role. Select the client from this list.

The first column also enables you to select whether you want to search for an open or closed shipment.

Note It is important that users close shipments when they are finished with them, so that searching through an ever-increasing number of open shipments does not become unacceptably slow.

The *Search* button performs a search based on the criteria you have selected. The *Clear* button clears the current search.

The *Export* button enables you to display the results of a search in an Excel spreadsheet rather than in the *Transaction* panel. Do not use the *Export* button without first specifying some search criteria. If you fail to narrow the export criteria, you export all transactions in the system to an Excel file. This can take several minutes to complete and consumes a lot of memory. It is possible for the administrator to disable the Export button.

The Clear button allows you to clear the contents of the fields in the Search panel, apart from the Group and Client fields.

The Workflow Assistant button allows you to query why a transaction is not visible in the Workflow Portal. You can check the:

- Workflow assigned to a transaction.
- Groups that own the transaction.
- Current status of the transaction.
- Groups and statuses to which you have access.

The Transfer Ownership button allows you to modify the groups and users associated with a transaction. You can:

- Add a new group to the list of groups that own the transaction.
- Remove an ownership group; this option is only possible when there is already more than one ownership group assigned.
- Change the groups, effectively adding a new group while removing a current group.
- Assign a new user from within an existing group.

The Link Transactions button allows you to view certain types of transactions that are associated with the transaction selected in the Transaction panel. When you click the button, a dropdown menu opens and you can select the type of transaction that you want to view. Your administrator can configure which transactions types you can select from the dropdown menu. For example, when a shipment is selected in the Transaction panel, click the Link Transactions button and select Order from the dropdown menu. The Transaction panel then displays any orders associated with the shipment. You can then select an order and click the Link Transactions button again to select another type of transaction associated with the order, or to unlink the order from the shipment that it is associated with it. Unlinking one transaction from another does not

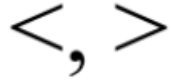
mean that you remove the association between the transactions; it means that you cannot view one transaction from the other transaction using the Link Transactions button.

You can configure the contents of the second, third, and fourth columns in the Search panel. By default, the second column contains the following fields:

- *Carrier*. If you are searching for a shipment sent with a particular carrier, you can enter the carrier name in this field.
- *User ID*. You can search by the ID of the user who created the shipment.
- *Customer*. You can search by customer.
- *Consignee*. You can search by consignee.
- *Workflow*. You can search by workflow.

By default, the third column contains the following fields:

- *Despatch Date (From/To)*. If you are searching for a shipment due for despatch in a particular time frame, you can enter the data range in these fields.
- *Status*. The Status lookup field enables you to specify transactions with a particular status from the pop-up Status list. The second field



enables you to widen your search using the operators. The operators allow you to return transactions that have already achieved the specified status, transactions that have not yet reached that status, or transactions with that status. You can type [blank] to retrieve transactions without a status.

- *Invoice No*. The Invoice Number lookup field allows you to choose a particular transaction from the pop-up Invoice Number list.
- *Booking Number*. If you know a booking number, you can enter it here.

By default, the fourth column is empty. The fifth column enables you to save search criteria as a template so that you do not need to complete the same fields each time you want to conduct the search. To create a template, type an appropriate name for your search criteria in the *Enter a template name* field and click the *Save* button. You can update and save existing templates.

You can retrieve the template at any time from the templates drop-down list. To perform a template-driven search, select the template from the *Select* drop-down list and click the *Search* button. This displays a list of shipments that match your search criteria in the *Transaction* panel. If you want to remove a template that you no longer use, select the template from the list and click the *Delete* button.

Note Your administrator can create templates and make this available to you alone, all users, or to all users with a particular client or listed in a particular group. If you update a shared template, the changes apply only to your version of the template; other users will still have access to the original, shared template.

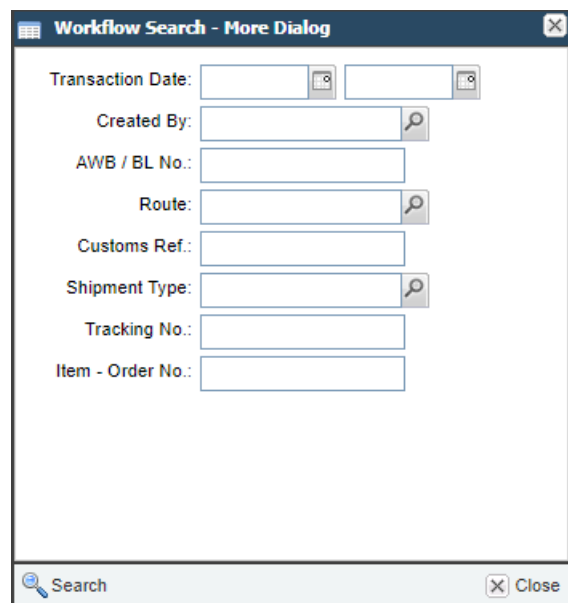
There are three additional buttons in the fifth column:

- The *More* button allows you to select further fields to search on.
- The *Config* button allows you to configure the contents of columns 2, 3, 4, and the *More* pop-up.
- The *Defaults* button restores the *Search* panel factory settings.

The More button enables you to select from a broader list of search criteria. When you click this button, the *Workflow Search – More* pop-up window is displayed. Typically, the fields in this pop-up window are rarely used search criteria.

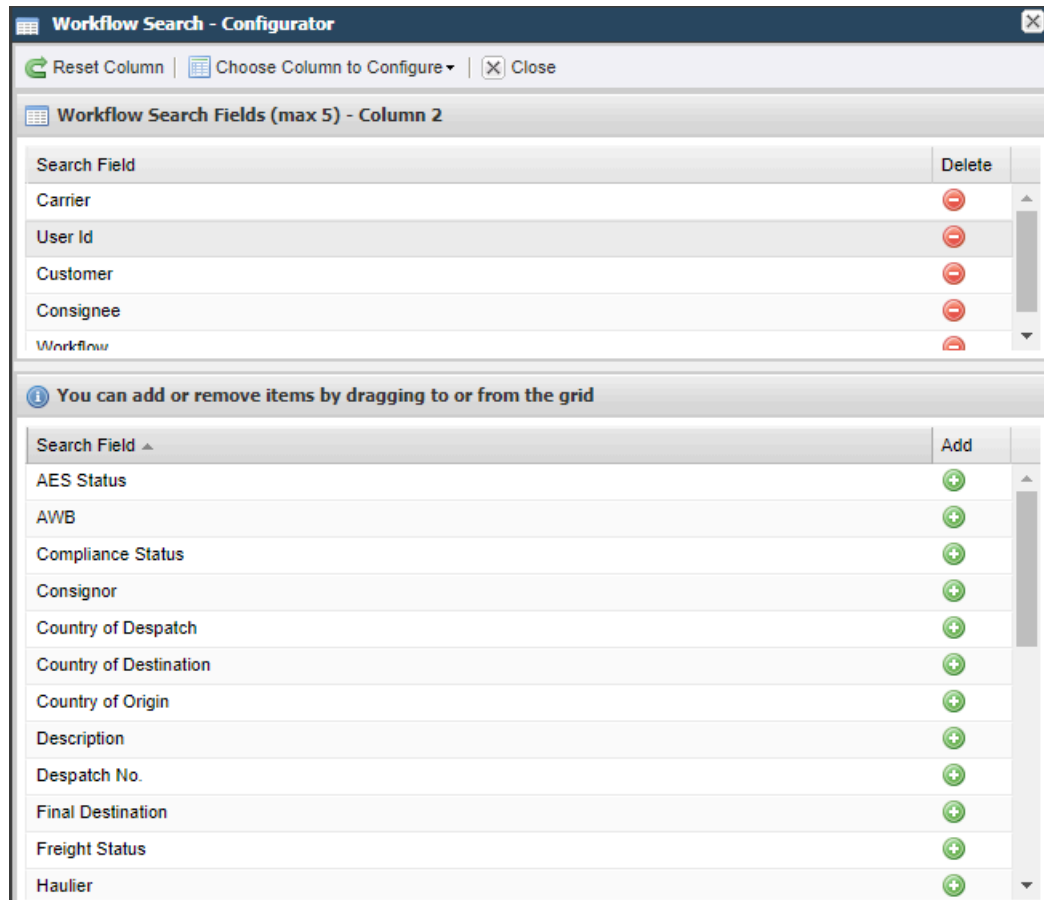
To configure the fields displayed in the *Workflow Search – More Dialog*, choose *More* from the *Choose Column to Configure* list in the *Workflow Search – Configurator* pop-up window.

Workflow Search – More Dialog



To add or remove fields from your screen, click the *Config* button. The *Workflow Search – Configurator* pop-up window displays.

Workflow Search – Configurator



In the pop-up window, click the green plus icon to add a field to the *Search* panel. To remove a field, click the red minus icon. Further configuration is possible using the tools at the top of the pop-up window:

- The *Reset Column* button clears any field additions or deletions you have made since you opened the pop-up window.
- The *Choose Column to Configure* list enables you to choose the *Search* panel column you want to configure.
- The *Close* button enables you to exit the pop-up window and automatically saves your configuration.

Transaction Panel

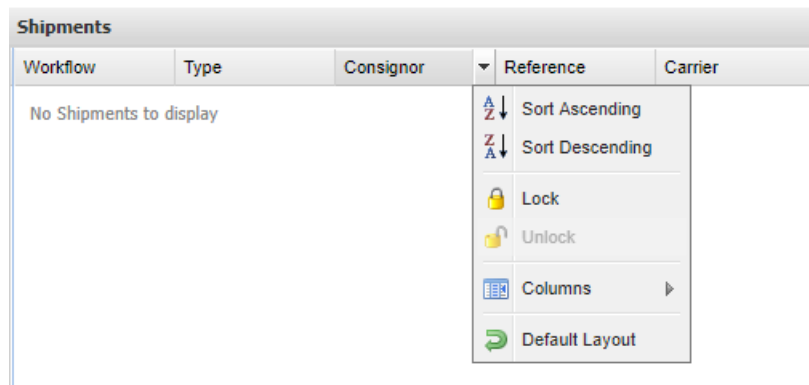
The *Transaction* panel displays all shipments that match the search criteria you specified in the *Search* panel. The actual panel name matches the transaction type you selected in the *View* list.

By default, the results of a search are sorted by descending reference sequence. You can use a number of features to customize the default layout of the *Transaction* panel for displaying results.

Column Options

You can resize the width of a column. You can also move columns into different positions on the *Transaction* panel. To do this, click and drag the column header to your preferred location. Each column on the *Transaction* panel features a drop-down menu of column options. To access the menu, click the arrow that appears when you roll over any column header on the *Transaction* panel.

Column Options



- Sort the contents of the grid based on a single column. To sort the data in descending order, click the column header once. To sort the data in ascending order, click the column header again. A small triangle icon in the column header indicates the column that the sort is based on, and whether the sort is in ascending or descending order.
- *Lock* freezes the selected column so it remains locked when scrolling right. You can lock multiple columns. Dragging the column to another location in the panel automatically unlocks the column.
- *Unlock* unfreezes the selected column.
- The *Columns* option allows you to select the columns to be included in the display. The table below lists the columns available.
- *Default Layout* reverts the columns to the default layout.

Transaction Panel Columns

Column Type	Description
Workflow	The name of the workflow associated with the shipment.
Type	The type of shipment.
Consignor	The person or company shown on the bill of lading as the shipper.
Reference	The QAD GTTE shipment transaction reference.

Column Type	Description
Carrier	The carrier code associated with the service used to ship the shipment.
Route	The route associated with the carrier service.
Place of Delivery	The place to which the shipment is to be delivered.
Country of Destination	The country to which the shipment is to be delivered.
Gross Weight	The gross weight of the shipment.
Status	The status of the shipment, identifying a particular task or step within the shipping process.
AES Status	The Automated Export System (AES) status of the shipment.
ITN No.	The Internal Transaction Number (ITN) for this shipment.
Customs Ref.	The customs reference for this shipment.
Despatch Date	The date on which this transaction is manifested.
Order Number	The number of the order attached to the shipment.
Description	A description of the shipment.
Customer	The identifier for the customer attached to the shipment.
Consignee	The person or company that the shipment is being sent to.
Mode	The mode of transport for the shipment; for example, air or sea.
Volume	The total volume of the shipment.
Place of Loading	The location where the shipment was loaded.
Haulier	The company transporting the shipment. Hauliers typically deal with heavy goods or goods transferred by road.
Payment Terms	The payment terms associated with the shipment.

Column Type	Description
Delivery Terms	The delivery terms associated with the shipment.
Total Value	The total value of the shipment.
Currency	The currency in which the shipment is invoiced.
Language	The language associated with the shipment.
Country of Origin	The country the shipment originates from.
Group	The user group with ownership of this shipment.
Client	The client this shipment is attached to.
Despatch	The date that the shipment was despatched.
AWB / BL No.	Air waybill number (AWB) or bill of lading for the shipment.
MAWB / MBL No.	Master air waybill number (MAWB) or master bill of lading for the shipment. An airline sends a MAWB or receipt to the customer to advise that the airline has received the goods and agreed to send them by air. This number identifies the MAWB attached to the shipment.
Consolidated	Indicates if a shipment is consolidated or not.
Consol. Ref.	The reference number relating to the consolidation.
User Defined Field 10	This field is available for configuration by the administrator. When displayed, this field has a different label.
SHUserDef7	This field is available for configuration by the administrator. When displayed, this field has a different label.
SHPSLDef4	This field is available for configuration by the administrator. When displayed, this field has a different label.

Panel Scroll Bars

Use the scroll bars on the right and bottom of the *Transaction* panel to scroll to the last transactions in the results list and to scroll to the columns displayed on the right of the panel.

Mouse-Over Details

The mouse-over option for column information allows you to read information that might be obscured by the column width. For example, the default column width for the *Description* or *Place of Delivery* columns may not be sufficient to display the complete entry. The mouseover option displays the text in full.

Resizing Panels

Click and drag the dividing area between the two panels to resize the *Transaction* panel. When you resize the *Transaction* panel, the system automatically recalculates the number of pages required to display the results.

Transaction Panel Toolbar

The number of results pages returned in a search is displayed at the bottom of the *Transaction* panel. Use the arrow keys to scroll to a particular results page or to the first or last page. Alternatively, insert the page number you want and press Enter. Updates to transaction information occur frequently. Use the *Refresh* button to update the *Transaction* panel with new information.

The *Copy to clipboard* icon allows you to copy selected rows in the search results. You can then export these rows by pasting the clipboard content to another application such as Excel.

Note The *Select All* button only selects the transactions on the current page.

Note The copy to clipboard behavior is browser-specific; for example, in some browsers, you may see a pop-up message that contains the text that you copied to the clipboard. Copy the highlighted text in the pop-up message again using Ctrl-C to ensure that the rows are copied to the clipboard correctly.

The *Unlock* button allows you to unlock an unintentionally locked shipment. Typically, when a task is run against a shipment the shipment is locked so that other users cannot modify a task when you are making an update. However, if you refresh the screen or exit the browser without saving the task, the shipment remains locked. In such cases, you can unlock the shipment using this button. Typically, this button is designed for use only in these circumstances. When a task is completed under normal circumstances, the shipment is automatically unlocked.

Transaction Panel Toolbar



Depending on your configuration, there may be other buttons on the toolbar. In the following graphic, the system has been configured to contain buttons that allow you to create a shipment, run the end-of-day manifest, load a routing guide, and fire rules.

Transaction Panel Toolbar: Typical Configuration

**Tasks Area**

Each transaction has a workflow associated with it. When you select a transaction in the *Transaction* panel, the tasks that can be performed against it are displayed in the *Tasks* area.

Tasks Area

Tasks						
All Docs SPS Partners Detail Other Requisite						
Status	Note	Description	Completed By	Completed On	Audit	
<input type="checkbox"/>		BASIC PACKING				
<input type="checkbox"/>		CHANGE ADDRESS				
<input type="checkbox"/>		AUTO ASSIGN CARRIER...				
<input type="checkbox"/>		RATE SHOP				
<input type="checkbox"/>		AUTO MANIFEST				
<input checked="" type="checkbox"/>		MANIFEST	QCONFIG	11-Sep-2019 09:35:54		
<input checked="" type="checkbox"/>		AUTO PRINT PACKING L...	QCONFIG	05-Sep-2019 05:11:00		
<input type="checkbox"/>		PRINT DOCUMENTS & L...				
<input checked="" type="checkbox"/>		SUMMARY INFORMATION	MN7	10-Jan-2020 14:31:44		
<input type="checkbox"/>		CLOSE				

The tasks displayed depend on the workflow associated with the transaction you selected. By default, there are three tabs on the *Tasks* panel.

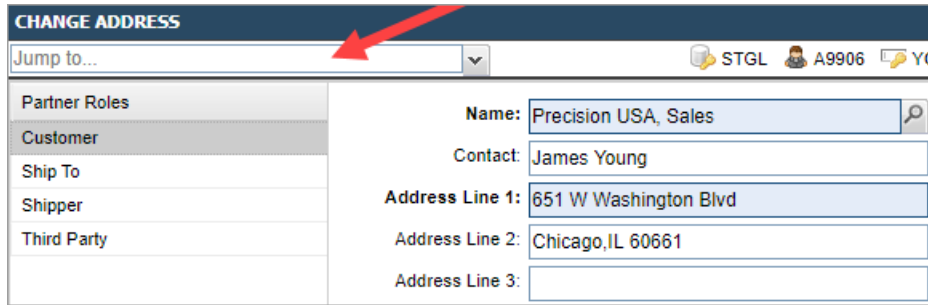
- The web tab displays the tasks that can be completed in the Web UI.
- The all tab displays all tasks related to this transaction.
- The *Requisite* tab displays all tasks that must be completed for this workflow.

However, your display may be different, depending on how the administrator has configured your system. The tabs might be renamed according to other categories and tasks associated with these categories. Tabs are especially useful in cases where there are a lot of tasks in a workflow.

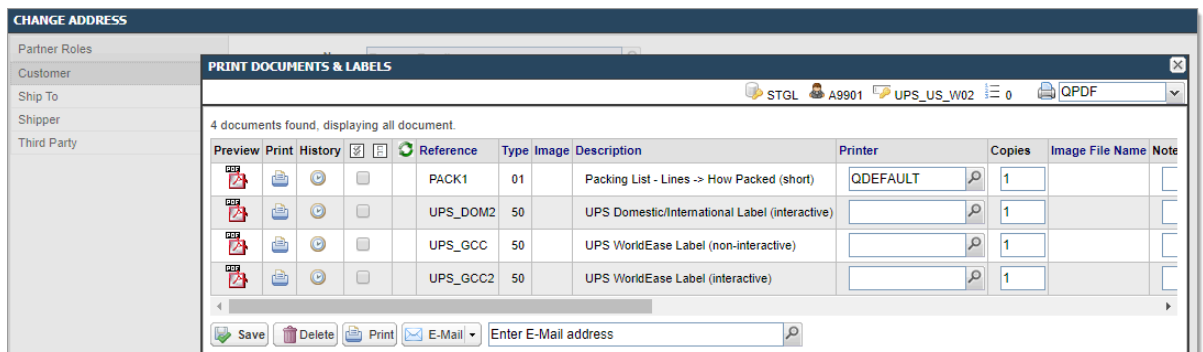
When you double-click a task, a pop-up window is displayed. The window enables you to enter details to update or complete the task. After a task is completed, the *Completed By* and *Completed On* columns are updated with the user information and a time and date stamp.

A drop-down menu available in the top left area of the task window allows you to jump to another task while keeping the existing task open. Your administrator determines which tasks are listed in the drop-down menu. You can select another task from this menu to open the new task over the existing one. You cannot jump to more than one task at a time.

Address Task with Jump to... Menu

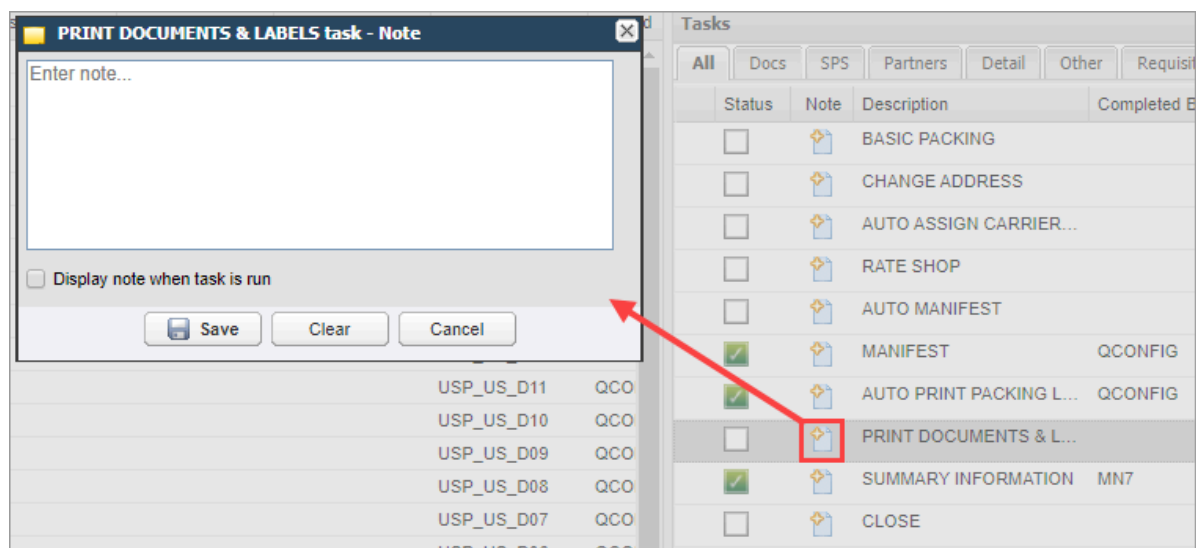


Document Task Pops Up with Address Task Remaining Open Behind






If you click the *Note* icon, a *Note* pop-up window is displayed. This allows you to create a note against a task. The window also contains a field that enables you to display the note when the task is run. If a note exists for a task then it can be viewed by clicking the *Note* icon or by running the mouse over it.

Task Note



Each task has three possible statuses.

Task Statuses

Icon	Meaning
	Indicates a task completed successfully, with a status of Complete.
	Indicates an unsuccessful task. This status does not prevent the task from being successfully completed at a later time.
	Indicates a task not yet completed.

Some tasks are configured by your administrator to take place in a certain sequence. You may not be allowed to complete a certain task if you try to complete it before a prerequisite task has been completed. Other tasks are post-requisite tasks, which means that when the task is complete, you can no longer run an earlier task.

Example The close shipment task is a post-requisite task of the packing shipment task, so the packing task cannot run if the close shipment task has run.

If a task appears in gray, this means that you cannot open and complete it in the Web UI. If you double-click the task, it does not open.

Task Not Web-Enabled

Tasks						
All	Docs	SPS	Partners	Detail	Other	Requisite
Status	Note	Description	Completed By	Completed On		
		Compliance - Overall Status	LKN	09-Sep-2019 03:15:21		
		Compliance - Run Compliance	LKN	09-Sep-2019 03:15:21		
<input type="checkbox"/>		Compliance - View Comp Results				
<input type="checkbox"/>		Items - Items				

When you run a task, the system locks the shipment so that nobody else can access the shipment and modify it at the same time. Information is provided on who is currently working with the shipment and for how long.

When a workflow task is completed, if it is configured to change the status or user group ownership, the changes are reflected in the information displayed on the screen.

There are a number of shortcut keys that you can use in workflow task pop-up windows:

- Esc – Close the workflow task pop-up window.
- Ctrl + F2 – Set the status of the workflow task to Complete.
- F2 – Perform the primary action available in the workflow task pop-up window, when the task has a primary action. The primary action appears in bold text.

Workflow Tasks

The following sections describe the tasks that comprise a basic shipment workflow.





Note Your administrator can assign a different name to a workflow task. For example, your administrator can rename the Address task as Review Address. The administrator can also configure the pop-up window for each task, and so the appearance of the tasks in your implementation may differ from the examples in the online help.

Each workflow task that you open has an information section at the top of the window, just under the task title.

This section displays information that uniquely identifies the shipment transaction within GTTE. This information includes one or more of the following:

Identifying Information

Icon	Explanation
STGL	Client. The client the shipment belongs to. This client is the client

Icon	Explanation
	that you selected to work with within the Workflow Portal, with a prefix indicating the type of shipment. Typically the client is the one that you choose at login, or the one associated with your profile. A prefix of S indicates a regular shipment but prefixes such as O for an order or K for a consolidation are also possible.
 17001	Consignor. The consignor associated with the shipment.
 TEST05RQF	Reference. The reference number of the shipment.
 0	Despatch Number. The despatch number associated with the shipment.
 QPSLBB	Print Locale. The current print locale. This icon identifies the printer group that labels and documents print to. A locale defines the printers to use when printing a particular set of documents.

The Client, Consignor, Reference, and Despatch Number values combine to form a unique identifier for the shipment transaction.

Note Typically, only one client and print locale is available to you. Use the GTTE login page to choose a client and print locale if you have a number of options. You can also change the client and print locale using **Change Session Details**, menu option CHGSES.

Address Task

Use this task to view addresses for each partner role associated with a workflow. Depending on your [configuration on page 320](#), you may be able to update address details before you rate a shipment. It is not possible to update addresses after rating a shipment.

A list of partner roles appears on the left side of the screen. Your administrator configures this list of partner roles. Select the partner role and update the address. The address fields are the same, regardless of the partner role you select.

Name

The name of the partner.

Contact

A contact name within the partner organization.

Address Line 1, Address Line 2, Address Line 3, Address Line 4

The partner's address line data.

City, State, Postal Code, Country, Phone Number, Fax Number, Email

The partner's address and contact data.

Consignee Type

The consignee type.

To update an address, complete the address fields and click Save. If there are mandatory fields on the screen, and you leave these fields blank, an error message appears at the top of the screen. Similarly, if an address is read-only, a message appears at the top of the screen advising you that the address is locked. To reset the address to the address saved in the partner record, click Reset Address.

If an address already exists, the address fields show this address when you select the partner in the Name field.

Depending on the GTTE configuration, [address verification on page 165](#) may apply to one or more of the addresses in the Address task.

To close the Address pop-up window, click Close. To mark the task as complete or unsuccessful, click the appropriate icon at the bottom left of the window. The Unsuccessful icon only appears when the administrator configures the relevant setting.

Close Task

The Close task changes a record's status from Open to Closed. Marking a shipment, purchase order, or import shipment as Closed indicates that it is complete and is processed.

If you need to locate a closed purchase order, select the Closed option in the status field on the Workflow screen. Then click Search.

Status Field, Workflow Search Panel

Purchase Order

The screenshot shows a search panel for Purchase Orders. At the top is a 'Search' header. Below it is a dropdown menu with 'Open' selected, and another dropdown menu with 'Purchase Order' selected. Below these is a text input field labeled 'Reference No.'. At the bottom is a toolbar with four buttons: 'Search' (magnifying glass), 'Open Transaction' (green arrow), 'Create' (lightbulb), and 'More' (magnifying glass).

To reopen a closed purchase order, select a record in the transactions grid and click the Open Transaction button in the toolbar.

Open Transaction Button, Workflow Toolbar



Container Information Task

You can view and add information related to containers and packing through the Container Information task.

Container Information Window

The screenshot shows the 'Container Information' window. At the top is a 'Jump to' dropdown. Below it are two search fields: 'Sequence No.' and 'Registration number', with a 'Search' button. Below the search fields is a table header for 'Packing - Containers' with columns: 'Seq No', 'Reg number', 'Seal number', 'Asset id', 'Nationality', 'Asset type', 'User defined 2', 'User defined 1', 'User defined 3', and 'Include in Fr'. The table body is empty with the text 'No records found.'. At the bottom is a toolbar with 'Complete' and 'Unsuccessful' buttons, and a 'Close' button.

To add a new record, click the Create  button in the toolbar.

Packing - Containers [Create] Window

Client: ETGL

Consignor: QCTRY-HL

Reference: 7210

Despatch number: 0

Sequence No: 20

Include in Freight Calculations:

Asset id:

Nationality:

Asset type:

Registration number:

Seal number:

User defined 1:


User defined 2:


User defined 3:

Create Close

Fields highlighted in blue are mandatory. It is not possible to edit the Client, Consignor, Reference, Dispatch Number, or Sequence No field values.

Click Create to save the new record, or Close to discard it.

Click Complete to save all changes and close the window. A green check  is then displayed beside the Container Information task to indicate that it is complete.

Click Unsuccessful to save and close the window. A red X  appears beside the task to indicate that it did not complete successfully.

Click Close to close the window without saving updates.

Documents Task (New)

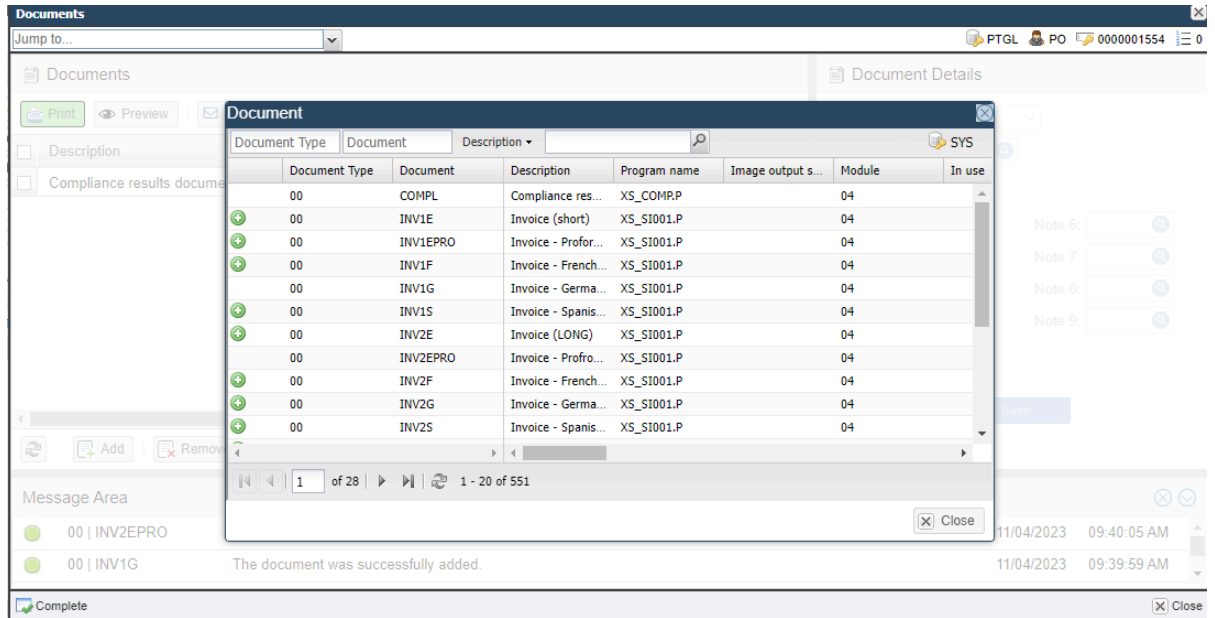
Documents are reports that you can create from predefined layouts. They are populated from the database. They are internally generated documents.

You can view and add shipment documents with the Documents (New) task. This task contains an updated version of the UI in the Documents (Old) task, which is available in some workflows.

Note Documents are different from attachments. Attachments are any documents that are uploaded to the workflow, such as documents from a third party, or the output of the Export Transaction Details workflow task.

The screenshot shows the 'Documents' task interface. The main area contains a table with the following columns: Description, Reference, Type, Printer, and No. of Copies. The table is currently empty. Below the table are 'Add' and 'Remove' buttons. To the right is a 'Document Details' panel with the following fields: Print To: (dropdown), Printer: (dropdown), No. of Copies: (dropdown), and nine Note fields (Note 1 through Note 9). A 'Save' button is located at the bottom of the 'Document Details' panel. At the bottom of the window is a 'Message Area' and a 'Complete' button.

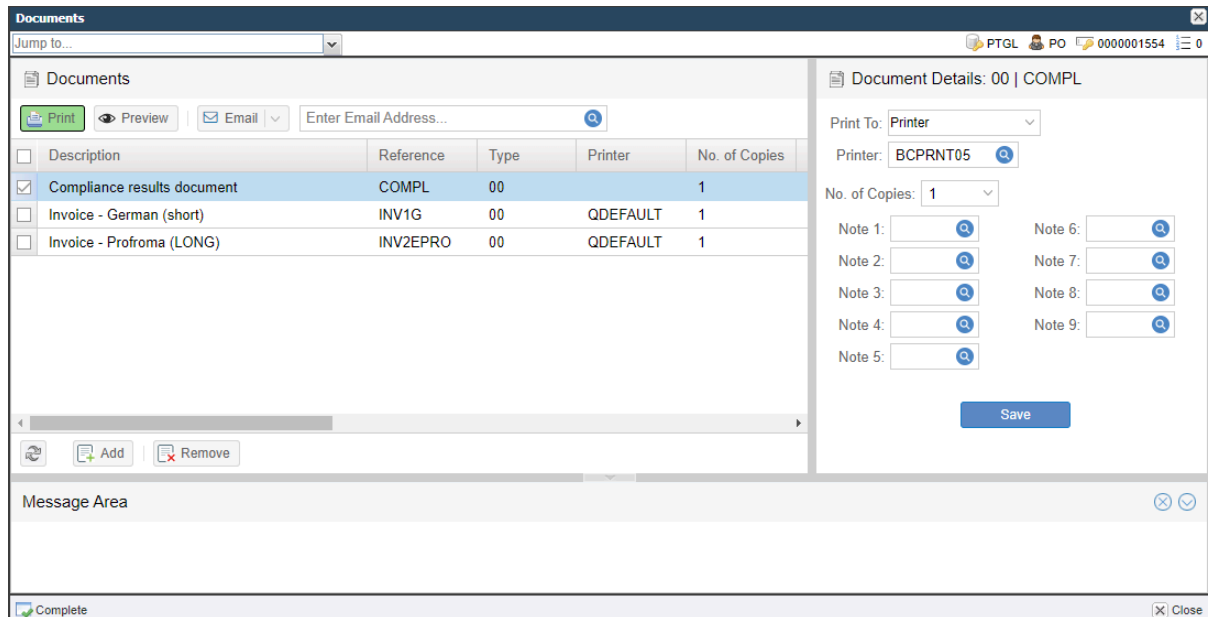
To add a new document to the purchase order, click the Add button. In the Document pop-up window, click the green Add Record icons to add documents to the workflow, then click the Close button to return to the main window. Added documents automatically save to the task.



Click the Remove button to remove a document.

After adding a shipment document, you can preview, print, and email the document. You can also attach an image file to the document.

- To print a document, select the checkboxes of the documents that you want to print, then click the Print button. You can select a printer and add notes in the Document Details section.




- To preview a document, click the Preview button.
- To email a document, select the checkboxes of the documents that you want to send in an email, then enter an email address in the Enter Email Address field and press the Return key on your keyboard.

Alternatively, click the blue lookup icon on the field to choose a partner email address.

After you add the email address, click the dropdown arrow on the Email button. From the dropdown menu, choose whether to combine the selected documents into one PDF, or to send each document as a separate PDF.



If the email is successfully sent, a success message appears in the Message Area.

- To attach an image to a document, select the checkbox of the documents that you want to print. Click the Upload button  to the right of the Image File Name field in the Document Details section. Navigate to the location where the image is stored and double-click it to select it and populate the Image File Name field. In the Document Details section, click the Save button. If the image is successfully uploaded, a success message appears in the Message Area.

Click Complete to save all changes and close the window. A green check is then displayed beside the Documents task to indicate that it is complete.

Click Close to close the window without saving updates.

Documents Task (Old)

Use the Documents task (Old) to add new documents to a shipment; for example, customs or insurance documents. Although you can access the Documents task at any time, it is typically used to add and print documents after the shipment has been manifested.

The fields on the Documents task (Old) screen are:

Type

The document type enables you to identify document types. To view a list of document types such as customs or hazardous material documents, click the lookup icon. Usually, you can leave this field blank because it automatically populates when you specify a value in the Reference field.

Reference

A code that identifies the document. The combination of the document type and reference uniquely identifies the document.

Image

Use this field to associate a document from an external system with the shipment. These documents are stored in GTTE as scanned images. To upload scanned images of documents, click Choose File. If the file type you upload is not supported, an appropriate message is displayed at the top of the screen. Your administrator controls which file types are supported.

Printer

Leave this field blank unless you want to override the current locale printer.

Copies

Specify the number of copies that you want to print.

To add an uploaded document to the shipment, click Add. Any documents that you add appear in a table at the top of the screen.

Preview a PDF version of the document, print one or more copies of the document, or view the history of the document by clicking the relevant icon in the document row.

Use the Save, Delete, Print, and E-Mail buttons below the table of documents to perform actions on multiple documents in the table. Select one or more documents and click the relevant button.

Before you click the E-Mail button, click the dropdown arrow on the button to choose whether to combine the selected documents into one PDF or to send each document as a separate PDF.

Note Your administrator can remove the E-mail button.

Use the E-Mail Partners button to specify a list of email addresses that you want to email the selected documents to. When you click E-Mail Partners, the Email Recipients pop-up window opens and enables you to specify a list of email addresses. Your administrator can configure a list of email addresses to appear in the the Email Recipients pop-up window by default.

Documents Text ID Task

If a task with option WFTDTI is included in a workflow, you can open the Document Text ID task from the Documents (Old) task and the Documents (New) task using the Document Text Id button.

If the workflow does not include the Document Text ID task, the Document Text Id button either does not appear in the Documents task, or is inactive.

If no document is selected in the Documents task, or you open the Document Text ID task directly from the workflow Tasks area, the text IDs for all documents are listed.

Items Task

The Items task enables you to add products that are associated with your shipment.

The search panel at the top of the window enables you to filter results in the grid below.

Add a new record by clicking the Create a New Record button in the toolbar. The Items [Create] window is displayed.

Fields with a blue background are mandatory.

After you complete the fields, click Create to save the details and add the item to the task.

Note The decimal values in the Item Line Number column indicate the article sequence number for the product. No decimal point indicates that there are no related articles.

Click Complete to save all changes and close the window. A green check is then displayed beside the task to indicate that it is complete.

Click Unsuccessful to save and close the window. A red X appears beside the task to indicate that it did not complete successfully.

Click Close to close the window without saving updates.

Manifest Task

Details Tab

Use the fields on this screen to manifest the shipment.

Route

The carrier service being used to transport the shipment.

Carrier

The carrier transporting the shipment.

Packing Location

The location from which the carrier is collecting the shipment.

Status

The freight status of the shipment. Possible values include Pending, Interim, and Rated. For details of shipment statuses, see [TE Shipment Freight Statuses on page 1495](#).

Despatch Date

The date on which the shipment is being despatched.

Delivery Terms

The particular delivery terms of the shipment. The terms can detail which party pays the carriage or duty on the shipment.

Freight Payment Method

Details of who pays the freight costs associated with the shipment.

Carrier A/C No

The carrier account number against which the freight costs are applied. This field is only relevant if the freight payment method requires that you specify an additional account; for example, if the freight payment method is Collect or Third Party.

Duty Tax Pay Method

This field is present in the case of international shipments. It identifies who is responsible for paying duties and taxes associated with the shipment.

If you update the Manifest screen but do not want to manifest the shipment immediately, save your updates by clicking Save. To manifest the shipment and print a label for the shipment, click Process. You can also manifest the shipment and choose not to print a label, or choose to print both a label and documents. To access these options, click the arrow on the Process button. When you process the shipment, a tracking number is assigned to the shipment. Tracking numbers allow you to monitor the progress of shipments in transit using the tracking feature on the carrier website, if available.

When you process a shipment, the Save and Process buttons no longer appear on the screen, and you cannot update the package information. The Cancel and Reprint Label buttons are displayed.

- The Reprint Label button enables you to reprint a label for the shipment.
- The Cancel button enables you to cancel a shipment; for example, when there is an error with a shipment or when a shipment is no longer necessary. You can only cancel a shipment after a shipment has been rated and before running EOD Manifest.

Important When you cancel a shipment through the Manifest task, the shipment reverts from a rated state to a pending state. This means that the shipment no longer has a service assigned to it, and the tracking numbers are removed from the shipment packages.

If the despatch date is not already set, it defaults to today's date. If the despatch date is earlier than today's date, today's date is used. You may see print icons or PDF icons on the screen, depending on the current print locale.

The Packages section contains details of each package in the shipment, including the weight, dimensions, and tracking number.

The Charges section displays information on the charges that apply to the shipment. The charges are based on the service selected, the carrier rate structure, and shipment properties, including the origin, the destination, and package dimensions. If any errors exist for this shipment, they are displayed in a table.

Surcharges Tab

The Surcharges tab lists the available accessorials for the selected service. Select the accessorials you want to add. For the insurance accessorial, some services offer insurance on a per pack basis, whereas others offer insurance on the shipment as a whole. If you specify that insurance is required, you may have to specify the value of each package in the shipment.

Parties Tab

The Parties tab allows you to view the addresses of the Ship To, Third Party, Customer, COD Party, Shipper, and Hold for pickup parties. Depending on how the administrator [configures on page 311](#) this tab, it is also possible to update some of these addresses. Select the party from the Party field and view or update the corresponding address. Depending on how the administrator configures this tab, [address verification on page 165](#) may apply to one or more of the addresses.

Additional Tab

Your administrator can [configure on page 311](#) the Additional tab to appear in the Manifest task. This tab contains:

- general fields
- carrier-specific fields
- other fields that the administrator can add when required

The general fields on the Additional tab are:

Trailer Number

A trailer number associated with the shipment. This field does not appear by default. Your administrator must configure the system to display it.

ITN/AES Exemption

Inventory Tracking Number/Automated Export System exemption details.

Explicit Customs Value

The explicit customs value of the shipment.

The right column of the tab contains carrier-specific fields that vary depending on the route assigned to the shipment.

Carrier-Specific Fields

Carrier	Field
FedEx	Ship Alert E-Mail
	Shipper Language
	Recipient Language
	Broker Language Code
	Ship Alert flag
	Ship Pod flag
	Recip Alert flag
	Recip Pod flag
	Broker Alert flag
	Priority Alert flag
	Broker Account
	Broker Id
Broker Pager	
UPS	Paperless Invoice flag
DHL	Neutral Delivery Service flag
	Recipient IATA Code

Note A [QAD Knowledgebase article](#) provides more information about FedEx Ship Alert options on the Additional tab.

Rate Shop Task

Rates Tab

The Rates tab displays the services that comply with the routing rules for the shipment. Use this screen to compare the available rates for the shipment.

Rates Tab Columns

Column	Explanation
Carrier	The carrier providing the service.
Description	A description of the carrier service.
Service	The carrier service code.

Column	Explanation
Selling Charge	What the shipper charges the buyer for shipping the items. This amount differs from the buying charge if the buying charge includes markup in costs.
Buying Charge	What the shipper pays the carrier for shipping.
Currency	The currency in which the rates are shown.
Transit Time	The number of days that it takes to transport the shipment.
ETA	Estimated date and time of arrival of the shipment at the destination.
Mode	The mode of transport; for example, air or rail.

To sort the table by a particular column, click a column title. An arrow appears next to the column title, indicating that the table is sorted in either ascending or descending order. To reverse the sorting order, click the column title again.

To access the column menu, click the arrow that appears when you hover over any column header in the table.

- To sort the table, use the Sort Ascending and Sort Descending options.
- To lock a column, click the column menu header and choose Lock. To unlock the column, choose Unlock.
- The Columns option allows you to select the columns to be included in the display.
- Default Layout displays the default columns in their default positions, hiding all optional columns.

To change the service applied to a shipment, select a service and click Ok or Save. If the shipment is rated, the option to save the newly selected service is not available.

Invalid Rates Tab

The Invalid Rates tab lists routes that did not meet the criteria in the shipment routing rules. This information is for reference purposes only. You cannot use this tab to correct rating errors.

Invalid Rates Columns

Column	Explanation
Carrier	The carrier associated with the service.

Column	Explanation
Description	A description of the carrier service.
Service	The carrier service code.
Mode	The mode of transport; for example, air or rail.
Error	The error code.
Error	A description of the error.

To sort the table by a particular column, click the column title. An arrow appears next to the column title, indicating that the table is sorted in either ascending or descending order. To reverse the sorting order, click the column title again. To access the column menu, click the arrow that appears when you hover over any column header in the table.

- Use the Sort Ascending and Sort Descending options to sort the table.
- The Columns option allows you to select the columns to be included in the display.
- The Group By This Field option allows you to categorize the rates in the table based on a particular column. Open the column menu by clicking the down arrow in the header of the column that you want to categorize by.
- When the Show in Groups option is enabled, it performs the same function as the Group By This Field option. When the Show in Groups option is not enabled, it removes any grouping that exists, and displays each row in the table separately.

Route, References and Containers Task

References and Partners Tab

Many of the fields on this tab relate to international shipments.

Carrier

The carrier associated with the shipment. To choose from a list of available partners, click the lookup icon to the right of the field.

Haulier

The haulier associated with the shipment. To choose from a list of available partners, click the lookup icon to the right of the Haulier field.

Shipment Type

To choose from a list of available shipment types, click the lookup icon to the right of the Shipment Type field. The type of shipment determines the workflow associated with it.

LC Number

Letter of Credit number. The letter of credit is a financial institution guarantee of the credit worthiness of the buyer.

Invoice Number

The number of the invoice associated with the shipment.

Order Number

The number of a sales order associated with the shipment. There may be multiple sales orders relating to the shipment. This field refers to a single sales order. You can also add sales order numbers at a line item level.

Buyers Reference

A reference number that buyers use to identify the shipment on their system.

Import Permit Number

Some countries require an import permit number for goods entering the country.

In Bond Code

An in bond shipment is an import or export shipment that has not yet cleared customs. The In Bond code is a two-digit code that identifies to US Customs and Border Protection whether the shipment is In Bond or otherwise. If the shipment is In Bond, the two-digit code provides more information identifying the particular type of In Bond shipment.

Additional Reference

Use this field to record additional information.

Export Traders Ref#

Exporters who want to apply for funding or refunds from the EU under the Common Agricultural Policy use this reference.

Cert of Origin Number

The number of the Certificate of Origin, which is a document verifying the country of origin of the goods being shipped.

CAP Number

Common Agricultural Policy number.

Consignor Excise Number

Identifies the consignor for the purposes of paying excise duty.

FOB Value

Free on Board Value. This value is the amount of money that the shipper agrees to contribute to the cost of shipping the goods.

Terms

The shipment delivery terms; for example, delivery duty paid, or freight prepaid. To view a list of available delivery terms, click the lookup icon to the right of the field.

Terms Text

Explanatory text related to the delivery terms. Enter text consistent with the content of the Terms field.

MAWB

Master air waybill number. An airline sends a MAWB or receipt to the customer to advise that the airline received the goods and has agreed to send them by air. This number identifies the MAWB attached to the shipment.

HAWB

House air waybill number. The air freight consolidator sends a waybill or receipt to the customer for goods that they receive and send on for transfer by air. This number identifies the HAWB attached to the shipment. This field also appears on the Reference Fields tab by default.

Intl. Carrier

The name of the partner carrying out the international transfer of the shipment. To view a list of partners, click the lookup icon to the right of the field.

Notify

If you want to notify a particular party about the shipment, identify the party here.

Bill of Lading No.

The number of the bill of lading document attached to the shipment. The bill of lading is a document issued to a shipper by a carrier, and represents a contract for the carriage of goods.

B/L Original/Copies

The bill of lading used to take receipt of the goods when the shipment reaches the destination, or to make a claim for lost or damaged goods. The original bill of lading is the carrier's bill of lading. Copies are given to the carrier and consignee.

B/L Shipper Original/Copies

The bill of lading used to take receipt of the goods when the shipment reaches the destination, or to make a claim for lost or damaged goods. Copies of the shipper's bill of lading are given to the carrier and the consignee.

B/L Bag Original/Copies

The bill of lading used to take receipt of the goods when the shipment reaches the destination, or to make a claim for lost or damaged goods. The bag bill of lading is intended for the consignee. Copies of this document are given to the shipper and the carrier.

Bank Draft Number

The number of the bank draft used to pay for the shipment.

Other Reference

Use this field to add another reference to the shipment, if necessary.

Customs Reference

A reference attached to the shipment so that it can be tracked at customs.

Entry Number

A number associated with the entry of the shipment through customs.

Booking Number

A number identifying the agreement with the carrier to transport the shipment.

Forwarders Ref

A reference number that the freight forwarder uses to identify the shipment on their system.

Cert of Insurance No

A number identifying the certificate of insurance associated with the shipment.

EUR1 Number

A number identifying the EUR 1 movement certificate associated with the shipment. This number applies to importers of goods from the EU, where the importer is based in a country that has a trade agreement with the EU. The certificate ensures that the importer receives favorable duty rates.

Consignee Excise No

The excise number associated with the consignee.

Bill of Exchange

If a bill of exchange exists for this shipment, select this field.

Dates and Locations Tab

The Dates and Locations tab contains important dates relating to the shipment.

Loading Date

The date when loading of the shipment onto the carrier begins.

End Loading Date

The date when loading of the shipment onto the carrier completes.

ETA Date

Estimated Time of Arrival Date. The date that the shipment is expected to arrive at the consignee delivery address.

Actual Arrival Date

The date that the shipment actually arrives at the consignee delivery address.

Despatch

The despatch date of the shipment.

Req Delivery 1

Requested Delivery 1. The earliest date within a range of dates that are acceptable for delivery of the shipment.

Req Delivery 2

Requested Delivery 2. The latest date within a range of dates that are acceptable for delivery of the shipment. If the shipment must be delivered on a specific day, this field matches the value in Req Delivery 1.

Extra Dates

Enter any additional dates that you require.

BL Date

Bill of Lading Date. The date that appears on the bill of lading.

Invoice Date

The date that appears on the invoice, provided the QAD GTTE application produces the invoice.

Order Date

The creation date of the sales order that relates to the shipment. There may be multiple sales orders relating to the shipment. This field refers to a single sales order. You can also add sales order numbers at a line item level.

Bill of Exchange Date

The creation date of the bill of exchange.

Bank Date

Use this field to record additional banking information.

Journey Time/Uom

The length of time it takes to transport the shipment. To specify if the time appears in hours or days, use the lookup icon next to the Uom field.

Early Delivery

If the selected carrier has an early delivery service, enable this field to use that service.

Route

The carrier service for this shipment.

Transport Mode

The means that the carrier uses to transport the shipment; for example, air or road.

Country of Origin, City of Origin, State of Origin

These fields contain the shipment country, city, and state of origin.

Place of Loading

The location where the shipment is loaded.

Country of Despatch

The country from which you despatch the shipment.

Place of Delivery

The location where the carrier delivers the shipment to the consignee.

Country of Destination

The country that the carrier delivers the shipment to.

Final Destination

The shipment's exact delivery location.

Country of Ultimate Destination

The destination country.

Shipment Subtype

A status code that provides more information about the shipment. To see a list of possible subtypes, click the lookup icon to the right of the field. This subtype usually represents an order type in your ERP system; for example, SO, ST, or SE.

User Defined and Other Tab

The User Defined and Other tab allows you to record information about payment methods. It also provides a user-defined section, where you can enter additional information specific to your organization.

Payment Method

Use this field to specify how the freight costs are paid. If the shipment is rated, the ability to change payment terms is restricted. The following table lists common payment methods that you can specify in this field.

Payment Method

Option	Explanation
Prepaid	The shipper pays for the freight.
Prepaid & Frgt	Prepaid and add freight. The shipper pays the carrier for the freight, but the charges are marked as billable. The details of the charges can be sent to the ERP system and appear on the invoice.
Collect	The consignee is billed for the freight. The carrier bills the consignee using the carrier account, if available, and the consignee address. You must enter a carrier account number.
3rd Party	A third party pays the freight costs. Provide a carrier account number for this third party. The carrier account number field is optional. Some carriers also require the third party address. You can enter an address on the rating screen.
COD Amount	Collect on Delivery Amount. The shipper pays for the freight. Before handing the goods to the receiver, the carrier collects a payment from the receiver of the goods. The receiver payment relates to the cost of the goods. The carrier forwards the payment from the receiver to the shipper.
COD Ship Cost	Collect on Delivery Ship Cost. The shipper pays for the freight. Before handing the goods to the receiver, the carrier collects a payment from the receiver of the goods. The receiver payment is for the cost of freight and the cost of the goods. The carrier forwards the receiver payment to the shipper.
Consignee Bill	The consignee pays the cost of carriage using an account that they hold with the carrier. To charge the cost of carriage to the consignee carrier account, select this option.

Note Depending on the carrier and service, other payment methods may be available. For example, Prepaid to Port of Export, Delivery Duty Paid, and Free Domicile are additional payment methods applicable to UPS.

Note If the shipment is rated, the ability to change payment terms is limited.

BoE Refer Questions

Bill of Exchange Refer Questions. Specify the person who answers questions relating to the bill of exchange; for example, the consignor, freight forwarder, or consignee. If you do not require this field, select None.

Prepaid, Collect [other]

This field has the same purpose as the Payment Method field. Usually, the administrator removes either the Payment Method or the Prepaid, Collect [other] field.

Use and/or Dest'n

This information applies to the USE AND/OR DESTINATION section of the T5 transit document used for customs processing within the EU. This field allows you to identify the use, or in some cases the destination, of the goods that you are exporting. The following table lists possible values for this field.

Use and/or Dest'n

Option	Explanation
Exit customs territory	The goods are exiting the customs territory of the European Union.
International organisation	The goods are for supply to an international organization.
Other	The goods are intended for another purpose or destination.
Victualling	The goods are provisions for the shipping journey.
To forces	The goods are intended for use by military forces in an EU member state.

User Defined 1-14

Use the fields User Defined 1 to User Defined 14 to track other data. Contact your administrator to find out if your company or department follows any specific procedures when filling out these fields.

EDI Status

Electronic Data Interchange Status. The EDI status of the shipment. Possible values include P and R, indicating that the EDI status is prepared, and S, indicating the EDI status is sent.

BoE Actions

Select how the bill of exchange is drawn on, or cashed. There are three options, as shown in the following table.

BoE Actions

Options	Explanation
Collection	The bill of exchange is drawn on when the carrier delivers the goods to the consignor.
Payment	The bill of exchange is drawn on when the consignor initially orders and pays for the goods.
Payment, Negotiate under LC	The bill of exchange is drawn on when the consignor initially orders and pays for the goods, and the bill of exchange is related to a letter of credit. The letter of credit is a document that the bank provides, stating the ability of a party to pay a specified amount of money.

Vessels and Containers Tab

The Vessels and Containers window consists of the Vessels panel and the Containers panel.

The Vessels panel enables you to add vessel information to the shipment. It consists of a Vessels table, with a row for each vessel that relates to the shipment. You can create multiple rows to describe multiple legs of a journey.

If the items in the shipment are packed in a container or containers, select the Shipped in Containers field. This information is used to fill in the T5 transition document and the Single Administrative Document (SAD), both of which are customs documents used in the EU and some neighboring countries.

There are a number of columns at the top of the table. You can resize the width of a column. You can also move columns into different positions on the Vessels panel by clicking and dragging the column header to your preferred location. Each column on the Vessels panel features a dropdown menu of column options.

To access the column menu, click the arrow that appears when you roll over any column header in the Vessels table. The Default Layout option displays the default columns in their default position, hiding all optional columns. The Columns option allows you to select the columns to be included in the display. The following table lists the columns that are available.

Vessels Panel Columns

Column	Description
Line	A unique number identifying this row in the Vessels table. The QAD GTTE application automatically assigns this value.
Vessel	The type of vessel.
Carrier	Carrier associated with the vessel.
Depart	The place that the vessel departs from.
Depart Pier	Departure pier of the vessel.
Depart Date	The date on which the vessel departs.
Arrive	Destination of the vessel. To view a list of available locations, click the lookup icon to the right of the field.
Arrive Pier	Arrival pier of the vessel.
Arr. Date	Arrival date of the vessel.
Reference	A reference for the vessel, also known as the voyage number.

To add or remove content from the Vessels table, use the Add Vessel, Update Vessel, and Delete Vessel icons below the table.

The Vessels window contains the following fields:

Vessel

To view a list of available vessel names, click the lookup icon to the right of the field.

Carrier

To view a list of carriers, click the lookup icon to the right of the field.

Depart

To view a list of departure locations, click the lookup icon to the right of the field. When you specify a particular port, a code number representing that port appears in the Depart column of the corresponding row in the Vessels table.

Depart Pier

Select the pier that the vessel departs from.

Depart Date

To select a particular date, click the calendar icon to the right of the field.

Arrive

To view a list of available arrival locations, click the lookup icon to the right of the field. When you specify a particular port, a code number representing that port appears in the Arrive column of the corresponding row in the Vessels table.

Arrival Pier

Select the pier that the vessel is expected to arrive at.

Arrival Date

To select an arrival date, click the calendar icon to the right of the field.

Reference

Specify a reference.

The Containers panel enables you to add container information to the shipment. It consists of a Containers table, with a row for each container that relates to the shipment.

There are a number of columns at the top of the table. You can resize the width of a column. You can also move columns into different positions on the Containers panel by clicking and dragging the column header to your preferred location. Each column on the Containers panel features a dropdown menu of column options. To access the column menu, click the arrow that appears when you hover over any column header on the Containers panel.

The Default Layout option displays the default columns in their default position, hiding all optional columns.

The Columns option allows you to select the columns to be included in the display. The following table lists the columns that are available.

Containers Panel Columns

Column	Description
Sequence	A unique number identifying this row in the Containers table. The GTTE application automatically assigns this value.
Reg. Num	The registration number of the container.
Type	The container type; for example, an open twenty-foot container or a refrigerated forty-foot container.
Seal	The container seal number.
Asset	The asset transporting the container; for example, a truck or a ship.
Nationality	The country of origin of the container.

To add or remove content from the Containers table, use the Add Container, Update Container, and Delete Container icons below the table.

The Containers window contains the following fields:

Reg. Num

The registration number of the container.

Type

To view a list of available container types, click the lookup icon to the right of the field. The container type details the packing attributes of the container.

Seal

The container seal number.

Asset


The asset transporting the container.

Nationality

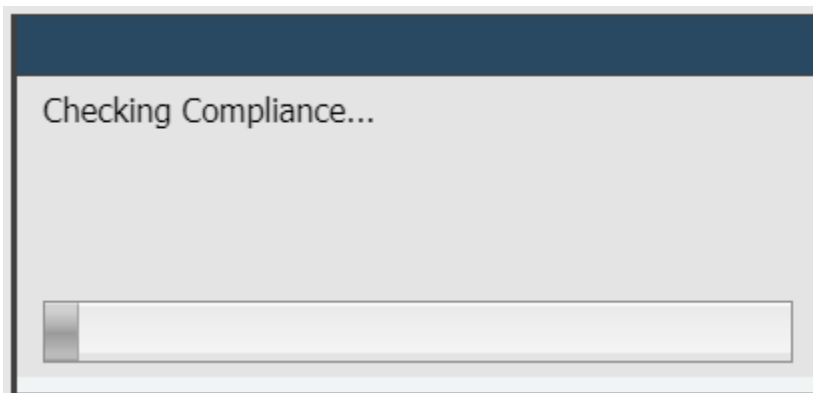
The country in which the ship is registered, if applicable.

Run Compliance Task

You can automatically perform a compliance check using the Run Compliance Workflow task. To begin a check, select a record in the transaction grid and double-click the Run Compliance task.

The Checking Compliance window displays. When the process is complete, a green check  displays beside the Run Compliance task.

Run Compliance



Shipment Charges Task

The Shipment Charges task allows you to enter basic charge information against a shipment.

You can also access the **Shipment Charges** screen directly from menu option QSHSO.

Use the fields in the Buying Charge and Selling Charge sections to add buying charges and selling charges to the shipment.

The buying charge is the amount that you, the shipper, pay the carrier for shipping the item. The selling charge is the amount that you, the shipper, charge the buyer for shipping the item. This amount differs from the buying charge when the buying charge includes a markup in costs.

Code

Specify a charge code. Charge codes are maintained in option CH.

Description

This field updates automatically based on the value of the Code field, and contains the charge code description listed in option CH. You can update this field.

Cost

Specify the value of the charge for this shipment.

Prt on Invoice

If you want this charge to appear on the shipment invoice, then select this field.

To add the charge to the shipment, click Save. The charge appears in the Shipment Charges grid.

To update an existing shipment charge, select the charge in the Shipment Charges grid. Edit the details and click Update.

You can also update additional details about the shipment charge by clicking the Additional Details link in the Buying Charge or Selling Charge sections. The Additional Details link is not available when you are creating a charge. It is only available when you are updating a charge. Use the Additional Details link to access a pop-up window that allows you to update additional shipment charge details.

View Compliance Status Task

After you run a compliance check, you can then review the results using the View Compliance Status task.

Note You must complete the Run Compliance task to access the View Compliance Status task.

View Compliance Status Window

The screenshot shows the 'View Compliance Status' window. At the top, there is a 'Jump to...' dropdown and a status bar with icons for PFCH, PO, 6405, and Translate Literals. Below this is a toolbar with 'Recheck' and 'Recheck All' buttons, and a 'Filter: None' dropdown. The main area is divided into two panes. The left pane shows a tree view of 'Compliance Checks' with sub-items: '(ITC-INTEG) ITC Data Integrity checks', '(DPL) Denied Party check', and '(IEBC) Embargoed Countries IM'. The right pane displays a table of check results:

Check	Tested Date	Tested Time	Overridden By	Overridden Date	Overridden Time
✓ PARTNER_VALID_ITC_SFC	2021/04/28	09:14:22 GMT			
✗ PRODUCT_VALID_CODE_ITC	2021/04/28	09:14:22 GMT			
✗ PRODUCT_VALID_ITC_CLASSIFICATI...	2021/04/28	09:14:22 GMT			
✓ PRODUCT_VALID_PRICE_ITC	2021/04/28	09:14:22 GMT			
✓ SUPPLIER_ACTIVE_ITC	2021/04/28	09:14:22 GMT			

Below the table, there are sections for 'Add Comment', 'Item Line: 10' (Product 'PROD01' is valid), and 'Item Line: 20' (Product 'PROD02' does not exist). A 'Legend' section at the bottom left defines the status icons: Passed (green check), Passed Manually (green check with hand), Passed with Warnings (yellow warning), Failed (red X), Failed Manually (red X with hand), Under Review (red flag), and Disabled (greyed out).

For more information on this window, see [Compliance Results](#) on page 982 in the Trade Compliance section of the online help.

Scan, Pack and Ship: Standard Packing

You use Scan, Pack and Ship to record packing information as you pack. The application can capture shipment packing information input from:

- Mouse input
- Electronic weight scales
- Barcode scanners

Packing Approaches

There are two configurable approaches to packing. In Standard Packing mode, you record the packing information for a shipment as the items arrive at the packing station. In Consolidation Packing mode, items from multiple transactions arrive at the packing station and as you pack the items, you build a consolidation shipment and record the packing information against this consolidation shipment.

This chapter deals with packing in Standard Packing mode. If your organization uses standard packing, it means that all the items you pack are associated with a shipment when they arrive for packing.

Example Your organization supplies computer items to large wholesale customers. Your customers send in orders, which are received and organized into shipments. The items for each shipment are then gathered, and scanned and packed for shipping.

The scan, pack, and ship functionality in Standard Packing mode allows you to record packing information for these existing shipments. When you bring up a shipment for packing, the application displays the unpacked items belonging to the shipment as available for packing.

Note Your administrator can also configure Standard Packing mode to reference other transaction types. However, in this document, Standard Packing mode refers to packing existing shipments.

Packing Options

The option you use to open Scan, Pack and Ship in Standard Packing mode depends on the setup of your organization. There are four basic options, which are described and explained in the table below. Depending on your environment, you can also access the scan, pack, and ship functionality using the menu search.

The following table describes the menu options. The description of the interface in this document focuses on the Scan, Pack and Ship option. The other options are similar, but may be better suited for certain packing processes or workflows. [Other Packing Options on page 113](#) describes the particular features of the other options.

Scan, Pack and Ship Shortcuts

Menu Option	Base Menu	Description
SNPKSD and SNPKSH	Scan, Pack and Ship	Standard Packing Demo and Standard Packing Web UI mode are two different flavors of Standard Packing mode. Standard Packing Demo is a configured example of Standard Packing mode, whereas Standard Packing Web UI mode allows the administrator to start configuring from a blank canvas. Whichever of these two options your administrator chooses to use, it enables you to pack shipments and perform any configured tasks.
SNPKPS	Scan and Pack	Standard Packing Station. At a packing station, items for a shipment arrive on a line. The goods are packed, packing information is recorded, each pack is sealed, and content labels are printed. The shipment is then sent to a rating station at another location on the line.
SNPKRS	Scan and Rate	Standard Packing Rating Station. The rating station functionality enables you to record pack weight and rating information for packed and sealed shipments. The functionality is used after packing information has been recorded at a packing station.
SNPKWF	Workflow Portal workflow task	Workflow task packing enables you to run the scan, pack, and ship functionality as a workflow task to allow the user to pack the selected shipment. If this has been configured, you run the task from the Workflow Portal Tasks area.

Scan, Pack and Ship

The Scan, Pack and Ship interface typically contains four main areas:

- Shipment toolbar
- Packing area, including:
 - *Packs* tab and *Shipment Details* panel

- *Pack Items* tab and *Pack Maintenance* panel
- *Items to be Packed* panel
- *Scanner Input* panel

Shipment Toolbar

The Shipment toolbar contains a single reference field that enables you to search for a shipment to pack. If you are using a barcode scanner, this field can be automatically populated and a search initiated when you scan a pack belonging to a particular shipment.

The image below displays the buttons and fields that typically appear on the Shipment toolbar. The default toolbar configuration contains a field enabling you to search for a shipment to pack. The first toolbar button allows you to reset the screen. The second button provides you with a status view of the workflow tasks that are assigned to the transaction. The third button allows you to resequence the pack numbers. Other buttons you may see on the toolbar are configured based on the workflow attached to the shipment. The configuration displayed in the image below contains other buttons that allow you to perform shipment workflow tasks. The buttons you see depend on your configuration, as well as the selected shipment; for example, fewer buttons are available if a rated shipment is selected.

Possible Shipment Toolbar Configuration



Packing Area

The Packing area displays the packs and pack items that you have already packed for a shipment. The display changes depending on the tab you select.

Packs Tab

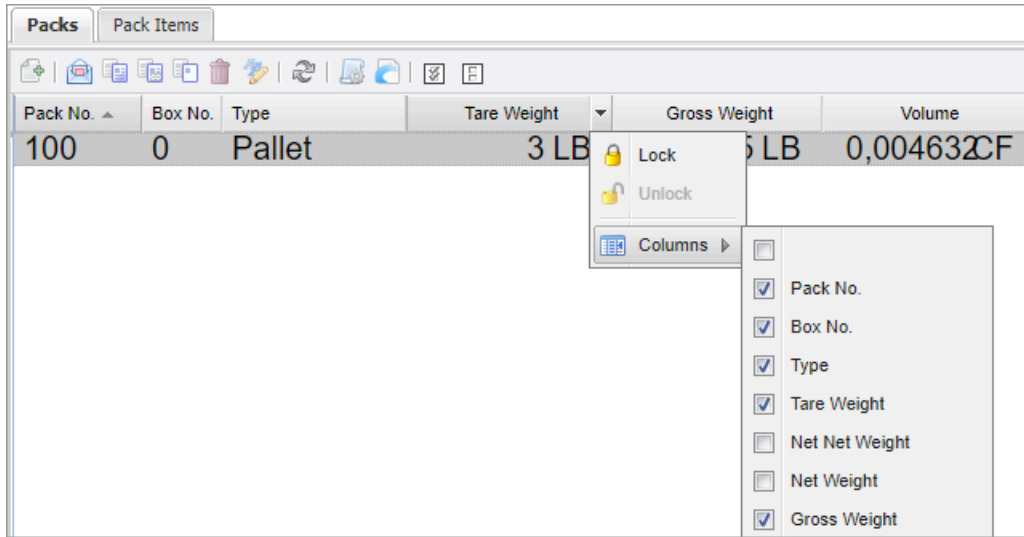
The *Packs* tab enables you to create new packs and add items to them. It displays the packs for the active shipment along with important shipment information. You can configure the display of pack information. To do this, click the arrow in any field in the header row, click *Columns*, and select the fields you want to display. The columns available are:

Packs Tab Columns

Column	Explanation
Pack No.	The number of the pack.
Box No.	The number of the box.
Type	The type of package used for the items.

Column	Explanation
Tare Weight	The weight of the packing unit into which the goods have been packed.
Net Net Weight	Weight (mass) of the goods themselves without any packing.
Net Weight	Actual, computed, or estimated weight of a good without its container and packaging. Gross weight less tare weight equals net weight.
Gross Weight	Weight of the packing unit, packaging, and goods.
Volume	Volume of the packing unit.
Dimensions	The length, width, and height of the packing unit.
Tracking Number	The number associated with the shipment, used to track it.
Additional Reference	An additional reference, generally configured according to company needs.
Total Pack Quantity	The number of items in a pack.
Related Box No.	The box number of another pack where the contents is related to this pack.
Closed	A pack status.
Pack Status	The status of the pack.
Dry Ice	The packing unit contains dry ice—a solid form of carbon dioxide, used primarily as a coolant. This flag is saved on the pack records; it does not affect the base documents.
Hazardous	The packing unit is considered hazardous to transport. It contains a material that, when transported in a particular amount and form, poses an unreasonable risk to health and safety or property. Hazardous material may include an explosive, radioactive material, etiologic agent, flammable or combustible liquid or solid, poison, oxidizing or corrosive material, and compressed gas. This flag is saved on the pack records; it does not affect the base documents.
Wet ice	The packing unit contains wet ice—frozen water in crushed or cubed form. This flag is saved on the pack records; it does not affect the base documents.












Packs Tab Display



The table below displays the toolbar buttons on the *Packs* tab and describes the function of each one.

Pack Toolbar Buttons

Button	Function
	Create pack. This is the first step you take when you want to pack items. When you click this button, the Pack Items tab is automatically displayed.
	Open selected pack. Open an existing pack you have selected in the pack list. You can also open the pack by double-clicking it.
	Copy selected pack. All pack information is copied. If there are insufficient unpacked items available to copy the selected pack, the pack is not copied and a message is displayed. If you hold down the Ctrl key and click this button, you are prompted for the number of duplicate packs that are to be created.
	Copy selected pack – Infinite. Continue to copy an existing pack until there are insufficient items to copy the pack again.
	Copy selected pack header. Copy the pack header information, including weight, dimensions, and type. However, no items are packed. The copy pack header button creates a duplicate pack with weight and volume overrides. If you hold down the Ctrl key and click this button, you are prompted for the number of duplicate packs that are to be created.
	Delete selected packs.

Button	Function
	Update box number. Update the box number to be in sequence with the other box numbers. This is useful if you have deleted some packs and there are box numbers missing.
	Refresh shipment.
	Seal pack. Seal the pack you have added items to. You can no longer add items to the pack unless you unseal it again. When you seal a pack, a content label can be automatically printed. This is a pack-level extension button.
	Open sealed pack. This is a pack-level extension button.
	Mark pack as rated. The pack is rated and is to be shipped with a particular carrier. This is a pack-level extension button.
	Void pack rating. Remove an assigned rating from a pack. This is a pack-level extension button.
	Mark pack as sealed. This is a pack-level extension button.
	Get Pack Weight. This is a pack-level extension button.
	Select all packs.
	Deselect packs.
	Reprint Content Label. This button is used to print out the contents of a pack, usually when you have made changes to its contents.
	Reprint Carrier Label. This button is used to reprint a carrier label, generally when you have rated a shipment for a second time and assigned a new carrier or if you have changed some of the shipment details that affect the carrier label.

Shipment Details Panel

By default, when you select the *Packs* tab, the *Shipment Details* panel is also displayed. The *Shipment Details* panel contains ship to, ship from, and carrier information. To hide the *Shipment Details* panel, click the arrow on the right of the page.

Shipment Details Panel

Shipment Details »»

Ship To: Z8801 - Bedford Systems Ltd

City: BEDFORD

City Name: BEDFORD

Zip/Postal: 10507

Country: US

Carrier: QUPS - UPS International

City Name:

Service: UPSUS002 - UPS 2nd Day Air®

Warehouse: A9901:Precision USA, Sales

City Name: CHICAGO

Despatch: 2019/09/09

Client: STGL

Carrier A/C:





Insurance: 0



The set of fields in the *Shipment Details* panel can be filtered by the system administrator. When filtering is activated and you want to view the complete address details for Ship To, Ship From, or Carrier, click in the relevant text field. The complete address is displayed in a pop-up frame for three seconds.

Pack Items Tab

The *Pack Items* tab displays the item lines you have added to a pack. You can configure the information displayed for each pack item. To do this, click the arrow in any field in the header row, click *Columns*, and select the fields you want to display. The table below displays the *Pack Items* toolbar buttons and describes the function of each.

Pack Items Toolbar Buttons

Button	Function
	Close pack.
	Close pack without saving.
	Edit pack line quantity.
	Delete selected pack items.

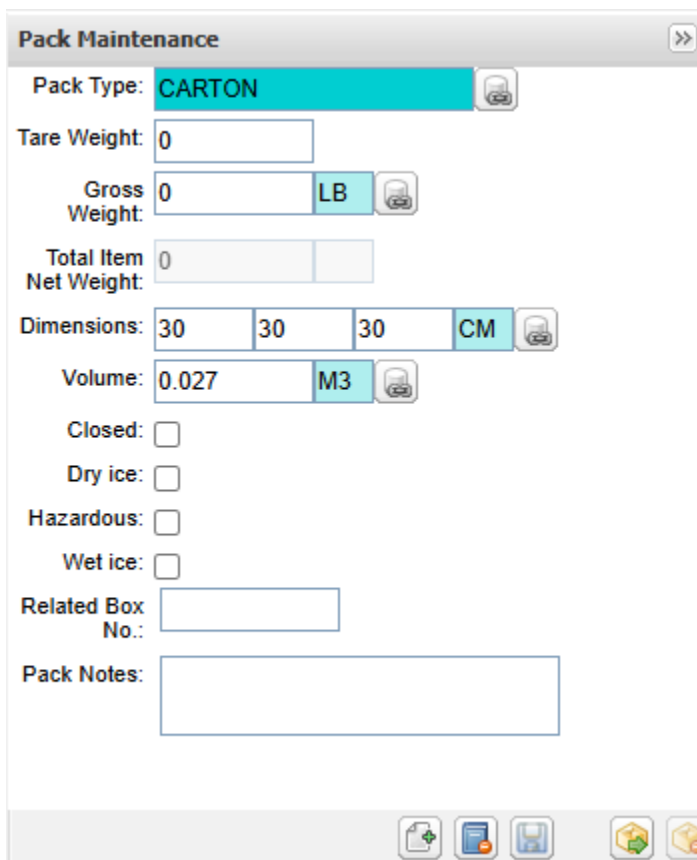
Button	Function
	Select all pack items.
	Deselect pack items.

Note Depending on your configuration, other buttons may be available.


Pack Maintenance

By default, when you select the *Pack Items* tab, the *Pack Maintenance* panel is also displayed. To hide the *Pack Maintenance* panel, click the arrow on the right of the page.


Pack Maintenance




Pack Maintenance >>


Pack Type: **CARTON** 

Tare Weight:

Gross Weight: **LB** 

Total Item Net Weight:

Dimensions: **CM** 

Volume: **M3** 

Closed:






Dry ice:

Hazardous:

Wet ice:

Related Box No.:

Pack Notes:

The pack header information defaults from the pack master record. The *Pack Maintenance* panel allows you to make changes to a pack header. For example, if you have specified a weight in kilograms, you can change the unit of measure to grams. You can make changes to any field. Before doing this, however, note that every time you add items to a pack, the total gross weight and volume are updated as a running total in the pack header. When you manually add a weight or volume, this is a manual

override and is used instead of the running total based on the items in the pack. The sum of the weight and volume from all the packs on the transaction is displayed in the top right corner of the page.

Important When you override a weight, volume, or dimension, the running total is lost and is no longer updated as additional items are added to the pack.

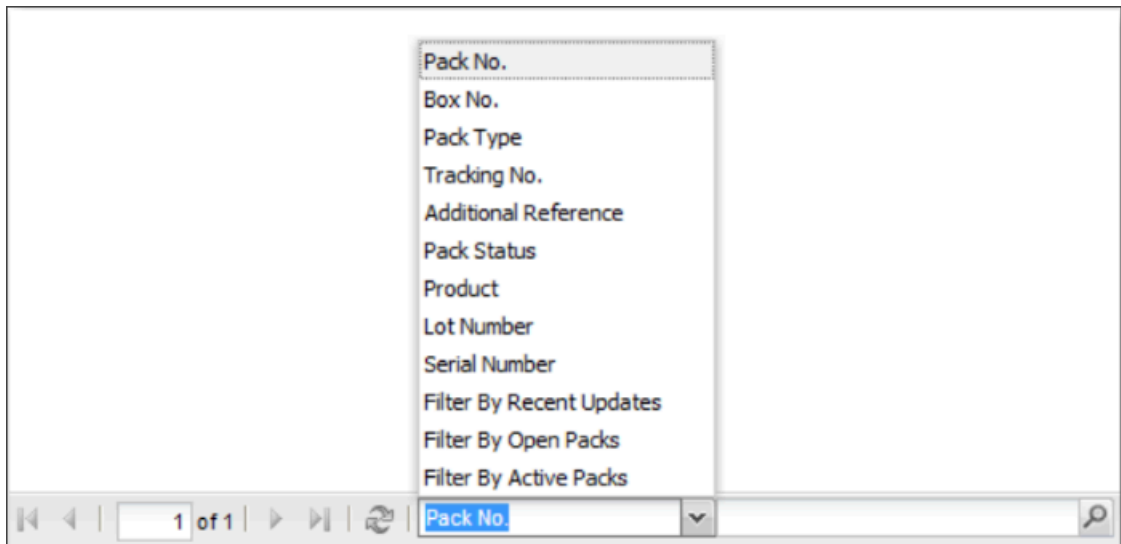
The buttons at the bottom of the *Pack Maintenance* panel allow you to clear the overrides you have entered, create a new pack, or save a pack. Depending on your configuration, other buttons may also be available.

Packs Navigation Toolbar

The navigation toolbar at the bottom of the pack list or the pack items list allows you to navigate the list. If a list runs over multiple pages, the navigation arrows enable you to navigate from page to page.

The *Refresh* button enables you to display any new packs or pack items added to the system. You can also filter the list to display a list of items based on certain criteria, as displayed in the image below. When you apply a filter, a filter button is displayed instead of the *Search* field. You can also enter specific information in the Search field and click the lookup button or press Enter.

Packs Navigation Toolbar



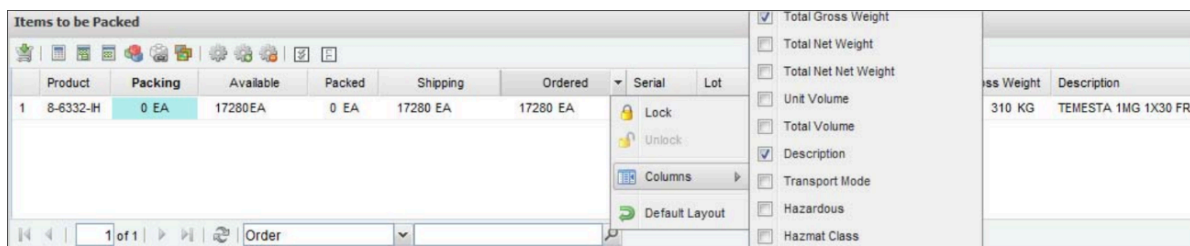
Items to be Packed Panel

The *Items to be Packed* panel displays the items that are available to pack for a shipment. You can select items and add them to the packs in the *Packs* panel.

Items List

When you load a shipment, the items list displays all shipment lines available for packing. By default, the *Packing* field is highlighted. In the *Packing* field, you can type the quantity of items you want to pack. You can configure the information displayed in the items list. To do this, click the arrow in any field in the header row, click *Columns*, and select the fields you want to display. Your layout is saved automatically. It is recommended that you always display the *Packing* field.





Items to be Packed Panel











Items to be Packed Toolbar Buttons

When you display a shipment for packing, the buttons on the toolbar offer various packing options. The table below displays a typical toolbar setup and describes the function of each button.

Items To Be Packed Toolbar Buttons

Button	Function
	Append to pack. When you specify a quantity of items in the Packing field, this button adds the items to the current open pack.
	Append all available items to pack. Add all available unpacked items to the current open pack. If you have applied a filter to the items list, only items that match the filtering criteria are appended.
	Auto Pack Available Items – Maximum Equal Product Quantity Split. You are prompted for the number of packs to use when splitting the unpacked items. The unpacked quantity of each product is summed and divided equally between the packs. Where the unpacked quantity cannot be split equally between the packs, the system determines the amount of stock that can be equally split between the packs. The remaining stock remains unpacked. It is assumed that a single unit of stock cannot be split during the packing process. If you have applied a filter to the items list, only items matching the filtering criteria are auto-packed.
	Auto Pack Available Items – Maximum Product Quantity Split. You are prompted for the number of packs to use when splitting the unpacked items. The unpacked quantity of each product

Button	Function
	<p>is summed and divided between the packs. For example, an order contains three items:</p> <ul style="list-style-type: none"> • Product A – 10 • Product B – 5 • Product C – 15 <p>If you want to create 5 packs, each pack contains:</p> <ul style="list-style-type: none"> • Product A – 2 • Product B – 1 • Product C – 3 <p>Where the unpacked quantity cannot be split equally between the packs, the system determines the amount of stock that can be equally split between the packs and the remaining stock is split as equally as possibly between the packs. It is assumed that a single unit of stock cannot be split during the packing process. If you have applied a filter to the items list, only items that match the filtering criteria are auto-packed.</p>
	<p>Assign packing quantity to available quantity. Set the quantity in the packing field to the total quantity remaining to be packed for this shipment line.</p>
	<p>Increment packing quantity by one. Increase by one the quantity in the packing field for the selected shipment line. If you hold down the Ctrl key and click this button, you are presented with a pop -up frame; use it to change the quantity by which the packing quantity number is incremented.</p>
	<p>Assign packing quantity to zero. Set the quantity in the packing field to zero.</p>
	<p>Select all items. Select all shipment lines in the Items to be Packed list.</p>
	<p>Deselect items. Deselect all shipment lines in the Items to be Packed list.</p>
	<p>Auto Pack Available Items – Item Inner/Outer Quantity Split. You can specify inner and outer pack quantities and types to use when packing shipment items. This automatic packing facility generates an inner pack for the specified quantity of inners and divides the items between the generated packs. It generates an outer pack for the specified quantity of outers and divides the inner packs between the generated outer packs. For example, you can pack 20 cigars into a box and 20 boxes are loaded onto a palette. You are shipping 400 cigars. In this</p>

Button	Function
	<p>case, the box is the inner quantity and the palette is the outer quantity. When you click this button, 20 boxes of 20 cigars are automatically packed. When you apply filtering to the Items to be Packed panel, only items that match the filtering criteria are considered during the auto packing process. Important The outer packing functionality is not currently implemented.</p>
	<p>Auto Pack Available Items – Master Inner/Outer Quantity Split. When configured, this button enables you to split inner and outer pack quantities/types against a product in a preconfigured way. This button is only used if you always put the same number of units into an inner and the same number of inners into an outer. When you apply filtering to the Items to be Packed panel, only items that match the filtering criteria are considered during the auto packing process. Important The outer packing functionality is not currently implemented.</p>
	<p>Auto Pack Available Items – Maximum Quantity Split. When configured, this button enables you to enter the number of packs to use to pack the remaining unpacked items, ignoring whether the products are the same. The unpacked items are then summed and divided between the packs. For example, an order contains three items:</p> <ul style="list-style-type: none"> • Product A – 10 • Product B – 5 • Product C – 15 <p>If you want to create 5 packs:</p> <ul style="list-style-type: none"> • The first pack contains 6 of Product A. • The second pack contains the remaining 4 of Product A and 2 of Product B. • The third pack contains the remaining 3 of Product B and 3 of Product C. • The other two packs each contain 6 of Product C. <p>If the unpacked quantity cannot be split equally between the packs, the system determines the amount of stock that can be equally split between the packs and the remaining stock is split as equally as possibly between the packs. By default, a single unit of stock cannot be split during the packing process. When you apply filtering to the Items to be Packed panel, only items that match the filtering criteria are considered during the auto packing process.</p>

When you use auto packing functionality, any active filters are applied to packing operations. For example, if a shipment contains multiple orders but you want to pack each order separately, filter by each order reference before executing the auto packing functionality.

Items to be Packed Navigation Toolbar

The navigation toolbar at the bottom of the *Items to be Packed* panel allows you to navigate the list of items. If you are packing a shipment that consists of many items running over multiple pages, the navigation arrows enable you to navigate from page to page. The *Refresh* button enables you to display any new items that have been added to the shipment.

You can also filter the list to display items based on certain criteria, such as the reference, order number, or product. Select the criteria you want to search for, enter the number in the *Search* field, and press Enter or click the lookup button.

Application Time Out

If you leave the application for too long, the session times out and you must log in again to continue. However, you do not lose your work in Scan, Pack and Ship.

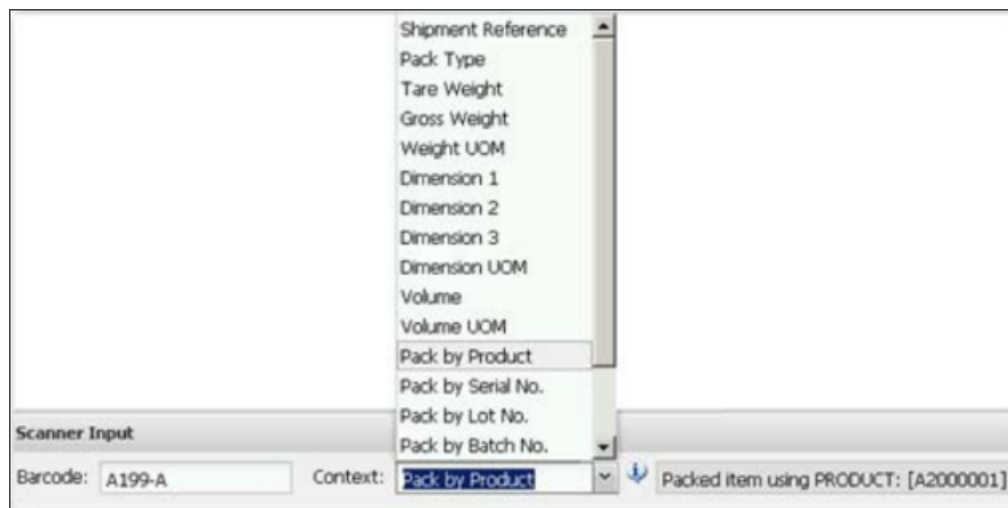
Scanner Input

You can use a scanner to enter data and perform actions instead of the keyboard and mouse.

Scanner Input Panel

To receive information from a scanning system, a *Scanner Input* toolbar is displayed.

Scanner Input



To scan items, select a context for the barcode, as displayed in the image above, and place the cursor in the *Barcode* field. When the *Barcode* field has focus, you can also modify the barcode context by using the Ctrl+Up or Ctrl+Down keys to scroll through the available barcode contexts. Use Ctrl+Enter to advance the scanner context to the next configured context.

Note When the *Order*, *Shipment*, *Barcode*, or *Pack Type* field has focus, you can also use the Up and Down keys to scroll through the last 20 entries to this field during this session.

Serial Number Controlled Scanning

If you are packing by serial number, you are prompted for a serial number when you scan an item code that is serial controlled. In this case, simply scan the appropriate serial number for the item.

When working with predefined serial numbers, you can change the scanner context to Pack By Serial No. This allows you to scan the serial numbers without scanning the item code. Based on the scanned serial number, the system determines the item on the shipment that has been allocated the scanned serial number.

Note If two item lines on the same shipment have the same predefined serial number, the system is unable to determine the specific item that the serial number relates to.

Packing Shipments

The following steps are a basic guideline to follow when packing a shipment. You can use the functionality described in the previous sections to perform more advanced steps or to change pack items and information.

Packing a Standard Shipment

1. Items arrive for packing at the packing station. Use a scanner to scan the shipment reference, or in the *Shipment Reference* lookup field, type the reference number of the shipment you want to pack and press Enter or click the lookup button to search for the shipment. The shipment is loaded. Any packs that already exist for the shipment are displayed in the *Packs* panel. Unpacked items are displayed in the *Items to be Packed* panel. To receive information from a scanning system, a *Scanner Input* toolbar is displayed.
2. To create a new pack for the items, in the *Packs* panel, click the *New Pack* button. The *Pack Lines* tab is automatically displayed. Alternatively, you can double-click an existing pack in the pack list to add additional packing information.

Note The pack type, weight, dimension, and volume of the new pack are automatically set based on the selected master pack type. You can change these defaults in the *Pack Maintenance* panel.

3. In the *Items to be Packed* panel, click the shipment line you want to pack.

4. Double-click in the *Packing* field and specify the quantity of items to pack.

Note In this example, you add shipment lines to the pack manually. You can also use the toolbar packing buttons to pack items in different ways.

5. To add the items to the pack, click the *Append to pack* button. Alternatively, double-click the shipment line. The items are added to the open pack.
6. To close the current pack, choose the *Packs* tab. Alternatively, in the *Pack Maintenance* panel, you can click the *Create a new pack* button.
7. When the pack is complete and closed, seal the pack. You can record that it is sealed by clicking the *Seal Pack* button.

Note At this point, a content label for your pack may be printed automatically. To print a content label at any time, you can click the *Reprint Content Label* button if it is available on the screen.

Deleting Packed Items

1. To remove item lines from a pack, select the item lines and click the *Delete selected pack line(s)* button. This removes the pack line and makes the items available for packing.
2. To remove a pack, select the pack and click the *Delete selected pack(s)* button. The pack is deleted and the contents of the pack are made available for packing.

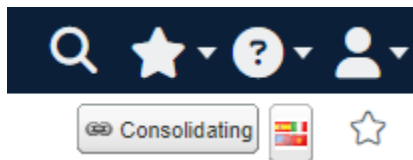
Note You cannot remove items from a sealed pack.

Consolidation Shipments

There may be times when you want to take items from another shipment and add them to your current shipment. Alternatively, you may not be able to pack all the items on your shipment because they are not available. For any scenarios where you want to add or remove items from your shipment, you can use the Consolidate and Ship functionality.

If you have permission to perform this function, a link is displayed in the top-right corner of the screen, as displayed in the image below. For more details, see the [Consolidate and Ship on page 453](#) section.

Consolidating Link



Shortcut Keys

The table below contains a list of keyboard shortcuts you can use with the scan, pack, and ship functionality.

Scan, Pack and Ship Keyboard Shortcuts

Key Combination	Function
CTRL+0	Set the focus to the Barcode field.
CTRL+1	Create new shipment. This shortcut is only used in Consolidation Packing mode.
CTRL+2	Save shipment.
CTRL+3	Available for configuration.
CTRL+4	Available for configuration.
CTRL+5	Refresh screen.
CTRL+6	Refresh shipment and orders.
CTRL+7	Create new pack.
CTRL+8	Close pack.
CTRL+9	Set the barcode context to Pack by Product.

Other Packing Options

If your organization does not run the standard Scan, Pack and Ship area for Standard Packing, it is likely that one of these two options is used:

- Scan and Pack and Scan and Rate—a packing station screen and a separate rating station screen.
- Packing as a workflow task—packing your shipment is a workflow task associated with your shipment in the Workflow Portal.

Packing Station

The Scan and Pack and Scan and Rate options split Scan, Pack and Ship into two areas. The functionality and buttons that you see in *Scan and Pack* depend on the workflow being used by your organization. This section describes a typical configuration from a user perspective.

To open *Scan and Pack*, enter SNPKPS in the menu search and press Enter.

As with Scan, Pack and Ship, the screen contains the following areas.

- Shipment toolbar
- Packing area
- *Items to be Packed* panel
- *Scanner Input* panel

However, in the toolbar and in the Packing area, there are no rating and pack weight buttons because this functionality is typically on the *Scan and Rate* page.

Packing Station Workflow

The basic packing workflow is described in [Packing a Standard Shipment on page 111](#).

Rating Station

The functionality and buttons that you see in *Scan and Rate* depends on the workflow being used by your organization. This section describes a typical Scan and Rate configuration from a user perspective.

To open *Scan and Rate*, enter SNPKRS in the menu search and press Enter.

In *Scan and Rate*, the *Packs* tab displays the packs for the active shipment along with important pack information. The buttons do not allow you to maintain a shipment, because shipment packs arriving at the rating station are already sealed. However, you can print and reprint carrier labels, and you may be able to reprint content labels. You can also rate the pack by getting its weight.

Rating Station Workflow

A typical workflow is described in the following steps:

1. Packs on a shipment arrive at the rating station after they have been sealed.
2. The rating station user scans the pack number off the box. On the *Scan and Rate* page, the shipment containing that pack is automatically loaded.
Note The user scans a content label that has already been printed at the packing station.
3. The user puts the pack on a weighing scale and presses a button on the scale to get the pack weight. This information is relayed to the *Scan and Rate* application.
4. The pack weight is recorded and added to the shipment weight running total. The pack status is also updated to reflect that the weight has been recorded.
5. The user prints a carrier label for the pack. Some systems are configured to automatically print a carrier label after the pack weight has been captured.

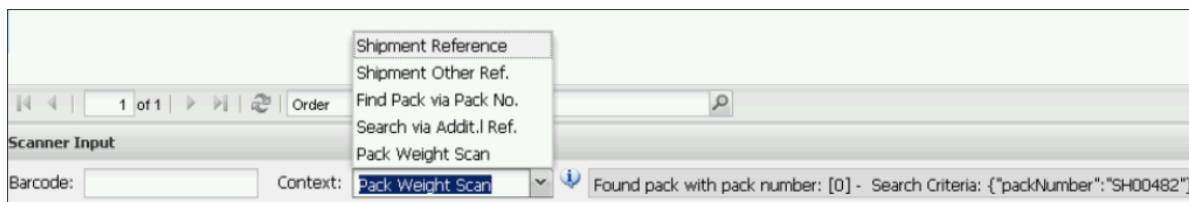
How the Scanner Works at a Rating Station

In the *Scanner Input* panel, the following contexts are typically available in the *Context* list:

- Shipment Reference

- Shipment Other Ref.
- Find Pack via Pack No.
- Search via Addit.I Ref.
- Pack Weight Scan

Rating Station Barcode Contexts



The following steps describe the rating process using a barcode scanner and a weighing scale in Scan and Rate:

1. The scanner context generally defaults to Find Pack via Pack No.
2. When the user scans the pack number, the shipment containing the pack is loaded.

Note By default, it is also possible to manually type the pack number in the *Barcode* field.

3. The scan context automatically changes to Pack Weight Scan.
4. When the user captures the weight, the screen is updated to reflect the captured pack weight and the updated shipment total weight. The pack information on the *Packs* tab changes color, as displayed in both images below. The shipment weight running total on the top right of the screen is also updated.

Pack Display Before Weight Scan

Pack No. ▲	Box No.	Type	Tare Weight	Gross Weight	Volume	Dimensions	Tracking Number
5506	1	CARTON	0,2 KG	7,21 KG	27000 CC	30 * 30 * 30 CM	

Pack Display After Weight Scan

Pack No. ▲	Box No.	Type	Tare Weight	Gross Weight	Volume	Dimensions	Tracking Number
5506	1	CARTON	0,2 KG	23 KG	27000 CC	30 * 30 * 30 CM	

5. The carrier label is printed with the correct pack weight.

The Find Pack via Pack No. scan context is automatically selected and the user can repeat the procedure for the next pack.

Packing as a Workflow Task

In some organizations, packing is run as a workflow task from the Workflow Portal. In this case, the Packing screen is very similar to the *Scan, Pack and Ship* page. However, because you are running Packing as a single task, there is no Shipment toolbar because the shipment is already selected in the Workflow Portal.

There are no shipment extension buttons because these are run as separate tasks in the Workflow Portal. The exact setup of the packing workflow screen depends on how your system is configured.

Workflow Portal Tasks Area

Tasks			
Status	Note	Description	Completed By
<input type="checkbox"/>		Created by	
<input checked="" type="checkbox"/>		Address Change	SANA_ADMIN
<input checked="" type="checkbox"/>		Documents	QCONFIG
<input checked="" type="checkbox"/>		Manifest	QCONFIG
<input type="checkbox"/>		Rate Shop	
<input checked="" type="checkbox"/>		Details	QCONFIG
<input checked="" type="checkbox"/>		Packing	QCONFIG

Sample Packing Workflow Task

Pack No.	Box No.	Type	Tare Weight	Gross Weight	Volume	Dimensions	Tracking Number
18657	1	CARTON	0 LB	0.4624 LB	500 CM3	10 * 5 * 10 CM	

Order	Line	Product	Packing	Available	Packed	Shipping	Ordered	Serial	Lot	Batch	Manufa...	Expiry	Unit Gross Weight
1	10	10086699	0 EA	1 EA	1 EA	2 EA	0 EA						100 KG

Scan, Pack and Ship: Consolidation Packing

You can use Scan, Pack and Ship to record packing information as you pack. The application can capture packing information input from:

- Mouse input
- Electronic weight scales
- Barcode scanners

Packing Approaches

There are two configurable approaches to packing. In Standard Packing mode, you record the packing information for a shipment as the items arrive at the packing station. In Consolidation Packing mode, items from multiple transactions arrive at the packing station and as you pack the items, you build a consolidation shipment and record the packing information against this consolidation shipment.

This section deals with packing in Consolidation Packing mode. If your organization uses consolidation packing, it means that the items you pack are part of an order when they arrive for packing. As you pack the items, you add them to a consolidation shipment. When the packed goods leave the packing station, they are now part of this consolidation shipment.

Example Your organization supplies computer items to large wholesale customers. Your customers send in orders, which are received. The items for each orders are then gathered. When the order reference is scanned, you are prompted for a shipment number before the items can be packed. The items are then added to the consolidation shipment, which is either an existing or new shipment.

In Consolidation Packing mode, you generate new consolidation shipments by selecting and recording packing information for order items. Unpacked order items are displayed as available for packing. As you record packing information for an order, the items are packed and new shipments are generated. You can pack multiple orders into a single shipment or multiple orders into multiple shipments. When you consolidate multiple orders into a single shipment, packing restriction criteria may be configured by the administrator to restrict the orders you can mix.

Note Your administrator can also configure Consolidation Packing mode to reference other transaction types. However, in this documentation, Consolidation Packing mode refers to packing order lines and assigning them to new consolidation shipments.

Packing Options

There are two options available to the administrator for configuring Scan, Pack and Ship in Consolidation Packing mode. The options are described and explained in the table below. However, the administrator will only configure one of the options so the user only needs to know how to open Scan, Pack and Ship.

Scan, Pack and Ship Options

Menu Option	Base Menu	Description
SNPKCD	Scan, Pack and Ship	Consolidation Packing Demo configuration is a sample configuration that gives an administrator a starting point when configuring packing.
SNPKCS	Scan, Pack and Ship	Consolidation Packing Web UI mode is the developer configuration for Consolidation Packing, giving a blank canvas with which to work.

Scan, Pack and Ship

The Scan, Pack and Ship interface typically contains four main areas:

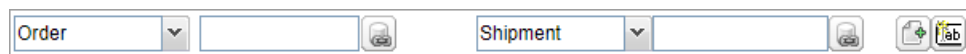
- Shipment toolbar
- Packing area, including:
 - *Packs* tab and *Shipment Details* panel
 - *Pack Items* tab and *Pack Maintenance* panel
- *Items to be Packed* panel
- *Scanner Input* panel

Shipment Toolbar

The Shipment toolbar contains two lookup fields. One field enables you to search for an order to pack. If you are using a barcode scanner, this field can be automatically populated and a search initiated when you scan a particular order reference. The other field enables you to enter an existing or new consolidation shipment to add the order to.

The image below displays the buttons and fields that typically appear in the Shipment toolbar. In addition to the two lookup fields, the first toolbar button allows you to reset the screen. The second button provides you with a status view of the workflow tasks that are assigned to the transaction. The third button allows you to resequence the pack numbers. Other buttons you may see on the toolbar are configured based on the workflow attached to the consolidation shipment.

Default Shipment Toolbar



Packing Area

The packing area displays the packs and pack items that you have already packed for a consolidation shipment. The display changes, depending on the tab you select. If you have not loaded a consolidation shipment, this area is empty.

Packs Tab

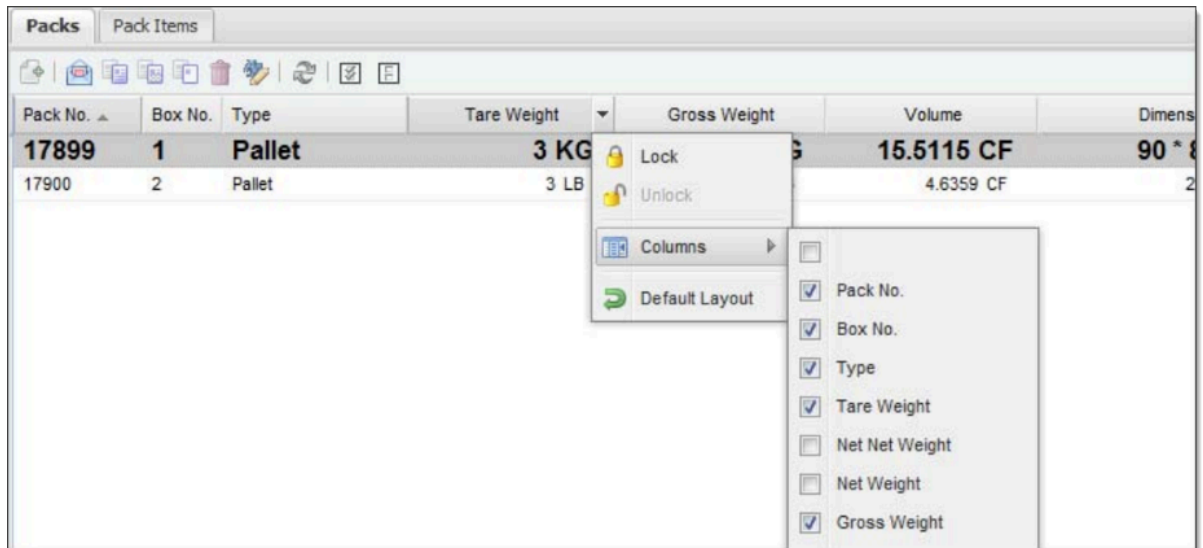
The Packs tab enables you to create new packs and add items to them. It displays the packs for the active consolidation shipment along with important shipment information. You can configure the display of pack information. To do this, click the arrow in any field in the header row, click *Columns*, and select the fields you want to display. The columns available are:

Packs Tab Columns

Column	Explanation
Pack No.	The number of the pack.
Box No.	The number of the box.
Type	The type of package used for the items.
Tare Weight	The weight of the packing unit into which the goods have been packed.
Net Net Weight	Weight (mass) of the goods themselves without any packing.
Net Weight	Actual, computed, or estimated weight of a good without its container and packaging. Gross weight less tare weight equals net weight.
Gross Weight	Weight of the packing unit, packaging, and goods.
Volume	Volume of the packing unit.
Dimensions	The length, width, and height of the packing unit.
Tracking Number	The number associated with the consolidation shipment, used to track it.
Additional Reference	An additional reference, generally configured according to company needs.
Total Pack Quantity	The number of items in a pack.













Column	Explanation
Closed	A pack status.
Pack Status	The status of the pack.
Dry Ice	The packing unit contains dry ice—a solid form of carbon dioxide, used primarily as a coolant. This flag is saved on the pack records; it does not affect the base documents.
Hazardous	The packing unit is considered hazardous to transport. It contains a material that, when transported in a particular amount and form, poses an unreasonable risk to health and safety or property. Hazardous material may include an explosive, radioactive material, etiologic agent, flammable or combustible liquid or solid, poison, oxidizing or corrosive material, and compressed gas. This flag is saved on the pack records; it does not affect the base documents.
Wet ice	The packing unit contains wet ice—frozen water in crushed or cubed form. This flag is saved on the pack records; it does not affect the base documents.






Packs Tab Display



The table below displays the toolbar buttons in the *Packs* tab and describes the function of each one.

Pack Toolbar Buttons

Button	Function
	Create pack. This is the first step you take when you want to pack items. When you click this button, the Pack Items tab is automatically displayed.
	Open selected pack. Open an existing pack you have selected in the pack list. You can also open the pack by double-clicking it.
	Copy selected pack. All pack information is copied. If there are insufficient unpacked items available to copy the selected pack, the pack is not copied and a message is displayed. If you hold down the Ctrl key and click this button, you are prompted for the number of duplicate packs that are to be created.
	Copy selected pack – Infinite. Continue to copy an existing pack until there are insufficient items to copy the pack again.
	Copy selected pack header. Copy the pack header information, including weight, dimensions, and type. However, no items are packed. The copy pack header button creates a duplicate pack with weight and volume overrides. If you hold down the Ctrl key and click this button, you are prompted for the number of duplicate packs that are to be created.
	Delete selected packs.
	Update box number. Update the box number to be in sequence with the other box numbers. This is useful if you have deleted some packs and there are box numbers missing.
	Refresh consolidation shipment.
	Seal pack. Seal the pack you have added items to. You can no longer add items to the pack unless you unseal it again. When you seal a pack, a content label can be automatically printed. This is a pack-level extension button.
	Open sealed pack. This is a pack-level extension button.
	Mark pack as rated. The pack is rated and is to be shipped with a particular carrier. This is a pack-level extension button.
	Void pack rating. Remove an assigned rating from a pack. This is a pack-level extension button.

Button	Function
	Mark pack as sealed. This is a pack-level extension button.
	Get Pack Weight. This is a pack-level extension button.
	Select all packs.
	Deselect packs.
	Reprint Content Label. This button is used to print out the contents of a pack, usually when you have made changes to its contents.
	Reprint Carrier Label. This button is used to reprint a carrier label, generally when you have rated a consolidation shipment for a second time and assigned a new carrier or if you have changed some of the shipment details that affect the carrier label.

Shipment Details Panel

By default, when you select the *Packs* tab, the *Shipment Details* panel is also displayed. The *Shipment Details* panel contains ship to, ship from, and carrier information. To hide the *Shipment Details* panel, click the arrow on the right of the page.

Shipment Details Panel

The screenshot shows a window titled "Shipment Details" with a scroll bar on the right. The fields are as follows:


- Ship To:** - West Coast Supplies
- Address:** 55 Cyril Magnin Street
- City:** SAN FRANCI
- State:** CA
- Zip/Postal:** 94102
- Country:** US
- Carrier:** QUPS - UPS International
- Address:** (empty)
- City:** (empty)
- State:** (empty)
- Zip/Postal:** (empty)






The set of fields in the *Shipment Details* panel can be filtered by the system administrator. When filtering is activated and you want to view the complete address details for Ship To, Ship From, or Carrier, click in the relevant text field. The complete address is displayed in a pop-up frame for three seconds.

Pack Items Tab

The *Pack Items* tab displays the item lines you have added to a pack. You can configure the information displayed for each pack item. To do this, click the arrow in any field in the header row, click *Columns*, and select the fields you want to display. The table below displays the *Pack Items* toolbar buttons and describes the function of each.

Pack Items Toolbar Buttons

Button	Function
	Close pack.

Button	Function
	Close pack without saving.
	Edit pack line quantity.
	Delete selected pack items.
	Select all pack items.
	Deselect pack items.


Note Depending on your configuration, other buttons may be available.

Pack Maintenance


By default, when you select the *Pack Items* tab, the *Pack Maintenance* panel is also displayed. To hide the *Pack Maintenance* panel, click the arrow on the right of the page.


Pack Maintenance


Pack Maintenance >>

Pack Type: QBOX 




Tare Weight:

Gross Weight: LB 

Dimensions: IN 

Volume: M3 

Closed:

The pack header information defaults from the pack master record. The *Pack Maintenance* panel allows you to make changes to a pack header. For example, if you have specified a weight in kilograms, you can change the unit of measure to grams. You can make changes to any field. Before doing this, however, note that every time you add items to a pack, the total gross weight and volume are updated as a running total in the pack header. When you manually add a weight or volume, this is a manual override and is used instead of the running total based on the items in the pack. The sum of the weight and volume from all the packs on the transaction is displayed in the top right corner of the page.

Important When you override a weight, volume, or dimension, the running total is lost and is no longer updated as additional items are added to the pack.

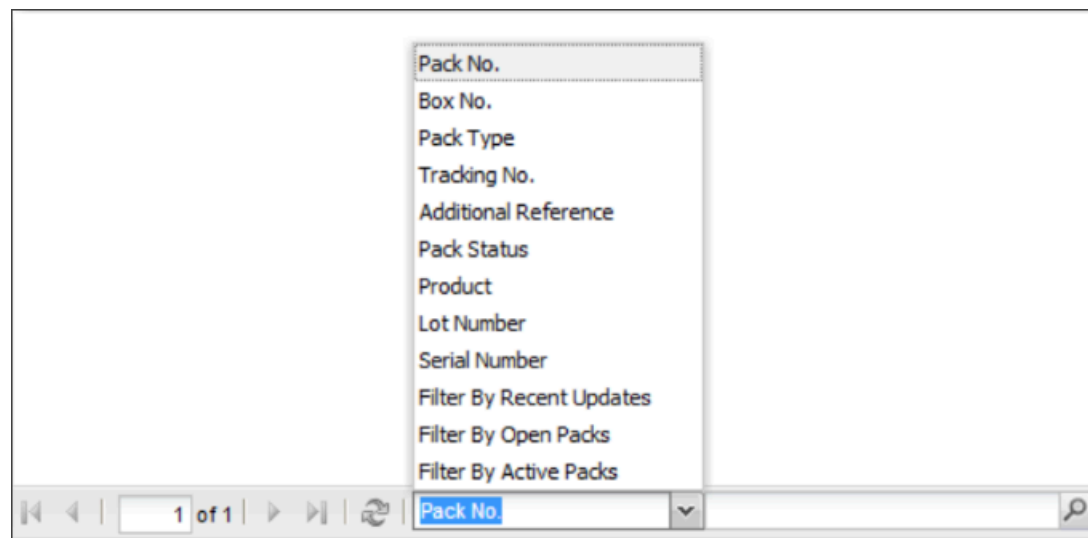
The buttons at the bottom of the *Pack Maintenance* panel allow you to clear the overrides you have entered, create a new pack, or save a pack. Depending on your configuration, other buttons may also be available.

Packs Navigation Toolbar

The navigation toolbar at the bottom of the pack list or the pack items list allows you to navigate the list. If a list runs over multiple pages, the navigation arrows enable you to navigate from page to page.

The Refresh button enables you to display any new packs or pack items added to the system. You can also filter the list to display a list of items based on certain criteria, as displayed in the image below. When you apply a filter, a filter button is displayed instead of the *Search* field. You can also enter specific information in the *Search* field and click the lookup button or press Enter.

Packs Navigation Toolbar



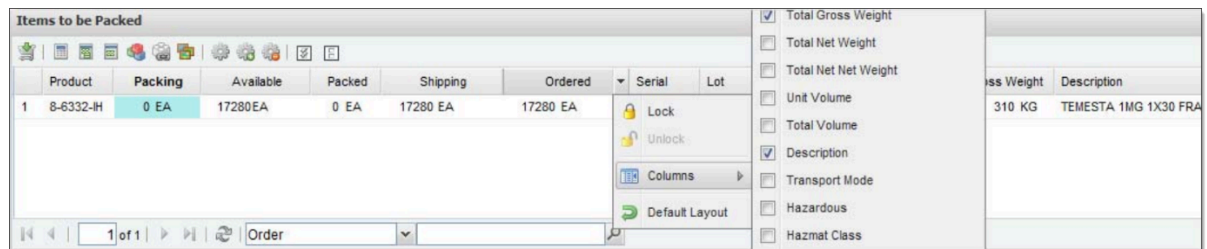
Items to be Packed Panel

The *Items to be Packed* panel displays the items that are available to pack for the loaded orders. If you have loaded a consolidation shipment with open packs, you can select order items to add to it.

Items List

When you load an order, the items list displays all order lines available for packing. By default, the *Packing* field is highlighted. In the *Packing* field, you can type the quantity of items you want to pack. You can configure the information displayed in the items list. To do this, click the arrow in any field in the header row, click *Columns*, and select the fields you want to display. Your layout is saved automatically. It is recommended that you always display the *Packing* field.

Items to be Packed Panel











Items to be Packed Toolbar Buttons

When you display an order for packing, the buttons on the toolbar offer various packing options. The table below displays a typical toolbar setup and describes the function of each button.

Items To Be Packed Toolbar Buttons

Button	Function
	Append to pack. When you specify a quantity of items in the Packing field, this button adds the items to the current open pack.
	Append all available items to pack. Add all available unpacked items to the current open pack. If you have applied a filter to the items list, only items that match the filtering criteria are appended.
	Auto Pack Available Items – Maximum Equal Product Quantity Split. You are prompted for the number of packs to use when splitting the unpacked items. The unpacked quantity of each product is summed and divided equally between the packs. Where the unpacked quantity cannot be split equally between the packs, the system determines the amount of stock that can be equally split between the packs. The remaining stock remains unpacked. It is assumed that a single unit of stock cannot be split during the packing process. If you have applied a filter to

Button	Function
	the items list, only items matching the filtering criteria are auto-packed.
	Auto Pack Available Items – Maximum Product Quantity Split. You are prompted for the number of packs to use when splitting the unpacked items. The unpacked quantity of each product is summed and divided between the packs. Where the unpacked quantity cannot be split equally between the packs, the system determines the amount of stock that can be equally split between the packs and the remaining stock is split as equally as possible between the packs. It is assumed that a single unit of stock cannot be split during the packing process. If you have applied a filter to the items list, only items that match the filtering criteria are auto-packed.
	Assign packing quantity to available quantity. Set the quantity in the packing field to the total quantity remaining to be packed for this order line.
	Increment packing quantity by one. Increase by one the quantity in the packing field for the selected order line. If you hold down the Ctrl key and click this button, you are presented with a pop-up frame; use it to change the quantity by which the packing quantity number is incremented.
	Assign packing quantity to zero. Set the quantity in the packing field to zero.
	Select all items. Select all order lines in the Items to be Packed list.
	Deselect items. Deselect all order lines in the Items to be Packed list.
	Auto Pack Available Items – Item Inner/Outer Quantity Split. You can specify inner and outer pack quantities and types to use when packing order items. This automatic packing facility generates an inner pack for the specified quantity of inners and divides the items between the generated packs. It generates an outer pack for the specified quantity of outers and divides the inner packs between the generated outer packs. For example, you can pack 20 cigars into a box and 20 boxes are loaded onto a palette. You are shipping 400 cigars. In this case, the box is the inner quantity and the palette is the outer quantity. When you click this button, 20 boxes of 20 cigars are automatically packed.

Button	Function
	<p>When you apply filtering to the Items to be Packed panel, only items that match the filtering criteria are considered during the auto packing process.</p> <p><i>Important</i> The outer packing functionality is not currently implemented.</p>
	<p>Auto Pack Available Items – Master Inner/Outer Quantity Split. When configured, this button enables you to split inner and outer pack quantities/types against a product in a preconfigured way. This button is only used if you always put the same number of units into an inner and the same number of inners into an outer.</p> <p>When you apply filtering to the Items to be Packed panel, only items that match the filtering criteria are considered during the auto packing process.</p> <p><i>Important</i> The outer packing functionality is not currently implemented.</p>

When you use auto packing functionality, any active filters are applied to packing operations. For example, if a consolidation shipment is to contain multiple orders but you want to pack each order separately, filter by each order reference before executing the auto packing functionality.

Items to be Packed Navigation Toolbar

The navigation toolbar at the bottom of the *Items to be Packed* panel allows you to navigate the list of items. If you are packing an order or orders that consist of many items running over multiple pages, the navigation arrows enable you to navigate from page to page. The *Refresh* button enables you to display any new items that have been added to the orders.

You can also filter the list to display items based on certain criteria, such as the reference, ordernumber, or product. Select the criteria you want to search for, enter the number in the *Search* field, and press Enter or click the lookup button.

Application Time Out

If you leave the application for too long, the session times out and you must log in again to continue. However, you do not lose your work in Scan, Pack and Ship.

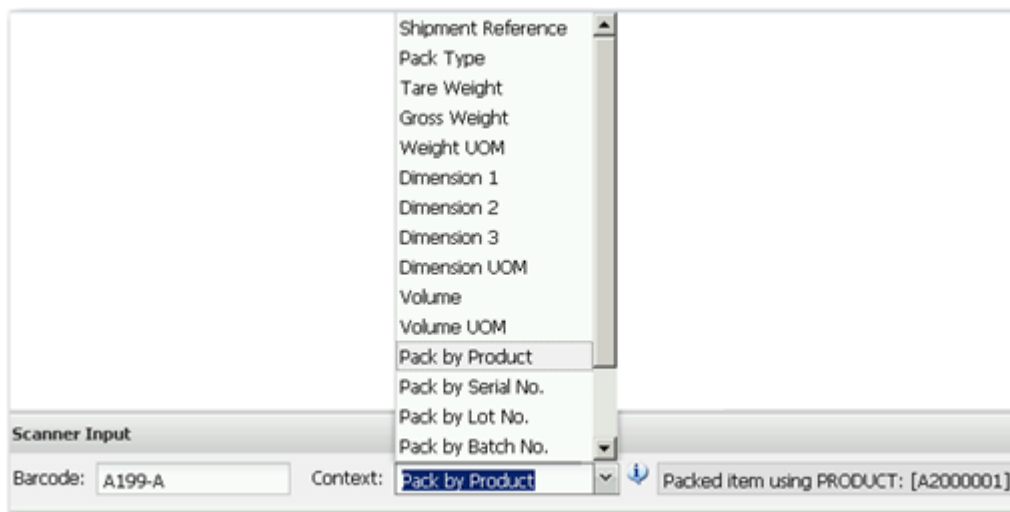
Scanner Input

You can use a scanner to enter data and perform actions instead of the keyboard and mouse.

Scanner Input Panel

To receive information from a scanning system, a *Scanner Input* toolbar is displayed.

Scanner Input



To scan items, select a context for the barcode, as displayed in the image above, and place the cursor in the *Barcode* field. When the *Barcode* field has focus, you can also modify the barcode context by using the Ctrl+Up or Ctrl+Down keys to scroll through the available barcode contexts. Use Ctrl+Enter to advance the scanner context to the next configured context.

Note When the *Order*, *Shipment*, *Barcode*, or *Pack Type* field has focus, you can also use the Up and Down keys to scroll through the last 20 entries to this field during this session.

Serial Number Controlled Scanning

If you are packing by serial number, you are prompted for a serial number when you scan an item code that is serial controlled. In this case, simply scan the appropriate serial number for the item.

When working with predefined serial numbers, you can change the scanner context to Pack By Serial No. This allows you to scan the serial numbers without scanning the item code. Based on the scanned serial number, the system determines the item on the consolidation shipment that has been allocated the scanned serial number.

Note If two item lines on the same consolidation shipment have the same predefined serial number, the system is unable to determine the specific item that the serial number relates to.

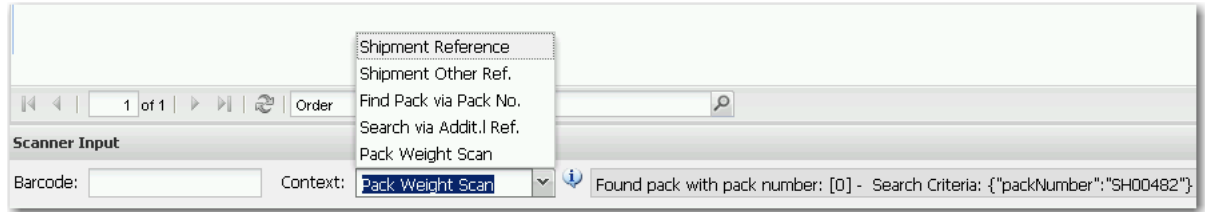
Rating a Pack using a Scanner

When using a barcode scanner and a weighing scale to rate a pack on a consolidation shipment, the following contexts are typically available in the *Context* list of the *Scanner Input* panel:

- Shipment Reference
- Shipment Other Ref.

- Find Pack via Pack No.
- Search via Addit.I Ref.
- Pack Weight Scan

Rating Station Barcode Contexts



The steps in the process are as follows:

1. The scanner context generally defaults to Find Pack via Pack No.
2. When the user scans the pack number, the consolidation shipment containing the pack is loaded.

Note By default, it is also possible to manually type the pack number in the Barcode field.
3. The scan context automatically changes to Pack Weight Scan.
4. When the user captures the weight, the screen is updated to reflect the captured pack weight and the updated consolidation shipment total weight. The pack information on the *Packs* tab changes color, as displayed in both images below. The consolidation shipment weight running total on the top right of the screen is also updated.

Pack Display Before Weight Scan

Pack No. ▲	Box No.	Type	Tare Weight	Gross Weight	Volume	Dimensions	Tracking Number
5506	1	CARTON	0,2 KG	7,21 KG	27000 CC	30 * 30 * 30 CM	

Pack Display After Weight Scan

Pack No. ▲	Box No.	Type	Tare Weight	Gross Weight	Volume	Dimensions	Tracking Number
5506	1	CARTON	0,2 KG	23 KG	27000 CC	30 * 30 * 30 CM	

5. The carrier label is printed with the correct pack weight.

The Find Pack via Pack No. scan context is automatically selected and the user can repeat the procedure for the next pack.

Packing Orders into a Consolidation Shipment

The following steps are a basic guideline to follow when packing an order into a consolidation shipment. You can use the functionality described in the previous sections to perform more advanced steps or change pack items and information.

Packing a Consolidation Shipment

1. Items arrive for packing at the packing station. Use a scanner to scan in the order reference, or in the *Order Reference* lookup field, type the

reference number of the order you want to pack and press Enter or click the lookup button to search for the order. The unpacked items on the order are displayed in the Items to be Packed panel.

2. To create a new consolidation shipment for packing the order items, click the *New Shipment* button. Alternatively, to load an existing shipment for adding additional order items, enter the shipment reference in the *Shipment lookup* field and press Enter or click the lookup button. The shipment is loaded. Any packs that already exist for the shipment are displayed in the *Packs* panel.
3. To create a new pack for the items, in the *Packs* panel, click the *New Pack* button. The *Pack Lines* tab is automatically displayed.

Alternatively, you can double-click an existing pack in the pack list to add additional packing information.

Note The pack type, weight, dimension, and volume of the new pack are automatically set based on the selected master pack type. You can change these defaults in the *Pack Maintenance* panel.

4. In the *Items to be Packed* panel, click the order line you want to pack.
5. Double-click in the *Packing* field and type the quantity of items to pack.

Note In this example, you add order lines to the pack manually. You can also use the toolbar packing buttons to pack items in different ways.

6. To add the items to the pack, click the *Append to pack* button. Alternatively, double-click the order line. The items are added to the open pack.
7. To close the current pack, choose the *Packs* tab. Alternatively, in the *Pack Maintenance* panel, you can click the *Create a new pack* button.
8. When you are finished sealing the pack, you can record that it is sealed by clicking the *Seal Pack* button.

Note At this point, a content label for your pack may be printed automatically. To print a content label at any time, you can click the *Reprint Content Label* button if it is available on the screen.

9. Next, the user puts the pack on a weighing scale and presses a button on the scale to get the pack weight. This information is relayed to Scan, Pack and Ship.
10. The pack weight is recorded and added to the shipment weight running total. The pack status is also updated to reflect that the weight has been recorded.
11. The user prints a carrier label for the pack. Some systems are configured to automatically print a carrier label after the pack weight has been captured.

Deleting Packed Items

To remove items from a pack, select the items and click the *Delete selected pack line(s)* button. This removes the pack line and makes the items available for packing.

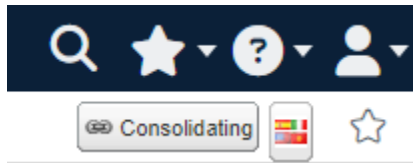
To remove a pack, select the pack and click the *Delete selected pack(s)* button. The pack is deleted and the contents of the pack are made available for packing

Consolidate and Ship

There may be times when you want to split or consolidate orders because of certain restrictions. For example, if there are restrictions on the amount of hazardous material that can be shipped on a shipment, you can remove some of that material and store it in a staging area. Alternatively, you might want to add particular orders to the existing orders and consolidate them for packing into one consolidation shipment later. For this type of scenario, you can use the Consolidate and Ship functionality.

If you have permission to perform this function, a link is displayed in the top-right corner of the screen, as displayed in the image below. For more details, see the [Consolidate and Ship on page 453](#) section.

Consolidating Link



Shortcut Keys

The table below contains a list of keyboard shortcuts you can use with the scan, pack, and ship functionality.

Scan, Pack and Ship Keyboard Shortcuts

Key Combination	Function
CTRL+0	Set the focus to the <i>Barcode</i> field.
CTRL+1	Create new consolidation shipment. This shortcut is for the <i>New Shipment</i> button.
CTRL+2	Save shipment.
CTRL+3	Available for configuration.
CTRL+4	Available for configuration.
CTRL+5	Refresh screen.
CTRL+6	Refresh shipment and orders.
CTRL+7	Create new pack.

Key Combination	Function
CTRL+8	Close pack.
CTRL+9	Set the barcode context to Pack by Product.

Consolidate and Ship

Consolidate and Ship enables you to build a consolidation shipment from existing orders and to move item lines between shipments. To do this, you will probably use a scanner. For details of the scanner functionality, see the [Scan, Pack and Ship: Standard Packing on page 98](#) and [Scan, Pack and Ship: Consolidation Packing on page 117](#) sections.

Use Cases

Typically, there are two main uses for Consolidate and Ship. You can use Consolidate and Ship in Consolidation Packing mode to:

- Create consolidations of orders for packing at a later time.
- Place several orders or order lines into new or existing consolidation shipments. You may want to do this if all items with a particular lot number must be shipped together, or if you can improve delivery times by reassigning items to a different shipment or shipments.

In Standard Packing mode, you can use Consolidate and Ship to:

- Deconsolidate a currently unavailable item from a shipment to allow the other items to be delivered on time. This is known as short shipping. The item you remove can be added to a new transaction for back ordering or consolidated onto an existing transaction.
- Add items to an existing shipment; for example, you can consolidate items that were on back order or items that can be shipped ahead of time.

Create Consolidations

Consolidation Picking enables you to combine orders—for example, based on shipping quantity or inner quantity or outer quantity, lots, or serial number—into one consolidation shipment. This makes it very similar to Consolidation Packing. The difference is that Consolidation Packing packs the orders into shipments. Consolidation Picking does not pack any orders for shipment. It simply combines them for storage purposes or in preparation for packing later.

There are many reasons why an organization might want to build consolidations. For example, some organizations deal with hazardous goods. Different laws restrict what goods can be shipped together. Therefore, goods might be staged at a consolidation point before packing to help ensure that no more hazardous material can go onto a shipment than is legally allowed.

Alternatively, you might create a consolidation when a customer submits multiple orders. You might do this to save on delivery costs or to ensure compliance with shipping regulations.

Short Shipping

Short Shipping describes the process of shipping a shipment without all its items to ensure on-time delivery of the items that are available. For example, a customer sends in an order. The warehouse receives this order through the ERP system as part of a shipment. However, one item on the shipment is not available until a future date. You can use Consolidate and Ship to remove that item and proceed to pack and ship the items that are available. This ensures on-time delivery of as many of the items as possible. The documentation accompanying the shipment likely contains details of the outstanding item on the order.

Opening Consolidate and Ship

Access Consolidate and Ship by entering SNPKCP in the menu search and pressing Enter. If you are on the *Scan, Pack and Ship* page, you can open Consolidate and Ship by clicking the *Consolidating* link in the top right corner if it is displayed. This displays any order or shipment you already have open on the *Consolidate and Ship* page.

Consolidate and Ship Interface

The Consolidate and Ship interface typically contains four main areas:

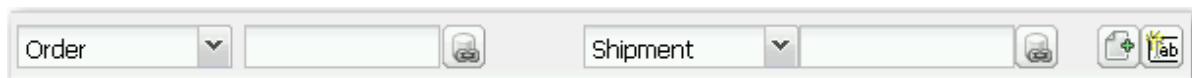
- Shipment toolbar
- *Items* tab, including the *Shipment Details* panel
- *Items to be Picked* panel
- *Scanner Input* panel

Shipment Toolbar

The image below displays the buttons and fields that appear in the Shipment toolbar by default. There are two search fields. The first enables you to search for an order and the second enables you to search for a shipment. These searches perform an exact match to return one transaction, so you cannot enter wildcards in the search fields. Enter a search value in the search field, or select a value using the accompanying lookup field, and then press Enter or click the lookup button.

Note This document refers to orders and shipments. However, depending on the configuration, you may be able to search for other transactions besides orders and shipments.

Toolbar



When you open an order or shipment, a number of buttons are displayed in the Shipment toolbar. These buttons are displayed based on the workflow attached to the transaction. One button of particular interest that

can be configured in Consolidate and Ship is the *Remove unpacked items from Consolidation* button. This button, when displayed, enables you to remove unpacked items from a consolidation.

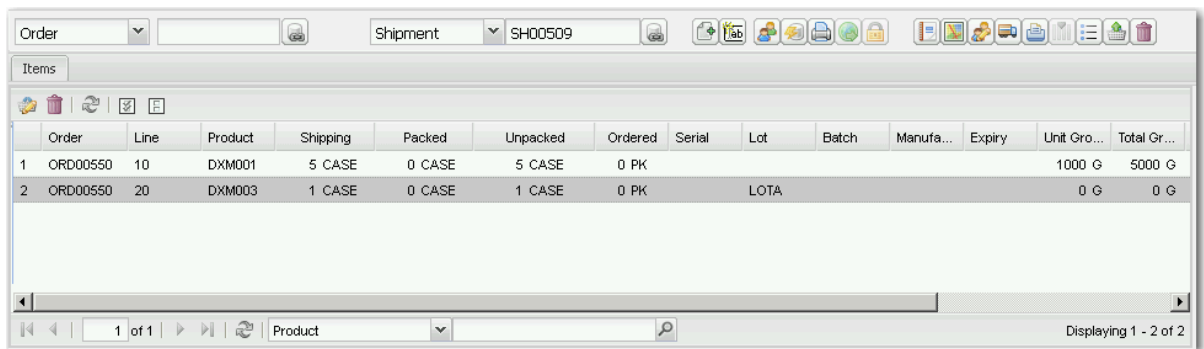
Remove Unpacked Items from Consolidation



Items Tab

The *Items* tab displays the list of the items in the current open shipment. You can add new order items to a shipment by picking them from the order in the *Items to be Picked* panel.

Items Panel



The table below displays the toolbar buttons in the *Items* panel and describes the function of each one.

Items Toolbar Buttons

Button	Function
	Edit item shipping quantity. Edit the quantity of a selected item. When you click this button, you are prompted to enter the new quantity. This must be greater than the number of items packed, and it cannot exceed the total number of items available on the order line. This is displayed in Figure 5.4.
	Delete selected item lines.
	Refresh shipment.
	Select all items.
	Deselect items.

Edit Item Shipping Quantity

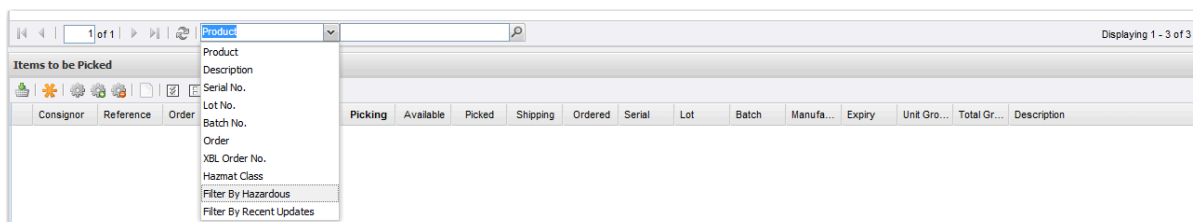
Note As part of the *Items* tab, the *Shipment Details* panel is displayed. This panel is discussed in the [Scan, Pack and Ship: Standard Packing on page 98](#) and [Scan, Pack and Ship: Consolidation Packing on page 117](#) sections.

Items Navigation Toolbar

The navigation toolbar at the bottom of the items list allows you to navigate the list. If a list runs over multiple pages, the navigation arrows enable you to navigate from page to page.

The *Refresh* button enables you to display any new order lines added to the system. You can also filter the list to display list items based on certain criteria, as displayed in the image below. When you apply a filter, a filter button is displayed instead of the search field. For example, you can filter by hazardous goods or by product, which are common filter actions when performing consolidations. You can also enter specific information in the search field and click the lookup button.

Items Navigation Toolbar Filter



Items To Be Picked Panel

The *Items to be Picked* panel displays the order lines available to pick for a shipment. You can pick items from the order lines and add them to the items in the Items panel.

Items List

When you load an order or shipment, the items list displays all order lines available for consolidation. By default, the *Picking* field is highlighted. In the *Picking* field, you can type the quantity of items you want to consolidate into the current open shipment. You can configure the

information displayed in the items list. To do this, click the arrow in any field in the header row, click *Columns*, and select the fields you want to display. It is recommended that you always display the *Picking* field. Depending on the picking criteria you are using, other important fields might include *Serial* and *Lot*.








Items To Be Picked Panel


Items to be Picked												
	Consignor	Reference	Order	Line	Product	Picking	Available	Picked	Shipping	Ordered	Serial	Lot
1	DX14-A9...	SR00550	ORD00550	10	DXM001	2 CASE	2 CASE	3...	5...	50 PK		
2	DX14-A9...	SR00550	ORD00550	20	DXM003	1 CASE	1 CASE	2...	3...	40 PK		LOTA
3	DX14-A9...	SR00550	ORD00550	20	DXM003	1 CASE	1 CASE	0...	1...	40 PK		LOTB

Items to be Picked Toolbar Buttons

When you display an order for picking, the buttons on the toolbar offer various picking options. The table below displays a typical toolbar setup and describes the function of each button.

Items To Be Picked Toolbar Buttons

Button	Function
	Append to pick. When you specify a quantity of items in the Picking field, this button adds the items to the current open shipment.
	Append all available items to pick. Adds all available unpacked items to the current open shipment. If you have applied a filter to the list, only items that match the filtering criteria are appended.
	Assign picking quantity to available quantity. Set the quantity in the Picking field to the total quantity remaining to be picked for this order line.
	Increment picking quantity by one. Increase by one the quantity in the Picking field for the selected order line. If you hold down the Ctrl key and click this button, you are presented with a pop-up. This pop-up allows you to change the quantity by which the picking quantity number is incremented.
	Assign picking quantity to zero. Set the quantity in the Picking field to zero.
	Reset items to be picked. Clear the contents of the Items to be Picked list if you no longer need to pick these order items.
	Select all items. Select all order items in the Items to be Picked list.

Button	Function
	Deselect items. Deselect all order items in the Items to be Picked list.

Consolidation Example

You have two orders for shipment to the same wholesale customer. The customer ordered 1000 laptops last Thursday. On Friday, this customer ordered 5000 MP3 players. You want to consolidate these orders onto one shipment to improve delivery time.

1. Open Consolidate and Ship.
2. In the *Order* field, type the reference numbers for the orders you want to consolidate, loading them one at a time. Click the lookup button or press Enter. The 1000 laptops and 5000 MP3 players to be picked are displayed in the *Items to be Picked* panel.

Note If you have already packed items from one of the orders into a shipment, you must unpack them from that shipment before they are displayed here. The *Order* lookup only displays orders with unpacked order items, and only unpacked items are displayed.

3. You want to create a new shipment for the orders. Click the *New Shipment* button. The *Items* tab is now displayed.
4. You can now pick the 1000 laptops and 5000 MP3 players from the *Items to be Picked* panel. There are several ways of doing this.
 - Double-click an order line to move it to the *Items* tab.
 - Drag and drop the items into the *Items* tab.
 - Select an order line containing some or all order items and click the *Append to pick* button.
 - Click the *Append all available items to pick* button.
5. The laptops and MP3 players are now consolidated onto one shipment.

Note These steps use a keyboard and mouse for capturing the picking information. You can also capture the information using a barcode scanner.

Short Ship Example

In this example, it is assumed that you want to pack a shipment in Standard Packing mode. An automotive industry customer has ordered 500 steering springs and 1000 steering arms. A shipment has been created for the items. However, only 800 steering arms are available. To ensure on-time delivery of as many components as possible, you want to remove the 200 steering arms that are currently not available. To do this, perform the following steps:

1. On the *Scan, Pack and Ship* page, load the shipment. The items for packing are displayed in the items to be packed panel.
2. You can pack the items that are available. When you have done this, click the *Consolidating* link.
3. The shipment is not currently configured as a consolidation shipment. You may be prompted if you want to enable the shipment for consolidation picking. Click *Yes*.
4. The items belonging to the shipment are displayed on the *Items* tab. To remove unpacked items from the shipment, you can:
 - Drag and drop the unavailable steering arms into the *Items to be Picked* panel.
 - Select an order line containing some or all the steering arms and click the *Delete* button.

Note You can only remove unpacked items from the consolidation.

5. The *Items to be Picked* panel shows the 200 steering arms awaiting assignment to another shipment. The *Available* column shows the total number of items in the order line. The *Picked* column shows the items that have been assigned to a shipment or shipments.
6. Click the *Packing* link on the top right of the page to return to the *Scan, Pack and Ship* page.
7. You can check that the removed items are now available for consolidation onto a new shipment. In *Consolidate and Ship*, type the order number of the removed steering arms and press enter. Alternatively, click the lookup button and browse for the order. The 200 steering arms are displayed as available for consolidation.

Note These steps use a keyboard and mouse for capturing the picking information. You can also capture the information using a barcode scanner.

Inquiry

The Inquiry functionality allows you to search for transactions and to copy, recall, and return transactions. Customer service agents often use Inquiry when dealing with shipment queries.

To open the *Inquiry* page, access the REPORT option and press Enter.

Inquiry consists of three panels:

- The Search panel, which allows you to specify transaction search criteria
- The Shipments panel, which displays a list of transactions that match the criteria specified in the search panel
- The Shipment Line Details panel, which allows you to view information about the individual transaction selected in the Shipments panel

Inquiry

The screenshot displays the QAD Administrator interface for the 'View Shipments' page. The top navigation bar includes 'QAD Administrator', 'System', 'Printing', 'Security', 'Testing', and 'Client Resources'. The 'Search' panel is active, showing a search criteria dropdown set to 'Reference = YOD_GB_D04'. Other search options include 'Select a template...', 'Search All Clients', 'Search only your groups', 'Created By', 'Shipment Status' (Open, Closed, All), and 'Type' (All, Shipments, Transaction, Voiced). Below the search panel is a table of shipments:

Actions	Client	Reference	Despatch Number	Despatch Date	Complan...	Carrier	Order Reference	Description	Status	Quantity	Weight	Weight UOM
	STGL	YOD_GB_D04	0	17/10/2024		QSECURICOR		TMS GB - Yodel - Dom - S...	00	7	8.00	KG

Below the shipment table is a 'Tracking Number' search panel with a search input field and a search button. The bottom of the page shows pagination controls: '1 of 1', 'Per Page: 25', and '1 - 1 of 1'. There are also links for 'Carrier Tracking' and 'Search and Export'.

Search Panel

The search panel at the top of the page contains a list of commonly used search criteria:

- **Search All Clients.** Select this field to search all of the specified transactions belonging to clients to which you have access. Selecting this option can increase the time that it takes the query to complete. If

you use the *Select Criteria* field to search for transactions related to a particular client, then you cannot select the *Search All Clients* field.

- *Search only your groups.* Select this field to search only the specified transactions that belong to a workflow group of which you are a member.
- *Created By.* To search only transactions created by a specific user, enter their user ID in this field.
- *Shipment Status.* Specify whether you want to search open shipments, closed shipments, or all shipments.
- *Transaction types.* Select the types of transactions that you want to search. Your administrator determines the transaction types that are available to choose from.

You can open the Inquiry screen with a particular shipment reference specified in the search criteria by including the reference in the URL for Inquiry. You can then click Search to conduct a search based on this reference number.

The last search that you performed in this screen displays the next time that you visit the screen.

You can add more search criteria using the *Select Criteria* drop-down list. The table below lists the available criteria.

Additional Inquiry Search Fields

Field/Option	Description
Reference	A reference number identifying the shipment.
Description	A description of the shipment.
Client	The client related to the shipment.
Consignor	The person or company shown on the bill of lading as the shipper.
Customer	The customer attached to the shipment.
Consignee	The person or company that the shipment is being sent to.
Carrier	The reference number for the company transporting the shipment. Hauliers typically deal with heavy goods or goods transferred by road.
Haulier	The reference number for the company transporting the shipment. Hauliers typically deal with heavy goods or goods transferred by road.
Shipping Officer	The person who looks after documents related to the shipment.

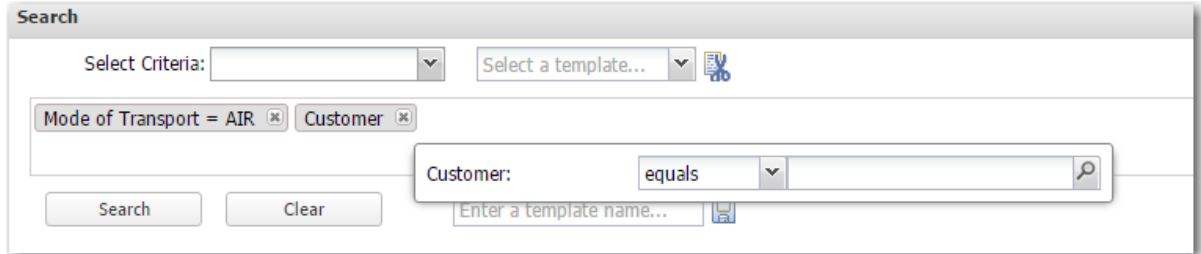
Field/Option	Description
Deliver From	The address that the shipment is being delivered from.
Deliver To	The address that the shipment is being delivered to.
HAWB No	House air waybill number. The air freight consolidator sends a waybill or receipt to the customer for the goods that have been received and sent on for transfer by air. This number identifies the HAWB attached to the shipment.
MAWB No	Master air waybill number. An airline sends a MAWB or receipt to the customer to advise that the airline has received the goods and agreed to send them by air. This number identifies the MAWB attached to the shipment.
Other Reference	This field holds a reference linked to the shipment. Your administrator may hide this field or configure it to display with different text—text that identifies the exact purpose of the field.
Customs Reference	The customs reference for this shipment.
Forwarders Reference	The reference of the company sending on the shipment.
Additional Reference	This field holds a reference linked to the shipment. Your administrator may hide this field or configure it to display with different text—text that identifies the exact purpose of the field.
User Defined Field5	This field holds a user-defined field related to the shipment. Your administrator may hide this field or configure it to display with different text — text that identifies the exact purpose of the field.
User Defined Field 10	This field holds a user-defined field related to the shipment. Your administrator may hide this field or configure it to display with different text—text that identifies the exact purpose of the field.
Invoice Number	The number of the invoice attached to the shipment.
Booking Number	The reference number for the booking linked to the shipment.
Bill of Lading No	This number identifies the bill of lading attached to the shipment. A bill of lading is a detailed breakdown of a shipment; for example, the products shipped

Field/Option	Description
	and the total weight of the products and containers used for packing. It establishes the terms of a contract between a shipper and a transportation company.
Route	The route code for the shipment.
Mode of Transport	The mode of transport for the shipment; for example, air or sea.
Country From	The code identifying the country the shipment is sent from.
Country To	The destination country of the shipment.
Place of Loading	The location where the shipment is loaded.
Place of Destination	The location that the shipment is being sent to.
Load Reference	The number of the load attached to the shipment.
Shipment Type	The type of shipment; for example, a domestic or import shipment.
Status	The status of the shipment, identifying a particular task or step within the shipping process.
AES Status	The Automated Export System (AES) status of the shipment.
Office	The office responsible for the shipment.
Despatch Date	The date on which the shipment was despatched.
Arrival Date	The date that the shipment arrived.
Packing Location	The packing location of the shipment.
Compliance Status	The compliance status of the shipment.
Order Number	The number of the order attached to the shipment. If you want to search within item lines, then use the Order Number (item) search field.
PO Number	The number of the purchase order attached to the shipment. If you want to search within item lines, then use the PO Number (item) search field.
Order Number (item)	An order number associated with a shipment item line. If you want to search for an order number at the

Field/Option	Description
	shipment level, then use the Order Number search field.
PO Number (item)	A purchase order number associated with a shipment item line. If you want to search for a purchase order number at the shipment level, then use the PO Number search criterion.
Product	The product code for the product being shipped. Product codes are listed in option PR.
Tracking Number	The tracking number associated with the shipment.
RFID Tag	The radio frequency identification tag that identifies the shipment.
Pack Type	The type of pack that is being used to ship the item; for example, a box.
UPI	The user payload identifier for the shipment.
Pack Number	An identifier for the pack.
COD Tracking Number	The reference number for tracking cash on delivery.
Container Number	The number of the container attached to the shipment.
Batch Number	The number identifying a particular batch or group of items.
Lot Number	The number identifying a particular lot or group of items.
Serial Number	The serial number of the shipment.
Sales Organisation 1	The code for a sales organization linked to the shipment.
Sales Organisation 2	The code for a sales organization linked to the shipment.
Sales Organisation 3	The code for a sales organization linked to the shipment.
Sales Organisation 4	The code for a sales organization linked to the shipment.

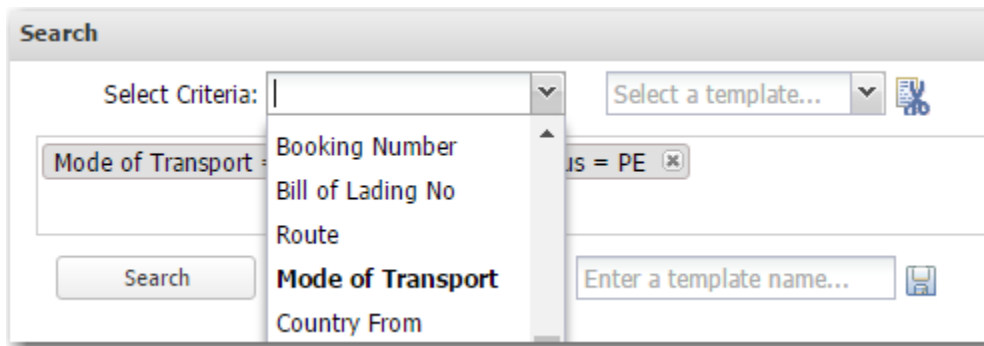
The criteria that you select using this field appear in the search criteria area above the search field. To specify values for a particular search criterion, hold the cursor over the criterion and complete the fields that appear on the screen.

Search Criteria Area



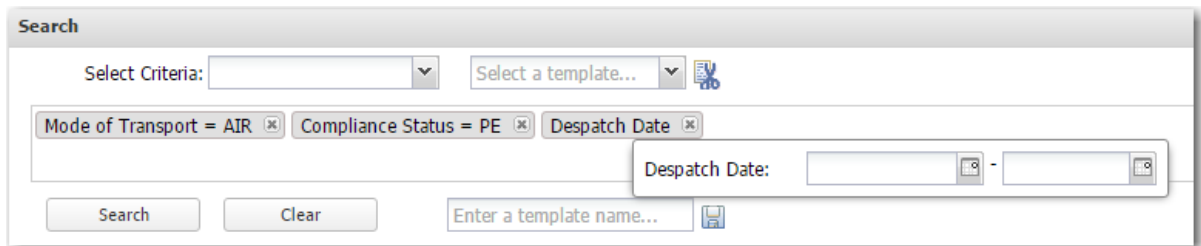
Selected criteria display in bold text in the drop-down list of criteria to indicate that these fields are already listed in the search criteria area.

Search Criteria Area, Selected Criterion



A number of search criteria relate to date ranges, as shown in the image below. If you do not want a lower limit to the date range, then leave the first date selection field blank. If you do not want an upper limit to the date range, then leave the second date selection field blank.

Search Criteria Area, Date Fields



To perform a search, click *Search*. The search results appear in the *Shipments* panel. For more information on this panel, see the [Shipments Panel on page 148](#) section.

To save the search criteria that you specify in the *Search* panel for future use, you can save the criteria as a template.

To clear the search criteria that you have chosen and set the search fields back to the default values, click *Clear*.

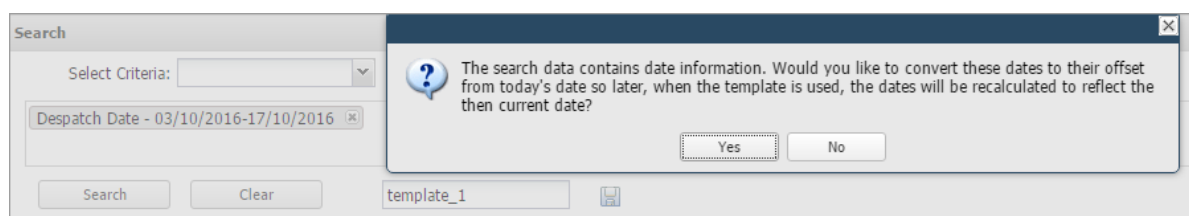
Search Templates

After you specify values for the standard search criteria and add any necessary search criteria, you can save the search criteria as a search template.

Saving a Search Template

To save the search template, specify a template name in the *Enter a template name...* field and click the *Save* icon to the right of this field. If your template contains search criteria based on dates, then the system prompts you to specify whether, when the template is run at a later date, you want the dates to be offset from today's date.

Template Date Offset Prompt



If you click *Yes*, then any dates specified in the search criteria are adjusted when the template is run in the future.

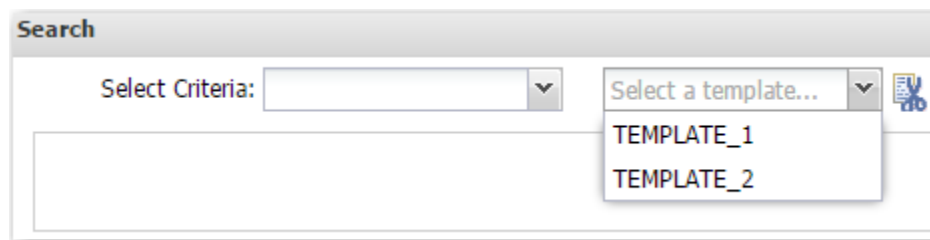
Example You save a search template to search for shipments with a despatch date up to and including today (January 15) and click *Yes* on the prompt about date offsets. When you load the template one week later, the despatch date in the search criteria is set to January 22 instead of January 15.

Example You save a search template to search for shipments with a despatch date up to and including today (January 15) and click *No* on the prompt about date offsets. When you load the template one week later, the despatch date remains set to January 15.

Loading a Search Template

To load an existing template, select a template name from the *Select a template...* drop-down menu.

Loading a Search Template



The search fields and search criteria area update to show the details of the search template.













Deleting a Search Template

To delete a search template, select a template name from the *Select a template...* drop-down menu and click the *Delete* icon to the right of the field.

Shipments Panel

The *Shipments* panel displays the results of a search.

Shipments Panel



Shipments									
Actions	Client	Reference	Despatch Numb...	Despatch Date	Carrier	Status	Weight	Consignor	Description
 	STGL	USP_US_D11	0	06/02/2016	QUSPS	00	4.00	A9901	TMS US - USF ▲
 	STGL	USP_US_D10	0	06/02/2016	QUSPS	00	3.00	A9901	TMS US - USF
 	STGL	USP_US_D09	0	06/02/2016	QUSPS	00	17.00	A9901	TMS US - USF
 	STGL	USP_US_D08	0	06/02/2016	QUSPS	00	14.00	A9901	TMS US - USF
 	STGL	USP_US_D07	0	06/02/2016	QUSPS	00	12.00	A9901	TMS US - USF
 	STGL	USP_US_D06	0	06/02/2016	QUSPS	00	19.00	A9901	TMS US - USF ▼












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Each row in the grid contains commonly used transaction information. You can view additional information about a transaction by double-clicking the relevant row.

Shipments Panel, Shipment Details

Header Details

Select fields to hide  

Bill To:	<input type="text" value="Lamaal Industries(J. Morgan)"/> <input type="text" value="13 Burnett avenue"/>	Ship From:	<input type="text" value="A9901"/> <input type="text" value="Precision USA, Sales(James Young)"/> <input type="text" value="651 W Washington Blvd Chicago,IL"/> <input type="text" value="60661 USA"/>
Ship To:	<input type="text" value="Lamaal Industries(J. Morgan)"/> <input type="text" value="13 Burnett avenue"/>	Gross Weight:	<input type="text" value="45"/> LB
Despatch Date:	<input type="text" value="01/07/2007"/>	Volume:	<input type="text" value="0,01"/> M3
Carrier:	<input type="text" value="QUPS"/> 	Quantity:	<input type="text" value="20"/> PCS
Forwarder:	<input type="text"/>	Value:	<input type="text" value="207"/> USD 
Origin:	<input type="text" value="CHICAGO"/> 	Insurance Value:	<input type="text" value="100"/> USD 
Destination:	<input type="text" value="LOS ANGELOS"/> 	Payment Method:	<input type="text"/>
Country To:	<input type="text" value="US"/> 	Credit Card:	<input type="text"/>
Haulier:	<input type="text"/>	Country From:	<input type="text" value="US"/> 
Packing Location:	<input type="text" value="A9901"/>	Reference:	<input type="text" value="SPS0000"/>
Shipment Type:	<input type="text" value="EX"/> 	Route:	<input type="text" value="UPSUS001"/> 
Shipping Officer:	<input type="text"/>	Mode of Transport:	<input type="text" value="Air"/>
Deliver To:	<input type="text"/>	Office:	<input type="text"/>
Sales Organisation 2:	<input type="text"/>	Deliver From:	<input type="text"/>
Sales Organisation 4:	<input type="text"/>	Sales Organisation 1:	<input type="text"/>
Bill of Lading No:	<input type="text"/>	Sales Organisation 3:	<input type="text"/>
Customs Reference:	<input type="text" value="NEW230001"/>	Order No:	<input type="text"/>
Invoice No:	<input type="text" value="UPD00000018"/>	MAWB No:	<input type="text"/>
Forwarder Reference:	<input type="text" value="CHG233445566"/>	PO Number:	<input type="text"/>
User Defined Field4:	<input type="text"/>	Other Reference:	<input type="text" value="UPD003123"/>
Carrier A/C Number:	<input type="text"/>	Additional Reference:	<input type="text" value="SET233445566"/>
Date Created:	<input type="text" value="16/03/2017"/>	Charge Status:	<input type="text" value="Rated"/>
ETD Date:	<input type="text" value="02/07/2007"/>	Type of Movement:	<input type="text" value="LCL"/>
Extra Date:	<input type="text"/>	Date Available:	<input type="text"/>
Distance:	<input type="text" value="0"/>	ETA Date:	<input type="text" value="02/07/2007"/>
Closed:	<input type="checkbox"/>	Transit Time:	<input type="text" value="1"/> DAY
User Defined Field5:	<input type="text"/>	Delivery Terms:	<input type="text" value="EXW"/> 
		Status:	<input type="text" value="00"/> 
		User Defined Field10:	<input type="text"/>

 Close

Hold the cursor over the blue information icons to view additional information about particular fields.

If you do not want to see all of the fields shown in the image above, then use the *Select Fields To Hide* drop-down list to select fields to remove from this *Shipment Details* pop-up window, and click the *Save* icon to the right of the drop-down list. The pop-up window refreshes, hiding the selected fields. Your selection applies to subsequent viewings of the *Shipment Details* pop-up window. To restore the screen to its initial state displaying all fields, click the *abc* icon.

Exporting Search Results

To run the current search query and save the results to an Excel file, click *Search and Export*. The Excel file lists the search results and search criteria in separate worksheets. You can limit the number of rows that you can export from the search results using the REPORT: MAX EXPORT SIZE system value.

Viewing SQL Queries

Your administrator can configure the *Inquiry* page to include a *View Last SQL Query* icon below the results grid. This information is useful when you want to review search criteria that produce unexpected results.

Last SQL Query

The screenshot shows the QAD Search interface. At the top, there are search criteria and template selection options. Below this is a 'Shipments' table with columns for Client, Reference, and Despatch. A 'Last SQL Query' dialog box is open, displaying the following SQL query:

```
SELECT DISTINCT XMSHDR0.CLIENT as s1, XMSHDR0.CLIENT, SHCONO as s2, SHCONO, SHSHIP as s3, SHSHIP, SHDESP, SHDDTE, SHCCKS, SHSHPC, SHORDN as s4, SHORDN, SHCNAM as s5, SHCNAM, SHSTSF, SHCURR, SHCQTY, SHGWGT, SHWTUM, SHCUBE, SHCUUM, SHBLNO as s6, SHBLNO, SHMAWB as s7, SHMAWB, SHCUST as s8, SHCUST, SHBREF, SHNTFY, SHHAUL, SHPDTE, SHEDTE, SHSDTE, SHSCT2, SHTDTE, SHXDTE, SHPLD, SHPDES, SHTYPE as s9, SHTYPE, SHMODE, SHINVN, SHDSTR, SHVALU, SHROUT as s10, SHROUT, SHWHOUSE, SHPCOL, SHOFIC, SHCORG, SHCDT1, SHOFIC as s11, SHOFIC, SHDLVR, SHDLVRT, SHSREP, SHCNSE, SHSSTS as s12, SHSSTS, XMS2DR0.S2TPACC FROM XMSHDR0 INNER JOIN XMS2DR0 ON XMS2DR0.CLIENT = XMSHDR0.CLIENT and XMS2DR0.S2CONO = XMSHDR0.SHCONO and XMS2DR0.S2SHIP = XMSHDR0.SHSHIP and XMS2DR0.S2DESP = XMSHDR0.SHDESP AND XMSHDR0.CLIENT = 'STGL' WHERE XMSHDR0.SHSSTS = '' ORDER BY XMSHDR0.SHSHIP DESC, XMSHDR0.CLIENT ASC, XMSHDR0.SHCONO ASC, XMSHDR0.SHDESP ASC
```

Below the dialog, the 'Shipments' table is visible with a grid of data. At the bottom, there are navigation controls and a 'Tracking Number' search field.

Client	Reference	Despatch	Status
STGL	SPS0001	0	
STGL	SPS0000	0	
STGL	500125999	0	
STGL	500125880	0	
STGL	PRH211522	0	
STGL	8160285	0	
STGL	8000814	0	

The Actions column in the Shipments Panel grid contains buttons that you can click to perform the following actions:

- **Copy:** Copy the details of a shipment into Desktop Shipping to create a new shipment.
- **Recall:** Load the details of a shipment into Desktop Shipping so the shipment can be completed and processed.
- **Return:** Copy the shipment details into Desktop Shipping but reverse the direction so the new shipment represents a return shipment.

Shipment Line Details Panel

When you select a transaction in the Shipments panel, detailed information about the transaction displays in the *Shipment Line Details* panel.

Shipment Line Details Panel, Packages Tab

Packages															
Tracking Number															
Search															
Pack Number	Pack Type	Tracking Number	RFID.	Length	Width	Height	Gross Weight	Gross Weight UOM	Dimension UOM	Volume	Volume UOM	Additional Reference	COD Tracking Number		
111147	QBOX			15.00	5.00	6.00	20.00	LB	IN		M3	0000010			


Packages Tab

The *Packages* tab displays information about each package in the shipment transaction. You can use tracking numbers to search for a particular package.

Your administrator can configure the *Tracking Number* column to contain a link to the tracking facility of the carrier associated with the shipment transaction.

To view the products added to a package, click the icon in the first column of the grid.

Shipment Line Details Panel, Packages Tab with Product Information

Packages									
Tracking Number									
Search									
Pack Number	Pack Type	Tracking Number	RFID Tag	Length	Width	Height	Gross Weight	Gross Weight U...	
1571	QBOX	4723176360		31.00	26.00	12.00	1.35	KG	

Products for pack number 1571					
Product	Description	Quantity	Pack Line No	Item Line No	Aloc Line No
778836-01	Information Technology Products	1	10	1	0
185095-02	Information Technology Products	1	20	2	0

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Items Tab

This tab displays all of the items in the transaction. You can use product codes to search for a particular package.

Documents Tab

This tab lists transaction documents. Your administrator can configure this tab to contain all documents related to the transaction, or a subset of these documents. You can use document codes to search for a particular document.

All documents, apart from labels, have a PDF icon and a print icon that allow you to preview the document as a PDF file or to print the document, respectively. When you preview or print a document, any mandatory [procedure notes on page 334](#) are also displayed.

The *Preview Carrier Label* and *Print Carrier Label* icons below the grid allow you to preview and print labels, which have a document type in the range 50–59. These icons are only available for rated transactions.

Shipment Line Details Panel, Documents Tab

Documents										
Document		Search								
	Document Type	Document	Image	Description	Printer	Number of Copies	Times Printed	Note 1	Note 2	
	50	UPS_DOM				1	0			
	50	UPS_DOM2			QPDF	1	0			
	CT	COC				1	0			
	CT	COCE				1	0			
	CT	PACKLIST				1	0			

Page 1 of 1 | 1 - 5 of 5 | Preview Carrier Label | Print Carrier Label

Parties Tab

This tab includes information about parties involved in the transaction, including the consignor, consignee, carrier, customer, sales representative, shipping officer, and the deliver to and deliver from parties.

Charges Tab

This tab displays charges associated with the transaction, and includes information about the associated line item.

Errors Tab

This tab displays error messages associated with the transaction, and includes information about error overrides.

Texts Tab

This tab displays all shipment texts related to the transaction.

Child Transactions

This tab includes information about the transactions that are consolidated in the selected transaction.

Consolidations

This tab includes information about the consolidations that the selected transaction is part of.

Manual Shipment

The Manual Shipment option allows you to create a shipment using QAD GTTE rather than your ERP system. You may want to do this if you are shipping samples or documents to customers.

To access the *Manual Shipment* page, in the menu search, enter MANSH and press Enter.

In addition, it is possible to access the option from Desktop Shipping or, if configured, in the task options at the bottom of the *Workflow* page. Manual Shipment consists of two pages.

- Create Manual Shipment
- Confirmation

The Create Manual Shipment and Confirmation pages correspond to the steps involved in creating a manual shipment. The numbers at the top right of the page indicate which page you are on.

Creating a Manual Shipment

When you open Manual Shipment, the *Create Manual Shipment* page is displayed.

Create Manual Shipment

Manual Shipment Details

1 2 ☆

Consignor: A9901 Ship To: Show Address Details

Overwrite Address

Consignee: Contact: Address 1: Address 2: Address 3: Address 4: City: State/Province: Phone: Postal/Zip Code: Consignee Country: Order Number: Buyers Ref No: Service/Route: Despatch Date: 14/3/2024

Shipment Type: EX Sold To: Show Address Details

Overwrite Address

Name: Contact Name: Address 1: Address 2: Address 3: Address 4: City: State/Province: Phone: Postal/Zip Code: Customer Country: Delivery Terms: Carrier: Transport Mode: Currency:

Remove	Item	Code	Description	Quantity	Price	Weight	Size
<input type="checkbox"/>				0.0 PCS	0.0	0.0	0.0 x 0.0 x 0.0

Clear Next

The table below describes the fields on the *Create Manual Shipment* page.

Create Manual Shipment Fields

Field	Explanation
Consignor	The person or company shown on the bill of lading as the shipper.
Ship To	The address that the shipment is being sent to. To display the address, click Show Address Details. Select the Overwrite Address field if you want to amend the address.
Overwrite Address	Select this field if you want to update the address that the shipment is being sent to.
Consignee	The consignee's company name. This field only appears if you have selected the Overwrite Address field below the Ship To field.
Contact	A contact name within the Consignee company. This field only appears if you have selected the Overwrite Address field below the Ship To field.
Address 1	The first line of the customer address. This field only appears if you have selected the Overwrite Address field below the Ship To field.
Address 2	The second line of the customer address. This field only appears if you have selected the Overwrite Address field below the Ship To field.
Address 3	The third line of the customer address. This field only appears if you have selected the Overwrite Address field below the Ship To field.
Address 4	The fourth line of the customer address. This field only appears if you have selected the Overwrite Address field below the Ship To field.
City	The city in which the consignee is based. This field only appears if you have selected the Overwrite Address field below the Ship To field.
State/ Province	The state or province in which the consignee is based. This field only appears if you have selected the Overwrite Address field below the Ship To field.
Phone	The consignee telephone number. This field only appears if you have selected the Overwrite Address field below the Ship To field.
Postal/Zip Code	The consignee postal or ZIP code. This field only appears if you have selected the Overwrite Address field below the Ship To field.

Field	Explanation
Consignee Country	The country in which the consignee is based. This field only appears if you have selected the Overwrite Address field below the Ship To field.
Order Number	The order number attached to the shipment.
Buyers Ref No	The reference number of the buyer.
Service/ Route	The service or route by which the shipment is to be sent.
Despatch Date	The date when the shipment is to be despatched.
Shipment Type	The type of shipment; for example, an export shipment.
Sold To	The company code for the customer who bought the shipment. To display the address, click Show Address Details. Select the Overwrite Address field if you want to amend the address.
Overwrite Address	Select this field if you want to update the address of the company that bought the shipment.
Name	The name of the customer's company. This field only appears if you have selected the Overwrite Address field below the Sold To field.
Contact Name	A contact name within the customer company. This field only appears if you have selected the Overwrite Address field below the Sold To field.
Address 1	The first line of the customer address. This field only appears if you have selected the Overwrite Address field below the Sold To field.
Address 2	The second line of the customer address. This field only appears if you have selected the Overwrite Address field below the Sold To field.
Address 3	The third line of the customer address. This field only appears if you have selected the Overwrite Address field below the Sold To field.
Address 4	The fourth line of the customer address. This field only appears if you have selected the Overwrite Address field below the Sold To field.

Field	Explanation
City	The city in which the customer is based. This field only appears if you have selected the Overwrite Address field below the Sold To field.
State/ Province	The state or province in which the customer is based. This field only appears if you have selected the Overwrite Address field below the Sold To field.
Phone	The customer phone number. This field only appears if you have selected the Overwrite Address field below the Sold To field.
Postal/Zip Code	The customer postal or ZIP code. This field only appears if you have selected the Overwrite Address field below the Sold To field.
Customer Country	The country in which the customer is based. This field only appears if you have selected the Overwrite Address field below the Sold To field.
Delivery Terms	Terms attached to the shipment's delivery; for example, Delivery Duty Paid.
Carrier	The company transporting the shipment.
Transport Mode	The mode of transport; for example, by air or sea.
Currency	The currency in which the shipping transaction is being conducted.

The lower part of the *Create Manual Shipment* page allows you to enter line item details. The table below describes the fields in the line item details section.

Line Item Fields

Field	Explanation
Code	The product code for the items.
Description	A description of the product being shipped. Click Show Product Details to display details of the product.
Quantity	The number of units in the line item. Use the lookup field next to the Quantity field to specify the unit of measure (UOM).
Price	The cost of the items.
Weight	The weight of the line item. Use the lookup field next to the Weight field to specify the UOM.

Field	Explanation
Volume	The volume of the line item. Use the lookup field next to the Volume field to specify the UOM.
Size	Specify the size of the line item in terms of length, width, and height. Use the lookup field next to the Size field to specify the UOM.

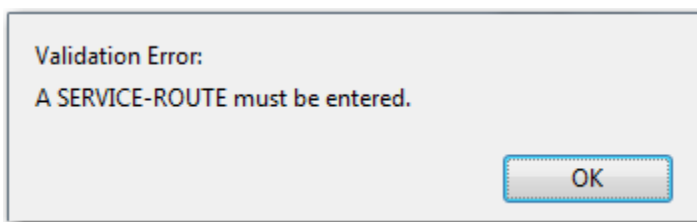
To add more line items, click the *Add Item* icon. To delete a line item, select the *Remove* field to the left of it and click the *Delete Items* icon.



Click the *Clear Form* icon to clear all fields.

Mandatory fields appear in blue, with the exception of the *Code* field in the line items section, which appears in white. After you complete the mandatory fields, click *Next* to create the manual shipment. You receive a validation error if you have not completed the mandatory fields correctly.

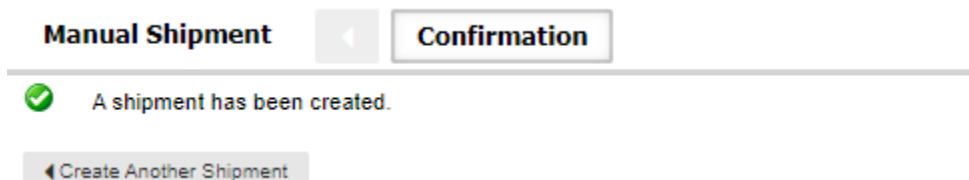
Create Manual Shipment Validation Error



Confirmation

After you click *Next*, the *Confirmation* page is displayed, including the reference number for the manual shipment you have created. To create another shipment, click *Create Another Shipment*.

Confirmation



Creating a Manual Shipment in the Workflow Portal

If your system is configured to display the *Create Shipment* toolbar button, you can create a manual shipment from the Workflow Portal. On the *Workflow Portal* page, click the *Create Shipment* button in the toolbar. The *Create Shipment* pop-up window is displayed.

Create Shipment Pop-up Window

The *Create Shipment* pop-up window in the Workflow Portal provides more functionality than the stand-alone *Create Manual Shipment* page. It allows you to create a manual shipment and save the shipment as a template, so you can create similar manual shipments in the future. It also allows you to update line items after you have created them.

The table below describes the fields in the *Create Shipment* pop-up window.

Create Shipment Fields

Field	Explanation
Consignor	The person or company shown on the bill of lading as the shipper.
Ship To	This is the partner that the shipment is being sent to. Select the partner using the lookup button, or click

Field	Explanation
	Once Off Shipment if this is a once-off shipment to a company that is not a partner. You might use the Once Off Shipment option if you are sending a sample to a prospective partner. Select the Overwrite Address field if you want to amend the address.
Overwrite Address	Select this field if you would like to update the ship to address and telephone number. The address and telephone fields will appear on the screen so that you can update them.
Order Number	The order number associated with the shipment.
Buyer's Ref No	The reference number associated with the buyer.
Service/Route	The service or route by which the shipment is to be sent.
Despatch Date	The date when the shipment is to be despatched.
Shipment Type	The type of shipment; for example, an export shipment.
Customer	The customer the shipment is being sent to.
Overwrite Address	Select this field if you would like to update the customer address and telephone number. The address and telephone fields will appear on the screen so that you can update them.
Delivery Terms	Terms attached to the shipment's delivery; for example, Delivery Duty Paid
Carrier	The company transporting the shipment.
Transport Mode	The mode of transport; for example, air or sea.
Currency	The currency in which the shipping transaction is being conducted.

The *Add New Item* section allows you to provide information on a shipment item line.

You must add at least one item line to the shipment before you can create the shipment.

Add New Item Fields

Field	Explanation
Product Code	The product code for the items being shipped. Use the lookup field to specify the product code.

Field	Explanation
Product Description	A description of the product being shipped.
Quantity	The number of items in the line item. Use the lookup field next to the Quantity field to specify the unit of measure (UOM).
Weight	The weight of the line item. Use the lookup field next to the Weight field to specify the UOM.
Net Weight	The net weight of the line item. Use the lookup field next to the Weight field to specify the UOM.
Volume	The volume of the line item. Use the lookup field next to the Volume field to specify the UOM.
Customs Value	The customs value of the line item. Use the lookup field next to the Volume field to specify the currency.
Freight Class	The freight class associated with the shipment.
Country of Origin	The country where the line item originated.
Customs Classification Group	The customs classification group associated with the line item.
Customs Classification Code	The customs classification code associated with the line item.
Customs Classification Description	A description of the customs classification that applies to the line item.
NAFTA Preference Criterion	North American Free Trade Agreement (NAFTA) criterion.
NAFTA Producer	North American Free Trade Agreement (NAFTA) producer.
NAFTA Net Cost	North American Free Trade Agreement (NAFTA) net cost.
NAFTA Country of Origin	North American Free Trade Agreement (NAFTA) country of origin.
Domestic/Foreign	Specify whether the shipment associated with the line item is domestic or foreign.
Type of Export	Specify whether this is a permanent export, a temporary export, or another type of export.
UN Class	Specify the UN class associated with the item.

Most mandatory fields appear in blue, with the exception of the *Code* field in the line items section. You will see a validation error if you do not fill in all mandatory fields.

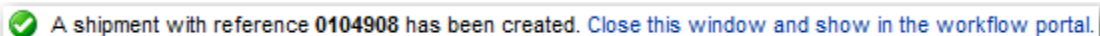
When you have filled in the details for a line item, you can add it to the shipment by clicking the *Add Item* icon, or by using the shortcut Ctrl+F2. The line item will appear in the list to the right of the line item fields.

To update a line item, select it in the product list and click the *Update* button. Update the contents of the line item fields and click *Update* to save your changes. To discard your changes, click *Cancel*.

To remove a line item from the list, select the item and click the *Delete* button, or press the *Delete* button on your keyboard. A message is displayed, asking if you are sure you want to delete the item. Click *OK*.

When you complete the details of the manual shipment, click the *Create* button at the bottom of the screen or use the shortcut key F2 to create the shipment. A confirmation message is displayed at the top of the *Create Shipment* pop-up window.

Create Shipment Confirmation Message

A confirmation message box with a green checkmark icon on the left. The text reads: "A shipment with reference 0104908 has been created. [Close this window and show in the workflow portal.](#)"

✔ A shipment with reference 0104908 has been created. [Close this window and show in the workflow portal.](#)

To close the *Create Shipment* pop-up window and display the shipment in the Workflow Portal, click the message or click the *Close* button at the bottom of the screen.

Manual Shipment Templates

If you regularly create manual shipments with particular field values, you may want to create a template. To do this, enter a template name in the *Save Template* field and click the *Save* button when you have filled in the desired fields. To use an existing template, select the template name from the *Load Template* drop-down list. To remove a template, select it from the list and click the *Delete* button.

General Maintenance

Depending on how your administrator has configured the application, you may have access to maintenance features, including Maintenance Man and Multi Language Support (MLS).

Maintenance Man

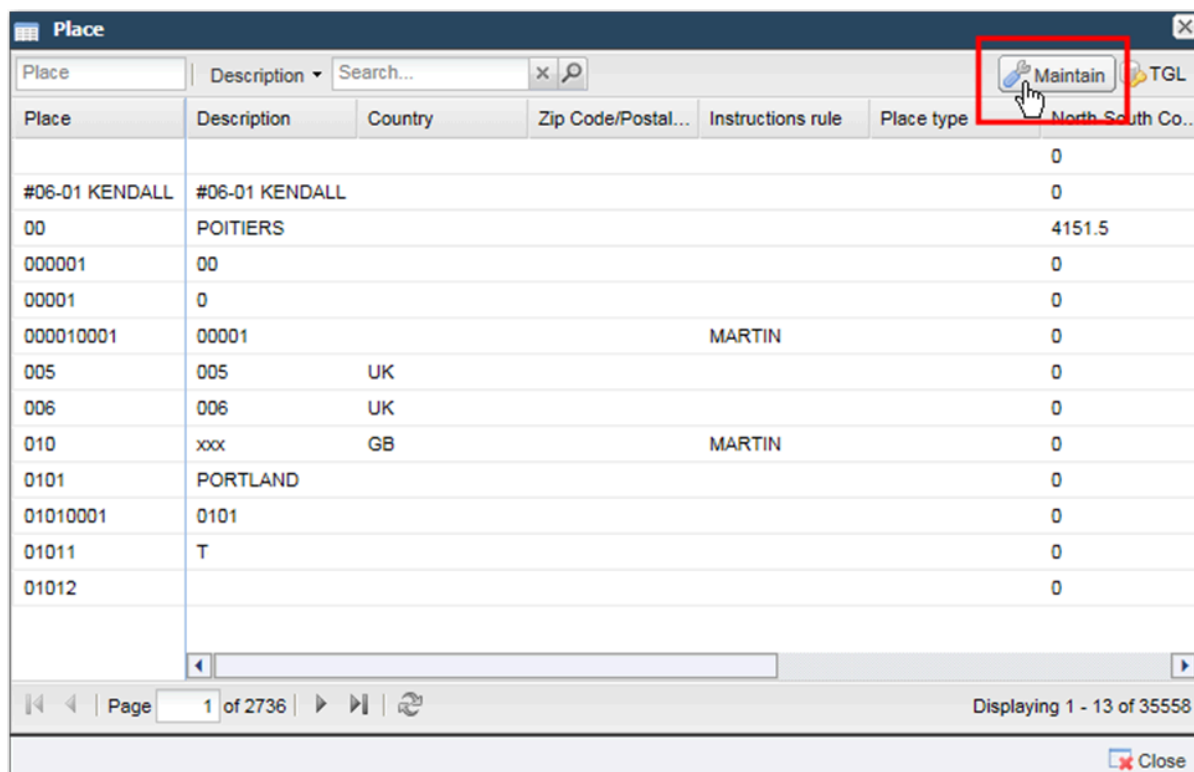
A number of options and sub-options include Maintenance Man functionality.

Options with Maintenance Man Functionality

Option	Description
ZS	Shipment Types
PT	Payment Terms
PY	Pack Types
CH	Charge/revenues
PL	Places
NO	Notes
CL	Client
LN	Packing Location

If the administrator has given you the requisite permission, a *Maintain* link displays in the selection list pop-up window for these options. Click *Maintain* to access a page that allows you to maintain the master data associated with these options.

Maintenance Man Link

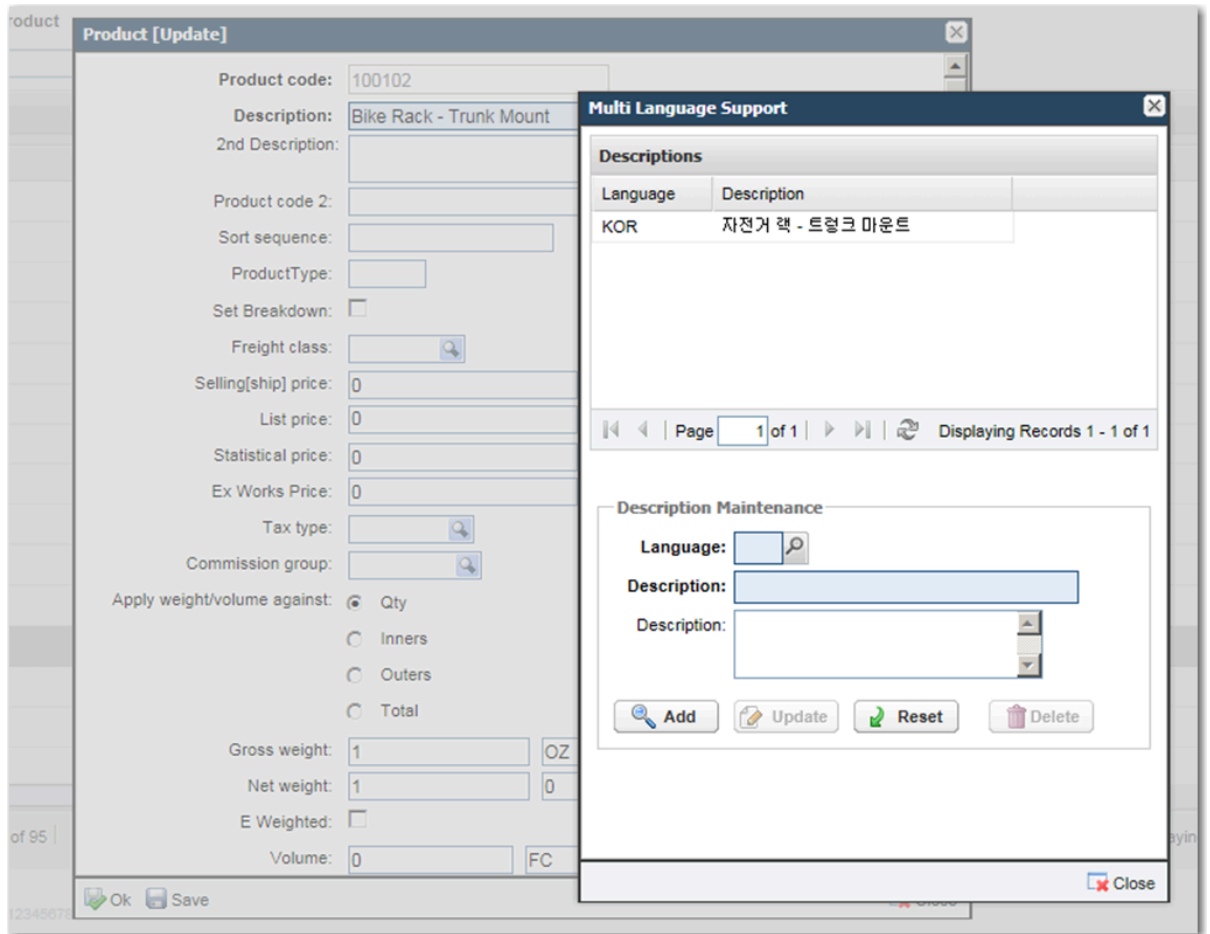


Place	Description	Country	Zip Code/Postal...	Instructions rule	Place type
					0
#06-01 KENDALL	#06-01 KENDALL				0
00	POITIERS				4151.5
000001	00				0
00001	0				0
000010001	00001			MARTIN	0
005	005	UK			0
006	006	UK			0
010	xxx	GB		MARTIN	0
0101	PORTLAND				0
01010001	0101				0
01011	T				0
01012					0

Multi-Language Support

General maintenance pages now support the ability to enter multi-language support (MLS) data. When a field has data entered, select F8 to view the *Multi Language Support* pop-up window.

Multi-Language Support



Address Verification

The address verification tool, powered by Loqate, can be configured to automatically verify addresses when shipments are created. You can also manually verify addresses in the Partners - Address Changes and the SPS Manifest & Rate workflow tasks.

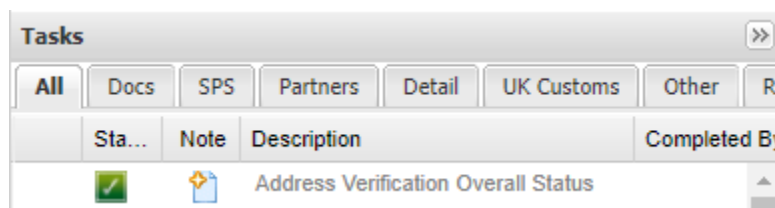
To perform address verification, configure the Maintain Workflows screen (menu option WF) and the Configure Address Verification screen (menu option CFGAV). For more information, see [Address Verification Configuration on page 503](#) in the Administration section.

Automatic Address Verification

After configuration, address verification runs in the background when a shipment is created. A read-only workflow task called *Address Verification Overall Status* shows whether the shipment address passed or failed verification.

A passing address is represented by a green tick icon in the *Status* column of the task. No action is necessary if the address passes verification.

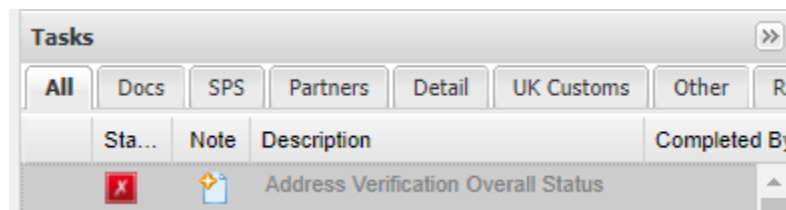
Passing Address



Tasks						
All	Docs	SPS	Partners	Detail	UK Customs	Other
Sta...	Note	Description	Completed By			
✓	📄	Address Verification Overall Status				

A failing address is represented by a red X icon in the *Status* column. If configured, *SPS Manifest & Rate* task processing is not allowed until the address passes verification. See [Blocking the SPS Manifest & Rate Workflow Task if Address Verification Fails on page 521](#).

Failing Address



Tasks						
All	Docs	SPS	Partners	Detail	UK Customs	Other
Sta...	Note	Description	Completed By			
✗	📄	Address Verification Overall Status				

Manual Address Verification

You can manually run address verification when you save a partner address in the Workflow Portal.

Partners - Address Changes Address Verification

To perform address verification on the *Partners - Address Changes* workflow task, select the *Verify Address* checkbox and click the *Save* button.

Verify Address Checkbox on the Partners - Address Changes Workflow Task

The screenshot displays the 'Partners - Address Changes' workflow task interface. On the left, a 'Partner Roles' sidebar lists 'Customer' (with an orange icon), 'Ship To' (with a green shield icon), 'Shipper', and 'Third Party'. The main form area contains the following fields and controls:

- Name:** [Text Field]
- Contact:** John Doe
- Address Line 1:** [Text Field]
- Address Line 2:** [Text Field]
- Address Line 3:** [Text Field]
- Address Line 4:** [Text Field]
- Address Line 5:** [Text Field]
- City:** SAN MATEO [Text Field]
- State:** CA [Text Field]
- County:** [Text Field]
- Postal Code:** [Text Field]
- Country:** US [Text Field]
- Phone Number:** [Text Field]
- Fax Number:** [Text Field]
- Email:** [Text Field]
- Consignee Type:** [Text Field]

At the bottom of the form, there is a checked checkbox for **Verify Address** and three buttons: **Save**, **Pass Manually**, and **Reset Address**.

If an address passes verification, a green shield icon appears beside the relevant partner role.

If the address fails to meet the validity threshold, a red icon appears beside the relevant partner role.

In some cases, an orange icon displays. This indicates that the current status is unknown because address verification did not run, or the address changed and the *Verify Address* checkbox was cleared.

You can override address verification. Click the *Pass Manually* button to submit the address, even if it fails address verification.

When an address fails verification, Loqate autofills a suggested address in the *Address Verification* window. Click the *Accept* button to accept the suggestion, or the *Ignore* button to disregard the suggestion and keep the original address that you submitted.

Note The Loqate API that is used is configured to suggest only one address. If the suggestion is ignored, it does not suggest another address.

Address Verification Window

Address Verification

A similar address was detected. Please see the suggested address below.
Address verified at premises (or building).
The quality test has failed.

Name:

Contact:

Address Line 1:

Address Line 2:

Address Line 3:

Address Line 4:

City:

State:

County:

Postal Code:

Country:

SPS - Manifest & Rate Address Verification

Address verification in the *SPS - Manifest & Rate* task is similar to *Partners - Address Changes*. You can configure [Automatic Address Verification on page 165](#) so that, if an address fails verification, the task displays the error message *Processing is not allowed due to Address Verification Overall Status task failure* on the *Details* tab. If the error appears, you can manually verify the addresses for the partner roles that are enabled for address verification on the *Parties* tab. Additionally, on the *Parties* tab, you can configure the addresses that you can verify for these partner roles.

Failed Address Verification in SPS - Manifest & Rate

The screenshot displays the 'SPS - Manifest & Rate' application window. The 'Parties' tab is active, showing a form for 'Test Address'. The form includes fields for Name, Contact (Jane Doe), Address Line 1-4, City (CHARLOTTE), State (NC), County, Postal Code, Country (US), Phone Number, Fax Number, Email, and Consignee Type. A 'Verify Address' checkbox is checked. Below the form are three buttons: 'Save', 'Pass Manually', and 'Reset Address'. The 'Ship To' role is highlighted with a red 'X' icon.

Similar to the *Partners - Address Changes* task, you can click *Pass Manually* to override address verification.

Address Verification Score

Each address gets a score to indicate its proximity to the pass threshold, which is set during configuration—see [Address Verification Configuration on page 503](#). To view the score and a tooltip that explains how the scores are calculated, click the information icon on the *Address Verification* window.

The score is a combination of Verification Status and Verification Match scores. Examples of scores include V4 and P0. Verification Status—the letter in the score—assesses the match between the submitted address and a single record from Loqate. Verification Match—the number in the score—measures the level to which the address matches the Loqate record.

Verification Status

Score	Meaning	Description
V	Verified	The submitted address is a complete match to the Loqate record.
P	Partially	The submitted address is a partial match to the Loqate record.
U	Unverified	Loqate is unable to verify the record, but there are no suggested changes.
A	Ambiguous	There is more than one close match for the address in Loqate's records. The address may require more specific information.
R	Reverted	The address is not verified to the configured level, so there are no suggested changes.

Verification Match Scores

Score	Description
5	The address matches a record of a delivery point in Loqate's records.
4	The address matches a record of a premises.
3	The address matches a record of a thoroughfare.
2	The address matches a record of a locality.
1	The address matches a record of an administrative area.
0	There is no Loqate record that matches the submitted address.

The score is measured as greater than or equal to the pass threshold. For example, if the threshold on the *Configure Address Verification* page is set to V4, passing scores include V4 and V5. Failing scores include V3, V2, V1, V0, P5, P4, P3, P2, P1, or P0.

Base Administration


This section describes how to configure various elements of the Web UI based on your users' and organization's needs.

- [Web UI Configuration on page 171](#)
- [Packing Locations on page 189](#)
- [Authentication on page 191](#)
- [User Role Configuration on page 219](#)
- [Permissions on page 249](#)
- [Workflow on page 271](#)
- [Rules and Rulebooks on page 323](#)
- [Scan, Pack and Ship on page 400](#)
- [Consolidate and Ship on page 453](#)
- [Inquiry on page 459](#)
- [Manual Shipment on page 465](#)
- [System Values on page 473](#)
- [Translations on page 478](#)
- [General Administration on page 494](#)
- [Address Verification Configuration on page 503](#)
- [Printers on page 524](#)
- [Locales on page 532](#)
- [Web UI Workflow Tasks on page 535](#)
- [Inquiry System Values on page 543](#)
- [List of Dynamic Fields on page 549](#)

Web UI Configuration

This section describes how to configure the appearance of the Web UI using the Configure Main Menu screen, menu option CFGMM, which provides fields through which you can update system values. The system values are identifiable from the help tooltip for each field. Configuration of the system values through these fields applies at the global level for all users. If you want to configure the button at a more granular level, click the Maintain System Value icon to the right of the relevant field. You can then configure the corresponding system value at the user, client, or group level.

The Configure Main Menu screen primarily allows you to configure settings at a global level. However, it is possible to configure settings at

a client and user level using the Maintain System Value icon . User level is the most granular level at which you can configure settings. User-level values override client-level values, which in turn override global-level values.

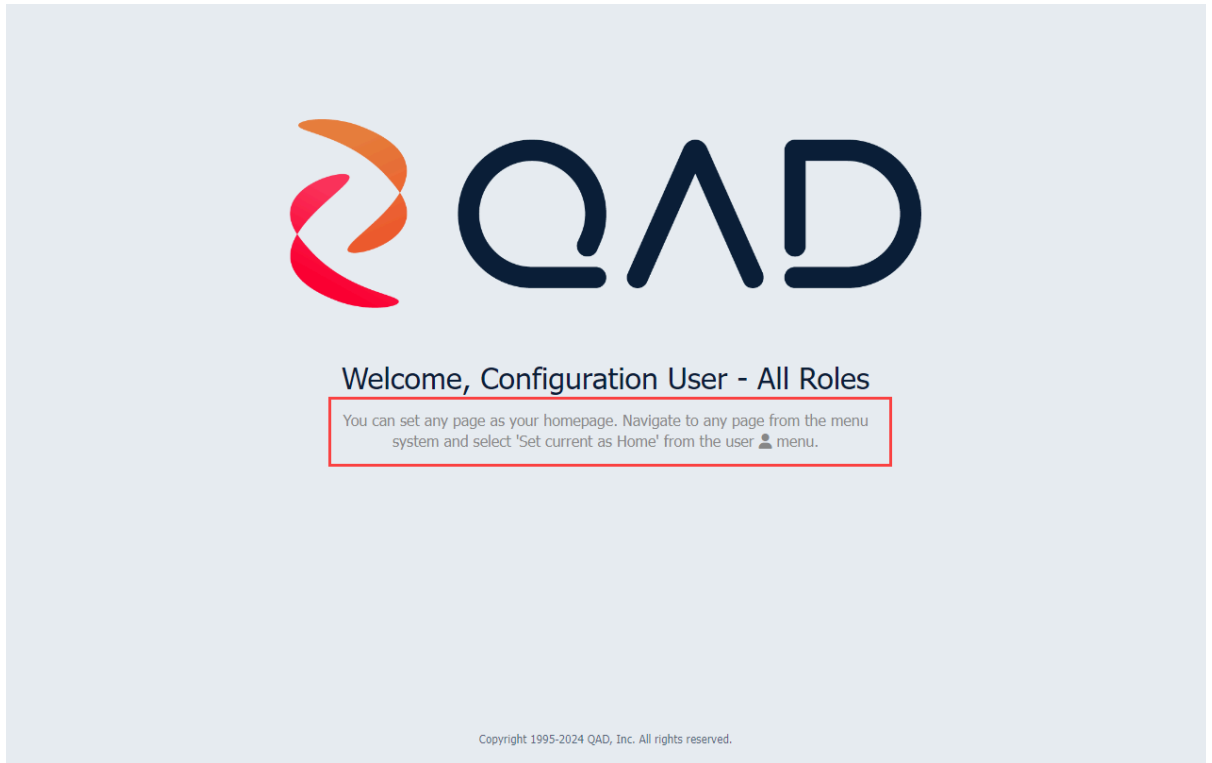
For more details on setting up users, see [User Role Configuration on page 219](#).

For information on how to create a new role menu, see [Configuring Effective User Roles on page 223](#).

Configuring the Welcome Page

The *Welcome* page, accessible through the WELCOM option, is the default home page. The page always contains the text Welcome, <USER_DESCRIPTION> , where <USER_DESCRIPTION> is the value of the *Description* field in the relevant user record in option US.

Welcome Page with Modifiable Text



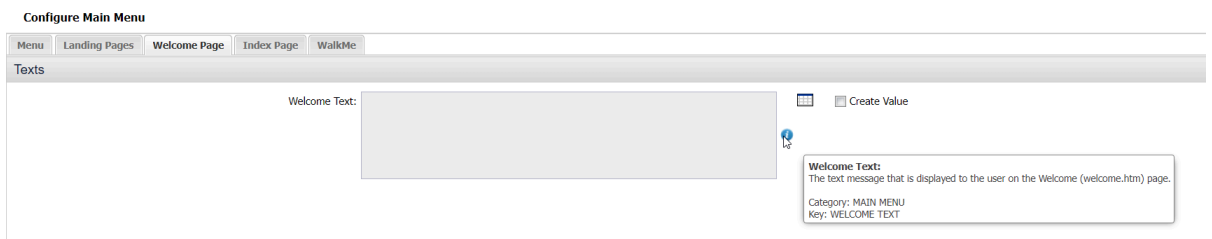
You can use the WELCOME TEXT system value to configure additional text that displays on the page.

WELCOME TEXT System Value

Category	Key	Description
MAIN MENU	WELCOME TEXT	Specify the welcome text that you want to appear on the <i>Welcome</i> page. Default value: You can set any page as your homepage. Navigate to any page from the menu system and select 'Set current as Home' from the user {0} menu.

You can also set this value in the *Welcome* page tab of option CFGMM, where the help tooltip identifies the related system value.

Option CFGMM, Welcome Page



Specifying the Home or Landing Page

When a user clicks on the logo on the top left of the main menu, the home page opens. The home page is determined based on the default home page value in the user record. This value is set when the user selects Set Current as Home from the user menu on the main menu. If the user has not set this value, then the home page is determined based on the HOME URL system value. If this value is not set, then the home page is set to the Welcome page.

When a user logs in to the Web UI, the landing page is determined based on a number of settings:

- If the user is being redirected from an external system, the landing page is based on the URL specified by the external system.
- If the user is logging in to the Web UI directly, the landing page is determined by the value in the ONLOGIN URL system value. If this value is not set, then the landing page is set to the default home on user record, which is set when the user selects Set Current as Home from the user menu on the main menu. If this value is not set, then the landing page is based on the HOME URL system value. If the HOME URL system value is not set, then the landing page is determined by the url.home property in the precision.properties file. Otherwise, the landing page is set to the Welcome page.

To set the default home page and landing page for the system, use the Landing Pages tab of option CFGMM, or update the HOME URL and ONLOGIN URL system values directly.

Option CFGMM, Landing Page

Configure Main Menu

Menu Landing Pages Welcome Page Index Page WalkMe

Default URLs

On Sign In URL: ⓘ ⌵

Home URL: ⓘ ⌵

System Values for the Home Page

Category	Key	Description
ITRAX	HOME URL	Specify the default home page URL when there is no home page option set on the user profile. Example: /htm/welcome.htm Default value: blank. When this system value is blank, the Welcome page displays on the page.

Category	Key	Description
ITRAX	ONLOGIN URL	When a user logs in, if there is no home page option set on the user profile, then the application accesses this URL. Example: /htm/workflow.htm Default value: This system value is blank by default.

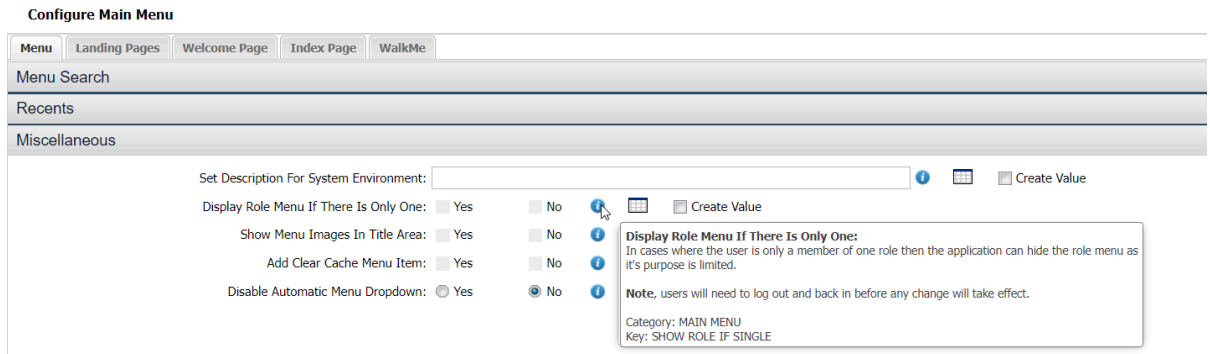
Configuring the Main Menu

Hiding the Role Menu

You can specify that the role menu does not appear in the main menu. This is useful when a user has only one role, and this user does not need to switch between roles.

To hide the role menu, set the Display Role Menu If There Is Only One field in option CFGMM to No. This field corresponds to the SHOW ROLE IF SINGLE system value. Ensure that you log out and log back in so that the setting is updated.

Option CFGMM, Hiding the Role Menu



SHOW ROLE IF SINGLE SYSTEM VALUE

Category	Key	Description
MAIN MENU	SHOW ROLE IF SINGLE	Possible values: true—the role menu appears in the main menu false—the role menu does not appear in the main menu Default value: true

Configuring the Role Menu Option Icons

You can configure the icons that appear in the role menu options. The Web UI ships with the Font Awesome library, which you can use to define the icons on the menu and pages.

Menu icons are stored in option UY, in the OPTIONPURPOSE lookup domain.

Option UY, OPTIONPURPOSE Lookup Domain

Lookup domain: Description

User Defined Lookup Domain

Lookup domain	Description
OPTIONPURPOSE	Option Purpose
* User defined lookup codes by domain	

User defined lookup codes by domain

Lookup code: Language:

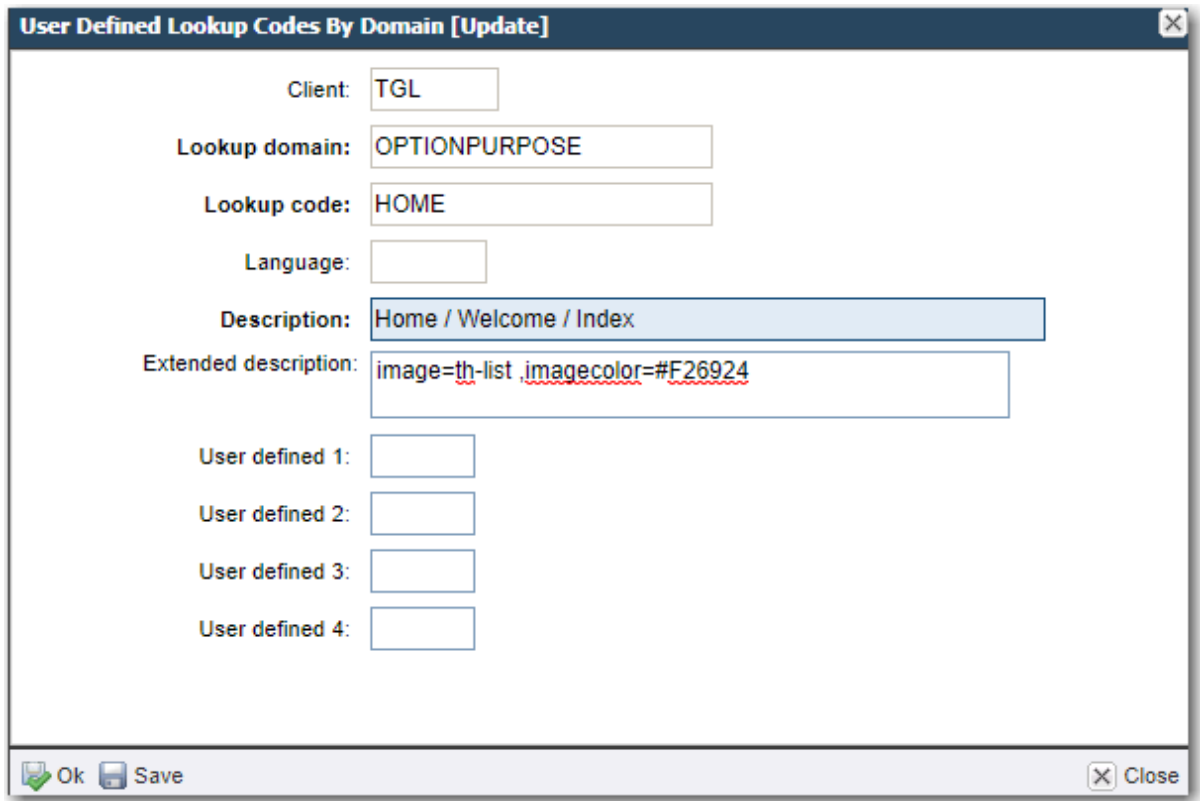
[User Defined Lookup Domain](#) - User Defined Lookup Codes By Domain

Lookup Code	Language	Description
ANALYTICS		Analytics/Dashboards
DEFAULT		Maintenance
EXTERNAL		External
FOLDER		Folder
HOME		Home / Welcome / Index
MAINTAIN		Maintenance
REPORT		Reports/Inquiries
TOOL		Tools
WORK		Work with transactions (Processing)

Each entry consists of:

- Lookup Code
- Extended description:
 - image: the icon name used in the Font Awesome toolkit, with fa- (the first three characters) removed.
 - image-color: the icon color

Option UY, Home Icon Entry



User Defined Lookup Codes By Domain [Update]

Client: TGL

Lookup domain: OPTIONPURPOSE

Lookup code: HOME

Language:

Description: Home / Welcome / Index

Extended description: image=th-list ,imagecolor=#F26924

User defined 1:

User defined 2:

User defined 3:

User defined 4:

Ok Save Close

You can configure menu icons at the option level or menu item level.

To configure menu icons at the menu item level:

1. Access option GN.
2. Select the menu entry for which you want to add or update the menu icon, and click the *Update Record* button in the toolbar; the *Menu Structure [Update]* pop-up window displays.
3. In the *Image File Name* field, specify the Font Awesome title for the icon, or specify the lookup code from the relevant OPTIONPURPOSE entry in option UY.

Menu Structure [Update] Pop-Up Window

Menu Structure [Update]

Menu: EC001

Option number: 10

Option type: SubMenu/Option
 Help
 Heading
 Ruler
 Skip

Module:

Option: CKHIST

Program type: 50

URL (Server:Port/Context):

URL (/Path):

Skip after
 Rule after
 Rule before
 Skip before

Image file name:

Description: Review Results

In use

Ok Save Close

4. Click OK.

To configure menu icons at the option level:

1. Access option GO.
2. Select the option for which you want to add or update the menu icon, and click the Update record in the toolbar; the Options [Update] pop-up window displays.
3. In the Purpose field, specify the lookup code from the relevant OPTIONPURPOSE entry in option UY.

Options [Update] Pop-Up Window

The screenshot shows the 'Options [Update]' window with the following fields and values:

- Option: CKHIST
- Program type: 50
- Description: Compliance History Search
- Program: -
- Program parameters: (empty)
- Web UI URL: /htm/compliance-history-search.htm
- Web UI Dependencies: /htm/compliance-history-search.ajax
- Purpose: REPORT
- Mandatory fields: (empty)
- Protected fields: (empty)
- Menu bar menu: LEVEL0
- Sub type: Option
- VRC code: *STANDARD
- Option security code: plpHapcdhqkeBdDc
- Image file name: (empty)
- SHDR transaction type: S
- GRUP transaction type: L
- Option Level: Other
- Next option: (empty)
- In use
- Message Id: (empty)
- Help label, Help folder, Help document: (empty)

4. Click OK.

The image and image color apply to all menu entries for this GO option.

Configuring the Menu Search

Option CFGMM allows you to configure the Menu Search. The fields in the *Menu Search* and *Recents* sections of the *Menu* tab relate to system values in the table below. Mouseover the help icon for each field to identify the specific system value.

Option CFGMM, Main Menu

Configure Main Menu

Menu | Landing Pages | Welcome Page | Index Page | WalkMe

Menu Search

Display Fastpath Codes: Yes No ? 📄 Create Value

Search Menu Shortcut: ? 📄 Create Value

Additional Options Available In Menu Search: + ? 📄

Select Records

- HOME
- INDEX
- LOGOUT
- WELCOM
- CHGSES
- NETCHG

Additional Options Available In Menu Search:
A list of options that will also list when searched for in the menu search.
Note: users will need to log out and back in before any change will take effect.
Category: MAIN MENU

Recents

Display Recently Used Options: Yes No ? 📄 Create Value

Maximum Recent History Length: ? 📄 Create Value

URLs Blacklisted From Recent History: ? 📄 Create Value

Miscellaneous

Set Description For System Environment: ? 📄 Create Value

Menu System Values

Category	Key	Description
MAIN MENU	SHOW MENU FASTPATH	<p>Possible values:</p> <ul style="list-style-type: none"> true—option code displays in menu search results false—option code does not display in menu search results <p>Default value: true</p>
MAIN MENU	USER MENU SHORTCUT	Specify the shortcut keys that open the menu search. Default value: Ctrl +M
MAIN MENU	ADDITIONAL AVAILABLE OPTIONS	The Menu Search searches the role menu options for text specified in the Menu Search text field. If you want the Menu Search to search other options apart from the user's role menu options, then specify these options in the comma-separated list. Possible values, which can be

Category	Key	Description
		<p>combined in a comma-separated list:</p> <ul style="list-style-type: none"> • HOME • INDEX • LOGOUT • WELCOM <p>Example: HOME,LOGOUT</p> <p>Default value: HOME,INDEX,LOGOUT,WELCOM</p>
MAIN MENU	SHOW RECENTLY USED	<p>Possible values:</p> <ul style="list-style-type: none"> • true—recently used options are shown in the Menu Search and in the Index option • false—recently used options are not shown in the Menu Search and in the Index option <p>Default value: true</p>
MAIN MENU	NUM RECENTLY USED	<p>Specify the number of recently used options that are shown in the Menu Search and in the Index option.</p> <p>Default value: 5</p>
MAIN MENU	RECENTLY USED BLACKLIST	<p>Specify a comma-separated list of URLs that the application does not include in the recently used options in the Menu Search and Index option.</p> <p>Default value: blank—an empty list</p>

Configuring the User Menu

Use the *Show Menu Images In Title Area* field of the CFGMM option to specify whether you want to provide the *Clear All Server-Side Caches* option appear in the User Menu. This field corresponds with the ALLOW CLEAR CACHE system value.

CFGMM Option, Main Menu Tab, Miscellaneous Settings



Configure Main Menu



Menu Landing Pages Welcome Page Index Page WalkMe



Menu Search

Recents


Miscellaneous

Set Description For System Environment:   Create Value

Display Role Menu If There Is Only One: Yes No   Create Value

Show Menu Images In Title Area: Yes No   Create Value

Add Clear Cache Menu Item: Yes No

Disable Automatic Menu Dropdown: Yes No 

Show Menu Images In Title Area:
Controls if the menu image is shown to the left of the page title.

Category: MAIN MENU
Key: SHOW TITLE IMAGES

User Menu System Values

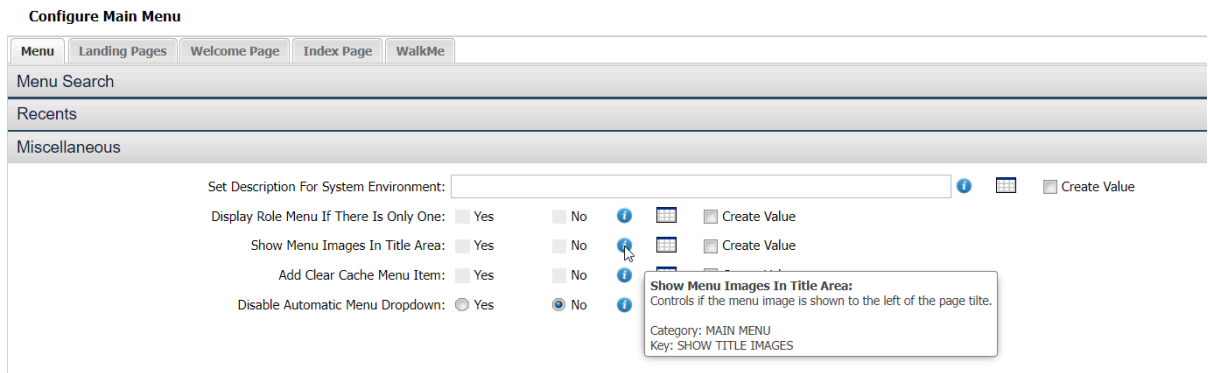
Category	Key	Description
MAIN MENU	ALLOW CLEAR CACHE	<p>Possible values:</p> <ul style="list-style-type: none"> true—the Clear All Server-Side Caches option is available in the User Menu. If this system value is set to true, the CSFR protection must be disabled so that the menu entry displays in the User Menu. If CSRF protection is enabled, then this menu option does not appear, even when ALLOW CLEAR CACHE is set to true. To disable CSRF protection, set the precision.security.csrf.token.validation property to no; this is the default setting. false—the Clear All Server-Side Caches option is not available in the User Menu <p>Default value: false</p> <p>Note If this property is set to true, it should not be changed to false without giving proper consideration to the web security requirements of the organisation.</p>
SYSTEM	ENVIRONMENT TAG	Specify a system environment description that the user sees in the Profile pop-up window that appears when a user clicks the Profile option in the User Menu.

Configuring the Title Area

The title for the option shown in the Title Area is determined by the Description value for the related menu record in option GN. For more details on setting up menu records in GN, see the [Creating a Menu for a Role](#) section in [Configuring Effective User Roles on page 223](#).

Use the Show Menu Images In Title Area field of the CFGMM option to specify whether you want to make the icon from the role menu appear in the Title Area of the current option. This field corresponds with the SHOW TITLE IMAGES system value.

CFGMM Option, Main Menu Tab, Miscellaneous Settings



SHOW TITLE IMAGES System Value

Category	Key	Description
MAIN MENU	SHOW TITLE IMAGES	<p>Possible values:</p> <ul style="list-style-type: none"> true—icon displays in the Title Area false—icon does not display in the Title Area <p>Default value: false</p>

Index Page

The *Index* page, accessible from the INDEX option, allows you to display useful links by category. Each tile or section contains a title and a set of links, and each link may have explanatory text. You can configure the links on each tile, apart from the *Recent* tile. The *Recent* tile displays recently accessed options; you can choose to hide the Recent tile so that it does not display on the page.

While it is recommended that you configure access to pages for users using the Effective User role-based menu, the INDEX page is useful if you want to organize links into a number of categories for users—for example to reflect the functionality available in a particular QAD GTTE module. The image below shows a tile with Base functionality.

Index Page Tile for Base Functionality

Index

The screenshot displays a dashboard with several tiles:

- Recent**: A list of recent actions including [Index](#), [Manual Shipment](#), [Scan and Pack](#), [Ad hoc Compliance](#), and [Workflow Portal](#), with a [Clear](#) button.
- Base** (highlighted with a red border): A list of tasks such as [Workflow Portal](#), [Inquiry](#), [Manual Shipment](#), [Scan, Pack and Ship](#), [Scan and Pack](#), [Scan and Rate](#), [Consolidate and Ship](#), [Shipment Consolidation](#), [Order Consolidation](#), and [Zone Skip](#).
- Transportation Management**: Includes [Routing Guide](#), [Desktop Shipping](#), [Mailing List Ship](#), [Cancel / Reprint Label](#), [EOD Manifest](#), and [Rate Shop](#).
- Delivery Exception Management**: Includes [Deliveries](#).
- Trade Compliance**: Includes [Audit](#), [Adhoc Screening](#), and [Batch DPL Data Scrub](#).
- Freight Bill Audit & Payment**: Includes [Invoices](#), [Shipments](#), and [Payment Batches](#).
- Admin**: A search bar and a list of administrative tasks including [Clear Caches](#), [System Values Maintenance](#), [Configure Rules and Rulebooks](#), [Configure Workflow](#), [Mailing Lists Maintenance](#), [Configure Shipment Consolidation](#), [Configure Order Consolidation](#), [Configure Zone Skip Consolidation](#), [Configure Compliance](#), [Compliance Questionnaires](#), [Configure Package Exception Management](#), [PEM Master Shipping Plans](#), [XML Upload](#), [Log Files](#), and [Configure Mailing Lists](#).

[Session Details](#)

Configuring the Index Page

The six configurable tiles are positioned on the page according to the labels in the image below. The six tiles or sections are arranged in three columns and two rows; for example, the Trade Compliance tile in the image below is positioned in section two, which is in column one and row two.

Index Page Sections or Tiles

Index

The screenshot displays a web interface with several sections:

- Recent:**
 - [Index](#)
 - [Manual Shipment](#)
 - [Scan and Pack](#)
 - [Ad hoc Compliance](#)
 - [Workflow Portal](#)
 - [Clear](#)
- Base:**
 - [Workflow Portal](#)
Perform a range of tasks on a shipment.
 - [Inquiry](#)
Specify shipment details and pull up shipment information.
 - [Manual Shipment](#)
Manually create a new shipment.
 - [Scan, Pack and Ship](#)
Scan, pack and ship.
 - [Scan and Pack](#)
Scan, pack and ship.
 - [Scan and Rate](#)
Scan, rate and ship.
 - [Consolidate and Ship](#)
Consolidate and Ship.
 - [Shipment Consolidation](#)
Build consolidations (X) from shipments (S).
 - [Order Consolidation](#)
Build shipments (S) from orders (O).
 - [Zone Skip](#)
Build zone skip consolidations.
- Trade Compliance:**
 - [Audit](#)
Examine previous compliance requests and view their results.
 - [Adhoc Screening](#)
Check an address against denied party, embargoed country lists and more.
 - [Batch DPL Data Scrub](#)
Screen addresses by uploading a CSV file with your address data.
- Transportation Management:**
 - [Routing Guide](#)
Maintain routing guide setup.
 - [Desktop Shipping](#)
Let desktop shipping walk you through creating a parcel shipment.
 - [Mailing List Ship](#)
Ship to a mailing list.
 - [Cancel / Reprint Label](#)
Specify a shipment to be cancelled or reprint a shipment or package label.
 - [EOD Manifest](#)
Perform carrier end of day batch processing.
 - [Rate Shop](#)
Enter a ship from and ship to and view possible rates from various carriers.
- Freight Bill Audit & Payment:**
 - [Invoices](#)
Work with invoices.
 - [Shipments](#)
Work with shipments.
 - [Payment Batches](#)
View payments and produce reports.
- Delivery Exception Management:**
 - [Deliveries](#)
Work with deliveries and manage exceptions.
 - Admin**
 - [Clear Caches](#)
Clear server side cached data.
 - [System Values Maintenance](#)
Maintain system values.
 - [Configure Rules and Rulebooks](#)
Maintain rules and rulebooks.
 - [Configure Workflow](#)
Maintain workflows and tasks.
 - [Mailing Lists Maintenance](#)
Create or edit mailing list addresses.
 - [Configure Shipment Consolidation](#)
View and edit all configurations for this option.
 - [Configure Order Consolidation](#)
View and edit all configurations for this option.
 - [Configure Zone Skip Consolidation](#)
View and edit all configurations for this option.
 - [Configure Compliance](#)
Maintain checks, security and notifications.
 - [Compliance Questionnaires](#)
Maintain compliance questions.
 - [Configure Package Exception Management](#)
Maintain data partitions.
 - [PEM Master Shipping Plans](#)
Master Shipping Plans.
 - [XML Upload](#)
Upload XML data files.
 - [Log Files](#)
View server log files.
 - [Configure Mailing Lists](#)
View and edit all configurations for this option.

[Session Details](#)






You can use the Index tab of the CFGMM option to configure the Index page for a particular user. Each field on this page relates to a system value, listed in the tooltip next to each field. To update the Index page configuration for more than one user, use the Y3 option to copy the related system value settings from one user to the group of users.

CFGMM Option, Index Tab

Configure Main Menu

Menu Landing Pages Welcome Page **Index Page** WalkMe

Links

Links For Section 1 [Column 1, Row 1]:	title=Base image=fa-tasks link1=Workflow Portal:Perform a range of tasks on a shipment.:/htm/optionrun.htm? optionCode=FLOW link2=Inquiry:Specify shipment details and pull up shipment information.:/htm/optionrun.htm?optionCode=REPORT link3=Manual Shipment:Manually create a new shipment.:/htm/optionrun.htm?	
Links For Section 2 [Column 1, Row 2]:	title=Trade Compliance image=fa-check-square-o link1=Audit:Examine previous compliance requests and view their results.:/htm/optionrun.htm?optionCode=OKHIST link2=Adhoc Screening:Check an address against denied party, embargoed country lists and more.:/htm/optionrun.htm?optionCode=CKADH link3=Batch DPL Data Scrub:Screen addresses by uploading a CSV file with your	
Links For Section 3 [Column 2, Row 1]:	title=Transportation Management image=fa-truck link1=Routing Guide:Maintain routing guide setup.:/htm/optionrun.htm? optionCode=FRROUT link2=Desktop Shipping:Let desktop shipping walk you through creating a parcel shipment.:/htm/optionrun.htm?optionCode=SHDTS link3=Mailing List Ship:Ship to a mailing list.:/htm/optionrun.htm?	
Links For Section 4 [Column 2, Row 2]:	title=Freight Bill Audit & Payment image=fa-money link1=Invoices:Work with invoices.:/fbap/portal/FAIN link2=Shipments:Work with shipments.:/fbap/portal/FASH link3=Payment Batches:View payments and produce reports.:/fbap/portal/FAPB	
Links For Section 5 [Column 3, Row 1]:	title=Delivery Exception Management image=fa-map-marker link1=Deliveries:Work with deliveries and manage exceptions.:/dem/portal/DEM	

Save Reset

Removing a Tile

To remove a tile from the *Index* page:

1. Using the *Index Page Sections or Tiles* image as a guide, take note of the tile or section number of the tile on the *Index* page.
2. In the CFGMM option, on the *Index* tab, locate the text area related to the tile section that you want to configure.
3. Delete the contents of the text area and click **Save**.
4. Access the **INDEX** option; verify that the *Index* page displays without the deleted tile content.

Modifying a Tile

To update the contents of a tile on the *Index* page:

1. Using the *Index Page Sections or Tiles* image as a guide, take note of the tile or section number of the tile on the *Index* page.
2. In the CFGMM option, on the *Index* tab, locate the text area related to the tile that you want to configure.
3. In the relevant **Links for Section** field, to set the contents of the menu, use the syntax:

title=[category title]

image=[icon name]

link1=[link name]:[link description]:[link url]

link2=[link name]:[link description]:[link url]

...

linkN=[link name]:[link description]:[link url]

In this syntax, title is the name of the tile or section. You can choose any name. The image is the icon name used in the Font Awesome toolkit, with fa- (the first three characters) removed. The link is made up of the link name, the description, and the URL.

To find the URL of any page you want to include, click the page link. The URL is displayed in the Address field of your browser.

Alternatively, right-click the link and choose Properties.

As an alternative to using the full URL, you can use a standard URL format followed by an option code. For example, to set a link to Manual Shipment, use this URL and option code:

```
link1=Manual Shipment:Create a shipment:/htm/optionrun.htm?
```

```
optionCode=MANSH
```

4. When you have completed the updates, click *Save*.
5. Access the INDEX option; verify that the *Index* page displays the correct tile content.

Showing and Hiding the Recent Tile

The *Recent* tile displays options that you have recently visited. You can decide if this tile is displayed and how many items are on it. To show or hide the *Recent* tile, use the SHOW RECENTLY USED system value.

SHOW RECENTLY USED System Value

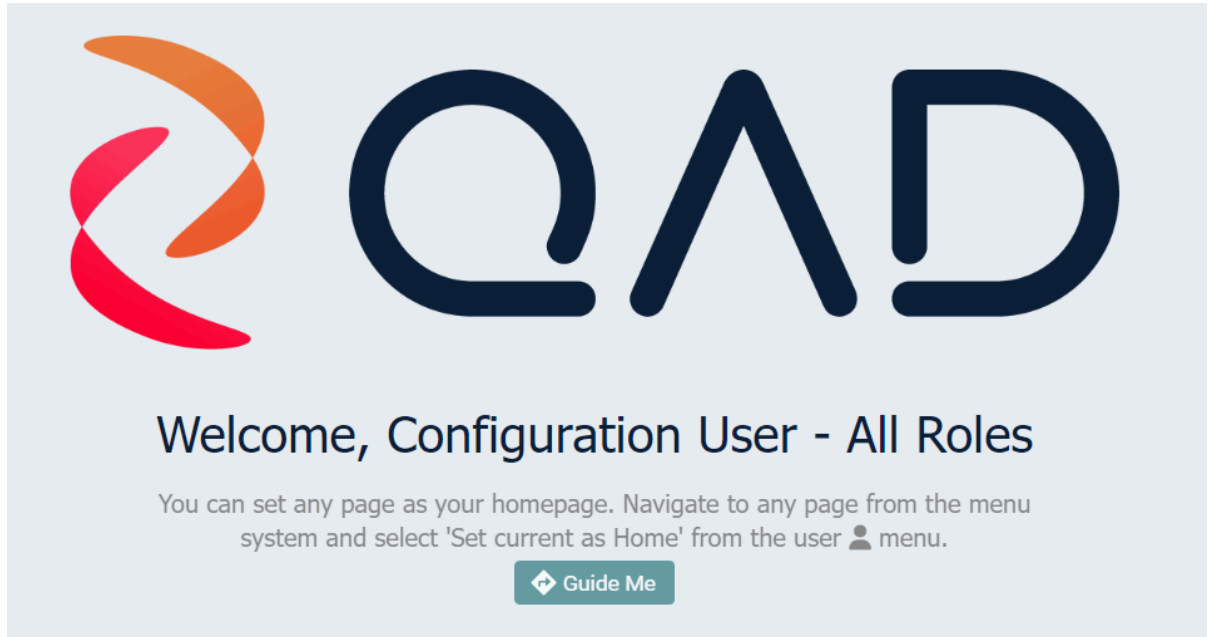
Category	Key	Description
Main Menu	SHOW RECENTLY USED	Specify whether you want the Recent tile, with links to recently accessed options, to display on the Index page. Possible values: <ul style="list-style-type: none"> • Yes – the Recent tile appears on the Index page. • No – the Recent tile does not appear on the Index page.

Note If you do not see the effect of any changes to your settings, it may be necessary to clear the caches. To do this, run the ADMIN option and click *Clear All Caches*.

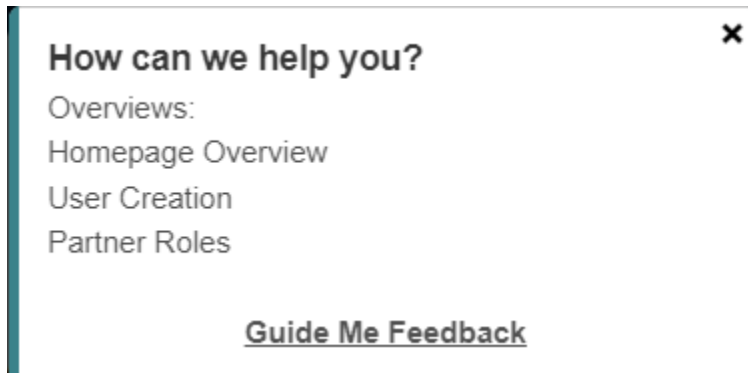
Configuring Guide Me

If your organization permits access to Guide Me, QAD GTTE includes on-screen guided assistance powered by the WalkMe digital adoption platform (DAP). The Guide Me menu includes workflows for certain tasks in QAD GTTE.

To access Guide Me, click the Guide Me button on the home page.



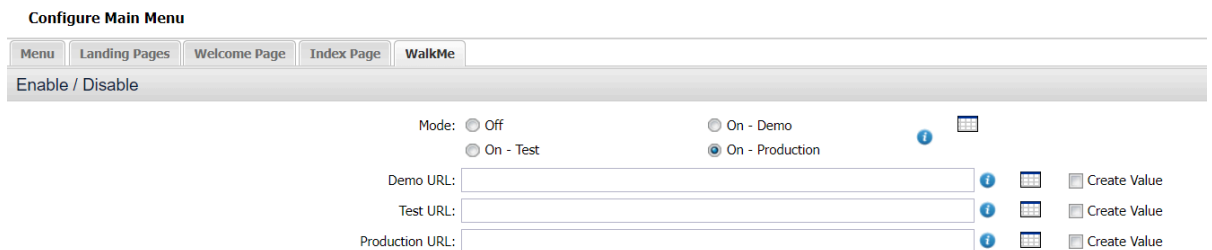
The Guide Me menu includes links to some workflows to help you to get started with QAD GTTE.



To request new tutorials and improve existing in-application training, click the Guide Me Feedback link.

The experience of using Guide Me can depend on what data you have in your system and on your role permissions.

To turn Guide Me on or off, in menu option CFGMM, use the WalkMe tab.



To configure Guide Me, complete the following tasks:

- [Turning On Guide Me on page 188](#)
- [Turning Off Guide Me on page 188](#)

Turning On Guide Me

To turn on Guide Me for all users of the QAD GTTE environment, complete the following steps:

Note To turn on Guide Me, your organization must permit access to the tool.

1. In menu option CFGMM, click the WalkMe tab.
2. In the Mode form, choose the On - Production option. The other options are for non customer-facing environments and are not for end users.

Note The Production URL field should be predefined with the following snippet: `<script type="text/javascript">(function() { var walkme = document.createElement('script'); walkme.type = 'text/javascript'; walkme.async = true; walkme.src = 'https://cdn.walkme.com/users/c01bb04255fc42ee948d84b4ff27e4b4/walkme_c01bb04255fc42ee948d84b4ff27e4b4_https.js'; var s = document.getElementsByTagName('script')[0]; s.parentNode.insertBefore(walkme, s); window._walkmeConfig = {smartLoad:true}; })();</script>`

3. Click Save.

Turning Off Guide Me

Note Turning off Guide Me may improve page load performance.

If you prefer not to use Guide Me, complete the following steps:

1. In menu option CFGMM, click the WalkMe tab.
2. In the Mode form, choose the Off option.
3. Click Save.

Packing Locations

To allow users to log in to the QAD GTTE application, you must associate the client with a packing location. In addition, users cannot access or use a packing location if it is not assigned to the client.

These associations can be configured using the Packing Location Clients sub-option on the Packing Locations page, accessible through the LN option.


A client's associated packing location impacts the lookups and validation on the following pages:

- Login
- End of Day
- Index
- Manifest Workflow Task
- Change Session Details
- Scan, Pack and Ship

Associating Clients With a Packing Location

1. Access option LN.
2. Select a record from the list of packing locations and click the *Packing Location Clients* sub-option.

Packing Locations Page, Packing Location Clients Sup-Option

Packing Locations		
Location:	<input type="text"/>	Location Description ▼
Packing Location		
Location	Location Description	
A3500	Newark	
 A9901	Chicago	
<div style="border: 1px solid gray; padding: 2px;"> <ul style="list-style-type: none"> • Packing Location Clients </div>		
A9903	Mexico	

3. Click the *Create* icon in the toolbar on the *Packing Location Clients* page.

Packing Location Clients [Create]

The screenshot shows a 'Packing Location Clients [Create]' dialog box. The dialog has a title bar with a close button. Inside, there are several input fields: 'Client' with the value 'SYS', 'Packing location' with the value 'A9901', 'Users client' with a search icon, and 'Description' which is empty. There is a checked checkbox labeled 'In use'. At the bottom, there are 'Create' and 'Close' buttons.

4. Use the *Users Client* lookup to specify the client that you want to associate with the packing location.
5. Enter a description.
6. Click *Create* to save.

Configuring the Packing Location Login Field

You can choose to present the Packing Location field on the QAD GTTE login page as a free text input field or a drop-down list using the `login.packinglocation.list` property. The following displays the field as a list:

```
login.packinglocation.list=list
```

Alternatively, set the property as follows to enable a free text field for Packing Location:

```
login.packinglocation.list=text
```

Note The options displayed in this drop-down list correspond to the packing locations associated with the selected client.

Authentication

This section describes the setup of user authentication. User authentication identifies the user to the system and enables access. To ensure that a user must be authenticated before they can access the system, enable login authentication in the precision.properties file.

You can then specify a login method. Choose from one of these methods:

- TRAX
- NTLM
- Database
- LDAP
- Single sign-on
- JAAS

Important When you decide which login method to use, do not change the properties or comment out any of the settings for the other login methods.

Password Policy and Encryption

System values let you implement your organization's password policy.

System Values to Implement Password Policy

Category	Key	Description
SECURITY	PASSWORD_DATABASE_ENCODING	Password encoding method. Possible values: MD5, SHA-1 Default value: MD5
SECURITY	MAX_ATTEMPTS_BEFORE_LOCK	Number of times a user can enter an incorrect password before their QAD GTTE user account locks. By default, this system value is disabled. Default value: -1
SECURITY	MIN_PASSWORD_LENGTH	Format: min=<NUMBER>,upper=<NUMBER>,lower=<NUMBER>,numbers=<NUMBER> min: minimum acceptable password length upper: minimum acceptable number of upper case letters in password lower: minimum acceptable number of lower case letters in password numbers: minimum acceptable number of numeric characters in password

Category	Key	Description
SECURITY	VALID DAYS BEFORE EXPIRY	<p>This system value applies when creating a user in option US in the Web UI. The value appears as the default value in the Password Expiry Cycle - Days field of option US, which is used to calculate the password expiry date.</p> <p>For example, if the value is set to 30, then the password expiry date defaults to 30 days from the creation date.</p>

Password History

When a user changes their password using the CHGPWD option, the password history is checked, and the user is prevented from using their two most recent passwords.

Password Encryption

For security, you can store encrypted passwords in the configuration files listed in Table 2.2. This approach is more secure than storing passwords as plain text.

Configuration Files that Support Encryption

File	Location	Encryption
precisioncon.properties	Subfolder highway \connectors\Service in the Web UI home folder. By default, the Web UI home folder is C:\PRECISION\WebUI	<ul style="list-style-type: none"> Any string in the GeneralConnect1 parameter that is encapsulated with "[x[...]x]" <p>Example: GeneralConnect1=-c 500 -U "p2009dev@precision_lin508" -P "[x[QHUNA3h7A21wFn6bZPU6vQ==]x]"</p> <ul style="list-style-type: none"> The password needed for the listener to automatically log in to the application. <p>Example: [Auto] User=4gllistener Password=obhc/ nW770V0feZwMrKB4g==</p>
precision.properties	Web UI home folder, which by default is C:\PRECISION\WebUI	jdbc passwords, for example, precision.db1.pass

File	Location	Encryption
highway.properties	WebUI home folder, which by default is C:\PRECISION\WebUI	jdbc passwords, for example,precision.db1.pass
schedule-service.xml	C:\PRECISION\WebUI\conf If the system is using JBoss 4, then schedule-service.xml is in the \${jboss_home}\server\default\deploy folder	autologin calls in this file, which send the user password as part of the url

Encrypting a Password

1. Open the encryptor.bat file and ensure that the value of ITRAX_HOME is set to your Web UI location.
2. Open a command prompt window and navigate to the folder containing encryptor.bat. The encryptor.bat file is in the subfolder named bin in the Web UI home folder; the default Web UI home folder is C:\PRECISION\WebUI.
3. Run encryptor.bat using the password that you want to encrypt as a parameter. The .bat file returns the encrypted password.

encryptor.bat

```

c:\PRECISION\WebUI\bin>encryptor.bat yourpassword
-----
This utility will encrypt a given password into a value that can
be used in PRECISION configuration files.

Usage:
  encryptor [plain password]
e.g.
  encryptor Precision

will return generate the value:
  z1bbHp31$bsaaZ0s9BZrbQ==
-----
C:\PRECISION\WebUI
"java classpath is: "C:\PRECISION\WebUI\wildfly\modules/apps/precision/lib/main/
*;C:\PRECISION\WebUI\wildfly\modules/apps/precision/libpsl/main/*;C:\PRECISION\W
ebUI\wildfly\modules/system/layers/base/javax/servlet/api/main/*;C:\PRECISION\W
ebUI\wildfly\modules/system/layers/base/org/jboss/log4j/logmanager/main/*""
"java home is: C:\PRECISION\WebUI\jre"
Attempting to load ESAPI.properties via file I/O.
Attempting to load ESAPI.properties as resource file via file I/O.
Found in 'org.owasp.esapi.resources' directory: C:\PRECISION\WebUI\ESAPI.propert
ies
Loaded 'ESAPI.properties' properties file
Attempting to load ESAPI.properties via file I/O.
Attempting to load ESAPI.properties as resource file via file I/O.
Found in 'org.owasp.esapi.resources' directory: C:\PRECISION\WebUI\ESAPI.propert
ies
Loaded 'ESAPI.properties' properties file
SecurityConfiguration for ESAPI.printProperties not found in ESAPI.properties. U
sing default: false
SecurityConfiguration for Encryptor.CipherTransformation not found in ESAPI.prop
erties. Using default: AES/CBC/PKCS5Padding
SecurityConfiguration for Logger.LogApplicationName not found in ESAPI.propertie
s. Using default: true
SecurityConfiguration for Logger.LogServerIP not found in ESAPI.properties. Usin
g default: true
o76PFmS4AxYXrex0WpZAPw==
Press any key to continue . . .
c:\PRECISION\WebUI\bin>_

```

Trax Login

TRAX login is the most widely used authentication method. It is also the most straightforward to set up. To use the trax login method, set it in the precision.properties file.

```
precision.login.method=trax
```

Using this method, the user ID and password are authenticated against the user details stored in the xtusr0 table in the QAD GTTE database. All user details are stored in this table automatically when you create a user profile. When a user supplies a user ID and a password on the Login screen, the system confirms that the user ID and password match a record in the table.

The QAD GTTE user profile setup contains a field that allows you to specify an alternative ID for a user. Some organizations use this field when users want to use the same ID as they already use to log in to other systems. The field is useful where a user ID is longer than 20 characters, because this number is the limit for a QAD GTTE user ID.

Note User passwords are encoded for Java using the md5 algorithm.

NTLM Login

NT LAN Manager (NTLM) is an authentication protocol used in an Active Directory single sign-on scheme. It enables you to set up your system to authenticate a user against a user ID and password held in Active Directory. To use this login method, ensure that you are familiar with NTLM and Active Directory.

When you use NTLM to authenticate, the QAD GTTE application must be able to identify the users to associate them with roles and permissions. The QAD GTTE user profile setup contains a field that allows you to specify an alternative ID for that user. The alternative ID must match the user ID in Active Directory. The user can then sign on using the Active Directory user ID, which matches the alternative ID in the QAD GTTE user profile record.

The alternative ID can also be used for punch-out requests and when the Web UI is configured to run in a multi-tenanted hosted mode. In the `precision.properties` file, enable NTLM authentication and specify an Active Directory server and a domain. The following example enables NTLM authentication with one server and one domain.

#NTLM authentication properties. Only used when login.method is set to "ntlm".

```
precision.login.method=NTLM
precision.login.nt.server=192.168.11.49
precision.login.domain=DOMAIN1
```

In a large organization, you might have several servers for a domain to allow for failover. You might also run multiple domains and enable user access to any number of domains. The following example enables NTLM authentication with two domains and two servers for each domain.

#NTLM authentication properties. Only used when login.method is set to "ntlm".

```
precision.login.method=NTLM
precision.login.nt.server.europe=cont85.europe.com: cont86.europe.com
precision.login.nt.server.US=cont87.us.com:cont88.us.com
```

When there are multiple domains, you can also specify a default domain:

```
precision.login.defaultdomain=europe
```

Problems arise if Active Directory is not set up properly or the identity of the organization domain server is unclear. In such cases, further research of NTLM and Active Directory settings is required. In addition, verify that the user ID and password authenticated by Active Directory match the alternative ID in the user profile. Use log4j to log authentication as it takes place.

Database Login

Using the database login method, the database is the repository for user names. You can specify this method in the `precision.properties` file.

```
precision.login.method=db
```

When a user supplies a user ID and password, the authentication compares the user ID and password with a database account in the QAD GTTE database, which is specified in the `precision.properties` file. If there is a match, a connection is created. This example specifies an Oracle database.

```
precision.db1.driver=oracle.jdbc.driver.OracleDriver
```

```
precision.db1.url=jdbc:oracle:thin:@CONT85:1521:precision
```

The database login method is not commonly used.

LDAP Login

Lightweight Directory Access Protocol (LDAP) is an Internet directory protocol standard. This protocol defines a directory service and access to that service. By enabling LDAP authentication, initial authentication is done using an LDAP Server, such as Novell or eDirectory. The user must also exist in the QAD GTTE Web UI database for authentication to complete successfully. To enable LDAP Authentication in the Web UI, set the login method to `ldap`.

```
precision.login.method=ldap
```

After LDAP is enabled, configure the LDAP server location and search settings properties in the `precision.properties` file. Possible properties and their values are displayed in the table below.

LDAP Setup

Property	Value
LDAP IP Address	<code>precision.login.IdapIP=ldap:// LDAPServerIPAddress:389/</code>
LDAP Manager DN	<code>precision.login.managerDn=[e.g. CN=Admin,O=Novell]</code> <code>precision.login.managerPassword=[manager's password]</code>

Property	Value
LDAP Search Patterns	precision.login.userDnPattern1=[CN={0},OU=users,O=domain,O=com] precision.login.userDnPattern2=[OU=users, O=domain, O=com] precision.login.userDnPattern3= precision.login.userDnPattern10=
LDAP User Filter	precision.login.userSearchBase=[e.g. o=Group] precision.login.userSearchFilter=[e.g. uid={0}]
LDAP Search Subtree	precision.login.searchSubtree=true

LDAP IP Address

The correct IP address of the LDAP Server is specified in this setting. LDAP uses TCP/IP port number 389 for basic authentication. If basic authentication is set to a different port on your server, the port number must correspond to the port number allocated. For failover purposes, you can specify multiple LDAP servers, as in the following example.

```
precision.login.ldapIP= ldap://LDAPServerIPAddress1:389/
```

```
ldap://LDAPServerIPAddress2:389/
```

Note The LDAP Server property value must start with `ldap://` in lowercase because parts of the code are case-sensitive.

LDAP Manager DN

LDAP is a tree of directory entries. Each entry has a unique identifier, known as a distinguished name (DN). The authentication service needs to initially bind as the administrator DN to have permissions to search for a user DN that matches the user login ID. The manager DN specifies the administrator DN that is initially used to bind to the LDAP Server.

All LDAP operations require some form of authentication with the LDAP server. If a manager DN and password are given, these values are used to authenticate with the LDAP server. Otherwise, the system typically uses the current user DN and password. The DN is written left to right. For example, `bill.people.domain.com` is written as:

```
uid=bill, ou=people, dc=domain, dc=com
```

In this example `uid=bill` is the Relative Distinguished Name (RDN) and `ou=people, dc=domain, dc=com` is the parent entry DN where `dc` denotes Domain Component.

LDAP Search Patterns

Each user DN pattern relates to the subbranch of your LDAP database that contains user records. Therefore, these fields specify the DN of the branches where the search for a user is to start. For performance reasons, make the DN as specific as possible. You can specify up to ten different patterns. Each pattern is tried until the user is found.

The user DN pattern function involves basic pattern matching. The login name supplied is substituted for the pattern argument {0}. By default, the Access Manager assumes that user entries are identifiable by the uid attribute "uid={0}". For example, the following two entries are the same:

```
uid={0},OU=users,O=domain,O=com
```

```
OU=users,O=domain,O=com
```

However, if your directory server uses a different attribute to specify a user DN, such as givenname/uniqueID/CN, you also must specify the attribute name in this field.

```
CN={0},OU=users,O=domain,O=com
```

The following dump is from LDAPSearch. You can use the italicized code for userDnPattern1 to 10:

```
LDAP Search is started ...
```

```
Host = 10.200.2.10
```

```
Port = 389
```

```
Connection Type = Non SSL
```

```
Timeout = 10 seconds
```

```
STEP 1 => Performing LDAP initialization
```

```
LDAP initialization completed
```

```
STEP 2 => Connecting to LDAP server using the given credentials...
```

```
LDAP bind completed successfully.
```

```
STEP 3 => Searching on the server ...
```

```
-----  
Enumerating attributes for DN :
```

```
cn=10_200_12_38,cn=12dot0,ou=Servers,o=Group  
-----
```

```
Enumerating attributes for DN : cn=SHR_RMA_ReadOnly,ou=CORP,o=Group  
-----
```

```
Enumerating attributes for DN : cn=ZCRED01L,ou=Printers,o=Group  
-----
```

```
Enumerating attributes for DN :
```

```
cn=10_200_18_71,cn=18dot0,ou=Servers,o=AM2Group
```

Enumerating attributes for DN :
cn=10_200_200_17,cn=200dot0,ou=Servers,o=AM2Group

Enumerating attributes for DN :
cn=USERNAME,ou=ACCT,ou=CORP,o=Group ou=Corp - Accounting

Enumerating attributes for DN : cn= USERNAME,ou=OPS,ou=CORP,o=Group
ou = Operations

This dump means that you specify the following for uid={0} to be searched in the Servers.Group subtree and CORP.Group subtree:

precision.login.userDnPattern1=ou=Servers,o=Group

precision.login.userDnPattern2=ou=CORP,o=Group

precision.login.userDnPattern3=ou=ACCT,ou=CORP,o=Group,ou=Corp-Accounting

precision.login.userDnPattern4=ou=OPS,ou=CORP,o=Group,ou=Operations

If you want to search in cn for the user login:

precision.login.userDnPattern1=cn={0},ou=Servers,o=Group

precision.login.userDnPattern2=cn={0},ou= CORP,o=Group

precision.login.userDnPattern3=cn={0},ou=ACCT,ou=CORP,o=Group,ou=Corp-Accounting

precision.login.userDnPattern4=cn={0},ou=OPS,ou=CORP,o=Group,ou=Operations

LDAP User Filter

If there are too many subtrees to specify, you can configure an LDAP search filter to locate the user. Instead of specifying userDnPatterns, you specify the userSearchBase and userSearchFilter attributes. A search is then performed under the userSearchBase node, which is usually close to the root node, using the value of the userSearchFilter attribute as a filter. Again, the user login name is substituted for the parameter in the filter name. If the userSearchBase is not supplied, the search is performed from the root. However, this method negatively impacts performance. Therefore, use userDnPatterns if they are known and limited to less than ten subtrees.

Note If userDnPattern and userSearchFilter are specified, the user search begins with the userDnPattern list. If no matching DN is found, the userSearchFilter is used.

LDAP Search Subtree

The search subtree option indicates the number of levels in the LDAP Server searched for a matching user profile from the base subtrees or roots specified in userDNPatterns or userSearchFilter. The search begins from the node specified in the attribute userDnPattern or userSearchFilter. The default value is SUBTREE=true. The search encompasses all entries at and below the specified node.

Note Each LDAP server property name is case-sensitive.

Troubleshooting LDAP Problems

After you have configured LDAP authentication, log in to the Web UI with your LDAP server user name and password. Table 2.4 describes some errors that can occur and how to troubleshoot them.

LDAP Error Troubleshooting

Error	Action
Check LDAP Server is up and connection settings are correct	This error is displayed if the Web UI cannot connect to the LDAP Server. First, check if the LDAP Server is available. LDAPSearch.exe is a useful freeware utility tool that allows you to connect to your LDAP Server and returns the necessary settings required for the Web UI. It is available from the Novell Web site. If the LDAP Server is available, the configuration settings in precision.properties are incorrect.
Bad Credentials	After you ensure that Caps Lock is not on, confirm that your user name and password are correct.
User does not exist in the QAD GTTE Web UI Database	When the user is authenticated with the LDAP server, it does not authorize access to the Web UI automatically. The user must also exist in the xtuscr0 table in the QAD GTTE database. Make sure that the user exists and that the id or alternative id and password match.

Configuring Secure LDAP Authentication in the Web UI

1. Change the LDAP IP address to use SSL authentication.
2. Obtain a digital certificate.
3. Generate a Java keystore.
4. Configure the properties file to use the keystore.

Change the LDAP IP address to use SSL authentication

For SSL authentication, in the precision.properties file, change the LDAP IP address to use TCP/IP port number 636. If SSL authentication is set to a different port of your server, the port number must correspond to the correct port number allocated.

Obtain a Digital Certificate

After LDAP Authentication is configured for SSL authentication in the Web UI, you must provide a certificate store containing a valid certificate as a parameter to authenticate to the LDAP Server. To do this, the client must generate a certificate from the LDAP Server and store it in a database on their machine. After the digital certificate is added to the client Trusted Store, the client can trust

any service with signed certificates.

You can use the LDAP Server Certificate utility to generate a certificate. This certificate can be exported to the client machine using iManager. The certificate is in .der or .b64 format. To complete this task using Novell eDirectory, perform the following steps:

1. On the client machine, log in to eDirectory through iManager.
2. Go to Novell Certificate Access and click Server Certificates.
3. In the Server Certificates window, select SSL-CertificateDNS and click Validate.
4. Export the certificate.
5. Save the exported certificate and save the cert.der file in any folder.
6. Open the certificate and select the Details tab.
7. Click Copy to File.
8. After you click Next, select Base-64 encoded X.609 (.CER) and click Next again.
9. Save the .cer file to any location and complete the procedure.

You now have two certificate files—one in .der and another in .b64 format.

How to Generate a Java Keystore

Before you generate a keystore, you must have a JDK installed with the / bin directory included in the path. You can verify this setup by typing keytool at the command prompt.

For the client to trust the LDAP server, the generated digital certificate must be present in the Client Trusted Store. You add the trusted digital certificate from the LDAP server to a Java keystore on the client machine. A keystore is a certificates database. To generate a keystore, run the command:

```
keytool -genkey -dname "cn=Joe Blogs, ou=JavaSoft, o=Sun, c=US" -alias  
business -keypass
```

```
kpi135 -keystore C:\working\mykeystore -storepass ab987c -validity 180
```

The command syntax is explained in the table below.

Generate a Keystore

Property	Value
cn	Common name, which matches the host name of the server.
ou=	Organization unit.
o	Organization.
c	Country code, which is the two lettered Country Code.
alias	Keystore alias.
keypass	Password for the private key generated.
keystore	Location and name of generated keystore.
storepass	Keystore password.
validity	Number of days the keystore is valid for.

To connect to LDAP Server using SSL, provide the keystore to the Web UI startup server by adding properties to the `precision.properties` file.

```
Djavax.net.ssl.trustStorePassword=keypass
```

```
Djavax.net.ssl.trustStore="C:\Documents and Settings\user\.keystore"
```

Single Sign-On

If you are using a solution, such as CA SiteMinder to provide SSO capabilities, then you can configure the `precision.properties` file to delegate the capture of the user name and password to another page. The default is to point to the `login.htm` page:

```
precision.login.authfail-url=/htm/login.htm?login_error=1
```

```
precision.login.logout-url=/htm/login.htm
```

```
precision.login.logout-link=/html/login.html
```

You can also point to a third-party login page that captures the login credentials, verifies them, and redirects back to the Web UI using the autologin URL.

```
precision.login.authfail-url=/htm/alt-logout.htm
```

```
precision.login.logout-url=https://abc.access.com/login.html
```

```
precision.login.logout-link=https://abc.access.com/login.html
```

JAAS Authentication

Java Authentication and Authorization Service (JAAS) is the Java implementation of the standard Pluggable Authentication Module (PAM) for authentication.

When a user tries to access the Web UI:

1. A prompt requests credentials to validate the user using JAAS. The security policy defined in JBoss determines which users JAAS accepts.
2. If the user is authorized, the login implementation sends the JAAS credentials to the appropriate authentication provider.
3. The authentication provider checks if the user is a valid Web UI user and validates the credentials that the user provided.

Enabling JAAS Authentication

1. Define the login method and the authorization fail URL.
 - a. Locate the precision.properties file. The path is usually: C:\PRECISION\WebUI
 - b. In the precision.properties file, set:


```
precision.login.method=jaas
precision.login.authfail-url=/htm/alt-logout.xj
```
2. Add a JBoss application policy to define which users JAAS accepts.
 - a. Locate the file \${jboss_home}\server\default\conf\login-conf.xml
 - b. Add an application policy. Ensure that the name of this policy matches the DjaasSecurityDomain parameter set up in step 5. Define the login module based on user needs:

```
<application-policy name="JAAS">
<authentication>
<login-module
code="org.jboss.security.auth.spi.UsersRolesLoginModule"
flag="required">
<module-option name=
"usersProperties">props/user.properties</module-option>
<module-option name=
"rolesProperties">props/roles.properties</module-option>
</login-module>
</authentication>
</application-policy>
```

Example An example in user.properties using the UsersRolesLoginModule:

```
#user=password
QCONFIG=Precision
```

Example An example in roles.properties using the UsersRolesLoginModule:

```
#user=role
QCONFIG=webUI
```

Note The role webUI is defined in step 3 but also in the web.xml file within the application EAR file; these definitions must be consistent. If you assign incorrect roles to users, then the user passes JAAS authentication but an access denied screen displays.

Note UsersRolesLoginModule is just one of the login modules that JBoss provides. You can configure this application policy using a different login module that meets your needs.

3. Add the authentication method to JBoss.
 - a. Locate the file `${jboss_home}\server\default\deploy\jboss-web.deployer\conf\web.xml`
 - b. Add the following code to the file:


```
<login-config>

<auth-method>BASIC</auth-method>

<realm-name>BASIC Auth</realm-name>

</login-config>
```
4. If you are using autologin when JBoss starts up, then complete these JBoss scheduler changes:
 - a. Locate the file `${jboss_home}\server\default\deploy\scheduler-service.xml` and make the following changes:
 - Replace `htm/autologin.htm` with `htm/autologin.xj`
 - Replace `option=CNTRLR` with `option=CNTRLJ`
 - Replace `servlet/controller` with `servlet/jaas/controller`
 - Replace `htm/command-controller.htm` with `htm/command-controller.xj`
5. Include two groups of JBoss server arguments:
 - a. Running the Web UI as a local JBoss application from a developer environment, add the following properties to JBoss Server arguments:


```
-DjaasHttpMethod1=GET -DjaasHttpMethod2=POST

-DjaasHttpMethod3=PUT -DjaasHttpMethod4=DELETE

-DjaasHttpMethod5=HEAD -DjaasHttpMethod6=OPTIONS

-DjaasHttpMethod7=TRACE -DjaasRoleName=webUI

-DjaasSecurityDomain=JAAS
```

Note To access the JBoss Server arguments, go to Launch Configurations|Arguments tab|VM arguments.

- b. Running the Web UI as a service, locate the `${webUI_home}\service\WrapperJBossService.conf` file and, below the last `wrapper.app.parameter` line, add these new parameters:
 - `wrapper.app.parameter.=-DjaasHttpMethod1=GET`
 - `wrapper.app.parameter.=-DjaasHttpMethod2=POST`
 - `wrapper.app.parameter.=-DjaasHttpMethod3=PUT`
 - `wrapper.app.parameter.=-DjaasHttpMethod4=DELETE`
 - `wrapper.app.parameter.=-DjaasHttpMethod5=HEAD`
 - `wrapper.app.parameter.=-DjaasHttpMethod6=OPTIONS`
 - `wrapper.app.parameter.=-DjaasHttpMethod7=TRACE`
 - `wrapper.app.parameter.=-DjaasRoleName=webUI`
 - `wrapper.app.parameter.=-DjaasSecurityDomain=JAAS`

where is the last sequence number incremented by 1.

6. Optionally, you can configure your log4j to print DEBUG information in the following packages:
 - `com.precisionsoftware.providers.AbstractAuthenticationProvider`
 - `com.precisionsoftware.trax.app.controller.login.JaasLoginController`

The resulting DEBUG information may help you to investigate configuration problems.

Synchronize Users with DSML

If your company uses a number of QAD products, you can use SAML authentication to validate user credentials for all of these products by checking a single credentials repository. Regardless of this single credentials repository, QAD GTTE requires that user information exists in the QAD GTTE user table.

You can use Directory Services Markup Language (DSML) to populate the QAD GTTE user table. DSML is an open standard for automatically extracting information from an LDAP repository. Using DSML, you can submit an XML request using a SOAP API and then build the table of QAD GTTE users based on the XML response. You can submit the XML request manually from the Web UI, as described in *Running DSML User Synchronization Manually*, or schedule XML requests to be sent at regular intervals, as described in *Running DSML User Synchronization as a Batch Job*.

Before running the DSML synchronization, see *Setting Up DSML in QAD GTTE* for information on how to set up DSML mapping of content in XML messages to the QAD GTTE user table.

Setting Up DSML in QAD GTTE

Before testing DSML functionality in QAD GTTE, ensure that:

- A directory service exists.
- A DSML gateway is set up.
- A gateway is a network service that translates DSML SOAP requests to LDAP Data Interchange Format (LDIF) requests and forwards them to a directory service for processing. The LDIF responses are then transformed back into DSML responses and returned to the client.
- A DsmIController exists that can connect to and query a directory service through a configured DSML gateway. This facility is available from Web UI 4.7.5-OPEN onwards.
- The DSML system values listed in Table 3.6 have the correct values.

You can use log4j to log information as authentication takes place. For more information on log4j and DSML, see *Troubleshoot with log4j*.

SML System Values

The table below lists the system values that you require to configure DSML synchronization in QAD GTTE.

DSML System Values

Category	Key	Description	Property in the precision.properties file
DSML	DN	<p>The root folder in which to start the DSML search.</p> <p>Example: OU=Users, OU=Accounts, DC=qad, DC=com</p> <p>A directory server is a tree of directory entries, and each entry has a unique identifier or distinguished name (DN). The DN is written left to right, for example bill.people.domain.com is written as: uid=bill, ou=people, dc=domain, dc=com.</p> <ul style="list-style-type: none"> • uid=bill is the entry's Relative Distinguished Name (RDN) 	dsml.dn

Category	Key	Description	Property in the precision.properties file
		<ul style="list-style-type: none"> ou=people is the organizational unit ou=people , dc=domain, dc=com is the DN of the parent entry, where DC denotes domain component, and OU denotes organizational unit. 	
DSML	EMAIL NOTIFICATION	A comma-separated list of e-mail addresses to receive notifications of the DSML search results. Default value: The e-mail address of the user who is logged in.	
DSML	ENABLE DSML	This value determines if the Admin page displays a link to manually invoke the DSML search. Possible values: yes, no Default value: no	dsml.emailnotification
DSML	FILTER	The filter used in the DSML search, which is based on the filter query syntax for DSML V2.	dsml.filter
DSML	PASSWORD	The user password for the DSML Gateway. This password must be Base64 encoded.	dsml.password
DSML	RESULT-FILE-LOCATION	The location of the DSML search results file. Default value: C:/PRECISION/WebUI/data/dsml/results	dsml.resultFilelocation
DSML	URL	The URL of the active DSML gateway. Example: http://localhost:8080/dsml/DSMLServlet	dsml.url
DSML	USER	The user ID of the user who has access to the DSML gateway.	dsml.user
DSML	USER-MAP-LOCATION	The location of user-map.xml. This file determines the field mapping that applies when creating new users. Default value: C:/PRECISION/WebUI/data/dsml/user-map.xml	dsml.usermaplocation

DSML XML Messages

The format of DSML XML messages is standardized and available from OASIS.

Example DSML Search Request

```
<?xml version="1.0" encoding="UTF-8" ?>

<soap-env:Envelope

  xmlns:xsd="http://www.w3.org/2001/XMLSchema"

  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"

  xmlns:soap-env="http://schemas.xmlsoap.org/soap/envelope/">

  <soap-env:Body>

    <batchRequest xmlns="urn:oasis:names:tc:DSML:2:0:core"
      requestID="Batch of search requests">

      <searchRequest dn="" requestID="search on Root DSE"
        scope="baseObject" derefAliases="neverDerefAliases" typesOnly="false" >

        <filter>

          <and>

            <equalityMatch name="objectCategory">

              <value>Person</value>

            </equalityMatch>

            <equalityMatch name="memberOf">

              <value>CN=QAD_APP_EA,OU=Groups,OU=Applications,DC=qad,DC=com</
              value>

            </equalityMatch>

          </and>

        </filter>

        <attributes>

          <attribute name="uid" />
```

```

    <attribute name="mail" />

    <attribute name="displayName" />

    <attribute name="memberOf" />

    <attribute name="c" />

    <attribute name="givenName" />

    <attribute name="sn" />

  </attributes>

</searchRequest>

</batchRequest>

</soap-env:Body>

</soap-env:Envelope>

```

Example DSML Search Response

```

<soap-env:Envelope xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/
envelope/">

```

```

  <soap-env:Body>

```

```

    <batchResponse xmlns="urn:oasis:names:tc:DSML:2:0:core"
requestID="Batch of search requests">

```

```

  <searchResponse>

```

```

    <searchResultEntry
dn="CN=kws,OU=Users,OU=Accounts,DC=qad,DC=com">

```

```

      <attr name="c">

```

```

        <value>US</value>

```

```

      </attr>

```

```

      <attr name="description">

```

```

        <value>Software Engineer, Architect - Research &
Development</value>

```

```

      </attr>

```

```
<attr name="displayName">
  <value>Kevin Schantz</value>
</attr>
<attr name="memberOf">
  <value>CN=QDN_Editors,OU=Groups,OU=Accounts,DC=qad,DC=com</
value>
  <value>CN=QAD_Employees_Group,OU=Groups,OU=Accounts,DC=qad,DC=com</
value>
  <value>CN=Project
X,OU=NotInUse,OU=Groups,OU=Accounts,DC=qad,DC=com</value>
</attr>
<attr name="department">
  <value>R & amp; D Software Foundation, Director</value>
</attr>
<attr name="name">
  <value>kws</value>
</attr>
<attr name="uid">
  <value>kws</value>
</attr>
<attr name="mail">
  <value>kws@qad.com</value>
</attr>
</searchResultEntry>
<searchResultDone>
```

```

        <resultCode code="0"/>

    </searchResultDone>

</searchResponse>

</batchResponse>

</soap-env:Body>

</soap-env:Envelope>

```

Mapping Attributes of DSML XML Messages to QAD GTTE

The user-map.xml file maps the attributes and corresponding values returned in the DSML response to the correct field names in the QAD GTTE user table.

Example user-map.xml File

```

<user>
  <attributes>
    <attribute tableName="User" fieldName="usr_active_reason" defaultValue="SYNC" overwrite="false" />

    <attribute name="c" tableName="User" fieldName="defaultLocale" defaultValue="QPSL" overwrite="true" filter="true">
      <map key="US" value="UPSL" />
      <map key="IE" value="QPSL" />
    </attribute>
    <attribute name="c" tableName="User" fieldName="DateFormat" defaultValue="1">
      <map key="US" value="2" />
    </attribute>
    <attribute name="c" tableName="User" fieldName="defaultLanguage" defaultValue="US" overwrite="true" filter="true">
      <map key="US" value="US" />
      <map key="IE" value="ENG" />
    </attribute>
    <attribute name="c" tableName="User" fieldName="defaultClient" defaultValue="TGL" overwrite="true" filter="true">
      <map key="US" value="TGL" />
      <map key="IE" value="TGL" />
    </attribute>
    <attribute name="mail" tableName="Partner" fieldName="emailAddress" overwrite="false" defaultValue="" />
    <attribute name="uid" tableName="User" fieldName="userId" overwrite="false" defaultValue="" />
    <attribute name="uid" tableName="User" fieldName="employee" overwrite="false" defaultValue="" />
    <attribute name="displayName" tableName="User" fieldName="description" overwrite="false" defaultValue="" />
    <attribute name="memberOf" tableName="GroupUser" fieldName="usergroup" overwrite="true" filter="true" >
      <map key="CN=QDN_Editors,OU=Groups,OU=Accounts,DC=qad,DC=com" value="QTGLMGR" />
      <map key="CN=QAD_Employees_Group,OU=Global Groups,OU=Groups,OU=Accounts,DC=webext,DC=qad,DC=com" value="QTGLUSER" />
    </attribute>
  </attributes>
</user>

```

The format of user-map.xml file is standardized and available from OASIS.

Example user-map.xml File

```

<user>

  <attributes>

    <attribute tableName="User" fieldName="usr_active_reason"
defaultValue="SYNC" overwrite="false" />

```

```
<attribute name="c" tableName="User" fieldName="defaultLocale"  
defaultValue="QPSL" overwrite="true" filter="true">
```

```
<map key="US" value="UPSL" />
```

```
<map key="IE" value="QPSL" />
```

```
</attribute>
```

```
<attribute name="c" tableName="User" fieldName="DateFormat"  
defaultValue="1">
```

```
<map key="US" value="2" />
```

```
</attribute>
```

```
<attribute name="c" tableName="User" fieldName="defaultLanguage"  
defaultValue="US" overwrite="true" filter="true">
```

```
<map key="US" value="US" />
```

```
<map key="IE" value="ENG" />
```

```
</attribute>
```

```
<attribute name="c" tableName="User" fieldName="defaultClient"  
defaultValue="TGL" overwrite="true" filter="true">
```

```
<map key="US" value="TGL" />
```

```
<map key="IE" value="TGL" />
```

```
</attribute>
```

```
<attribute name="mail" tableName="Partner" fieldName="emailAddress"  
overwrite="false" defaultValue="" />
```

```
<attribute name="uid" tableName="User" fieldName="userId"  
overwrite="false" defaultValue="" />
```

```
<attribute name="uid" tableName="User" fieldName="employee"  
overwrite="false" defaultValue="" />
```

```
<attribute name="displayName" tableName="User" fieldName="description"  
overwrite="false" defaultValue="" />
```

```
<attribute name="memberOf" tableName="GroupUser"  
fieldName="usergroup" overwrite="true" filter="true" >
```

```
<map
key="CN=QDN_Editors,OU=Groups,OU=Accounts,DC=qad,DC=com"
value="QTGLMGR" />
```

```
<map
key="CN=QAD_Employees_Group,OU=GlobalGroups,OU=Groups,OU=Accounts,DC=webext,DC=qad,DC=com"
value="QTGLUSER" />
```

```
</attribute>
```

```
</attributes>
```

```
</user>
```

Ensure that:

- The user-map.xml file correctly maps the list of possible countries to their corresponding:
 - Locale
 - Default language
 - Default client
- The user-map.xml file correctly maps the list of possible memberOf groups to their corresponding QAD GTTE group role; this group role must exist in QAD GTTE.

Attribute Element in user-map.xml

Attribute Name	Default Value	Description	Required Attribute
defaultValue		The default value to use when no value is provided in the DSML response.	no
fieldName		The field name mapping.	yes
filter	false	Use this attribute to remove attributes that do not match a mapping key. It is useful for filtering multiple values such as the memberOf attribute.	no
name		The Active Directory attribute name returned in the DSML response.	yes
overwrite	true	When true, the value is overwritten during an update of the user record. When false,	no

Attribute Name	Default Value	Description	Required Attribute
		the value is written during the creation of the user record only.	
tableName		The table name mapping.	yes

Map Element within the Attribute Element in user-map.xml












Attribute Name	Default Value	Description	Required Attribute
key		The mapping key for matching an attribute value. This value is not case sensitive.	
value		The mapping value to replace the original value.	


Running DSML User Synchronization Manually

1. In the menu search, enter ADMIN and press Enter.
2. On the Administration page, click Synch Users using DSML to send a SOAP message containing a query based on the DSML - FILTER system value. Depending on the query result, the DSML Synch page displays a success message, a failure message, or a waiting message. A waiting message appears when the SOAP Request/Response is delayed due to a high number of users being added to the table.

Administration Page with Synch Users using DSML Option

Clear Caches **Caches** Java Listeners 4GL Listeners

-  Clear All Caches
-  Clear System Value Cache
-  Clear User Cache
-  Reset Cached Permission Information
-  Clear Routing Guide Dynamic Cache
-  Clear Translation Literals File
-  Clear Cached Maintenance Information
-  Clear Cached Translation Information
-  Clear Tracking Response Cache
-  Clear 4GL Listener Cache
-  Clear Microservice Cache

 **System Values**

DSML Synch Page, Success Message

DSML Results: 3 Users added out of 6		
Status ▾	User Id	User Name
[-] Status: Already Added (3 Users)		
Already Added	emb	Evan Bishop
Already Added	ejt	Evan Todd
Already Added	kun	Karen Nolan
[-] Status: Successfully Added (3 Users)		
Successfully Added	kzc	Karen Cader
Successfully Added	k2d	Karen Deng
Successfully Added	kih	Karen Hirzel

DSML Synch Page, Failure Message

DSML Errors:		
Error Code	Error Type	Error Message
1	couldNotConnect	org.opens.server.tools.LDAPConnectionException: The simple bind attempt failed

- You can view the result in an email address or a file. The EMAIL NOTIFICATION and RESULT_FILE_LOCATION system values determine the file location. The email subject matches one of the following lines:

- Precision - DSML Status Email - COMPLETED SUCCESSFULLY

- Precision - DSML Status Email - FAILURE

Running DSML User Synchronization as a Batch Job

When you have tested DSML User Synchronization by running it manually, you can set up a batch job to synchronize user login information on a daily basis.

1. Open the file `/JBOSS_HOME/server/default/deploy/scheduler-service.xml`.
2. Ensure that the following code is in the file `scheduler-service.xml`, and is not commented out.

```
<mbean code="org.jboss.varia.scheduler.Scheduler"
name=":service=Scheduler5">
```

```
  <attribute name="StartAtStartup">true</attribute>
```

```
  <attribute name="SchedulableClass">org.jboss.varia.scheduler.Initialize</
attribute>
```

```
  <attribute name="SchedulableArguments">ALWAYSSTART,http://
localhost:8080/precision/htm/autologin.htm,targetUrl=/precision/htm/
dsml.htm?
```

```
  action=getUserList&amp;useridkey=userid&amp;userid=xxxxxxx&amp;userpassword=xxxxxxx&amp;cli
attribute>
```

```
  <attribute
name="SchedulableArgumentTypes">java.lang.String,java.lang.String,java.lang.String,java.lang.String<
attribute>
```

```
  <attribute name="InitialStartDate">NOW</attribute>
```

```
  <attribute name="SchedulePeriod">86400000</attribute>
```

```
  <attribute name="InitialRepetitions">-1</attribute>
```

```
</mbean>
```

3. Replace `http://localhost:8080/precision/htm/autologin.htm,targetUrl=/precision/htm/dsml.htm` with your URL.
4. Amend the `userid` and `userpassword` entries, which are defaulted to `xxxxxxx`, as these values are required for the auto-login.

This job is set to run once every 24 hours (86400000 milliseconds).

Troubleshoot With log4j

You can use a tool named `jboss-log4j.xml` to help troubleshoot issues with authentication. This utility is a Java-based logging utility that logs activity in the Web UI engine. It is located in `C:\PRECISION\WebUI\jboss\server\default\conf`. To log additional information in the `server.log` file, update the `jboss-log4j.xml` file with the following properties:

```
<logger name="com.precisionsoftware.providers" additivity="false">

  <level value="DEBUG"/>

  <appender-ref ref="CONSOLE"/>

  <appender-ref ref="FILE"/>

</logger>
```

This enables you to log what happens when you execute the authentication component. The output log is located in `...\PRECISION\WebUI\jboss\server\default\log`.

Logging DSML Synchronization Information

To log information about DSML synchronization, add the following lines to `/JBOSS_HOME/server/default/conf/jboss-log4j.xml`:

```
<category name="com.precisionsoftware.trax.app.controller.dsml">

  <priority value="INFO"/>

</category>
```

Punch-Out

Punch-out is a feature that allows the user to jump from some other Web page into the Web UI. When this action occurs, the user is logged on automatically and lands directly on the configured page. The ability to navigate from the page is restricted. In certain cases, fields on the page are populated automatically. To use the punch-out feature, set the following properties in the `precision.properties` file:

```
precision.singlelogin.key=*XMLPUNCHOUT
```

```
precision.login.method=trax
```

To reach the Web UI, send an http post request to the URL, with the XML posted as a request parameter.

```
"<Precision Web UI-location/<contextPath>/htm/punchout-autologin.htm
```

By default, the name of the request parameter is `XMLDATA`. To change the name of the request parameter, change the `trax` property

```
trax.login.punchout.xmlparametername=parametername
```

As part of punching out, the other system sends an XML message to the Web UI. The XML contains details of sign-on information, the page to load, and default data to use. The Web UI processes the XML message and opens the specified page. If there is a problem with the XML, an error page is loaded. A test punch-out page is available at </precision/jsp/ship/punchout-test.jsp>.

User Role Configuration

The Web UI includes a number of predefined roles, which are described in [Using QAD GTTE For Your Role on page 49](#). You can assign one or more roles to a user. The user then has access to the functionality associated with the role, as listed in [Default User Roles and Associated Options on page 233](#).

In an organization, one group of users performs manual shipments. These users are identified as desktop shipping users, and therefore have a Desktop Shipper role. This role grants them access to desktop shipping and inquiry functionality in the system. A second set of users work in the warehouse. They use scan, pack, and ship functionality to prepare shipments, and they use consolidate and ship functionality to consolidate shipments. The Warehouse Operative role best describes their role. Finally, there is a small group of admin users who modify the system setup. The Administrator role defines the actions that they perform.

If the predefined roles in the Web UI do not reflect the user roles and operations carried out in your organization, you can create other roles or modify the existing roles. Before configuring roles, make sure that you have clearly defined real-world roles for system users. Next, map your real-world roles and their associated options to the functionality available in the Web UI. This approach will help when it comes to the actual configuration setup in QAD GTTE.

User Groups and Responsibilities


In menu option GU, in addition to user roles, you can configure groups of users that have particular responsibilities for QAD GTTE modules.


When you create or update a group in menu option GU, optionally enter a responsibility in the User Group Responsibility field.


Groups [Update]

Group code: ADMINISTRATOR

Description: Administrator

Business Unit: 

Cost Centers: 

Office: 

User Group Responsibility: EFFECTIVE_USER_ROLE

Data Partition Type:

Partition Reference A:

Partition Reference B:

Partition Reference C:

The following table describes the user group responsibilities that you can enter in this field:

User Group Responsibility	Module	Description
Blank	-	If you do not enter a value in the User Group Responsibility field, the group does not have any clearly defined responsibilities in the system.
CONSOLIDATION	Base	Use this group to associate the ownership of a consolidation when configuring Build A or B in menu options CFGBA or CFGBB. Note In menu options CFGBA and CFGBB, the CONSOLIDATION responsibility allows

User Group Responsibility	Module	Description
		you to more easily filter groups for the Assign Group (Owner) for Input Transaction setting.
DATA_MAINTENANCE	-	Not used.
DATA_SEGREGATION	PEM	PEM is deprecated in QAD GTTE v20 and later. Therefore, this group type is no longer used.
EFFECTIVE_USER_ROLE	Base	<p>An EFFECTIVE_USER_ROLE group is a collection of menus and users. Use this group to link available menus with users, determining which menus are visible when a user signs in.</p> <p>For more information, see Configuring Effective User Roles on page 223.</p>
FAVORITES	-	Not used.
FBAP_OWNERSHIP	FBAP	FBAP administrators can use this group when configuring invoice ownership as part of the process flow setup, which determines the users who have access to invoices in the system.
ITC_USER	Import Management	An ITC_USER group is a collection of users that is used in the configuration of the Import Management module. This group works in conjunction

User Group Responsibility	Module	Description
		<p>with the system value ITC_SUPERUSER_GROUP_LIST. The system value lists one or more groups, and the users in these groups are then considered Import Management super users.</p>
NOTIFY_GROUP	PEM	<p>PEM is deprecated in QAD GTTE v20 and later. Therefore, this group type is no longer used.</p>
PERMISSIONS	Base	<p>A PERMISSIONS group is a collection of one or more users that you can reference when configuring permissions in menu option ZP. As part of the access control setup, this group enables an administrator to grant the group access to specific options in menu options GO or FN.</p>
SYSTEM_VALUE_GROUP	Base	<p>Use this group to associate a system value with a group of users, rather than associating the system value at the client, user, or global level. This is important in cases where you need to assign the same value to many users, but it is not appropriate to set the value at a global or client level.</p>

Configuring Effective User Roles

The typical workflow for configuring effective user roles is:

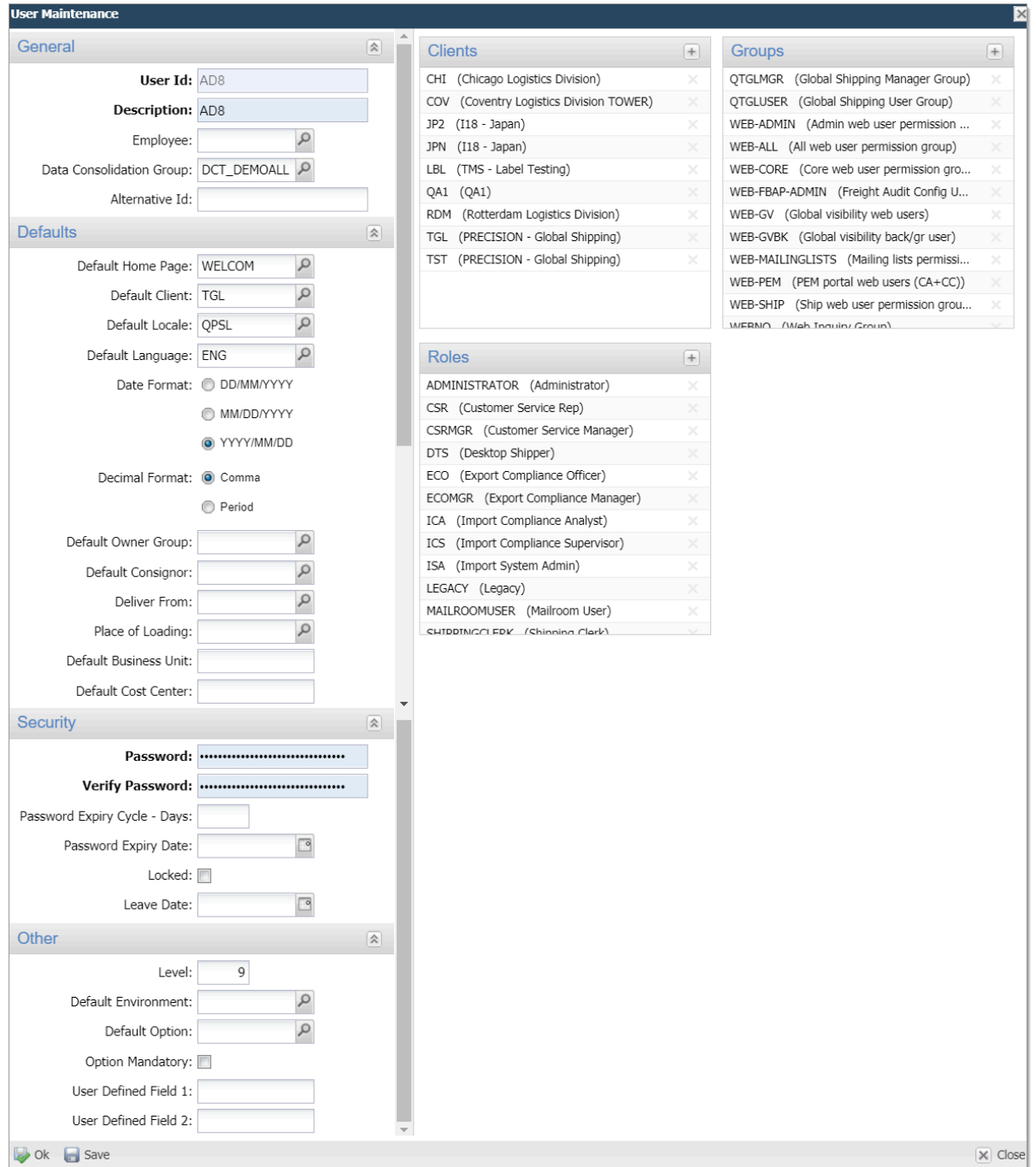
1. Create a user in menu option US. See [Creating a User](#).
2. Create a role in menu option GU. See [Creating an Effective User Role](#).
3. Create menus in menu option GN to associate with the role. See [Creating a Menu for a Role](#).
4. Use menu option GU to associate the menus with the role. See [Associating Menus with a Role](#).
5. Use menu option US to associate users with the role. See [Associating Users with a Role](#).
6. Optionally, you can configure a user group with permissions that are based on the options that are available within the effective user role. For more information on configuring permissions, see [Permissions on page 249](#).

Creating a User

Before you begin the process of configuring user roles, you may want to create a user first. You can do this, and maintain existing users, using option US. This option also enables you to associate users with roles, clients, and groups. To create a new user:

1. Access option US.
2. Click the Create button in the toolbar.

User Maintenance Window, US Option



3. In the User Maintenance window, enter a unique user ID, description, and password, and complete the other fields as necessary.
 - Employee. Select a partner record using the lookup. This employee partner record is used for various purposes; for example, retrieving a user’s time zone information, and for notification purposes related to compliance.

- Data Consolidation Group. This field is obsolete.
- Alternative Id. Specify an alternative user ID. Some organizations use this field when users want to use the same ID as they already use to log in to other systems.
- Default Home Page. Set a default home page for this user.
- Default Client. Assign a default client for this user. When the Use default values for this user field is selected on the login page, this value is applied to the Client field.
- Default Locale. Assign a default locale for this user. When the Use default values for this user field is selected on the login page, this value is applied to the Locale field.
- Default Language. Assign a default language for this user. When the Use default values for this user field is selected on the login page, this value is applied to the Language field.
- Date Format. Specify the format to apply to dates in the Web UI.
- Decimal Format. Specify the format to apply to decimals in the Web UI.
- Default Owner Group. Assign a default user group to this user.
- Default Consignor. This field is used for Desktop Shipping purposes. See TMS documentation for more details.
- Deliver From. This field is used for Desktop Shipping and authentication purposes, and assigns a default value to the Shipper field in option MLSHIP.
- Place of Loading. This field is used to retrieve the user's time zone information.
- Default Business Unit. Specify a default value for the Business Unit field in option MLSHIP.
- Default Cost Center. This field is used for Desktop Shipping purposes, and assigns a default value to the Cost Center field in option MLSHIP.
- Password Expiry Cycle - Days. Specify the number of days for which the password is valid.
- Password Expiry Date. Enter a date if you want the password to expire on a specific day.
- Locked. Select this field if you want to prevent this user from logging in to the Web UI.
- Leave Date. Specify the date on which the user will leave the organization.
- Level. This field is not currently in use.

- Default Environment. This field is primarily used for Windows UI purposes and determines the default environment when the user logs in to the QAD GTTE application.
- Default Option. This field is not currently in use.
- Option Mandatory. This field is not currently in use.

4. Click Save.

Creating an Effective User Role

Use the GU option to create an effective user role in the Web UI. An effective user role is a user group with the User Group Responsibility field set to EFFECTIVE_USER_ROLE.

1. Access option GU.
2. To create a role, click the Create button on the toolbar.
3. In the pop-up window, supply a meaningful role name and description. Set the User Group Responsibility field to EFFECTIVE_USER_ROLE.

Create Role

The screenshot shows a 'Groups [Create]' dialog box with the following fields and controls:

- Group code:** A text input field with a red warning icon to its right.
- Description:** A text input field.
- Business Unit:** A text input field with a search icon to its right.
- Cost Centers:** A text input field with a search icon to its right.
- Office:** A text input field with a search icon to its right.
- User Group Responsibility:** A text input field.
- Data Partition Type:** A small text input field.
- Partition Reference A:** A text input field.
- Partition Reference B:** A text input field.
- Partition Reference C:** A text input field.

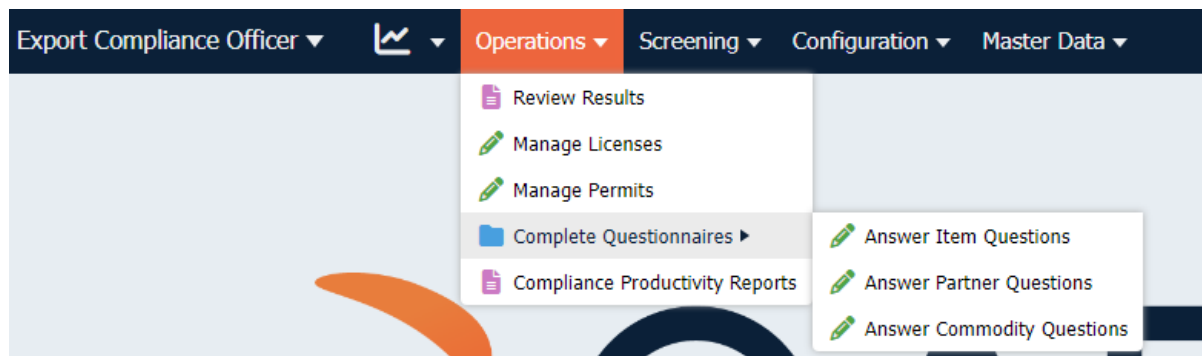
At the bottom of the dialog, there is a 'Create' button on the left and a 'Close' button on the right.

- Group Code. Specify the role name.
- Description. Specify the menu description.
- User Group Responsibility. Set this field to EFFECTIVE_USER_ROLE to identify this GU record as a role in the effective user menu.

Creating a Menu for a Role

The next step is to create a menu for the role that you have created, and to populate that menu with options and sub-options. You can create a menu with up to two levels of sub-options, as shown in the image below.

Export Compliance Menu in the Web UI



The images below show the setup for this menu in option GN. Top-level menus have an Option Number value of zero; sub-menus have an Option value that corresponds with a Menu value from another row in the grid.

Export Compliance Menus, Sub-Menus, and Menu Options in GN

Menus

Menu: Option number: Description: Search

Menu	Option number	Description	Option type	Option	Program type	In use	Color	Skip before	Skip after
ECO01	0	Operations	7			✓			
ECO01	10	Review Results	1	CKHIST	50	✓			
ECO01	20	Manage Licenses	1	XL	00	✓			
ECO01	30	Manage Permits	1	XG	00	✓			
ECO01	40	Complete Questionnaires	1	ECO901	95	✓			
ECO01	50	Compliance Productivity Reports	1	CKRPT	50	✓			
ECO02	0	Screening	7			✓			
ECO02	10	Ad hoc	1	CKADH	50	✓			
ECO02	20	Data Scrub	1	DSCRUB	50	✓			
ECO03	0	Configuration	7			✓			
ECO03	10	Compliance Configuration	1	CK	00	✓			
ECO03	20	Setup Questionnaires	1	QE	50	✓			
ECO03	30	License Requirements	1	ECO902	95	✓			
ECO03	40	Export Control	1	ECO903	95	✓			
ECO04	0	Master Data	7			✓			
ECO04	10	Items	1	PR	00	✓			
ECO04	20	Partners	1	NR	00	✓			
ECO04	30	Countries	1	CT	00	✓			
ECO04	40								

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Menus

Menu: Option number: Description:

Menu Structure


Menu	Option number	Description	Option type	Option	Program type	In use	Color	Skip before	Skip after
ECO901	30	Answer Commodity Questions	1	CMAN	00	✓			
ECO902	0	License Requirements	7			✓			
ECO902	10	Commodities	1	CM	00	✓			
ECO902	20	Items	1	PR	00	✓			
ECO903	0	Export Control	7			✓			
ECO903	10	Dual Use Classifications	1	ECCN	00	✓			
ECO903	20	Country Groups	1	CTG	00	✓			
ECO903	30	Compliance Groups	1	CKG	00	✓			
ECO903	40	Compliance Codes	1	CKGC	00	✓			
ECO903	50	License Codes	1	XC	00	✓			

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To create a top-level menu, a sub-menu, or a menu option:


1. Access the GN option.
2. Click the Create button in the toolbar.
3. In the Menu Structure [Create] pop-up window, complete the fields to create a top-level menu, a sub-menu, or a menu option.


Menu Structure [Create]


Menu: 

Option number:

Option type: SubMenu/Option
 Help
 Heading
 Ruler
 Skip

Module: 

Option: 

Program type: 

URL (Server:Port/Context):



URL (/Path):

Skip after
 Rule after
 Rule before
 Skip before

Image file name:

Description:

In use

 Create  Close

- **Menu.** Use the Menu field to create a new menu or to reference an existing menu. After you have specified the menu code, you can add details for a menu option or sub-option.
- **Option Number.** Specify a number that indicates the position of this menu option within the menu; the menu option with the lowest number appears at the top of the list of menu options. For a top-level menu, set this field to 0.
- **Option Type.** If you are creating a new top-level menu, then set this field to Heading. If you are creating a menu option or a sub-menu, then set this field to SubMenu/Option.
- **Option.** Specify the option that you want to make available through this menu option. If you want to make a sub-menu available through this menu option, then set this field to the Menu value that you specified for that menu. If this is a top-level menu, then leave this field blank.
- **Program Type.** Set this field to:

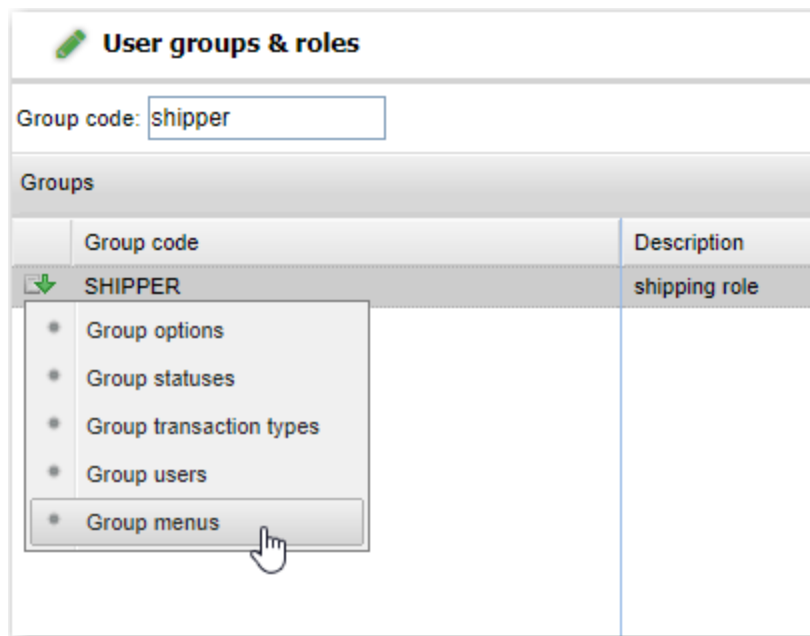
- 50 if the menu option is a Web UI option
 - 00 if the menu option is a maintenance option
 - 95 if the menu option represents a sub-menu
 - Description. Specify the text that appears in the Web UI for the menu option.
4. Click Save to save the menu option.
 5. Continue to add the other menu options for this role by clicking Create, specifying the menu code, and then completing the remaining relevant fields.

Associating Menus with a Role

To associate a menu with a role:

1. Access option GU.
2. Select the role with which you want to associate a menu.
3. Click the green arrow and choose the Group Menus sub-option. Then click the Create button in the toolbar on the next page.

Option GU, Group Menus



Group Menus [Create]

Client: TGL

Group code: SHIPPER

Menu: 🔍

Sequence: 0

In use

Create Close

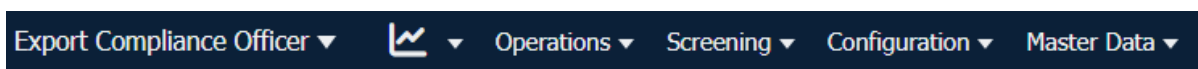
Complete the fields:

- Menu. Select the menu that you want to add a top-level menu for this role.
- Sequence. Specify the position of this menu in the order of appearance of top-level menus.
- In Use. To make this menu appear in the role menu for this role, select this field.

4. Click Create.

The image below shows an example menu for an export compliance officer role, and Figure 4.8 shows how these menus are set up in the Group Menus sub-option of option GN.

ECO Menu in the Web UI



ECO Menu Setup in Option GN

Menu	Description	Sequence	In use
ECO01	Operations	10	✓
ECO02	Screening	20	✓
ECO03	Configuration	30	✓
ECO04	Master Data	40	✓

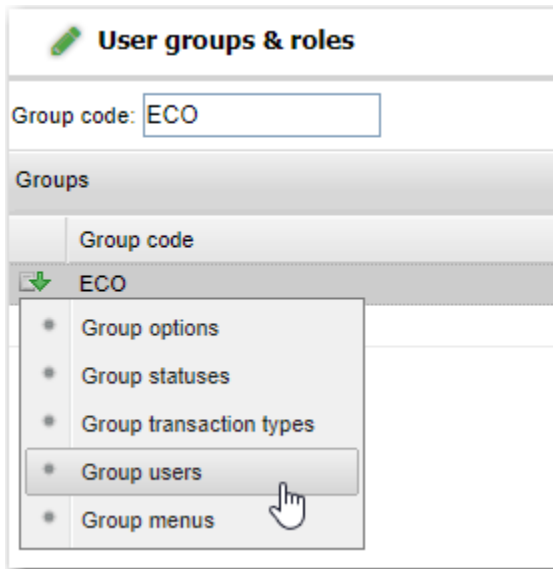
Associating Users with a Role

To make a role—and its associated role menus—available to a particular user, you must associate the user with the role.

You can do this through the GU option:

1. Access option GU.
2. Select the role that you want to make available to the user, and click the green arrow.
3. Click the Group Users sub-option.

Option GU, Group Users



4. In the Group Users grid that appears on the page, click the Create button in the toolbar.

Group Users [Create]

Client: TGL

User group: ECO

User Id:

Read only member

In use

Create Close

5. Complete the fields:
 - User Group. This field automatically contains the role name that you chose in Creating an Effective User Role.
 - User ID. Specify the user ID to which you want to assign this role.
 - In Use. To make this user a member of the group of users, select this field.
6. Click Create

Default User Roles and Associated Options


The tables below list the default user roles available in the [menu bar on page 52](#). These roles have role menus associated with them at the top level. These top-level menus include level 2 menu options, and—in some cases—level 2 menus that offer options at a third level of granularity.

Default Roles and Associated Options

Role	Level 1 Menu	Level 2 Menu Description	Level 2 Menu Option	Level 3 Menu Description	Level 3 Menu Option
Administrator	System	Clear Caches	ADMIN	None	None
		Environment	EN	None	None
		Languages	DL	None	None

Role	Level 1 Menu	Level 2 Menu Description	Level 2 Menu Option	Level 3 Menu Description	Level 3 Menu Option
		QZ Tray Configuration	CFGQZ	None	None
		Log Files	LI	None	None
		System Values	FNDCY3	None	None
		Translate Literals	TRANSL	None	None
		XML Upload	XML	None	None
		Foundation	FOUND	None	None
		Electronic File Management	EFM	None	None
	Printing	Printers	DP	None	None
		Locales	FNDCLO	None	None
		Documents	DO	None	None
		Macros	MA	None	None
	Security	Users	US	None	None
		User Import	USIMP2	None	None
		User Groups & Roles	GU	None	None
		Configure Permissions	ACCESS	None	None
		Permissions	ZP	None	None
		Menus	GN	None	None
		Configure Main Menu	CFGMM	None	None
		Options	GO	None	None

Role	Level 1 Menu	Level 2 Menu Description	Level 2 Menu Option	Level 3 Menu Description	Level 3 Menu Option
		Function Groups	FN	None	None
		Configure APIs	CFGAPI	None	None
	Testing	SOA Test Page	BBTEST	None	None
		SOA Test Page (Load)	BBLOAD	None	None
	Client Resources	API Swagger Page	None	Delivery Exception Management	None
			None	Docs	None
			None	Transportation Execution	None
			None	Imports	None
		API Client Libraries	None	DEM Jar File	None
			None	Doc Jar File	None
			None	EFM Jar File	None
		Apps	None	QAD ePage	None
	None		QZ Tray	None	
	Customer Service Representative	Tracking	Track Deliveries	DEM	None
View Shipments			REPORT	None	None
Screening		Ad Hoc Compliance	CKADH	None	None
Customer Service Manager	Dashboard dropdown menu	Transportation Execution Dashboard	ANTE	None	None

Role	Level 1 Menu	Level 2 Menu Description	Level 2 Menu Option	Level 3 Menu Description	Level 3 Menu Option
		Reports	LRC	None	None
Desktop Shipper	Shipping	Make a Shipment	SHDTS	None	None
		Recall a Shipment	SHRCLL	None	None
		Void a Shipment	SHVOID	None	None
		Mailing List Shipping	MLSHIP	None	None
		Mailing Lists	MLEDIT	None	None
		Partner Import	NRIMP2	None	None
	Tracking	Track Deliveries	DEM	None	None
		View Shipments	REPORT	None	None
Export Compliance Officer	Dashboard dropdown menu	Trade Compliance Dashboard	ANTC	None	None
	Operations	Review results	CKHIST	None	None
		Manage Licenses	XL	None	None
		Manage Permits	XG	None	None
		Complete Questionnaires	None	Answer Item Questions	PRAN
			None	Answer Partner Questions	NRAN

Role	Level 1 Menu	Level 2 Menu Description	Level 2 Menu Option	Level 3 Menu Description	Level 3 Menu Option
				Answer Partner Questions	CMAN
		Compliance Productivity Reports	CKRTP	None	None
	Screening	Adhoc Compliance Screening	CKADH	None	None
		Data Scrub	DSCRUB	None	None
	Configuration	Configuration	CK	None	None
		Set Up Questionnaires	QE	None	None
		License Requirements	None	Commodities	CM
				Items	PR
		Export Control	None	Dual Use Classifications	ECCN
				Country Groups	CTG
				Compliance Groups	CKG
				Compliance Codes	CKGC
				License Codes	XC
	Master Data	Items	PR	None	None
		Partners	NR	None	None
		Countries	CT	None	None
		Denied Parties	XPXF	None	None

Role	Level 1 Menu	Level 2 Menu Description	Level 2 Menu Option	Level 3 Menu Description	Level 3 Menu Option
Export Compliance Manager	Dashboard dropdown menu	Trade Compliance Dashboard	ANTC	None	None
Import Compliance Analyst	Dashboard dropdown menu	Trade Compliance Dashboard	ANTC	None	None
		Imports Dashboard	IMPDH	None	None
	Pre-Entry	Product Master	IMPPR	None	None
		Mass Classification	IMPMC	None	None
		Product Labels	None	Approval Requests	PCMA
			None	Review Requests	PCMR
			None	New Classification	PCMB
			None	ERP Classification Review	PCME
	Entry	Import Shipment	FLOWE	None	None
		Purchase Order	FLOWP	None	None
	Screening	Compliance History Search	CKHIST	None	None
		Ad Hoc	CKADH	None	None
		Data Scrub	DSCRUB	None	None
		Unmatched Broker Documents	IMPUB	None	None

Role	Level 1 Menu	Level 2 Menu Description	Level 2 Menu Option	Level 3 Menu Description	Level 3 Menu Option
Import Compliance Supervisor	System	Imports Admin Maintenance Portal	ITCC	None	None
Import System Admin	System	Imports Admin Maintenance Portal	ITCC	None	None
		Imports Configurator	CFGITC	None	None
		Broker Docs	None	Unmatched Broker Documents	IMPUB
			None	Background Jobs	IMPJM
			None	Broker Document Feeds	IMPBD
		Electronic File Management	EFM	None	None
		SRM Document Templates	IMPADT	None	None
		Tracking Milestones	CFGIMP	None	None
Mailroom User	None	None	None	None	None
Shipping Clerk	Operations	Work with Transactions	FLOW	None	None
		Desktop Shipping	SHDTS	None	None
		Make a Shipment	MANSH	None	None
		Mailroom Shipping	MLSHIP	None	None

Role	Level 1 Menu	Level 2 Menu Description	Level 2 Menu Option	Level 3 Menu Description	Level 3 Menu Option
		Simplified Shipping	TE_SS	None	None
	Consolidating	Consolidate Orders	BUILDB	None	None
		Consolidate Partial Orders	SNPKCS	None	None
		Consolidate Shipments	BUILDA	None	None
		Create a Zone Skip Shipment	BUILDZ	None	None
	Tracking	Track Shipments	DEM	None	None
		View Shipments	REPORT	None	None
Super User	Configuration	Compliance	None	Configure Compliance	CFGCK
		Core	None	System Values	FNDCY3
				Configure Workflow	CFGWF
				Maintain Workflows	WF
				Configure Rules	RULES
	Consolidation	None	Configure Shipment Consolidation	CFGBA	
			Configure Order Consolidation	CFGBB	
			Configure Zone Skip Consolidation	CFGBZ	

Role	Level 1 Menu	Level 2 Menu Description	Level 2 Menu Option	Level 3 Menu Description	Level 3 Menu Option	
		Dashboards	None	Configure Dashboard	CFGDB	
			None	Configure Address Verification	CFGAV	
		Documents	None	Map Documents	DOCS	
			None	Configure Documents	CFGDO	
		Languages	None	Languages	DL	
			None	Translate Literals	TRANSL	
		Shipping	None	Configure End of Day	CFGEOD	
			None	Configure Error Refine	CFGERR	
		Simplified Shipping	None	Configure Shipment Forms	TE_SC	
		Tracking	None	Configure DEM Admin	DEMADS	
				Configure DEM User Views	DEMUV	
		Other	None	Configure Mailing Lists	CFGML	
		System	Change Session Details	CHGSES	None	None
			Clear Caches	ADMIN	None	None

Role	Level 1 Menu	Level 2 Menu Description	Level 2 Menu Option	Level 3 Menu Description	Level 3 Menu Option
		Log Information	LI	None	None
		Net Change Document	NETCHG	None	None
		User Count Assessment	UCA	None	None
		XML Upload	XML	None	None
	Master Data	Clients	CL	None	None
		Countries	CT	None	None
		Currencies	CU	None	None
		Delivery Terms	DE	None	None
		Items	PR	None	None
		Pack Types	PY	None	None
		Packing Locations	LN	None	None
		Partners	NR	None	None
		Partners Import	NRIMP2	None	None
		Shipment Types	ZS	None	None
		Text IDs	ZBTX	None	None
		Transaction Types	Z9	None	None
		Transport Modes	TR	None	None
	Units of Measure	UO	None	None	

Role	Level 1 Menu	Level 2 Menu Description	Level 2 Menu Option	Level 3 Menu Description	Level 3 Menu Option
		User Defined Lookups	UY	None	None
Supply Chain Manager	Dashboard dropdown menu	Transportation Execution Dashboard	ANTE	None	None
		Reports	LRC	None	None
Transportation Analyst	Dashboard dropdown menu	Transportation Execution Dashboard	ANTE	None	None
		Reports	LRC	None	None
	Operations	Routing Guide	FRROUT	None	None
		Rate Shopping	SHRATE	None	None
		Quick Cost Entry	QSHSO	None	None
	Freight Bill Audit	Process Carrier Invoices	FAIN	None	None
		Manage Carrier Payments	FAPB	None	None
		Manage Shipment History	FASH	None	None
	Master Data	Packing Locations	LN	None	None
		Maintain Carriers	CRTCAR	None	None
		Carriers	NR	None	None
		Services	RT	None	None
		Charges	None	Charge Tables	TE_TH

Role	Level 1 Menu	Level 2 Menu Description	Level 2 Menu Option	Level 3 Menu Description	Level 3 Menu Option
			None	Charge Class	GC
			None	Charge Codes	CH
			None	Charge Category	CG
			None	Calculation Method	TZ
		Zones	None	Zones	TE_RG
			None	Zone Classifications	TE_ZC
			None	Postal Codes	PB
			None	Places	PL
		Transit Times	None	NonNoneTransit Days	TE_TR
			None	Transit Times	TE_RN
		Assets	TA	None	None
		Freight Class	FC	None	None
		National Motor Freight Class	NM	None	None
		National Motor Freight Class	TR	None	None
		Transport Mode	TR	None	None
		UN Numbers (Hazardous)	UN	None	None

Role	Level 1 Menu	Level 2 Menu Description	Level 2 Menu Option	Level 3 Menu Description	Level 3 Menu Option
Warehouse Manager	Dashboards dropdown menu	Transportation Execution Dashboard	ANTE	None	None
		Reports	LRC	None	None
Warehouse Operator	Shipping	Pack and Process Shipments	SNPKSH	None	None
		Pack Shipments	SNPKPS	None	None
		Rate Shipments	SNPKRS	None	None
	Consolidating	Consolidate Shipments	BUILDA	None	None
		Create a Zone Skip	BUILDZ	None	None
		Consolidate and Process Shipments	SNPKCS	None	None
Warehouse Supervisor	Shipping	Close Out Carrier Accounts	SPSEOD	None	None
		Void a Shipment	SHVOID	None	None
		Work with Shipments	FLOW	None	None
		Make a Shipment	MANSH	None	None
	Tracking	Track Deliveries	DEM	None	None
		View Shipments	REPORT	None	None

Legacy Roles

Role	Level 1 Menu	Level 2 Menu Description	Level 2 Menu Option	Level 3 Menu Description	Level 3 Menu Option	
Legacy Note This role provides access to the menus and the majority of options that were available on the side menu in earlier QAD GTTE releases. This may be useful if you plan to upgrade.	Base	Workflow Portal	FLOW	None	None	
		Inquiry	REPORT	None	None	
		Legacy Inquiry	NQ	None	None	
		Scan, Pack and Ship	SNPKSH	None	None	
		Scan and Pack	SNPKPS	None	None	
		Scan and Rate	SNPKRS	None	None	
		Consolidate and Rate	SNPKRS	None	None	
		Manual Shipment	MANSH	None	None	
	Transportation Execution	Desktop Shipping	SHDTS	None	None	
			Rate Shopping	SHRATE	None	None
			EOD Manifest	SPSEOD	None	None
			Cancel or Reprint a Shipment	SHVOID	None	None
			Recall Shipment	SHRCLL	None	None
	Trade Compliance	Compliance History Search	CKHIST	None	None	
			Ad Hoc Compliance Screening	CKADH	None	None

Role	Level 1 Menu	Level 2 Menu Description	Level 2 Menu Option	Level 3 Menu Description	Level 3 Menu Option
		Batch DPL Data Scrub	DSCRUB	None	None
	Delivery Exception Management	DEM Portal	DEM	None	None
	System Settings	Base	None	Rules & Rulebooks	RULES
			None	System Values	Y3
			None	Workflow	WF
			None	Administration	ADMIN
			None	XML Upload	XML
			None	Log Files	LI
		Transportation Execution	None	Routing Guide	FRROUT
			None	Assets	TA
			None	Calculation Method	TZ
			None	Charge Category	CG
			None	Charge Class	GC
			None	Charge / Revenues	CH
			None	Charge Tables	TH
			None	Freight Class	FC
	None	Postal Codes	PB		
	None	Route	RT		

Role	Level 1 Menu	Level 2 Menu Description	Level 2 Menu Option	Level 3 Menu Description	Level 3 Menu Option
			None	Services (RM)	SE
			None	Zone Classifications	ZC
			None	Zones	RG
		Trade Compliance	None	Compliance Checks	CKCFG
			None	Questions	QE
			None	License Maintenance	XL
			None	Compliance Groups	CKG
			None	Compliance Codes	CKGC
			None	License Codes	XC
			None	ECCN Details	ECCN
		Testing	None	SOA Test Page	BBTEST
			None	SOA Load Test Page	BBLOAD

Permissions

This section describes how to assign permissions to users. Typically, you assign permissions to a group of users rather than a single user. You may decide to assign permissions to user groups that reflect the effective user roles discussed in [Configuring Effective User Roles on page 223](#). Or you may decide to assign permissions to a user group created specifically to support a particular permission set or system role.

The system roles discussed in this section are not the same as the effective user roles discussed in other parts of the QAD GTTE online help.

Configuring Permissions

The typical workflow for configuring permissions is:

1. Enable permissions in the Web UI; see *Enabling Permissions*.
2. Create an option group for a permission set. An option group is a collection of options and generally maps directly to a system role. For more information, see *Creating an Option Group*.
3. Associate the options you need with the option group; see *Associating Options With an Option Group*.
4. Create a user group for the specific permission set. A user group is a collection of users and generally maps directly to a system role. For more information, see *Creating a User Group for a Permission Set*.
5. Associate users with the user group; see *Associating Users With a User Group*.
6. Tie the option group and the user group together using a Permissions record; see *Creating the Permission*.
7. Make any changes for particular users or options at a user or option level.
8. Test the permissions that you have configured.
9. Troubleshoot any problems or errors; see *Troubleshooting Permissions in the Web UI*.

Enabling Permissions

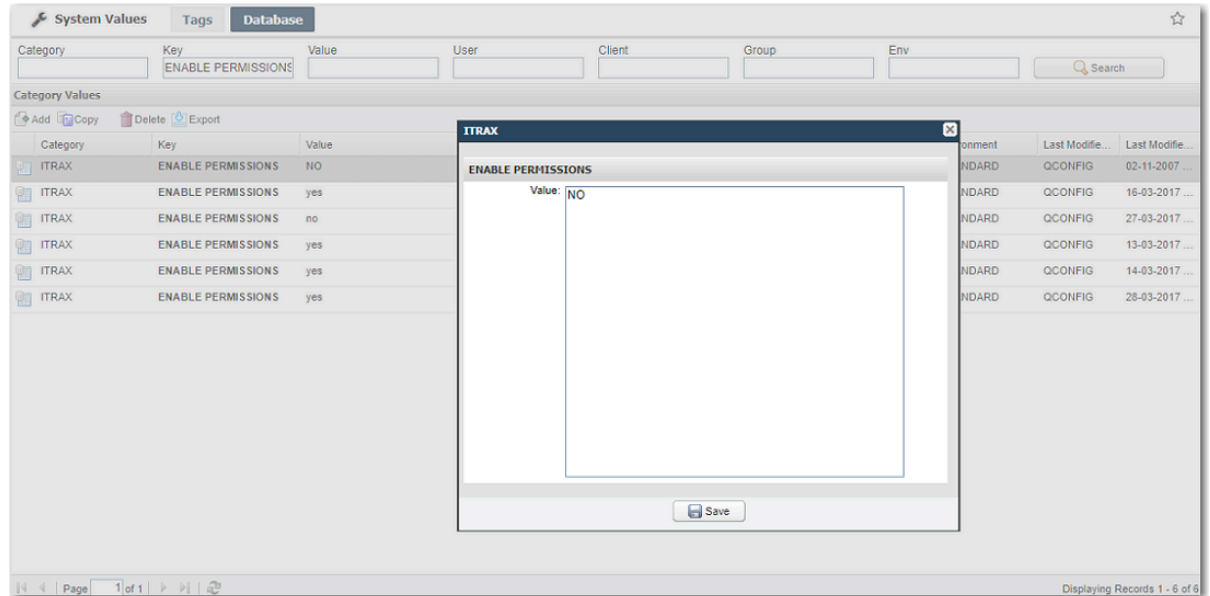
In most organizations, many users share a single role, needing access to the same system functions. Therefore, when you set up permissions in the Web UI, the most efficient and risk-free method is to set up permissions at user group and option group level first. After permissions are working at group level, you can begin to set more granular permissions at user and option level.

By default, permissions are not enabled in the Web UI. This means that every user has access to all parts of the system. Unlike the Windows UI, however, the Web UI is designed as a grant-access application. When you enable permissions for the system, the administrator must explicitly grant permissions to users and user groups.

To enable permissions, open the System Values page. In the More list, choose Administration, and click the Enable Permission system value. You can enable permissions at three levels:

- Global
- Client
- User

Permission Levels



Enable permissions for the chosen level and set the value to Yes. It is good practice to have at least one admin user for whom permissions are not enabled. To do this, add a user-level system value for this user and set the value to No.

Note Although you can enable permissions at client level, you cannot set different permissions for different clients. You can only maintain one set of permissions.

You can also enable permissions in the Windows UI. Use the menu option Y3 to access the system values page. In the Category field, type ITRAX. The key is ENABLE PERMISSIONS.

Core Role

If you enable permissions, all system users need to be able to log in and log out and run the options they have permissions for. A core role, WEB-CORE, is defined in the solution. This role allows users to perform these basic tasks.

WEB-CORE

The screenshot shows a web application window titled "User groups & roles". At the top, there is a search bar with "Group code:" and "Description" fields, and a "Search" button. Below the search bar is a table with the following columns: Group code, Description, Business Unit, Cost Centers, Office, and User Group Responsibility. The table contains several rows, with the "WEB-CORE" row highlighted in grey. The "WEB-CORE" row has a green arrow icon to its left and lists "Core web user permission group" as the description and "PERMISSIONS" as the responsibility. Other rows include "QTGLUSER", "SHIPPINGCLERK", "SUPERUSER", "SUPPLYCHAINMGR", "TEST01", "TOWER_UG", "TRANSPORTANALYST", "WAREHOUSEMANAGER", "WAREHOUSEOPERATOR", "WAREHOUSESUPERVISOR", "WEB-ADMIN", "WEB-ALL", "WEB-FBAP", "WEB-FBAP-ADMIN", "WEB-FBAP-VIEW", "WEB-GV", "WEB-GV-ADM", and "WEB-GV-CUS". At the bottom of the window, there is a status bar showing "Page 3 of 3" and "Displaying record 21 - 40 of 44".

Group code	Description	Business Unit	Cost Centers	Office	User Group Responsibility
QTGLUSER	Global Shipping User Group				
SHIPPINGCLERK	Shipping Clerk				EFFECTIVE_USER_ROLE
SUPERUSER	Super User				EFFECTIVE_USER_ROLE
SUPPLYCHAINMGR	Supply Chain Manager				EFFECTIVE_USER_ROLE
TEST01	Administrator				EFFECTIVE_USER_ROLE
TOWER_UG	Tower User Group				
TRANSPORTANALYST	Transportation Analyst				EFFECTIVE_USER_ROLE
WAREHOUSEMANAGER	Warehouse Manager				EFFECTIVE_USER_ROLE
WAREHOUSEOPERATOR	Warehouse Operator				EFFECTIVE_USER_ROLE
WAREHOUSESUPERVISOR	Warehouse Supervisor				EFFECTIVE_USER_ROLE
WEB-ADMIN	Admin web user permission group				PERMISSIONS
WEB-ALL	All web user permission group				PERMISSIONS
WEB-CORE	Core web user permission group				PERMISSIONS
WEB-FBAP	Freight Audit Standard Users				PERMISSIONS
WEB-FBAP-ADMIN	Freight Audit Config User				PERMISSIONS
WEB-FBAP-VIEW	Freight Audit View Transaction				PERMISSIONS
WEB-GV	Global visibility web users				PERMISSIONS
WEB-GV-ADM	Global Visibility Web UI Admin				PERMISSIONS
WEB-GV-CUS	Global Visibility Web UI Customer				PERMISSIONS

Creating an Option Group

An option is a program that runs in the Web UI. In most cases, an option is displayed as a URL. An option group—also known as a function group—is a container for a group of options necessary for a role. You can assign any number of options to one option group. To create an option group, complete the following steps.

1. In the menu search, type FN and press Enter.
2. To create an option group, click the Create button on the toolbar.
3. In the pop-up window, supply a meaningful option group name and description.

Create Option Group

The screenshot shows a dialog box titled "Function Groups [Create]". It has a dark blue header with a close button (X). The main area contains two text input fields: "Option group:" with the value "WEBNQ" and "Description:" with the value "Shipment Inquiry Role". At the bottom of the dialog, there are two buttons: "Create" and "Close".

Associating Options With an Option Group

The next step is to associate options with the option group you have created.

1. Select a record from the list and click the sub-options icon that appears.

2. Click Option group options to open the Option group options for the WEBNQ option group.
3. To add an option to the group, click the Create button.
4. Add the NQ option to the option group

Add an Option

The screenshot shows a dialog box titled "Option Group Options [Create]". It contains the following fields and controls:

- Client:** A text box containing "TGL".
- Function/group:** A text box containing "WEBNQ".
- Option:** A dropdown menu with "NQ" selected and a search icon to its right.
- In use:** A checkbox that is checked.
- Buttons:** A "Create" button at the bottom left and a "Close" button at the bottom right.

5. Click Create.

Creating a User Group for a Permission Set

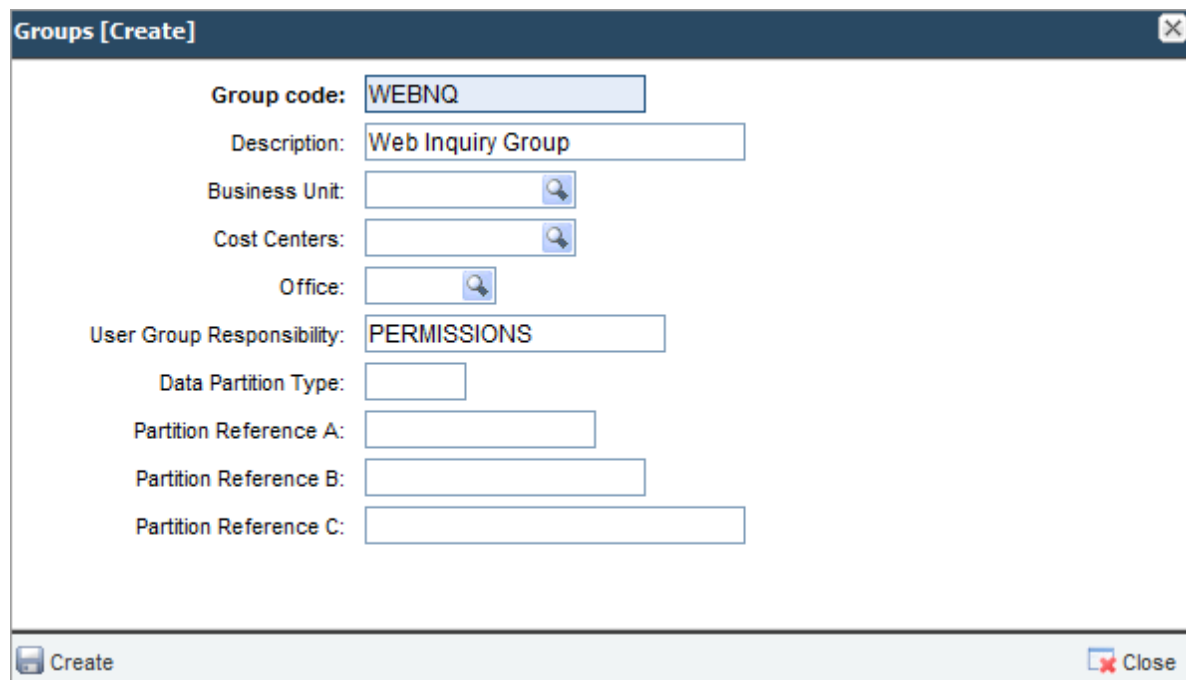
After adding options to the option group, create a user group to tie users with the same role together. Ensure that you give the user group a name that clearly links it to the option group.

Note A user can have more than one set of permissions or system role, and can therefore be a member of multiple user groups.

To create a user group for permission purposes:

1. Access option GU.
2. To create a group, click the Create button on the toolbar.
3. In the pop-up, enter a Group Code, ideally one that matches the name of the option group, and complete the other fields as necessary. Because groups are also used for data segregation and effective user roles, it is good practice to set the User Group Responsibility field to PERMISSIONS. In Figure 5.5, a user group is created for Shipment Inquiry.

Create User Group Example



Groups [Create]

Group code: WEBNQ

Description: Web Inquiry Group

Business Unit:

Cost Centers:

Office:

User Group Responsibility: PERMISSIONS

Data Partition Type:

Partition Reference A:

Partition Reference B:

Partition Reference C:

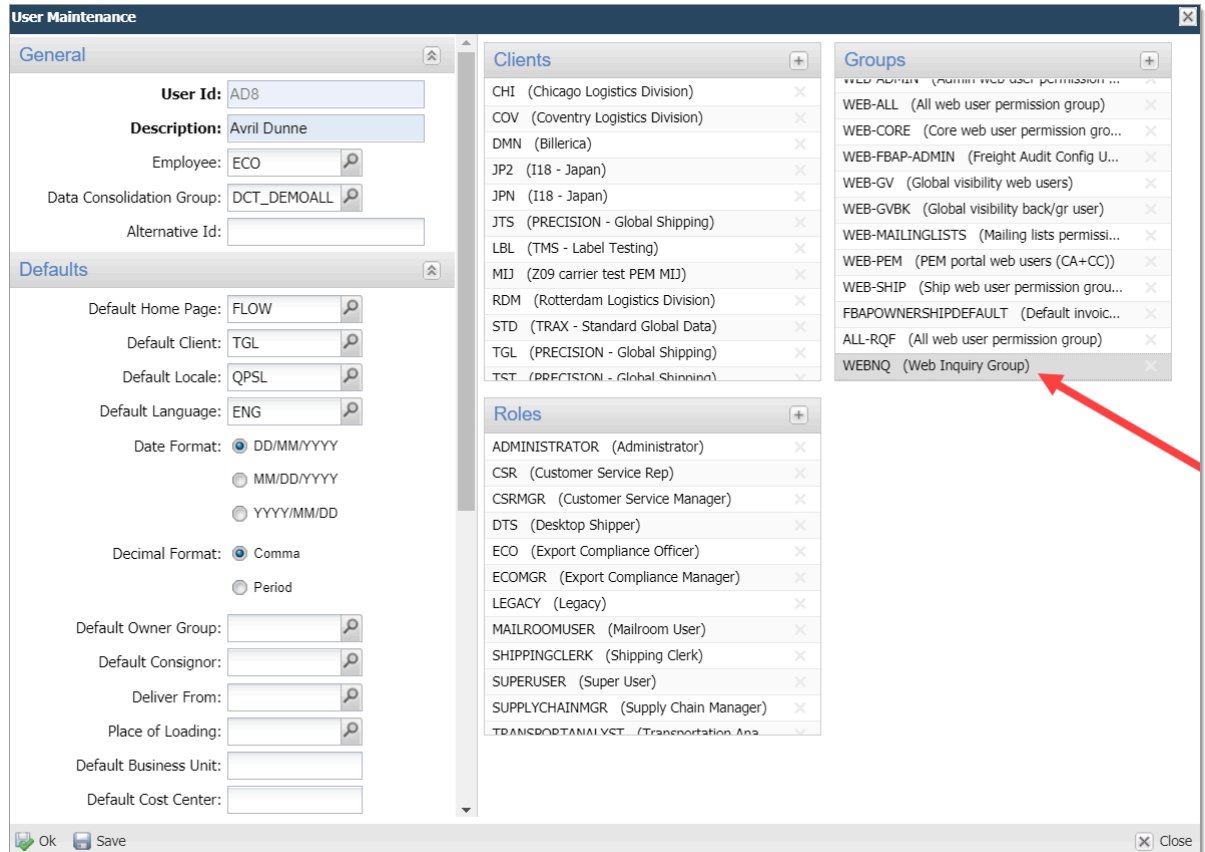
Create Close

Note You may see some user groups that are not relevant for permissions purposes. User groups are also used to create effective user roles and, in workflow, to determine the set of records you can view.

Associating Users With a User Group

After you have created a user group, you can add users to the group you created. You do this by associating users with a group or groups with a user. To associate users with a group, open the Group page using the option GU, select the group, click the green arrow, and choose Group Users. To associate groups with a user, open the Users page, which is on the same menu as Options. Alternatively, use the menu option US. Add the users to the group, as displayed in the image below.

Add Users to a User Group



Setting Permissions at a Granular Level

Although all users typically belong to at least one user group, a particular user might need access to another option in the Web UI.

A user might belong to a group that has permission to create a shipment. However, this user also needs a specific permission to do an end of day manifest. You can grant this permission at a user level. Permissions set at a more granular level take precedence. Therefore, a permission configured at user level overrides a permission configured for a user group.

Configuring Permissions

The Configure Permissions page, option ACCESS, enables you to create and maintain security permissions. It provides a detailed overview of the permission records that are currently in the system, and the users, groups, roles, options, and option groups associated with them.

ACCESS Option

The screenshot displays the 'Configure Permissions' interface. At the top, there are search fields for 'USER' and 'OPTION', and radio buttons for filtering by 'User', 'Group', 'Role', and 'All' (selected). Below this is a main grid with columns: User, Option, Allow A..., Add, Change, Delete, and In Use. The grid lists various users and options, with 'QTGLUSER' and 'FLOW-C' highlighted. To the right, there are configuration options for 'User: QTGLUSER' and 'Option: FLOW-C', including a 'Permissions' section with checkboxes for 'Allow Access', 'Add', 'Change', 'Delete', 'In Use', 'Confirm', 'Close', 'Print Records', and 'Custom Action 1-5'. At the bottom, there are two summary panels: 'Users in Group QTGLUSER' and 'Options in Group FLOW-C', each with a table of records and a 'No data' status.

Using the fields in the search panel below the title area, you can filter the records displayed in the permissions grid by:

- User
- Group
- Role
- All






You can also use the free text input fields to find a specific user or option permission record.

The icon displayed in the User column of each record indicates the level that the permission is set for; user, user group, or role. In the Option column, an icon indicates whether the record applies to a single option or an option group.

Icons in User and Option columns

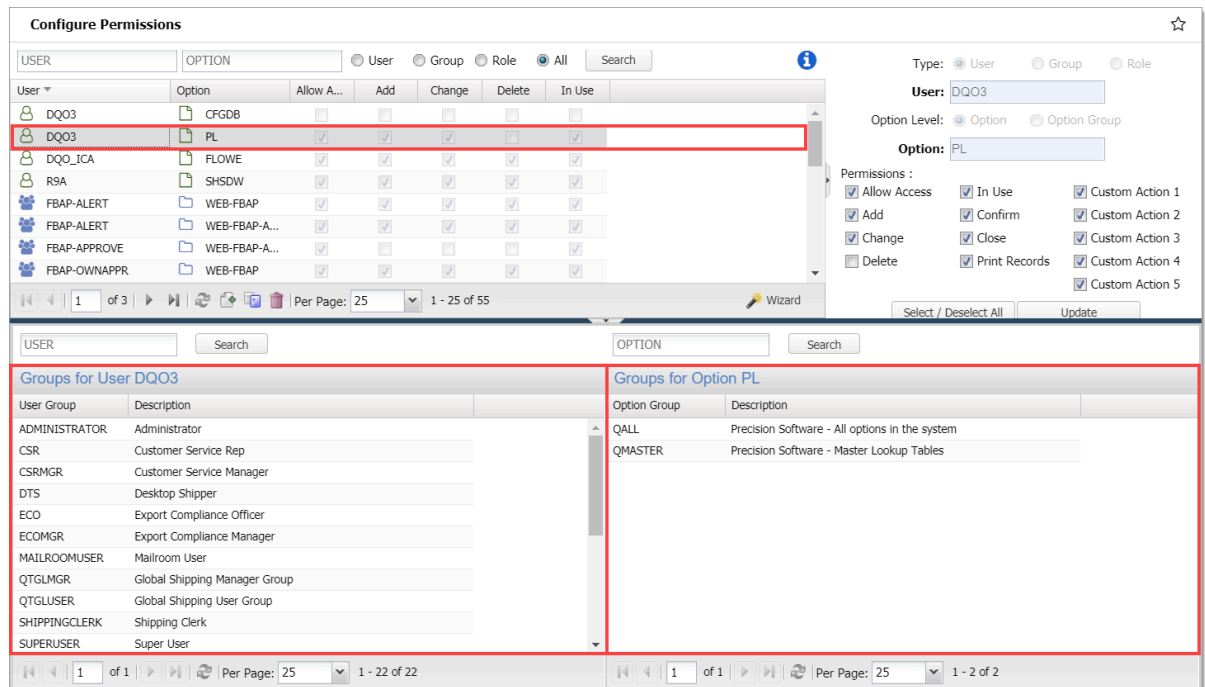
This close-up screenshot shows the 'Configure Permissions' interface with the search panel and the first row of the permissions grid. The search panel includes 'USER' and 'OPTION' input fields, radio buttons for 'User', 'Group', 'Role', and 'All' (selected), and a 'Search' button. The first row of the grid shows 'User: WEB-GVBK' with a blue group icon, 'Option: WEB-GVBK' with a blue folder icon, and checkboxes for 'Allow A...', 'Add', 'Change', 'Delete', and 'In Use'.

Type and Option Column Icons

Icon	Description
	User
	User Group
	Role
	Single option
	Option Group

The data displayed in two panels in the lower half of the window depends on the permission record that is selected in the top grid. Select a user record to view the groups associated with a user in the Groups for User panel on the bottom left.

Groups for Selected User and Option



The screenshot shows the 'Configure Permissions' window. At the top, there are filters for 'USER' and 'OPTION', and radio buttons for 'User', 'Group', 'Role', and 'All'. Below this is a grid with columns: 'User', 'Option', 'Allow A...', 'Add', 'Change', 'Delete', and 'In Use'. The row for 'DQ03' and 'PL' is highlighted with a red box. To the right of the grid are controls for 'Type', 'User' (DQ03), 'Option Level' (Option), and 'Option' (PL). Below these are 'Permissions' checkboxes for 'Allow Access', 'Add', 'Change', 'Delete', 'In Use', 'Confirm', 'Close', 'Print Records', and five 'Custom Action' checkboxes. At the bottom, there are two panels: 'Groups for User DQ03' and 'Groups for Option PL'. The 'Groups for User DQ03' panel lists various user groups like ADMINISTRATOR, CSR, CSRMGR, etc. The 'Groups for Option PL' panel lists option groups like QALL and QMASTER. Both panels have a red border and a scroll bar.

When you select a user group, the panel on the bottom left displays the users within the group.

Users in Selected Group

The screenshot shows the 'Configure Permissions' window. The top table lists users and options. The row for user QTGLMGR and option FLOW-C is highlighted with a red box. Below this, two panels are visible: 'Users in Group QTGLMGR' and 'Options in Group FLOW-C'. The 'Users in Group QTGLMGR' panel lists various users like BMU, DBU, DQO, etc. The 'Options in Group FLOW-C' panel is currently empty.

User	Option	Allow A...	Add	Change	Delete	In Use
FBAP-OWNPAID	WEB-FBAP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FBAP-OWNRATED	WEB-FBAP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FBAP-OWNRVWD	WEB-FBAP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
QTGLMGR	FLOW-C	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
QTGLUSER	FLOW-B	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
QTGLUSER	FLOW-C	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
QTGLUSER	FLOW-D	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
QTGLUSER	FLOW-I	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
QTGLUSER	FLOW-L	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

If there is a single option associated with a user, you can view the option groups that contain the option in the Groups for Option panel on the bottom right.

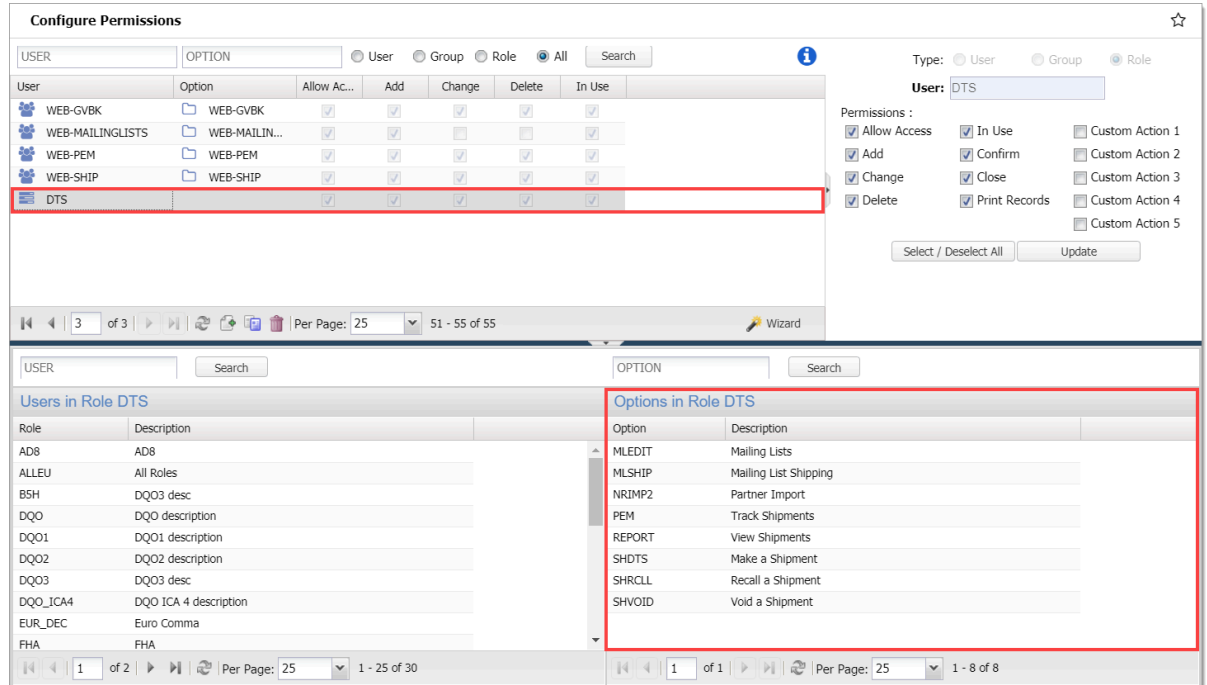
Groups for Selected Option

The screenshot shows the 'Configure Permissions' window. The top table lists users and options. The row for user DQO_ICA and option FLOWE is highlighted with a red box. Below this, two panels are visible: 'Groups for User DQO_ICA' and 'Groups for Option FLOWE'. The 'Groups for Option FLOWE' panel lists option groups ICA and ICS.

User	Option	Allow A...	Add	Change	Delete	In Use
DQO3	CFGDB	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DQO3	PL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DQO_ICA	FLOWE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
RSA	SHSDW	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FBAP-ALERT	WEB-FBAP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FBAP-ALERT	WEB-FBAP-A...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FBAP-APPROVE	WEB-FBAP-A...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FBAP-OWNAPPR	WEB-FBAP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FBAP-OWNCANCEL	WEB-FBAP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

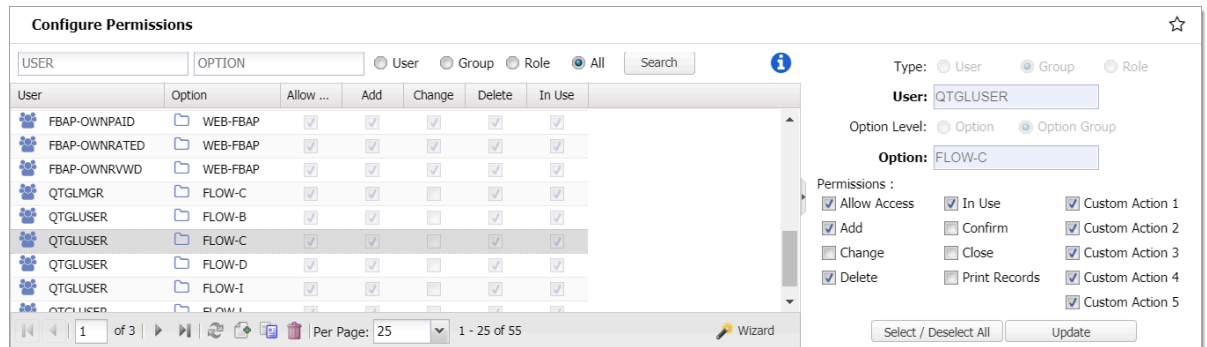
When a Role is selected, the options available to users in that role are displayed in the panel in the bottom right.

Options for Selected Role



To view the configuration of a permission record, select a row in the grid. The form to the right of the grid populates with the record data, showing the various levels of access for the selected user, group, or role.

Form Displays Permission Configuration



Creating the Permission

The next step in the permission configuration workflow is to tie the option group and the user group together using a Permissions record.

1. Click the Create Record icon in the toolbar. This action resets the form displayed in the panel on the top right.

Permissions Form

Type: User Group Role

User:

Option Level: Option Option Group

Option:

Permissions :

<input type="checkbox"/> Allow Access	<input type="checkbox"/> In Use	<input type="checkbox"/> Custom Action 1
<input type="checkbox"/> Add	<input type="checkbox"/> Confirm	<input type="checkbox"/> Custom Action 2
<input type="checkbox"/> Change	<input type="checkbox"/> Close	<input type="checkbox"/> Custom Action 3
<input type="checkbox"/> Delete	<input type="checkbox"/> Print Records	<input type="checkbox"/> Custom Action 4
		<input type="checkbox"/> Custom Action 5

Select / Deselect All Create

2. Select the permission type that you want to create; user, group, or role. To associate the WEBNQ option group with the WEBNQ user group, select Group.
3. In the User field, select a user, user group, or role using the lookup. In this example, the WEBNQ user group is selected.
4. Assign an option level to the selected user or group using the Option Level and Option lookup fields. Option Group and the WEBNQ option group are selected in the example below

Note The option fields do not display if the selected type is Role. This is because specific options are already mapped to each Web UI role in order to match the associated users' real-world roles. However, you can configure the level of access that a user has within a particular role. For example, you can enable or disable the ability to delete records for the Desktop Shipper role.

Permissions Fields for WEBNQ Configuration

Type: User Group Role

User:

Option Level: Option Option Group

Option:

Permissions :

<input type="checkbox"/> Allow Access	<input checked="" type="checkbox"/> In Use	<input type="checkbox"/> Custom Action 1
<input type="checkbox"/> Add	<input type="checkbox"/> Confirm	<input type="checkbox"/> Custom Action 2
<input type="checkbox"/> Change	<input type="checkbox"/> Close	<input type="checkbox"/> Custom Action 3
<input type="checkbox"/> Delete	<input type="checkbox"/> Print Records	<input type="checkbox"/> Custom Action 4
		<input type="checkbox"/> Custom Action 5

Select / Deselect All Create

- By default, no permissions are enabled on a new record. For user or user group access to an option or option group, ensure that Allowed Access is selected in the Permissions list.

Note The other permissions fields control what a user can do on a page at a more granular level. For the shipment inquiry URL, the fields do not have an effect on user access. However, for other options, these fields are important. See *URL Dependencies*.

Permissions Wizard

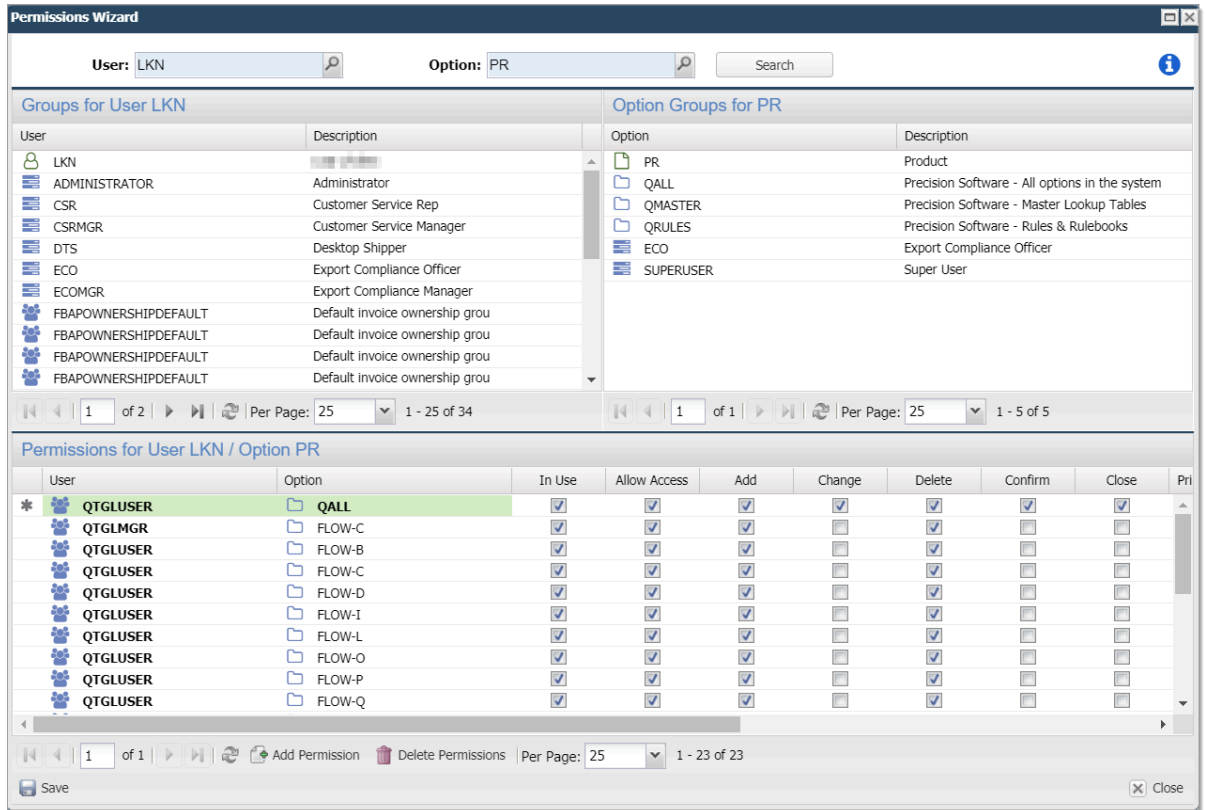
You can also create a permissions record using the Permissions Wizard. This tool is particularly useful if a user is unable to access or interact with a particular option, and you want to ascertain why. To open the Permissions Wizard window, click the Wizard button in the ACCESS option. The window is divided into three panels.

Permissions Wizard

To view a user's current permissions related to a specific option:

1. In the User field at the top of the window, select a user using the lookup.
2. Select an option code using the Option field lookup.
3. Press Enter or click the Search button.

Permissions Wizard Search



The panel on the top left displays the user groups and roles that the user belongs to, and the panel to the right shows the option groups that contain the specified option. The grid in the bottom panel lists the permissions records in the system that apply at user or option level in some way. They can be related to the user, or the role or group that they belong to. The configuration of these records is displayed in the columns to the right.

Note The records displayed can be exact or partial matches.











The records in the bottom panel may be highlighted or displayed in bold text. The table below describes what this can indicate.

Highlighted Permissions Records

Text	Description
Bold User / User Group / Role	Users, user groups, and roles displayed in bold indicate that the specified user code is a match or the user is a member of the user group.
Bold Option / Option Group Options	Options and option groups displayed in bold indicate that the specified option code is a match or the option is in the option group.

Text	Description
Green Highlight	The match that takes precedence and overrides all other matches is highlighted in green, with an asterisk to the left of the user column. This permission configuration is used in deciding access for the user/option combination.
Yellow Highlight	Records highlighted in yellow match the specified user/option combination, but are overridden by permissions that take precedence.

Exact Match at the Most Granular Level Takes Precedence

Permissions for User LKN / Option PR			
	User		Option
*	 LKN		QALL
	 QTGLUSER		QALL
	 QTGLMGR		FLOW-C
	 QTGLUSER		FLOW-B
	 QTGLUSER		FLOW-C

You can also create a permissions record for a user or user group directly in the wizard:

1. Select a user or user group in the User panel.
2. Select the option or option group that you want to give them access to in the Option panel.
3. Click the Add Permission button in the toolbar.

Note It is not possible to configure access to options or option groups at role level here. Therefore, you cannot select a role from the User panel and an option or option group in the Option panel; for example, the ECO role and the PR option.

To update a permissions record in the wizard:

1. Select or deselect the permissions that you want to enable or disable for the corresponding record in the permissions grid at the bottom of the window.
2. Click Save.

Note Updated items are indicated by a red triangle.

Updated Permissions Record

Permissions for User LKN / Option PR						
User	Option	In Use	Allow Access	Add	Change	
QTGLUSER	FLOW-D	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
QTGLUSER	FLOW-I	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
QTGLUSER	FLOW-L	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
QTGLUSER	FLOW-O	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
QTGLUSER	FLOW-P	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
QTGLUSER	FLOW-Q	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
QTGLUSER	FLOW-S	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
WEB-ADMIN	WEB-ADMIN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
WEB-ALL	WEB-ALL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
WEB-CORE	WEB-CORE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

1 of 1 | Per Page: 25 | 1 - 24 of 24

Save

Note Although an alternative permissions page—option ZP—exists, it does not provide the same overview of existing permission records and their associated users, user groups, roles, options and option groups

ZP Option

Permissions [Create]
✕

User level: User
 Group
 Role

User / Group:

Opt level: Option
 Group

Option / Group:

- Allowed access
- Add records
- Change records
- Delete records
- Copy records
- Display records
- Confirm
- Close
- Print records
- Custom Action 1
- Custom Action 2
- Custom Action 3
- Custom Action 4
- Custom Action 5
- In use flag

URL Dependencies

An option points to a primary URL that is used to launch the page. In addition to the primary URL, there may be a number of other URLs that are used to allow the user to complete tasks on the page. These URLs must be invoked directly by the user on the primary URL page. The user requires permission to invoke these URLs. Typically, these URLs are associated with the page option as a URL dependency. Therefore, when a user is given permission to the options, the user also has access to the necessary URLs.

Many of these URL dependencies are AJAX (Asynchronous JavaScript and XML) calls. If an option record does not also specify the dependent URLs, nothing happens when a user triggers the URL request from the main URL page. To avoid this scenario, dependent URLs are included in the option record.

For example, the CU option enables you to run the currency maintenance page. On this page, there are sub-options enabling you to perform operations on the currencies. You can list the dependencies for an option in a comma-separated list. You can also use the wildcard * character to associate many dependent URLs with an option. It is recommended that dependencies point uniquely to one option.

URL Dependencies

Options [Update]

Web UI URL: /htm/permissions.htm

Web UI Dependencies: /htm/permissions*. * (highlighted with a red box)

Purpose: TOOL

Mandatory fields:

Protected fields:

Menu bar menu: LEVEL0

Sub type:

- SubMenu
- Option
- Help

VRC code: *STANDARD

Option security code:

Image file name:

SHDR transaction type: S

GRUP transaction type: L

Option Level:

- Shipment
- Load
- Shipment OR Load
- Other

Next option:

In use

Message Id:

Help label, Help folder, Help document:

Ok Save

When you run the CU option, the toolbar on the page enables the user to add, delete, copy, and edit records. If an option contains this type of sub-option, the fields in the *Permissions Fields for WEBNQ Configuration* image become important. These fields specify the sub-options that the user can access and run. For example, you may want a user to be able to add currencies, but not to delete, copy, or update them. You can set these permissions by selecting only the appropriate fields in the permissions record.

Troubleshooting Permissions in the Web UI

Typically, there are three reasons why permissions may not work as you expect them to.

- The cache has not been cleared.
- Permissions have not been set up correctly.
- There is URL information missing in the option content.

Cache Not Cleared

Permission information is cached. If you change any permission records, you must clear the permissions cache on the admin page by clicking **Reset Cached Permission Information**.


In addition, roles are assigned to a user when the user logs in. Therefore, if you change the role of any user, this user needs to log out and log back in for the new role to take effect.

Permissions Not Set Up Correctly

Sometimes, you may get a message that you do not have sufficient privileges to view a page when accessing a URL you believe you have permissions for. This might happen when an option has not been added to the permission record for an option group. By expanding the authorization details for the page, you can check which options are required for accessing the URL. You can also review the roles that are allocated to you. You can then add the required option to gain access. The image below indicates that the option SHDTS is not in a role that this user has permission to.

Insufficient Privileges

User: Distribution User

 **Sorry, you do not have sufficient privileges to view this page.**
Currently your privilege level is set to that of **Normal User**.

You may navigate [back](#) a page or return to your [homepage](#).

Hide Authorization Details:

Roles needed to view page '/jsp/ship/desktop-shipping-step1.jsp'	Roles allocated to you (JRIQUELME)
ROLE_SHDTS_ACCESS	ROLE_PEMSH_ADD
ROLE_SHDTS_ADD	ROLE_PEMCOM_COPY
ROLE_SHDTS_UPDATE	ROLE_PEMCTH_DELETE
ROLE_SHDTS_DELETE	ROLE_PEMEVT_ACCESS
	ROLE_PEMSH_DISPLAY
	ROLE_PEM_CONFIRM
	ROLE_PEM_PRINT
	ROLE_PEMEVT_DELETE
	ROLE_PEMCTH_DISPLAY
	ROLE_PEMCOM_PRINT
	ROLE_PEMSH_PRINT
	ROLE_PEM_ADD
	ROLE_PEMCTH_CLOSE
	ROLE_PEMCOM_CLOSE
	ROLE_PEMSH_DELETE
	ROLE_PEMSH_CLOSE
	ROLE_PEMCTH_CONFIRM
	ROLE_PEMEVT_COPY
	ROLE_PEM_DISPLAY
	ROLE_PEM_DELETE
	ROLE_PEMSH_COPY
	ROLE_PEM_ACCESS
	ROLE_PEM_UPDATE

If you feel this is incorrect you should contact your system administrator or support contact for further assistance.

Note As an administrator, you may not want users to see details of the privileges they have. You can turn off the authorization details information for the error page in system values. From the More list, select Administration and set ERROR PAGE SHOW STACK DETAILS to no.

Missing Content

If the role is configured with permission to access a page and you still cannot reach it, it is possible that the GO option content for the URL is not up-to-date. Contact QAD GTTE Support if you believe this is the case.

It is also important to note that an error only appears when you run an option URL. It does not appear when you run a dependent URL on a page using an AJAX call.

In this case, confirm in Options in the Web UI Dependencies field that all dependent URLs are listed as sub-options for the option URL.

In Options, open WFTCST. In the field Web UI Dependencies, you see that the address is /htm/consolidate-shipments.*

The * indicates a wildcard that allows an AJAX call to perform some consolidation task on the workflow page. If you remove the wildcard, the call does not work. You can try to run the task but nothing happens because the option data is not correct.

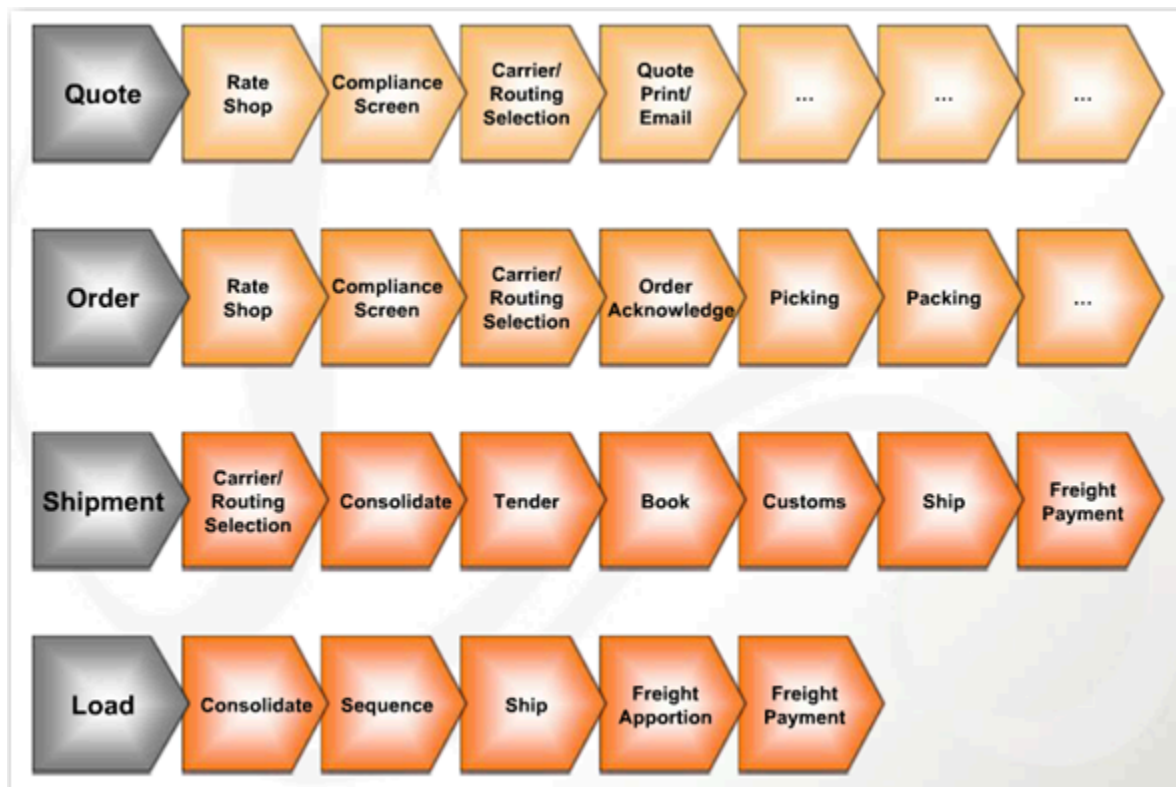
Troubleshooting Tool

You can use a tool named Fiddler to check what your system is doing when you attempt to access an option or sub-option. When your system loads an option or sub-option correctly, the Fiddler log displays a 200-message, indicating that the information is loaded as expected. If you see a type-403 error, this suggests the option setup is not correct and that content is incorrect or incomplete.

Workflow

A workflow is a set of tasks that is associated with a transaction. Workflows mirror business processes within a company. The diagram below illustrates some typical business processes involving quote, order, shipment, and load transactions.

Workflows Mirror Business Processes



As an administrator, you can create workflows to match your company business processes, and associate them with relevant transaction types. You can then ensure that users adhere to these workflows by limiting user access to tasks, adding checks and breakpoints, and making certain tasks pre- and prerequisites of other tasks. This section describes how to:

- Configure Workflow in the Web UI
- Create a workflow and workflow tasks

It outlines how rulebooks and shipment types can determine the workflow associated with a particular transaction. It also explains how to create pre- and prerequisite tasks and checks, and how to link tasks in a workflow.

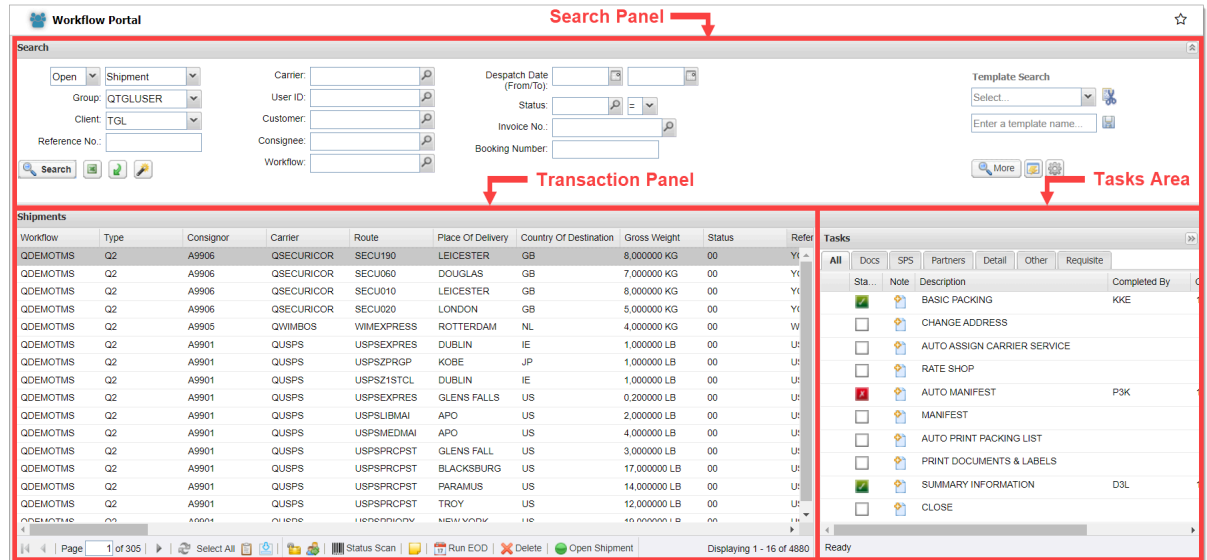
Note Before configuring Workflow, it is recommended that you read the [Workflow on page 56](#) section for a detailed description of how the Workflow functionality works from a user perspective.

Configuring UI Options

The Workflow page is split into a number of different areas. The areas in the Workflow page are:

- Search panel
- Transaction panel
- Tasks area

Workflow Portal



The table below lists the system values that you can use to configure the Workflow page. See [System Values on page 473](#) for information on how to access and update system values.

Workflow Portal

Category	Key	Page Area	Details
	WORKFLOWTAB ORDER	View list	See Configuring Search Fields on page 274 below.
ITRAXSTORE	AVAILABLEWORKFLOWSEARCHFIELDS	Search panel	See Configuring Search Fields on page 274 below.
ITRAXSTORE	COLUMNONEGRIDSEARCHLAYOUT	Search panel	See Configuring Search Fields on page 274 below.
ITRAXSTORE	COLUMNTWOGRIDSEARCHLAYOUT	Search panel	See Configuring Search Fields on page 274 below.

Category	Key	Page Area	Details
ITRAXSTORE	COLUMNTHREEGRIDSEARCHLAYOUT	Search panel	See Configuring Search Fields on page 274 below.
WORKLOAD	SEARCH - ALLOW ALL CLIENTS	Search Panel	See Facilitating Searches Based on Particular Groups and Clients on page 276 below.
ITRAXSTORE	AUTO SEARCH ON FULL REFERENCE	Search panel	See Enabling Barcode Scanner Searches on page 276 below.
WORKLOAD	CLEAR FIELDS ON SEARCH	Search panel	See Enabling Barcode Scanner Searches on page 276 below.
WORKLOAD	REPORTS ENABLED	Search panel	See Enabling the Export of Search Results to a File on page 276 below.
WORKLOAD	REPORT – CSV THRESHOLD	Search panel	See Enabling the Export of Search Results to a File on page 276 below.
WORKFLOW	VALID LINK TO TYPES - L	Search Panel	See Configuring the Link Transactions button on page 277 below.
WORKFLOW	VALID LINK TO TYPES - S	Search Panel	See Configuring the Link Transactions button on page 277 below.
WORKFLOW	VALID LINK TO TYPES - K	Search Panel	See Configuring the Link Transactions button on page 277 below.
WORKFLOW	VALID LINK TO TYPES - O	Search Panel	See Configuring the Link Transactions button on page 277 below.
WORKFLOW	VALID LINK TO TYPES - Q	Search Panel	See Configuring the Link Transactions

Category	Key	Page Area	Details
			button on page 277 below.
WORKFLOW	VALID LINK TO TYPES - T	Search Panel	See Configuring the Link Transactions button on page 277 below.
WORKLOAD	TOOLBAR – <TRANSACTION_TYPE_LETTER>	Transaction Panel	See Configuring the Transaction Panel Toolbar on page 280 below.
WORKLOAD	TASK CATEGORIES – <TRANSACTION_TYPE_LETTER>	Tasks area	See Assigning Tasks to Tabs in the Tasks Area on page 283 below.

Search Panel

The Search panel allows users to search for transactions by entering data in a number of search fields. Users can add and remove fields from the Search panel, and export search results to a file. As an administrator, you can configure the appearance of the Search panel and the functionality it provides. For example, you can:

- Configure search fields
- Facilitate searches based on particular groups and clients
- Enable barcode scanner searches
- Enable the export of search results to a file
- Configure the Link Transactions button

Configuring Search Fields

The View drop-down list allows users to determine the type of transaction they want to view in the workflow by selecting the transaction type from a drop-down menu. Users can also choose to view open or closed transactions using the drop-down list to the left.

The TAB ORDER system value determines the contents of the View drop-down list. Enter a comma-separated list of letters in TAB ORDER. Each letter represents a type of transaction; for example, S is for shipments, and O is for orders. The order of the letters determines the order of the items in the list.

You can configure the TAB ORDER system value so that users can view shipments, orders, invoices, loads, consolidations, or any other transaction type. Because system values can be set at user, group, client or global levels you can control what transactions types a user can work with. For a full list of transaction types, go to the Z9 option.

Note Transaction types are created during initial system setup.

You can configure other fields and the More pop-up in the Search panel using the Config button on the right of the panel. For more information on how to use the Config function, see [Search Panel on page 58](#). All users have access to this functionality.

You can create a configuration that all users see when they open the Workflow page. The easiest way to do this configuration is to first create your own user settings, and then apply these settings as global settings.

1. Edit the contents of the Search panel to suit your needs using the Config button. This sets up a user-level configuration for you.
2. Search for the following system values:
 - AVAILABLEWORKFLOWSEARCHFIELDS
 - COLUMNONEGRIDFIELDLAYOUT
 - COLUMNTWOGRIDFIELDLAYOUT
 - COLUMNTHREEGRIDFIELDLAYOUT

These four system values contain the setup you have configured.

3. Copy the four system values and make them global. The configuration now applies to all users.

Configuring Search Templates

You can create search templates and make these available to a single user, all users, all users with a particular client, or all users listed in a particular group. If users update a shared template, the changes apply to that user's version of the template, only; other users will still have access to the original, shared template. To do this, create a template in the Web UI as described in the Search Templates section in [Search Panel on page 141](#).

QAD GTTE creates a system value that relates to this template. The template relates to your user account. You can copy this system value to make it available for other users, user and client combinations, or user groups. For information on system value granularity, see [System Value Granularity on page 476](#).

Note Do not edit the content of the system value's Value field.

Template System Value

Category	Key	Description
ITRAXSTORE	WF- <TEMPLATE_NAME>.001	The name of the template, where <TEMPLATE_NAME> is the name of the template that you saved in the Web

Category	Key	Description
		UI. Example: The system value WF-TEMPLATE_A:001 relates to the template called TEMPLATE_A.

Facilitating Searches Based on Particular Groups and Clients

The contents of the Group and Client lists depend on the groups and clients that the user is associated with. All groups associated with the user appear in the Group list. All clients associated with the user appear in the Client list. For more information on how to assign users to groups and clients, see [Configuring Effective User Roles on page 223](#).

When you select the *All option in the Client field, the system searches across all clients associated with your user. To make *All an option to select from the Client list, set the SEARCH - ALLOW ALL CLIENTS system value in the WORKLOAD category to Yes. You can also set this system value using the Enable The Ability To Search All Clients In Workflow field on the Workflow tab of the Configure Workflow screen (CFGWF).

Enabling Barcode Scanner Searches

It is possible to set up the Search panel so that a search is run automatically when a user enters data in the Reference No. field. To automatically trigger a search when the Reference No. field contains a reference of 10 characters, set the system value AUTO SEARCH ON FULL REFERENCE to yes. To clear all fields after the search has run, set the system value CLEAR FIELDS ON SEARCH to yes. This feature makes it easier to use a barcode scanner to enter search data. When a user scans a barcode, the search runs automatically. All free text input fields are then cleared so that the next barcode can be scanned

Enabling the Export of Search Results to a File

You can save the result of a search to an Excel file with the name format WORKFLOW_REPORT_<USERNAME>_<DATE>.xls. Set the REPORTS ENABLED system value to yes, which enables the Export button on the Search panel.

Note In the Web UI, there is also a REPORTS ENABLED system value for PEM. If you disable the Export button in Workflow, it does not affect the PEM setting. PEM is deprecated in QAD GTTE v20 and later.

To save the file, click Export. The saved file contains the search results and the search criteria. Exporting a large list of results can hinder performance. REPORT – CSV THRESHOLD sets a threshold above which the search results are exported to Notepad rather than Excel. The default value is 65536.

Note When you click Export, a fresh search is run that exports the results to file. When you run a search, change the search criteria, and then click Export, the contents of the exported file do not match the contents of the Transaction panel. If CLEAR FIELDS ON SEARCH is set to yes, then you must enter search criteria again before clicking Export.

Configuring the Link Transactions button

Use the Transaction Linking tab of the Configure Workflow screen, menu option CFGWF, to configure which transaction types you can view when you click the [Link Transactions button on page 59](#) when a particular transaction type is selected in the Transaction panel.

Note Configuration of the Link Transactions button through these fields applies at the global level for all users. If you want to configure the button at a more granular level for a particular transaction type, click the Maintain System Value icon to the right of the relevant field. You can then configure the corresponding system value at the user, client, or group level.

List of Valid Transactions For Linking From Type L

Enter a comma-separated list of transaction types that you can view when you select a load in the Transaction panel of the Workflow screen, menu option FLOW, and click the Link Transactions button. The list of transaction types appear as a dropdown menu that you can select from.

If you specify O for orders in this comma-separated list, you must include :<LINKING_METHOD> after the O. Possible values for <LINKING_METHOD> are:

- findOrderFromTransaction - for a given transaction, retrieve the orders
- findTransactionFromOrder - for a given order, retrieve the transaction
- findOrderFromShipment - for a given shipment, retrieve the orders
- findShipmentFromOrder - for a given order, retrieve the shipment

An example value for this field is S,K

This field corresponds to the VALID LINK TO TYPES - L system value in the WORKFLOW category.

List of Valid Transactions For Linking From Type S

Enter a comma-separated list of transaction types that you can view when you select a shipment in the Transaction panel of the Workflow screen, menu option FLOW, and click the Link Transactions button.

The list of transaction types appear as a dropdown menu that you can select from.

If you specify O for orders in this comma-separated list, you must include :<LINKING_METHOD> after the O. Possible values for <LINKING_METHOD> are:

- findOrderFromTransaction - for a given transaction, retrieve the orders
- findTransactionFromOrder - for a given order, retrieve the transaction
- findOrderFromShipment - for a given shipment, retrieve the orders
- findShipmentFromOrder - for a given order, retrieve the shipment

An example value for this field is O:findTransactionFromOrder,L

This field corresponds to the VALID LINK TO TYPES - S system value in the WORKFLOW category.

List of Valid Transactions For Linking From Type K

Enter a comma-separated list of transaction types that you can view when you select a consignee consolidation in the Transaction panel of the Workflow screen, menu option FLOW, and click the Link Transactions button. The list of transaction types appear as a dropdown menu that you can select from.

If you specify O for orders in this comma-separated list, you must include :<LINKING_METHOD> after the O. Possible values for <LINKING_METHOD> are:

- findOrderFromTransaction - for a given transaction, retrieve the orders
- findTransactionFromOrder - for a given order, retrieve the transaction
- findOrderFromShipment - for a given shipment, retrieve the orders
- findShipmentFromOrder - for a given order, retrieve the shipment

An example value for this field is O:findTransactionFromOrder,L

This field corresponds to the VALID LINK TO TYPES - K system value in the WORKFLOW category.

List of Valid Transactions For Linking From Type O

Enter a comma-separated list of transaction types that you can view when you select an order in the Transaction panel of the Workflow screen, menu option FLOW, and click the Link Transactions button. The list of transaction types appear as a dropdown menu that you can select from.

For every transaction type that you include in this comma-separated list, you must include :<LINKING_METHOD> after

the letter representing the transaction type. Possible values for <LINKING_METHOD> are:

- findOrderFromTransaction - for a given transaction, retrieve the orders
- findTransactionFromOrder - for a given order, retrieve the transaction
- findOrderFromShipment - for a given shipment, retrieve the orders
- findShipmentFromOrder - for a given order, retrieve the shipment

And example value for this field is

S:findOrderFromTransaction,K:findOrderFromTransaction

This field corresponds to the VALID LINK TO TYPES - O system value in the WORKFLOW category.

List of Valid Transactions For Linking From Type Q

Enter a comma-separated list of transaction types that you can view when you select a quote in the Transaction panel of the Workflow screen, menu option FLOW, and click the Link Transactions button. The list of transaction types appear as a dropdown menu that you can select from.

If you specify O for orders in this comma-separated list, you must include :<LINKING_METHOD> after the O. Possible values for <LINKING_METHOD> are:

- findOrderFromTransaction - for a given transaction, retrieve the orders
- findTransactionFromOrder - for a given order, retrieve the transaction
- findOrderFromShipment - for a given shipment, retrieve the orders
- findShipmentFromOrder - for a given order, retrieve the shipment

This field corresponds to the VALID LINK TO TYPES - Q system value in the WORKFLOW category.

List of Valid Transactions For Linking From Type T

Enter a comma-separated list of transaction types that you can view when you select a return shipment in the Transaction panel of the Workflow screen, menu option FLOW, and click the Link Transactions button. The list of transaction types appear as a dropdown menu that you can select from.

If you specify O for orders in this comma-separated list, you must include :<LINKING_METHOD> after the O. Possible values for <LINKING_METHOD> are:

- findOrderFromTransaction - for a given transaction, retrieve the orders

- findTransactionFromOrder - for a given order, retrieve the transaction
- findOrderFromShipment - for a given shipment, retrieve the orders
- findShipmentFromOrder - for a given order, retrieve the shipment

This field corresponds to the VALID LINK TO TYPES - T system value in the WORKFLOW category.

Transaction Panel

The Transaction panel displays the results of searches. As an administrator you have control over:

- The column layout
- The contents of the Transaction panel toolbar

Configuring Column Layout

To configure the column layout, you can drag and drop columns into the positions you want. You can also use the shortcut menu to display or hide columns. The settings are saved automatically.

Configuring the Transaction Panel Toolbar

You can add or remove buttons in the Transaction panel toolbar. You can set the contents of the toolbar at a user, client, or global level. A number of buttons appear here for every user. These buttons include the navigation arrows to scroll through search results, along with the page number and the refresh button. The unlock button is used to unlock a transaction, which might be necessary if a user refreshes a task page or closes the browser during task execution.

Transaction Panel Toolbar Default Contents



Use the TOOLBAR – <TRANSACTION_TYPE_LETTER> system value to add buttons to the Transaction panel toolbar. For example, TOOLBAR – S determines the buttons that appear when Shipments is selected from the View list, while TOOLBAR – O determines what appears when orders are selected and TOOLBAR – L determines what appears when loads are selected. To create system values for other transaction types, copy the TOOLBAR – S system value, rename it, and edit the contents of the value.

The syntax for these system values is:

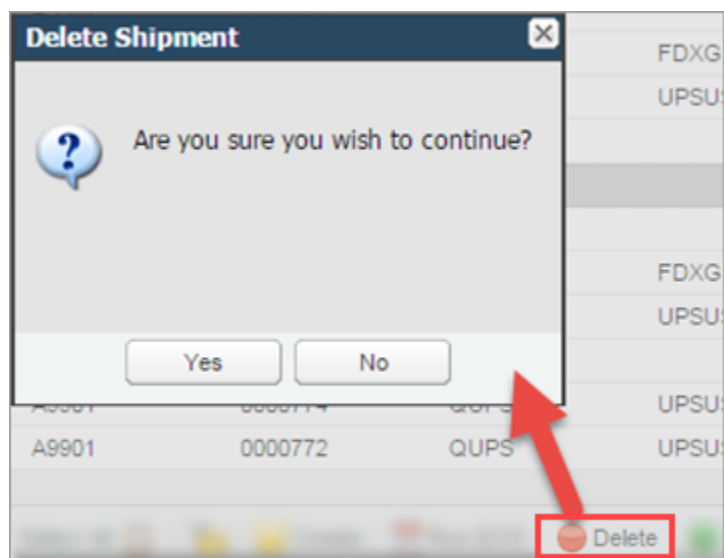
label:<LABEL_TEXT>;tooltip:<TOOLTIP_TEXT>;option:<OPTION_CODE>;icon:<ICON_FILENAME>;

EL_NUMBER>;height:<PIXEL_NUMBER>;transaction:Yes/No;confirm:Yes/No

For the width and height attributes of the TOOLBAR – <TRANSACTION_TYPE_LETTER> system value, you can use the term “max” instead of <PIXEL_NUMBER>. This opens the workflow task pop-up window to the maximum size based on the user’s browser window size.

The confirm parameter allows you to prompt users when they select a particular task; for example, if you add a delete shipment action to the toolbar with the confirm parameter set to Yes, then the user sees a prompt asking for confirmation of the deletion.

Delete Shipment Confirmation



The table below displays popular options that you can add to this toolbar.

Toolbar Options

Option	Description
WFONWS	Create manual shipment
WFOEOD	Run EOD task
WFODOC	Run document task
BBSRUL	Run rules as a task
OPENSH	Reopen a closed shipment or load
RRULES	Run rules as an option
WFOCPY	Workflow - Copy Shipment
WFONWL	Create load
WFODEL	Delete load

Option	Description
WFTCST	Create consolidation
BBSDEL	Delete shipment

Setting Transaction to yes means that information about the currently selected shipment is passed to the option. This is necessary for options that run on a specific shipment such as the documents or delete shipment options. For the WFONWL, WFTCST, and WFONWS option, an additional parameter—next—is available that allows you to specify the next task to run automatically after the user creates the load, consolidation, or shipment; specify the Key ID of the task that you want to run.

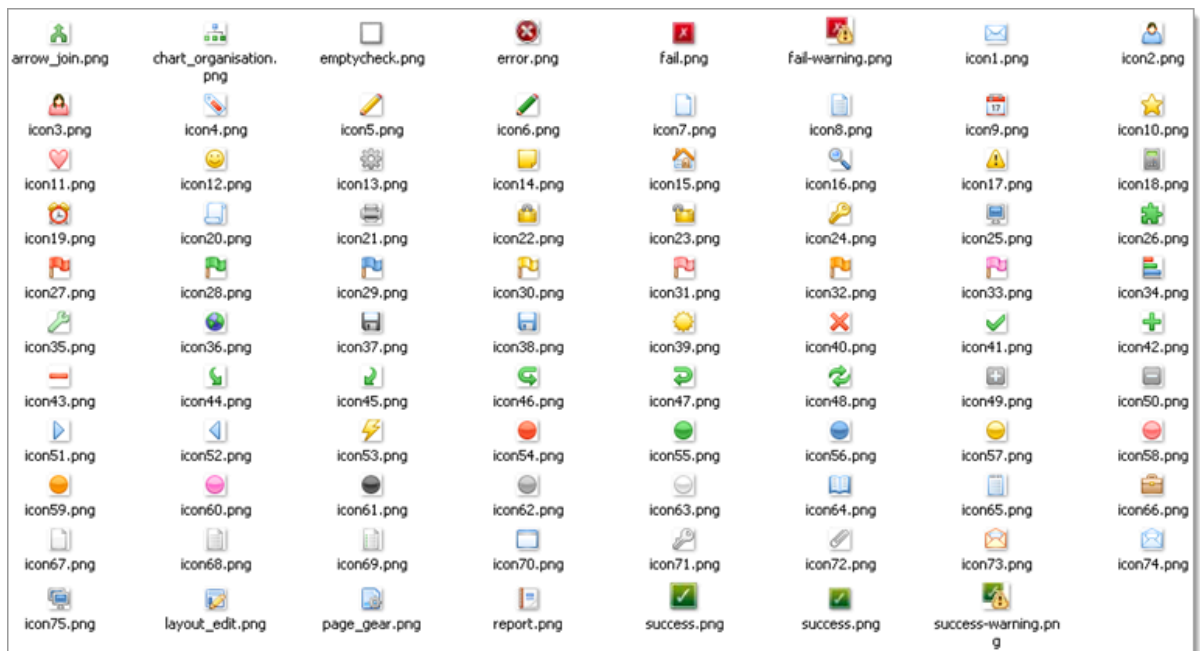
Example

label:Create;tooltip:Create a new
load;option:WFONWL;icon:icon14;width:340;height:250;next:GR50

Choose an icon to represent the toolbar option. You can locate these icons in your QAD GTTE folder at ...\\WebUI\\jboss\\server\\default\\deploy\\precision-webui-<version number>-OPEN.ear\\web-client-<version number>-OPEN.war\\images\\workflow\\ where <version number> > is the Web UI version number, for example, 7.1.

Note It is recommended that you use 7-Zip to extract the .EAR file.

Icon Selection



Note Use this toolbar facility to add tasks that are commonly used. More specific tasks are listed in the Tasks area, which displays all the tasks in the currently selected workflow.

For example, the view in the image below is the result of setting
TOOLBAR – S to:

tooltip:Create

Shipment;option:WFONWS;icon:icon14;width:max;height:max,label:Run

EOD;tooltip:End of Day

Manifest;option:WFOEOD;icon:icon9;width:950;height:600,label:Delete;tooltip>Delete

Shipment;option:BBSDEL;transaction:Yes;icon:icon54,label:Open

Shipment;tooltip:Re-Open Selected

Shipment;option:OPENSH;transaction:Yes;icon:icon55,tooltip:Rules;option:RRULES;transaction:Yes

;icon:report;

TOOLBAR – S Sample Configuration



Tasks Area

The Tasks area displays a list of tasks, which are part of the workflow associated with the transaction selected in the Transaction panel. You can add tabs to the Tasks area and assign different tasks to each tab. You can give different users access to different tabs to prevent unauthorized or untrained users from carrying out certain tasks.

Assigning Tasks to Tabs in the Tasks Area

Tasks can be divided into categories based on different criteria, with these categories appearing as tabs in the Tasks area.

Tasks Area Tabs

Tasks						
All	Docs	SPS	Partners	Detail	Other	Requisite
Sta...	Note	Description				
<input checked="" type="checkbox"/>		BASIC PACKING				
<input type="checkbox"/>		CHANGE ADDRESS				
<input type="checkbox"/>		AUTO ASSIGN CARRIER SERVICE				

All tasks appear in the All tab, while required tasks appear in the Requisite tab. Looking at the All tab gives you an overview of the entire workflow and the business process behind it. Tasks shown in gray are not accessible from the Web UI. To configure the tabs that appear in the Tasks area, edit the TASK CATEGORIES – <TRANSACTION_TYPE_LETTER> system value, where

<TRANSACTION_TYPE_LETTER> is replaced by the letter that represents a particular transaction type. For a full list of transaction types, use the Z9 option. You can create a system value for other transaction types by copying one of the existing system values.

Enter a comma-separated list of category names in the system value. The order of the list determines the order of the tabs in the Tasks area. You can choose any category names you want. To associate a task with a particular category, enter the category name or names in the Categories field of the workflow task. Creating workflow tasks is described later in this section.

You can configure this system value on a user level, client level, or client/user level if necessary. It is possible to remove the All tab, but it is not possible to remove the Requisite tab.

Tasks include an option to jump to another workflow task, while keeping the existing task open. A drop-down Jump To... menu is available in the top left area of the task window. Users can select another task from this menu to open the new task over the existing one. You cannot jump to more than one task at a time. To make a task available in the Jump To... menu, select the Show on Jump menu field in the Workflow Task - Update screen of option WF, Workflow Task Configurations.

Adding Dynamic Fields to the Workflow Portal

Use dynamic fields to add extra predefined fields to the **Workflow Portal transaction panel on page 62**. You can add dynamic fields using the system value FLOW DYNAMIC GRID FIELDS. For the list of dynamic fields, see [List of Dynamic Fields on page 549](#).

1. Open the **System Values** screen (menu option FNDCY3).
2. Click the Database tab.
3. In the Category field, enter the category ITRAX.
4. In the Key field, enter the key FLOW DYNAMIC GRID FIELDS.
5. Click Search.
6. Navigate to the FLOW DYNAMIC GRID FIELDS system value, then double-click the Value field.
7. In the Value field, enter the names of the dynamic fields from [List of Dynamic Fields on page 549](#) that you want to add to the **Workflow Portal**; for example, taxCode,bankDate. Separate the fields by commas. Do not add spaces between the values.
8. Click Update.
9. Ensure the In Use field is set to true.
10. Open the **Workflow Portal** (menu option FLOW).
11. Scroll to the right of the grid in the transaction panel. You and other users should be able to see the new dynamic fields at the end of the grid.

Shipments										
Defined Fi...	ASN Number	PSL Defined1	PSL Defined2	PSL Defined3	PSL Defined4	PSL Defined5	Packing Location	Air Way Bill	taxCode	bankDate

Note With the Workflow Search – Configurator window, you can add dynamic fields as search fields on the Search panel. For more information, see [Search Panel on page 58](#).

Creating a Shipment Workflow

When a shipment is created, rulebooks are checked and a list of rules is run on the shipment. This defaults information into the shipment, including which workflow to associate with it. If more than one rule specifies a workflow, the workflow specified by the latest rule run overrides the others. If no rule specifies a workflow, the shipment type determines the workflow. It is often appropriate to associate different workflows with different shipment types. For example, a different workflow or process may be required for export and domestic shipments, or for hazardous material.

For more information on rules, see the [Rules and Rulebooks on page 323](#) section..

To specify a workflow based on the shipment type, you must:

1. Create a workflow, including any necessary tasks and pre- and postrequisites.
2. Create a shipment type in option ZS.
3. Associate the shipment type with the workflow.

Creating a Workflow

1. Access the WF option to view the Workflow Task Configurations page shown in the image below.

Workflow Task Configurations

- In the WorkFlow grid, click Add to create a new workflow.

Add Workflow

- WorkFlow.* Choose a meaningful workflow code.
- Type.* Specify the transaction type to associate the workflow with. Typically, the type is S—for shipments.
- Description.* Add a meaningful description for the workflow.
- Initial Owner.* Specify a user group as the initial owner of the workflow.
- Initial Status.* Assign an initial status to the workflow; for example, set the status to 00 for a new shipment. To see a full list of statuses, access the SR option.

Note You can modify the list of statuses, but this change can only be done once—on system setup

Adding Tasks to a Workflow

1. Ensure that the new workflow is selected in the Workflow grid. Then, in the Tasks for WorkFlow grid, click Add to create a new workflow task.

Workflow Task – Create

Workflow Task - Create
✕

Client:

Workflow code:

Workflow type:

Task sequence number: !

Key ID:

Task option:

Task program type:

Task description:

Availability: Windows
 Web
 Both

Program Parameters:

Task type: Standard Task
 Secure Task - Before
 Secure Task - After
 Secure Task - Before && After
 Check
 Sub-Flow
 Compliance Status Task

Categories:

Repeatable task
 Warn of repeat

Required status:

Required status condition: =
 >
 <
 >=
 <=
 User confirms success

New status if successful:

New owner if successful:

New User if successful:

Complete if unsuccessful

New status if unsuccessful:

New owner if unsuccessful:

New User if unsuccessful:

Change status only on 1st run
 Break point task
 In forward loop when New
 In forward loop when Update
 In back loop when New
 In back loop when Update
 Is create new task
 Can display in read-only mode
 Can update in read-only mode
 Is a background task
 Show on Goto menu
 Show on Jump menu

Menu accelerator CTRL+ / ALT+:

Show in Task List area
 Lock transaction

VRC code:

Create
 Close

Not all of the fields in this page are relevant when creating tasks in the Web UI. The relevant fields are:

- *Client, Workflow code, Workflow type.* These fields populate automatically.
- *Task sequence number.* Enter a task sequence number. Sequence numbers determine the order in which tasks appear in the workflow.
- *Key ID.* Choose a unique and meaningful character code for the task. This code is used to identify the task and to link it to pre- and postrequisite tasks and checks. The key ID ensures that, even if a task's sequence number changes, the links remain unbroken. Also, the key ID is used by other programs within Workflow to identify and update the task.
- *Task option.* The shortcut code for the option that you want to run for this task. For a full list of options you can configure as workflow tasks, see [Web UI Workflow Tasks on page 535](#). When you choose a Task option, a number of other fields populate automatically.
- *Task program type.* Typically, this value is 50, but it can also be 00.
- *Task description.* A brief description of the task. When you run the task, this text is displayed in the task pop-up titlebar.
- *Availability.* This field indicates if the task is available from the Windows UI, the Web UI, or both.
- *Program Parameters.* You can use this field for document printing, pop-up notes, compliance checking, the customs task, and the manifest task. For more information on the parameters available for a particular workflow task, see [Web UI Workflow Tasks on page 535](#).
- *Task type.* Indicates the type of task you are creating. For example, it may be a standard task, a secure task, or a check. A sub-flow task is a workflow within the main workflow, with a number of tasks that run consecutively. A compliance status task updates with compliance information when compliance runs either outside or within a workflow task, or in the background.
- *Categories.* List the categories that the workflow task falls under. The categories determine the tabs in which the tasks appear in the Tasks area of the Workflow Portal.
- *User confirms success.* If you want the Unsuccessful button to appear at the bottom of the workflow task in the Web UI, then select this field. If you do not select this field, then the system determines if a task completed successfully or not based on a user's actions while running the task.

- *New status if successful.* If you want the status of the workflow to change on successful completion of the task, then specify the new status here.
 - *New owner if successful.* If you want the owner of the workflow to change on successful completion of the task, then specify the new owner here.
 - *New User if successful.* If you want the user assigned to the workflow to change on successful completion of the task, then specify the new user here.
 - *Complete if unsuccessful.* Select this option if you want the task to show as complete, regardless of whether the task was successful.
 - *New status if unsuccessful.* If you want the status of the workflow to change when the task is unsuccessful, then specify the new status here.
 - *New owner if unsuccessful.* If you want the owner of the workflow to change when the task is unsuccessful, then specify the new owner here.
 - *New User if unsuccessful.* If you want the user assigned to the workflow to change when the task is unsuccessful, then specify the new user here.
 - *Break point task.* Select this option if the task is a breakpoint task. Breakpoint tasks result in a pause in the workflow before the next task is run. If the task is not a break point task, then the Tasks area shows an arrow linking this task with the previous task. When configuring a workflow task, consider the categories associated with the task and ensure that, if it is not a break point task, then the previous task is shown in the same category.
 - *Lock transaction.* To lock the related transaction when this task is running, select this field. This lock prevents other tasks from accessing the transaction when the task is running. However, if this task does not modify the shipment in any way, and you want to allow other users to run other tasks on the shipment when this task is running, then do not select this field. In some cases, if a task is called from another task—and the shipment is already locked—ensure that this flag is cleared; for example, when the Document Text ID task, WFTDTI, runs from the Documents task, WFTDOC.
2. When you finish entering details for the task, click Create. The message The record has been successfully created appears at the top of the page.

Creating a Shipment Type

Shipment types are subcategories of transaction types. To create a shipment type:

1. Access the Shipment Types page using the ZS option.
2. Click the Add icon at the bottom of the grid.

Shipment Types [Create]

Shipment Types [Create]

Type:

Description:

Domestic inbound

Domestic outbound

Export

Import

Workflow code:

Workflow type:

User defined:

User defined:

User defined:

User defined:

User defined:

User defined:

User defined:

User defined:

User defined:

User defined:

Transaction type: S

Create Close

- *Client*. This field is read only.
- *Type*. Enter a two-character code for the new shipment type
- *Description*. Enter a short description of the shipment type.
- *Domestic inbound, Domestic outbound, Export, Import*. Select the appropriate fields to describe the shipment type. These fields affect how a shipment type can be used in QAD GTTE. If Domestic inbound or Import are selected, then a TE shipment is interpreted as an inbound/return shipment, and the carrier integration functionality applies all rules for returns functionality to the shipment. Otherwise, the TE shipment is treated as an outbound shipment.

Note For TE implementations, mark a ZS record as an inbound (domestic or import) shipment or as an outbound (domestic or

export) shipment; do not mark the record as both an inbound and an outbound shipment.

- *Workflow code*. Specify the workflow code linked to this shipment type. The workflow type and the transaction type fields automatically populate based on the workflow code that you choose.
- *Workflow type*. This field populates automatically based on the content of the Workflow code field.
- *User defined*. Typically, these user-defined fields are renamed by Services to implement the business process of your company.
- *Transaction type*. The transaction type associated with the shipment type. This field populates automatically based on the content of the Workflow code field.

Creating a Shipment with the New Shipment Type

You can now use the manual shipment option in Workflow to create a shipment using the new shipment type. This action associates your newly created workflow with the shipment. The image below shows the Create Manual Shipment pop-up window with the newly created shipment type ZY.

Create Manual Shipment

Load Template: Select a template... ▾

Save Template:

Consignor:

Ship To: [Once Off Shipment](#)

Overwrite Address

Order Number:

Buyer's Ref No:

Service/Route:

Despatch Date:

Shipment Type: ZY

Customer:

Overwrite Address

Delivery Terms:

Carrier:

Transport Mode:

Currency: USD

Add New Item:

Product Code:

Product Description:

Quantity: 1.0 EA

Weight: 0.0 KG

Net Weight: 0.0 KG

Volume: 0.0 M3

Total Value: 0.0 USD

Freight Class:

Country Of Origin:

Customs Classification Group:

Customs Classification Code:

Customs Classification Description:

NAFTA Preference Criterion:

NAFTA Producer:

NAFTA Net Cost: 0.0 USD

NAFTA Country Of Origin:

Domestic/Foreign: Domestic Foreign

Dangerous Goods:

Type Of Export: Permanent ▾

Product Code	Product Description	Quantity	Quantity UOM
--------------	---------------------	----------	--------------

[+ Add Item](#)

Create Close

After you create a shipment, you can view it in the Transaction panel of the Workflow Portal. Selecting the shipment displays the associated workflow tasks in the Tasks area. Double-click a task to run it.

Pre and Postrequisite Standard and Check Tasks

You can stipulate that a particular standard task—task B—can only be run after another task—task A—completes successfully. In this case, you add task A as a prerequisite to task B.

Example You set compliance task A as a prerequisite to packing. In this case, you add the compliance task as a prerequisite of the packing task.

Similarly, you can set standard task C as a postrequisite to task B, so that task B cannot be run if task C has already run. Task B must precede task C; it cannot follow task C.

Example Packing—task B—can only run if close shipment—task C—has not completed successfully.

You can also set check tasks as pre and postrequisites. These tasks run in the background before or after the task for which they are a requisite task.

Note You can create a single check task and set it as both a pre and postrequisite; for example, you can create a check to update a data field before and after running a task.

If a prerequisite check fails, then you can configure the workflow to behave in one of three ways:

- Display a warning and then continue on to the task
- Display a warning and give the user the option to cancel or to continue on to the task
- Display an error and prevent the user from running the next task

If a prerequisite check fails, then the task is marked as completed unsuccessfully. To create a pre or postrequisite standard or check task for a task within the workflow:

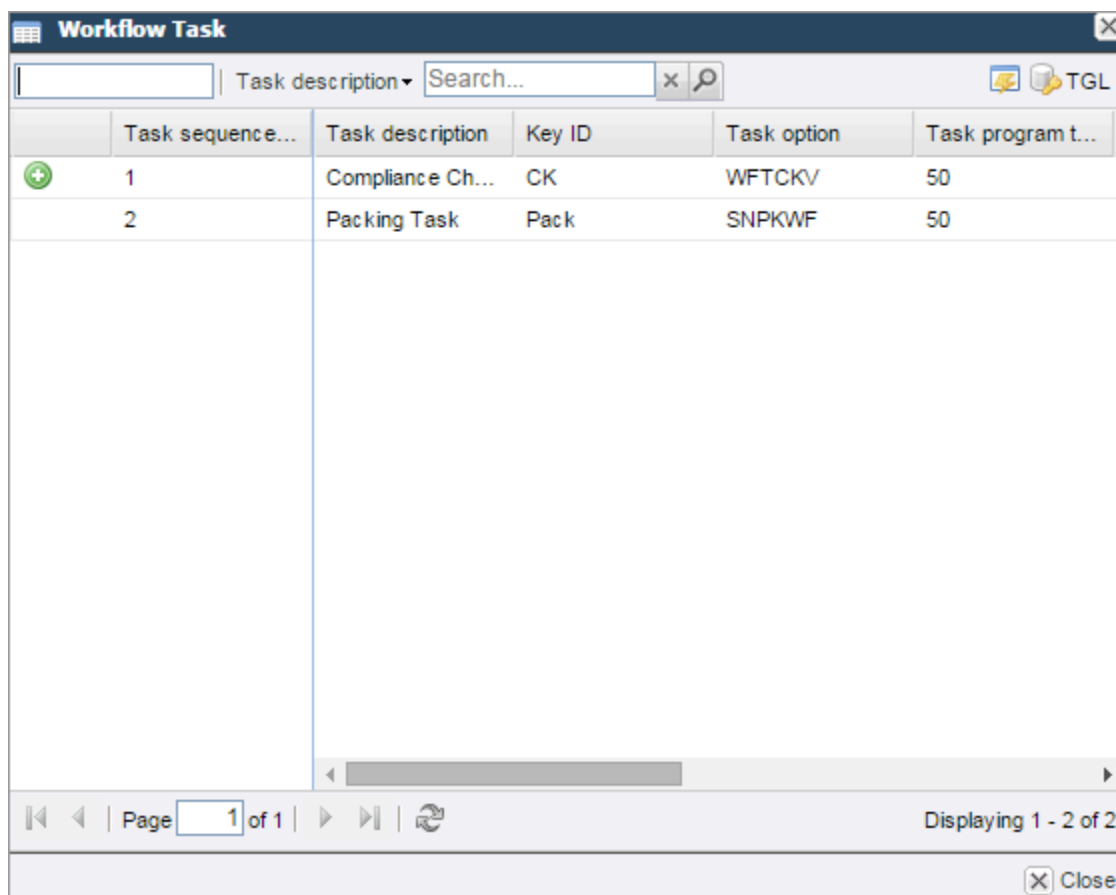
1. Go to the WF option and select the relevant workflow in the WorkFlow grid.

Note Ensure that the workflow contains all of the necessary tasks, including the standard and check tasks that you want to add as requisites to other tasks.

Note It is common practice to assign high sequence numbers to check tasks so that checks are easy to locate in the workflow task list; this practice also ensures that lower sequence numbers are available for any standard tasks that you want to add to the workflow in the future.

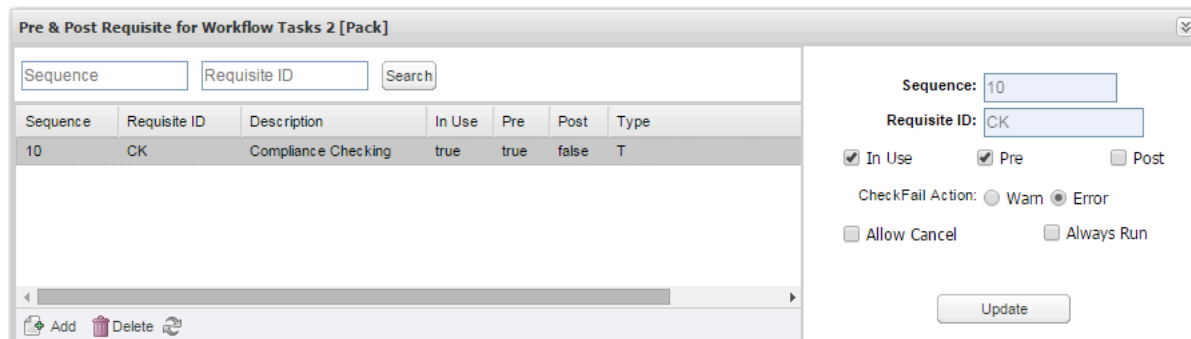
2. In the Tasks for Workflow grid, select the task that you want to add a requisite to.
3. Click the Add button at the bottom of the Pre & Post Requisite grid. A list of the other tasks in the workflow appears in a new window.

Add a Task Requisite



- Click the Add button at the bottom of the Pre & Post Requisite grid. A list of the other tasks in the workflow appears in a new window.

Update Option in Pre and Post Requisite Grid



The Update section to the left of the Pre & Post Requisite grid allows you to configure the requisite task that is selected in the grid.

- Sequence, Requisite ID.* The sequence number and ID number of the requisite; these fields are read only.

- *In Use* . Select this field to make the requisite active.
- *Pre*. Select this field to make the task a prerequisite of the task selected in the Tasks for Workflow grid.
- *Post*. Select this field to make the task a postrequisite of the task selected in the Tasks for Workflow grid.
- *CheckFail Action*. This field is only relevant for prerequisite check tasks. Specify the action that occurs when a user tries to run the task selected in the Tasks for Workflow grid when the prerequisite check task has failed. If you set this field to Error, then when the prerequisite check task fails and the user tries to run the next task in the workflow, a pop-up window informs the user that the task cannot run due to failure of the prerequisite check task.

Example The compliance check task is a prerequisite task of the packing task. When a user runs the packing task, the compliance task runs in the background and fails. The user then sees a message stating that the packing task cannot run because the compliance check failed.

If you set this field to Warn, then when the prerequisite check task fails and the user tries to run the next task in the workflow, a pop-up window informs the user that the task did not complete due to failure of the prerequisite check task. Depending on how you configure the Allow Cancel field for the requisite task, the user may have to run the next task.

For postrequisite tasks that are set to Warn, the pop-up message that the user sees when the task fails is very similar to the message shown when tasks are set to Error. The only difference is the icon included in the message, which is a warning icon instead of an error icon.

- *Allow Cancel*. This field is only relevant for prerequisite tasks with the CheckFail Action field set to Warn. If CheckFail is set to Warn and Allow Cancel is selected, then when the check fails the user has the option to cancel execution of the task or to ignore the warning and continue. If CheckFail is set to Warn and Allow Cancel is not selected, then when the check fails the user sees a warning message about the check failure and the user must then click ok to acknowledge the warning and continue running the task; the user does not have the option to cancel the task.
- *Always Run*. If you select this field, then the check is always run, even when the task has completed successfully.

A Task with Pre- and Postrequisites

User: Precision Configuration User Home About Precision Contact Logout

You are here: [Home](#) - Workflow Task Configurations Translate Literals

Workflow

wf_1 Type Description

Work Flow	Type	Description
WF_1	S	Type 1 Workflow

Workflow:
 Type:
 Description:
 Initial Owner:
 Initial Status:

Tasks for Workflow WF_1

Task Sequence Description Key ID

Sequence	Description	Key ID	Option	Task Progra...	Categories	Required Status	Success
1	Compliance Checking	CK	WFTCKV	50			
2	Packing Task	Pack	SNPKWF	50			
3	Close Shipment	CLOSE	BBSCLS	50			

Pre & Post Requisite for Workflow Tasks 2 [Pack]

Sequence Requisite ID

Sequence	Requisite ID	Description	In Use	Pre	Post	Type
10	CK	Compliance Checking	true	true	false	T
20	CLOSE	Close Shipment	true	false	true	T

Sequence:
 Requisite ID:
 In Use Pre Post
 CheckFail Action: Warn Error
 Allow Cancel Always Run

Breakpoint Tasks

When you create a task, the breakpoint option is selected by default. Breakpoint tasks return control to the user after a task has completed. For example, a user may click the manifest task in the Tasks area to run the task. After the task is complete, control returns to the user, who can then choose what to do next.

You can also set up tasks so that they are not breakpoint tasks. In this case, when a non-breakpoint task is complete, the following task is run without returning control to the user. Non-breakpoint tasks have a blue line next to them in the Tasks area, with a blue arrow next to the following task; this indicates that the task is run immediately after the non-breakpoint task.

Non-Breakpoint Task

	<input type="checkbox"/>		Test - Packing
	<input checked="" type="checkbox"/>		Workflow - Note Tasks

Check Tasks

Check tasks are tasks that run in the background and check or update some data in the database before or after a task is run. Because they run in the background, users may never be aware of them. There are two types of checks: PROGRESS code checks and Java code checks.

Check tasks are an advanced feature of Workflow, and are typically used to plug in custom logic requiring consultation with QAD GTTE Services. You can then add these check tasks to your workflow, setting the Task type field to Check when filling in the task details in the *Workflow Task – Create* window. Choose high task sequence numbers for check tasks to distinguish them from other tasks in the workflow. Specify whether the check task is a pre- and/or prerequisite to another task.

Secure Tasks

Secure tasks show in the Workflow Portal with a lock icon.

You must enter your credentials before running a secure task or marking it as complete.

Note The secure task feature is not available when SSO is in use.

Updating Transactions

Task status information is held for each shipment that has an associated workflow. If a task is deleted from a workflow, you can use the Update Transactions button on the bottom right of the workflow grid to remove the information about the deleted task from existing shipments with that workflow. If a new task is added to a workflow, you can use the Update Transactions button to add the task to existing shipments with this workflow. Ensure that you select the relevant workflow before you click Update Transactions.

Note If there are a lot of shipments associated with a workflow, then updating transactions can take a long time. For this reason, when you click Update Transactions, QAD GTTE displays a pop-up window asking you to confirm that you want to update all transactions associated with the workflow.

Merging Tasks

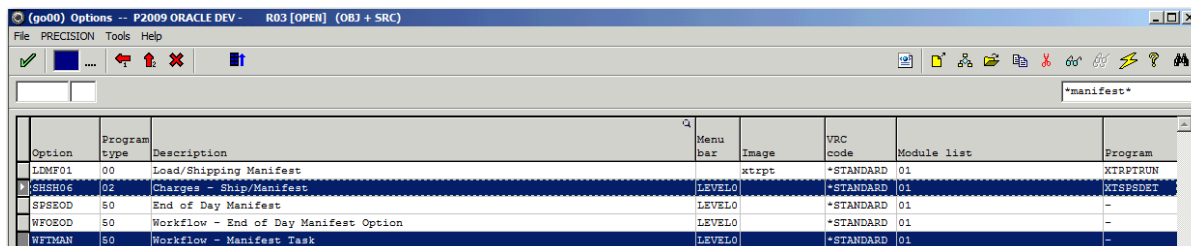
There are often two versions of the same task: one that runs in the Windows UI and one that runs in the Web UI. Usually, Windows UI tasks have a program type of 02 and Web UI tasks have a program type of 50. Sometimes it is important to be able to view the result of a Windows UI task in the Web UI.

For example, if the manifest task fails, it is important that users of both the Windows and Web UI are aware of this. There are two manifest tasks:

- SHSH06 Charges – Ship/Manifest, which is the Windows UI task
- WFTMAN Workflow – Manifest Task, which is the Web UI task

You can view details of each of these tasks using the GO option in the Windows UI. Search for *manifest* to see a list of manifest tasks.

Manifest Tasks



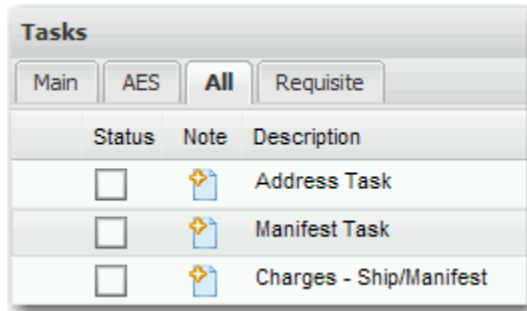
Option	Program type	Description	Menu bar	Image	VRC code	Module list	Program
IDMF01	00	Load/Shipping Manifest		xrpt	*STANDARD	01	XTRPRTRN
SHSH06	02	Charges - Ship/Manifest	LEVEL0		*STANDARD	01	XTRPSDET
SPES0D	50	End of Day Manifest	LEVEL0		*STANDARD	01	-
WFOE0D	50	Workflow - End of Day Manifest Option	LEVEL0		*STANDARD	01	-
WFTMAN	50	Workflow - Manifest Task	LEVEL0		*STANDARD	01	-

To merge the Windows UI and Web UI tasks:

1. Select the Web UI task, WFTMAN.
2. Click F7 or click the Update an entry button in the top right menu. The task option details appear.
3. The program field contains a dash only. Scroll down to the Web UI URL field, which contains /htm/manifest.task. Copy the text in this field.
4. Click the red back arrow to return to the list of manifest tasks.
5. Select the Windows UI task, SHSH06.
6. Click F7 or click the Update an entry button in the top right menu. The task details appear. Note that the Program field contains the name of the 4GL program related to this task.
7. Scroll down to the Web UI URL field, and paste the URL that you copied from the Web UI task. Click the green check mark button to process this change and return to the list of manifest tasks.
8. Click the red check mark button to go to the main menu.
9. Go to the WF option.
10. Search for the workflow in which you wish to merge the Windows and Web UI tasks. When you have found the workflow, double-click it to see the list of tasks.
11. Select the Windows UI task from the task list.
12. Click F7 or click the Update an entry button in the top right menu. The task details appear.
13. Set the Availability field to Both.

The tasks are now merged, and the Windows task, Charges – Ship/ Manifest now shows as enabled in the Web UI.

Windows Task Enabled in the Web UI



Clicking this task in the Windows UI runs the 4GL program XTSPSEDET, while clicking on the task in the Web UI opens /htm/manifest.task.

Creating a Load Workflow

Creating a workflow for loads is very similar to creating a workflow for a shipment.

[Web UI Workflow Tasks on page 535](#) identifies tasks that are relevant for loads.

A number of system values are relevant for creating loads and load workflows, as shown in the table below.

System Values for Loads and Load Workflows

Category	Key	Description
LOADBUILD	LOAD NUMBER FORMAT	<p>Controls the format of the load reference number produced when a user creates a load.</p> <p>Format: <NUMBER_FORMAT>,<PREFIX_LENGTH>, where <NUMBER_FORMAT> is the number format prescribed for load reference numbers, and <PREFIX_LENGTH> is the number of characters in the number format (counting from the left) that cannot be overwritten.</p> <p>The load reference number produced is the next sequential number superimposed over the number format, taking the prefix length into account. Example: When LOAD NUMBER FORMAT is set to 000000000,0 and the next sequential number is 123, the load reference number is set to 0000000123</p>

Category	Key	Description
		Example: When LOAD NUMBER FORMAT is set to XXX0000000,3 and the next sequential number is 123, the load reference number is set to XXX0000123 Example: When LOAD NUMBER FORMAT is set to XXX0000000,3 and the next sequential number is 123123123, the load reference number is not generated due to an error Example: When LOAD NUMBER FORMAT is set to XXX0000000,1 and the next sequential number is 123123123, the load reference number is set to X123123123
LOADBUILD	NEXT LOAD NUMBER	Details the next number to use as a load reference.
LOADBUILD	DEFAULT L TYPE	Defines the Group Type (XMGRUP0.GRTYPE) value to be assigned to a new load created by Web UI. GRTYPE is validated over the ZS records.
WORKFLOW	DEFAULT L WORKFLOW	Controls the workflow to be assigned to a new load. This system value must match the workflow code of the workflow that you create for loads. This system value is only used when no workflow is determined from the rules that fire.

Case Study

The following case study illustrates how to create a workflow for domestic outbound shipments. It covers the creation of a workflow to match a business process, the creation of a new shipment type to associate with the workflow, and the creation of a manual shipment associated with the workflow. The table below describes the business process for the case study, and the tasks you create to do this.

Business Process and Tasks

Business Process Steps	Corresponding Tasks
Receive order from an ERP system	Outside of workflow
Create a manual shipment within workflow to fulfill this order	Outside of workflow
Verify ship to address	WFTADD

Business Process Steps	Corresponding Tasks
Add items to the shipment, or check items in the shipment	WFITEM
Pack items (adding and checking items is a prerequisite of this task)	WFTSPK
Rate the shipment	WFTRAT
Complete the shipment manifest	WFTMAN
Print documents related to the shipment	WFTDOC
Verify all details related to the shipment by viewing the shipment details	WFTSDE

The tasks form a workflow similar to that in the image below.

Completed Tasks for Workflow Grid

Tasks for Workflow DOM_OB_S							
Task Sequence		Description		Key ID		Search	
Sequence	Description	Key ID	Option	Task Program Type	Categories	Required Status	Success Status
10	Check Address	D_OB_ADD	WFTADD	50			
20	Check or Add Items	D_OB_ITE	WFITEM	50			
30	Pack Items	D_OB_PAC	WFTSPK	50			
40	Rate Shop - Pick a Carrier	D_OB_RAT	WFTRAT	50			
50	Manifest	D_OB_MAN	WFTMAN	50			
60	Print Documents	D_OB_PRINT	WFTDOC	50			
70	Verify Details	D_OB_VERIF	WFTSDE	50			

Creating a Sample Workflow and Adding Tasks

1. Access the Workflow Task Configurations page using option WF.
2. Use the Create Workflow section at the top right of the page to create the workflow for domestic outbound shipments.

Workflow Grid

Workflow:

Type:

Description:

Initial Owner:

Initial Status:

- a. Choose a workflow code and transaction type that the workflow is based on. This sample workflow relates to shipment transactions.

- b. Click the Create button. The new workflow appears in the Workflow grid.
3. In the Tasks for Workflow grid, click Add to view the Workflow Task – Create window.

Workflow Task – Create Window 1

Workflow Task - Create

Client: TGL

Workflow code: DOM_OB_S

Workflow type: S

Task sequence number:

Key ID:

Task option:

Task program type:

Task description:

Availability: Windows
 Web
 Both

Program Parameters:

Task type: Standard Task
 Secure Task - Before
 Secure Task - After
 Secure Task - Before && After
 Check
 Sub-Flow
 Compliance Status Task

Categories:

Repeatable task
 Warn of repeat

Required status:

Required status condition: =
 >

Create Close

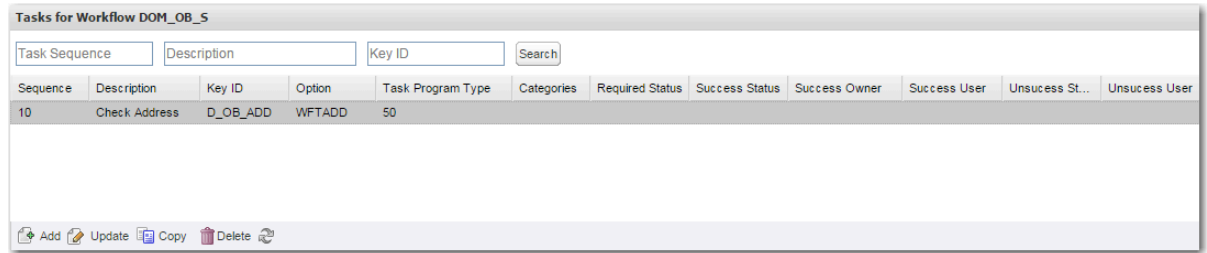
The Workflow code and Workflow type fields are already completed.

- a. Enter a Task sequence number; choose a low number for the first task, and higher numbers for later tasks. Leave a gap between each sequence number so that, if your business process changes in the future, you can slot in other tasks.
- b. Choose a meaningful Key ID, which is a unique identifier for the task.
- c. Enter the desired option code in the Task option field.
- d. Enter a meaningful task description.
- e. Specify that you want the tasks to be available in the Web UI.
- f. Leave all other fields unchanged. g. Click Create. The message: "The record has been successfully created." appears at the top of the window.

g. Click Close

The new task appears in the Tasks for Workflow grid.

Tasks for Workflow Grid



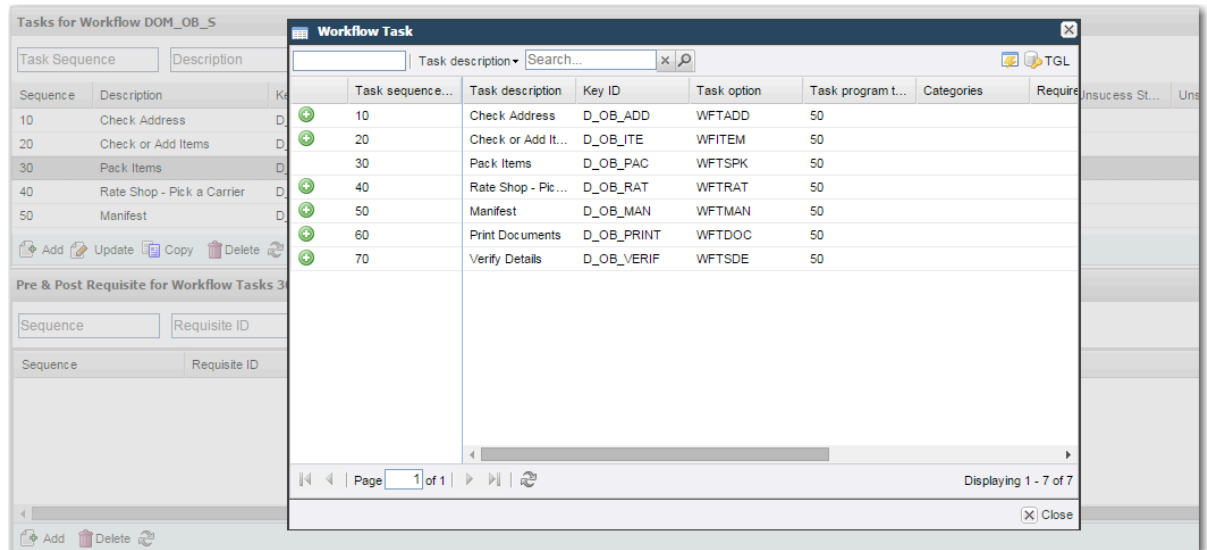
- Repeat step 3 for each workflow task listed in the *Completed Tasks for Workflow Grid* image.

Specifying a Prerequisite Task

To add the Check or Add Items task as a prerequisite of the Pack Items task:

- Select the Pack Items task in the Tasks for Workflow grid and, in the Pre & Post Requisite for Workflow Tasks grid, click Add.

Pre & Post Requisite for Workflow Tasks Grid



- Click Close. In the image below, the Check or Add Items task appears in the Pre & Post Requisite grid as a prerequisite of the Pack Items task. In this case, failure to complete the task will result in an error, as specified in the CheckFail Action field.

CheckFail Action Field

Tasks for Workflow DOM_OB_5

Task Sequence Description Key ID

Search

Sequence	Description	Key ID	Option	Task Program Type	Categories	Required Status	Success
10	Check Address	D_OB_ADD	WFTADD	50			
20	Check or Add Items	D_OB_ITE	WFITEM	50			
30	Pack Items	D_OB_PAC	WFTSPK	50			
40	Rate Shop - Pick a Carrier	D_OB_RAT	WFTRAT	50			
50	Manifest	D_OB_MAN	WFTMAN	50			

Pre & Post Requisite for Workflow Tasks 30 [D_OB_PAC]

Sequence Requisite ID Search

Sequence	Requisite ID	Description	In Use	Pre	Post
10	D_OB_ITE	Check or Add Items	true	true	false

Sequence: 10
 Requisite ID: D_OB_ITE

In Use Pre Post

CheckFail Action: Warn Error

Always Cancel Always Run

Update

Add Delete Refresh

Creating a New Shipment Type

You can create a new shipment type to associate with the workflow.

1. Access the Shipment Types page using the ZS option.
2. Click the Add icon at the bottom of the page.

Domestic Outbound Shipment Type

3. In the Type field, enter a short code to identify the new shipment type. Give the shipment type a meaningful description. Fill in the fields as in the image above to specify that the shipment is related to the newly created workflow, and is related to the shipment transaction type.

Creating a Manual Shipment

You can now create a manual shipment in the Workflow Portal page using your new shipment type.

1. Click the Create Shipment button in the Workflow Transaction Panel toolbar.
2. In the Create Shipment window that appears, enter the shipment details, including the code for the new shipment type.

Create Shipment Window

Load Template: Select a template...
 Save Template:

Consignor:
 Ship To: [Once Off Shipment](#)
 Overwrite Address

Order Number:
 Buyer's Ref No:
 Service/Route:
 Despatch Date:

Shipment Type: ZY
 Customer:
 Overwrite Address
 Delivery Terms:
 Carrier:
 Transport Mode:
 Currency: USD

Add New Item:

Product Code:
 Product Description:
 Quantity: 1.0 EA
 Weight: 0.0 KG
 Net Weight: 0.0 KG
 Volume: 0.0 M3
 Total Value: 0.0 USD
 Freight Class:
 Country Of Origin:
 Customs Classification Group:
 Customs Classification Code:
 Customs Classification Description:
 NAFTA Preference Criterion:
 NAFTA Producer:
 NAFTA Net Cost: 0.0 USD
 NAFTA Country Of Origin:
 Domestic/Foreign: Domestic Foreign
 Dangerous Goods:
 Type Of Export: Permanent

Product Code	Product Description	Quantity	Quantity UOM








Create Close

- Click Create. Note the reference number of the new shipment, and close the Create Shipment window to view the shipment in the Workflow Portal.

Note If the Create icon does not appear in the Transaction Panel toolbar, see the Configuring the Transaction Panel Toolbar section in [Configuring UI Options on page 272](#).

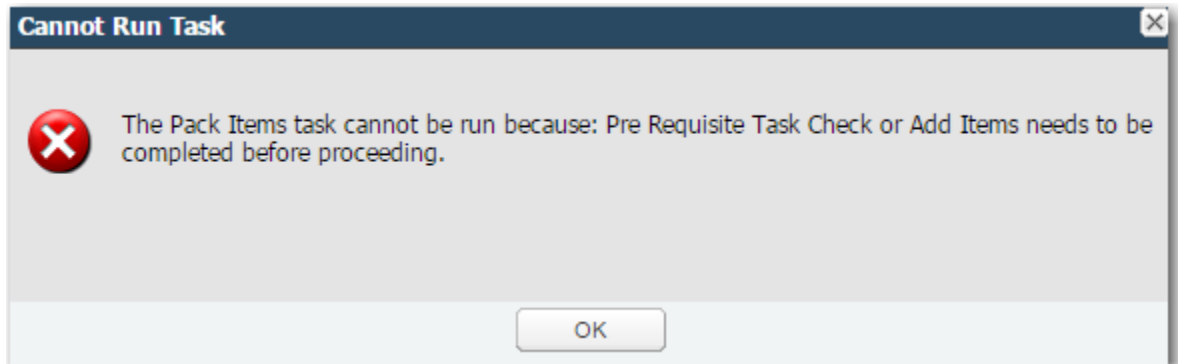
You can now search for and view the shipment in Workflow. Enter the reference number of the newly created shipment in the Reference No. field of the Search panel and click Search. The shipment appears in the Transaction panel, and the associated workflow appears in the Tasks area.

Domestic Outbound Workflow

Tasks						
All	Docs	SPS	Partners	Detail	Other	Requisite
Status	Note	Description	Completed By	Completed On		
<input type="checkbox"/>		Check Address				
<input type="checkbox"/>		Check or Add Items				
<input type="checkbox"/>		Pack Items				
<input type="checkbox"/>		Rate Shop - Pick a Carrier				
<input type="checkbox"/>		Manifest				
<input type="checkbox"/>		Print Documents				
<input type="checkbox"/>		Verify Details				

Before you complete any of the tasks, double-click the Pack Items task. An error displays stating that you cannot complete the task before completing the prerequisite task.

Error Due to Incomplete Prerequisite Task



Configuring Workflow Tasks

As an administrator, you can configure certain aspects of the workflow tasks listed in [Web UI Workflow Tasks on page 535](#). Some of these workflow tasks are described in [Workflow Tasks on page 70](#).

Configuring the Rate Shop Task

The [Rate Shop task on page 82](#) contains nine columns, displaying the results of your rate shop. You can configure these columns.

Rate Shop Task System Values

Category	Key	Description
ITRAX	RATE SHOP SHOW BASE COSTS	<p>Determines the charge columns that appear on the screen. Assigning a value of CUSTOMER causes the Buying Charge column to appear. The Buying Charge is the amount that the shipper pays the carrier for shipping the item. Assigning a value of COMPANY causes the Selling Charge column to appear. The Selling Charge is the amount that the shipper charges the buyer for shipping the item. Assigning a value of BOTH causes the Buying column and the Selling column to appear.</p> <p>Possible values: COMPANY, CUSTOMER, BOTH</p> <p>Default value: COMPANY</p>
ITRAX	RATE SHOP TASK – DEFAULT SORT	<p>This system value controls how the results are sorted.</p> <p>Possible values: COST, MODE, LEADTIME, SERVICE, BUYING_COST, CARRIER_AND_COST.</p> <p>By default, results are sorted based on buying cost. If buying costs are not displayed, then the results are sorted based on selling cost.</p>

Configuring the Shipment Charges Task

The [Shipment Charges task on page 95](#) allows you to enter basic charge information against a shipment.

Shipment Charges Task System Value

Category	Key	Description
ITRAX	QUICK CHARGE ENTRY: PERMISSIONS	<p>Specifies the charge maintenance permissions available to users at each stage of the shipment.</p> <p>Possible values:</p> <ul style="list-style-type: none"> • RATED – Users can create, update, and delete charges before the shipment is rated. • RATED_ADD – Users can create, update, and delete charges before the shipment is rated. Users can create charges after the shipment is rated. • RATED_ADD_EDIT – Users can create, update, and delete charges before the shipment is rated. Users can create, update, and delete manual charges after the shipment is rated. • CLOSED – Users can create, update, and delete charges when the shipment is open. • CLOSED_ADD – Users can create, update, and delete charges when the shipment is open. Users can create charges when the shipment is closed. • CLOSED_ADD_EDIT – Users can create, update, and delete charges when the shipment is open. Users can create, update, and delete manual charges when the shipment is closed. • NONE – Users can create, update, and delete charges at all times. <p>Default value: NONE</p>

Configuring the Manifest Task

The [Manifest task on page 79](#) enables you to confirm a shipment as rated, assign a tracking number to the shipment, print a carrier label, and make the shipment available for EOD manifest.

There are four possible tabs on this screen:

- Details
- Surcharges
- Parties
- Additional

You can use the Additional tab to add extra fields to the Manifest task. This tab consists of two sections. The left side of the screen contains custom fields that are not commonly used. Your company may want to add more information to the shipment when rating it. You can request that the GTTE Services team customize this section of the Additional tab to capture this additional information. The right side of the screen contains fields that relate to the shipment carrier. The additional tab is not relevant for all carriers.

A number of system values are available that you can use to change the appearance of the Manifest task.

System Values: Manifest Task

Category	Key	Description
ITRAX	MANIFEST TASK SHOW DESP DATE	To remove the Despatch Date field from the Manifest task screen, set this system value to no. The default value is yes.
ITRAX	DTS STATE CODE VALIDATION	This system value determines whether the state code on the Parties tab is required. Possible values: Optional, Mandatory. By default, this value is set to Optional.
WORKFLOW	MANIFEST_PROCESS_ACTION	When a shipment is rated, a Process button appears on the Details tab. You can click this Process button to rate the shipment, or click the down arrow to see a menu of options. This system value determines the actions that are available when the user clicks the Process button or the menu options linked to the button. There are three possible actions that can appear in the Process menu button:

Category	Key	Description
		<ul style="list-style-type: none"> • Process (Print Label) • Process (Don't Print Label) • Process (Print Label and Documents) <p>For each menu option, there is a section within this system value that can be set to true or false:</p> <ul style="list-style-type: none"> • Process (Print Label) – do_print • Process (Don't Print Label) – no_print • Process (Print Label and Documents) – print_label_and_documents <p>There is also a default section, which specifies which of the above three options appears on the Process menu button.</p> <p>Example:default:no_print,do_print:true,no_print:true,do_print_label_and_documents</p> <p>In this example, the Process (Print Label) and Process (Don't Print Label) options appear in the Process menu. The Process (Print Label & Documents) option does not appear. Clicking the Process button activates the Process (Don't Print Label) option.</p>
ITRAX	SHOW CUSTOM MANIFEST TASK TAB	If this system value is set to Yes, then the Additional tab is shown. This tab displays additional fields that are carrier specific. If your company requires additional information to be recorded about the shipment when it is being rated, then contact the GTTE Services team. This team can add fields to the Additional tab to record this information.
ITRAX	MANIFEST TASK SHOW TRAILERID	If this system value is set to Yes, then the Trailer Number field is shown on the Additional tab. By default, this field is not shown.
ITRAX	CONSOL:PACK PRORATE METHOD	This value applies to consolidated shipments. When a consolidated shipment is processed, the system can copy the package and tracking information onto the child shipments. This system value

Category	Key	Description
		<p>determines the type of information that the system copies to child shipments.</p> <p>Possible values: Pack, Tracking, None.</p> <p>If set to Pack, then the system copies the package information from the consolidation to the child shipments.</p> <p>If set to Tracking, then the system pushes the tracking number from the consolidated shipment to the child shipments. If the consolidation has more than one package and tracking number, the child shipment is assigned the tracking number related to the particular package that the child shipment is in.</p> <p>If set to None, then no information is transferred to child shipments.</p> <p>By default, this system value is set to None.</p>
ITRAX	DTS SHOW BASE COSTS	<p>This value determines the charge columns that appear on the screen. Assigning a value of CUSTOMER causes the Customer Charge column to display. Assigning a value of COMPANY causes the Company Charge column to display. Assigning a value of BOTH causes the Customer Charge and Company Charge columns to display.</p> <p>Possible values: COMPANY, CUSTOMER, BOTH.</p>
ITRAX	MANIFEST TASK SHOW INSURANCE	<p>If this value is set to Yes and the service chosen offers insurance, then the user can use the Surcharges tab to enter insurance amounts for the packages in the shipment. The type of insurance offered depends on the carrier service. This option allows the user to select insurance, but it does not guarantee that the carrier provides it.</p> <p>Possible values: Yes, No.</p> <p>Default value: No</p>
ITRAX	AUTO- OPEN-PDF	<p>If this value is set to Yes, then any PDF documents produced when the user rates the shipment open automatically in the browser. The user may have to set the</p>

Category	Key	Description
		security settings of their browser to ensure that the PDF has the permission to open.
ITRAX	MANIFEST TASK – DEFAULT PARTY	<p>Use this value to set the default value of the Party field on the Parties tab.</p> <p>Possible values: A partner type from the table in the PI option.</p>
SPS	DELIVERY TERMS TO PAY METHODS	<p>This system value is used to configure default delivery terms and payment methods in the Details tab. The system assigns these default values based on the contents of the Route and Delivery Terms fields in the Details tab. The user can leave these default values as they are, or enter other values in these fields.</p> <p>Format: <COMMAND1> <COMMAND2> ... <COMMANDN></p> <p>If you do not include at least one symbol in the command, an error occurs.</p> <p>Each command has the format:</p> <p><SERVICE>=<SERVICE_VALUE>,<TERM>=<TERM_VALUE>,<FRT></p> <p>The parts of a shipment that can be checked are:</p> <p>SERVICE – The service related to the shipment, which displays in the Route field of the Details tab. The complete list of services is stored in the RT menu option.</p> <p>TERM – The delivery term related to the shipment, which displays in the Delivery Terms field of the Details tab. The complete list of services is stored in the DE menu option.</p> <p>The SERVICE is checked first, and then the TERM. If there is no service, then the TERM is checked.</p> <p>The fields that can be assigned a value are:</p> <p>FRT – The Freight Payment Method field of the Details tab.</p> <p>DUTY – The Duty/Tax Payment Method field of the Details tab.</p> <p>COD – The COD Payment Method field of the Details tab.</p>

Category	Key	Description
		<p>For a list of possible values for these fields, see the Message_Field_Lookups tab of Appendix A on the QAD Document Library.</p> <p>Example: TERM=EXW,FRT=COLLECT,DUTY=CONSIGNEEPAYSDUTY TERM=DDP,FRT=DELIVERYDUTYPAYD,DUTY=CONSIGNEEPAYSDU SERVICE=FDXGND,TERM=DDP,FRT=PREPAIDADD,DUTY=THIRDP SERVICE=UPSUS001,TERM=CPT,FRT=CODSHIPCOST,COD=CASH</p> <p>In this example, SERVICE is checked first, and then TERM. These values are compared with the contents of the Route and Delivery Terms fields on the Details tab of the Manifest task. If the Route field is not filled in, or if it does not correspond to any of the values in the commands, then TERM is checked. The first section of the example checks if the Delivery Terms field (TERM) is set to ex works (EXW). If it is, then the system sets the Freight Payment Method to Collect and the Duty field to Consignee. If none of the conditions are true, the fields in the Details tab are not changed. Regardless of the effect of this system value, the user can manually change the values of the fields in the Details tab.</p>
WORKLOAD	ADDRESS TASK – READONLY ROLES	<p>To make a particular partner role address read-only in the Parties tab, enter the number that corresponds to the partner role.</p> <p>Enter a comma-separated list of roles, for example 14,TP. The partner codes are accessible from the PI menu option, which is accessible from the INDEX menu option.</p> <p>When this system value is not set, some addresses are still read-only, as it is not always appropriate to edit them.</p> <p>This system value controls edits to addresses in the Address task of the Manifest task also.</p>
ITRAX	FLOW ADDRESS VERIFY ALLOWED	<p>This system value determines whether address verification on page 165 applies to the Address task and Parties tab of the Manifest task in the Workflow Portal. It has the same effect as setting the Enable</p>

Category	Key	Description
		Workflow Address Verification field in Configure Address Verification , menu option CFGAV. For more information, see Configuring Address Verification for Workflow Tasks on page 511.

Configuring the Documents Task (WFTDOC)

The Documents task ([Old on page 77](#)) enables you to view any documents associated with the shipment and to add new documents. You can select documents from the list and email them.

There are a number of system values that affect the Documents task.

System Values Related to the Documents Task (Old)

Category	Key	Description
WORKLOAD	DOCUMENT EMAIL SUBJECT	Enter the text that you want to appear in the subject line of the email.
WORKLOAD	DOCUMENTS EMAIL BODY	Enter the text that you want to appear in the body of the email.
ITRAX	COLLATE PDF LOCALES	This system value lists the locale or locales that are used to generate PDF versions of the document. When the user is using a locale in the list, the system combines all the documents into one PDF document that can then be previewed or emailed.
ITRAX	DOCUMENT TASK – HIDE BUTTONS	This system value allows you to hide buttons from the Documents task. Specify a comma-separated list of values. Each entry in the list represents a button that you want to remove. Possible values: PRINT, DELETE, SAVE, EMAIL, GRID_PRINT, GRID_PREVIEW, GRID_HISTORY, ADD.

Category	Key	Description
ITRAX	AUTO-OPEN-PDF	If this value is set to Yes, then any PDF documents produced open automatically in the browser. The user may have to set the security settings of their browser to ensure that the PDF opens.
DOCUMENTS	EMAIL RECIPIENTS	This system value contains a comma-separated list of partner codes that populates the Email Recipients pop-up window on page 78 .
DOCUMENTS	EMAIL RECIPIENTS: USE CONTACTS	If this value is set to YES, the system compares the contents of the EMAIL RECIPIENTS system value on page 317 with the contents of the Contacts suboption of the relevant NR partner records to ensure that the EMAIL RECIPIENTS value contains valid email addresses.

Associating External Files with a Shipment

Configuring Image Classes

To configure the system to store these documents, use the **Image Class** screen. The D2 menu option, accessible from the **INDEX** screen, opens the **Image Class** screen. In this context, an image class is a file type that can be stored in GTTE. Each entry in the Image Class table contains information about a particular file type.

GTTE already has the most common file types listed in this table. You can add any other file types that you need. Click the Add icon at the bottom of the table to display the Image Class Create window.

There are a number of important fields to complete on this screen:

Image Class

A code to identify the class. In the date fields next to this field, specify the date from which the image class can be used in the system.

Description

A description of the file type.

Document Type

In the first field, enter the number 97. Use the lookup icon in the second field to select IMAGE. This document type identifies the file as being different from other GTTE shipping documents.

File extension subtype

A code to associate the image class with a windows file type; for example, DOCX.

Rename imported files?

Set to yes or no. If you set it to yes, specify the File Naming Syntax in the relevant field.

File Naming Syntax

If you set the Rename imported files? field to yes, then you can specify how to rename the files using this field. There are a number of tokens that you can use to specify the format of the name. The tokens are given a run time value. For example, <month> is 1 in January, and 12 in December.

Filename Tokens

Token	Run Time Value
<month>	Month number Example: 12
<year>	Year number Example: 2000

Token	Run Time Value
<day>	Day number Example: 31
<date>	Date Example: 311201 The date format is set on the user profile. Use the menu option US to set the date format preference for a user
<today>	Session date Example: 311201
<time>	Session time Example: 121559
<client>	Current transaction client
<user>	Current user
<drive>	Drive location where the file originated Example: C:\
<drive-letter>	Drive letter where the file originated Example: C
<path>	The path where the file originated, without the <drive>
<full-path>	<drive><path>
<file>	File name of the original file without the full path

Move or Copy imported files?

Set this field to Copy.

Folder Location

The folder location for the copied files. This folder location must be visible to the JBoss application server.

Viewing Stored Images

When users add documents to a shipment using the Documents task, an entry is added to the Image Register. This table is accessible through the D1 menu option, which in turn is accessible from the INDEX option.

Each entry in the Image Register has a unique image identifier. The format of the identifier is controlled by the NEXT SEQUENCE NUMBER system values.

Image Identifier Format

Category	Key	Description
IMAGE	NEXT SEQUENCE NO:	Specifies the format of the image identifier stored in the Image Register. Enter a value of the format [prefix,number,length] where prefix is a three-letter code, number is the sequence number, and length is the number of digits in the identifier. The sequence number fills from the right of the identifier. Example: IMG,207,9 results in the identifier IMG000000207.
IMAGE	NEXT SEQUENCE NO: <FILE_EXTENSION>	If the file that you are uploading has the extension <FILE_EXTENSION>, then this system value is used. It works in the same way as NEXT SEQUENCE NO:

Configuring the Address Task

Use the [Address task on page 71](#) to enable users to view and update addresses for each partner associated with the shipment.

You can configure the list of displayed partners based on the partner types in your system. You can allow the user to edit the address details for the partner, or you can display the address details as read-only. To set these properties, open the **System Values** screen in the Web UI and configure the system values listed in the following table.

Address Task System Values

Category	Key	Description
WORKLOAD	ADDRESS TASK – READONLY ROLES	To make a particular partner role address read-only in the Address task pop-up window, enter the number that

Category	Key	Description
		<p>corresponds to that partner role. You can enter more than one partner role using a comma-separated list. The full list of partner role codes is accessible from the PI menu option, which in turn is accessible from the INDEX screen.</p> <p>When this system value is not set, some addresses are still read-only, as it is not always appropriate to edit them.</p> <p>This system value also controls edits to addresses in the Parties tab of the Manifest task.</p>
WORKLOAD	ADDRESS TASK – ROLES	<p>Enter a comma-separated list of partner roles. Each role appears in the Address task pop-up window. The addresses are blank or complete, depending on the data saved in the system for that partner. The full list of partner role codes is accessible from the PI menu option, which in turn is accessible from the INDEX screen.</p> <p>Example: Delivered from;17,Delivered To;18,Ship To;01,Shipper;14,Third Party;TP.</p>
ITRAX	DTS STATE CODE VALIDATION	<p>Possible values: optional, mandatory. If this system value is set to mandatory, then the state code must match a state code in the STATE CODES lookup domain table available through the UY menu option.</p>
WORKLOAD	ADDRESS TASK – ALLOW EDIT ROLE	<p>Possible values: yes, no. If this system value is set to no, then the user can only use this task to view roles the administrator specifies. They cannot add or delete roles.</p>
ITRAX	SET SHIP TO CONTACT IN SHUS10	<p>Possible values: yes, no. If this system value is set to yes, then the Ship To contact name is also stored in the user-defined field XMSHDR0.SHUS10.</p>

Category	Key	Description
ITRAX	FLOW ADDRESS VERIFY ALLOWED	Determines whether address verification on page 165 applies to the Address task and Parties tab of the Manifest task in the Workflow Portal. It has the same effect as setting the Enable Workflow Address Verification field in Configure Address Verification , menu option CFGAV. For more information, see Configuring Address Verification for Workflow Tasks on page 511 .

Rules and Rulebooks

Rules and rulebooks allow you to specify attributes that apply to shipments under certain conditions. Rules processing runs during the shipment life cycle, and applies the relevant rules to shipments. Rules enable you to specify shipment information. Typically, the information in rules relates to:

- Legal requirements
- Customer requests
- Business procedures

Rulebooks enable you to specify:

- Rules that may apply to a shipment
- Other rulebooks that may apply to a shipment
- The conditions, known in QAD GTTE as rule determinations, under which each of these rules and rulebooks apply to shipments
- Exceptions to each rule determination

There is no limit on the number of rulebooks that can apply to a single shipment, and you can nest a rulebook within another rulebook. This section describes rules and rulebooks, and how they apply to shipments.

Note Rules can be applied to load building. The rule functionality for loads is the same as that for shipments. However, you can only associate rulebooks with a load through the consignor.

A rule consists of information that you want to apply to a shipment. This information is split into categories of fields that correspond to fields on the shipment master table—XMSHDR0—and the shipment item table.

Multiple rules can exist within a rulebook, and you can nest rulebooks. A rulebook contains a collection of rules and rulebooks, along with a number of conditions that specify when a particular rule or rulebook in the top-level rulebook applies to a shipment. These conditions are known as rule determinations in QAD GTTE. For each shipment that is created in QAD GTTE, the rule logic runs and compares the characteristics of the shipment with the rule determinations in any rulebooks attached to the shipment. When a rule determination in a rulebook matches a shipment, the rule or rulebook assigned to that rule determination fires. When a rule fires, it updates the fields in the shipment based on the information that you specify in the rule fields.

Importance of Rulebooks

You can generate a large amount of the data on a shipment through the use of rulebooks and—when interfacing from an ERP system to QAD GTTE—from information on the sales order. You or your colleagues can enter the remaining information such as container numbers and despatch dates manually.

Rulebooks allow you to set up details regarding the movement of goods in advance of shipping. You can set up rulebooks by country, consignor, customer, consignee, and product.

Example A rulebook contains one rule for shipments when the Transport mode field is set to Sea and another rule for shipments when the Transport mode field is set to Air. When shipping using multiple transport modes, the appropriate rule fires based on the transport mode that exists on the shipment.

Preloaded Rules and Rulebooks

To simplify and speed up the setup of rulebooks, QAD GTTE contains the following preloaded rules and rulebooks:

- A preloaded rule and rulebook for each country. The format of the rule and rulebook name is QCTRY-<COUNTRY_CODE>, where <COUNTRY_CODE> is the two-digit ISO country code for that country, for example, QCTRY-IN is the country rule for India. Preloaded rules and rulebooks speed up the creation of rule determinations.

Attaching Rulebooks to Shipments

You can attach rulebooks to a shipment in a number of ways: Using the DEFAULT RULE BOOKS system value. For more information on this system value, see the *System Values for Rules and Rulebooks* table in the [Configuring the Rules Engine on page 383](#) section.

- By country, using the Country Rule Books sub-option in the CT option or the Country tab in the <ASSOCIATION> for Rulebook <RULEBOOK_NAME> grid of the RULES page.
- By consignor, using the Partner tab in the <ASSOCIATION> for Rulebook <RULEBOOK_NAME> grid of the RULES page.
- By product, using the Associated Rule Books sub-option in the PR option or the Product tab in the <ASSOCIATION> for Rulebook <RULEBOOK_NAME> grid of the RULES page.
- By customer, using the Partner tab in the <ASSOCIATION> for Rulebook <RULEBOOK_NAME> grid of the RULES page.
- By consignee, using the Partner tab in the <ASSOCIATION> for Rulebook <RULEBOOK_NAME> grid of the RULES page.

Rule Hierarchy

The rule hierarchy determines the order in which rules apply to shipments. Therefore, rules lower in the hierarchy can override higher rules. The lower the level in the hierarchy, the more specific the rule.

Rule Hierarchy

Position	Method
1	System values
2	Consignee inherited partner country
3	Consignee inherited partner country + shipment type
4	Consignee country
5	Consignee country + shipment type
6	Consignor
7	Consignor + shipment type
8	Product
9	Product + shipment type
10	Customer
11	Customer + shipment type
12	Consignee inherited partner
13	Consignee inherited partner + shipment type
14	Consignee
15	Consignee + shipment type

Example A rule at country level populates the carrier and a rule at customer level populates the carrier; the shipment contains the carrier applied in the customer rule.

Important If a document is added to a shipment in more than one rule, then the document only contains details from the document set up on the last rule to fire; it does not merge the notes from each occurrence of the document in the rule hierarchy. A document is only attached to a shipment when the document criteria parameters of transport mode, print stage, declaration, currency, delivery term, and value are met.

When processing rulebooks within rulebooks, QAD GTTE fires the rule at the bottom first and works back up through the nested rules.

You can use the Assigned Rules Web UI Workflow task, SHSU, to see a list of the rulebooks and rules fired against a shipment. If a rule fires against a shipment more than once, the rule appears in the list more than once.

Rules Processing in the Shipment Life Cycle

Typically, rules processing begins when a shipment is created, either manually or through an interface with an ERP system.

However, it is possible to fire rules at different stages of the shipment life cycle, by grouping rules in rule sets representing life cycle stages, and using the rule set as the basis for rule determination.

This document describes rules processing that begins at the start of the shipment life cycle.

Shipment Creation and Rules Processing

Performance Rules processing can increase the time that it takes to create a shipment transaction in QAD GTTE. There are a number of configuration options available to mitigate this issue.

The rule logic is transaction driven, which means that it first looks at the shipment items or shipment partners, then finds the product or partner master records, and then checks the rule information. If you are certain that there are no rules assigned based on a particular characteristic of the shipment such as the products in the item lines or the consignee, then turning these checks off can reduce rules processing time and speed shipment creation up.

Example You know that there are no rules configured at a product level, so you set the APPLY PRODUCT RULES system value to No. When rules processing runs, it skips the step that finds all products on the shipment line items and checks for associated rules.

System values that can reduce rules processing time include APPLY CONSIGNEE RULES, APPLY CONSIGNOR RULES, APPLY CUSTOMER RULES, APPLY PRODUCT RULES, and APPLY EXPORT REFUND RULES.

Rules and Rulebooks Creation and Processing Flow

The steps for creating a rule and applying that rule to a shipment are:

1. Create a rule or update one of the preloaded rules.
2. Create a rulebook for the rule and attach the rule to this rulebook, or add the rule to an existing rulebook such as the default rulebook or a client-specific rulebook.
3. Add rule determinations to the rulebook.
4. Optionally, add rule determination exceptions to the rule.
5. Associate the rulebook with a shipment using one or more of the methods listed in the Attaching Rulebooks to Shipments section in [Rules and Rulebooks on page 323](#).
6. Create a shipment manually or through an interface with an ERP system. Rules processing then begins, and the appropriate rules fire.

Rules and Rulebooks Page

To create and view rules and rulebooks, use the RULES menu option.

Rules and Rulebooks Page

The screenshot displays the 'Rules and Rulebooks' page. It features three main sections:

- Rules Section:** A table listing rules such as QCTRY-AO (Angola - User maintained), QCTRY-AQ (Antarctica - User maintained), QCTRY-AR (Argentina - User maintained), QCTRY-AS (American Samoa - User ...), QCTRY-AT (Austria - User maintained), QCTRY-AU (Australia - User maintained), QCTRY-AW (Aruba - User maintained), QCTRY-AZ (Azerbaijan - User maintai...), QCTRY-BA (Bosnia And Herzegovina ...), and QCTRY-BB (Barbados - User maintained). A 'Configure Engine' button is visible in the top right.
- Rulebooks for Rule QCTRY-AT:** A table showing one rulebook: QCTRY-AT (Austria - User maintained) with User Id QCONFIG.
- Countries for Rulebook QCTRY-AT:** A table showing one country: AT (AUSTRIA) with Description 'Austria Rulebook'. To the right, there are form fields for 'Country Code', 'Shipment Type', and 'Comment', along with a 'Create / Update' button.

The Rules and Rulebooks page is divided into upper and lower sections.

Upper Section

The Rules tab displays all rules. You can create, view, update, and delete rules in the rules grid. You can add documents and sub-options to a rule. You can also view the rulebooks that a rule is associated with in the Rulebooks for Rule <RULE_NAME> grid.

The Rulebooks tab displays all rulebooks. You can create, view, update, and delete rulebooks in the rulebooks grid. You can also view the rules that a rulebook is associated with in the Rules Determinations for Rulebook <RULEBOOK_NAME> grid.

Both of these tabs contain a Configure Engine button, which enables you to access the System Values Setup page, option Y3, with the Rules Engine tag selected in the Tag Search tab.

Lower Section

The lower section, <ASSOCIATION> for Rulebook <RULEBOOK_NAME>, displays the Countries, Partners, Products, and Default Types tabs. When you select a rulebook in the upper section of the page, these tabs display the countries, partners, products, and default shipment types associated with that rulebook. You can use the Create/Update section to the right of the grid to update these associations.

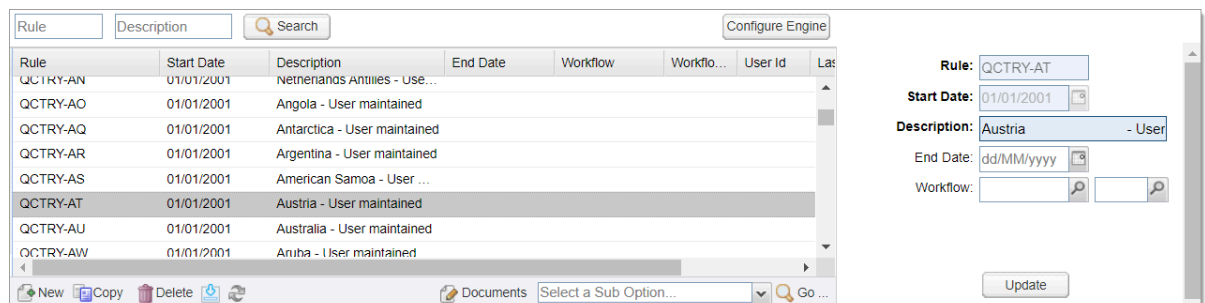
These associations are important, as they are the methods by which rulebooks are associated with shipments, as listed in *Attaching Rulebooks to Shipments*.

Creating and Modifying Rules

In the RULES option, on the Rules tab, the rules grid displays all rules, and enables you to search for a particular rule. When you select a rule, you can update the rule description, end date, and associated workflow by updating the fields to the right of the grid and clicking Update.

To create a new rule, click the New button below the grid, complete the fields to the right of the grid, and click Create.

Rules Grid, Creating a Rule



- **Rule.** Use up to ten alphanumeric characters to specify the rule name; choose a name that is easily understood and makes the purpose of the rule clear. This field is mandatory.
- **Start Date.** Specify the date when the rule comes into effect. This field is mandatory, and the value is checked against the shipment despatch date. The start date allows you to create multiple rules in one sitting, even if they are applicable to different time frames.

Note When you select the current date as the start date, the rule does not come into effect until the following day. This behavior protects current transactions in the event that a rule is created in error.

- **Description.** Add a description of the rule. This field is mandatory.
- **End Date.** Specify the last effective date of the rule. If you do not specify an end date, then the rule applies indefinitely.
- **Workflow code.** If you want to associate a particular workflow with the rule, then specify the workflow code in this field. When the rule is applied to a shipment, it attaches the workflow to the shipment.
- **Workflow type.** If you want to associate a particular workflow type with the rule, then specify the workflow type in this field. When the rule is applied to a shipment, it attaches the workflow type to the shipment.
- **Rulebook.** Select an existing rulebook to which you want to attach this rule.

- *Auto Create Rulebook.* Select this field to automatically create a rulebook with the same name as the rule, and to attach the rule to that rulebook.

Viewing Rulebooks for a Rule

On the Rules tab, the Rulebooks for Rule <RULE_NAME> > grid shows the rulebooks that contain the rule selected in the Rules grid. You can select a rulebook in the Rulebooks for Rule <RULE_NAME> grid and click the Rulebook Details button to open the Rulebooks tab with the selected rulebook displayed in the Rulebooks grid.

Rulebook Details Button on Rules Tab

Rulebooks for Rule QCTRY-US					
Rulebook		Description		Search	
Rulebook	Start Date	Description	User Id	Last Modified	
QCTRY-US	01/01/2001	United States - User maintained	QCONFIG		

[Rulebook Details >](#)

Adding Documents to a Rule

To view the documents associated with a rule, select the rule in the grid, and click the Documents button below the grid.

Rules Grid, Viewing Documents

Documents						
Document type:	Document:	Image:	Output type:		Search	
Documents TGL DAM01 06-Feb-2018						
Doc type	Document	Image	Number of copies	Output type	Description	Print
00	INV1E		1		Invoice (short)	

Page 1 of 1 | Displaying record 1 - 1 of 1 | Close

To add a document to a rule, in the Documents pop-up window, click the Create a New Record icon or choose F9.

Documents [Create]

Documents [Create]
✕

Client:

Rule:

Start date:

Document type:

Document:

Image:

Printer:

Printer for continuation page:

Number of copies:

Note 1:

Note 2:

Note 3:

Note 4:

Note 5:

Note 6:

Note 7:

Note 8:

Note 9:

Image class output stage:

- Print
- RePrt unconfirm
- RePrt confirm
- Close
- Purge
- Original
- Never

Output type:

- Original
- Certification Required
- Legalisation Required

Create
 Close

- *Client, Rule, Start date.* These values are read only, and depend on the rule.

- *Document type*. Use the lookup to choose the document type. Document types, based on format and function, are maintained in the DT option.
- *Document*. Use the lookup to choose the document. A list of documents is maintained in the DO option.
- *Image*. Use the lookup to attach an image file to the document, where applicable.
- *Printer*. Choose the printer to which the document is sent from within the shipment. QAD GTTE currently supports four types of printing:
 - Print to a single printer.
 - Print to a group of printers within a printer group.
 - Send as a fax; a fax server must be available.
 - Send as an e-mail; an e-mail server must be available.

Printers are maintained in option DP.

- *Printer for continuation page*. Specify the printer to which QAD GTTE output continuation sheets are sent.
- *Number of copies*. Specify the number of copies of the document required.
- *Note 1–9*. Attach up to nine notes to the document. Note 1 appears before the shipment lines. Notes 2–5 appear after the shipment lines. Notes 6–9 appear in the footer.
- *Image class output stage*. Select one of the available options to indicate when the document is imaged:
 - Print. The document is imaged when the document is first printed.
 - RePrt unconfirm. Each time the document is printed, a new image is created. A history of images for the document is maintained on the system within the image registry.
 - RePrt confirm. Each time the document is printed, a new image is created. Before the image is created, you will be requested to confirm this action.
 - Close. The document image is created at the transaction close stage.
 - Purge. The document image is created when the transaction is purged from the system.
 - Original. Use this option to specify that this image is an original image imported into QAD GTTE, and not produced by the QAD GTTE print engine.
 - Never
- *Output type*. Specify the output type.

- *Original*. If an original document is required, select this field.
- *Certification Required*. If the document requires certification, select this field.
- *Legislation Required*. If the document requires legislation, select this field.

Click Create to add the document to the rule.

Adding Multiple Documents to a Rule

To add more than one document to the rule at a time, in the Documents pop-up window, click the Add multiple rule documents icon.

Adding Multiple Documents

	Document Type	Document	Description	Program name	Image output st...	Module	VRC cc
+	00	COMPL	Compliance res...	XS_COMP.P		04	*STAN
+	00	INV1EPRO	Invoice - Profor...	XS_SI001.P		04	*STAN
+	00	INV1F	Invoice - French...	XS_SI001.P		04	*STAN
+	00	INV1G	Invoice - Germa...	XS_SI001.P		04	*STAN
+	00	INV1S	Invoice - Spanis...	XS_SI001.P		04	*STAN
+	00	INV2E	Invoice (LONG)	XS_SI001.P		04	*STAN
+	00	INV2E-CP	Invoice (LONG)...	XS_SI001.P	03	04	*STAN
+	00	INV2EPRO	Invoice - Profro...	XS_SI001.P		04	*STAN
+	00	INV2F	Invoice - French...	XS_SI001.P		04	*STAN
+	00	INV2G	Invoice - Germa...	XS_SI001.P		04	*STAN
+	00	INV2S	Invoice - Spanis...	XS_SI001.P		04	*STAN
+	00	QUOTE	Quotation (short)	XS_SI001.P		04	*STAN
+	01	BOL_M	US Straight Bill ...	XS_SM001.P		04	*STAN

Page 1 of 43 | Displaying 1 - 13 of 548 | Close

To select a document from the documents list, click the green plus button in the related row. After you have selected the documents that you require, click Close. If the documents do not appear in the documents grid, then click the Refresh button to update the grid.

Updating Rule Sub-Options

Rule sub-options allow you to specify information for shipments that have this rule attached to them.

To update the sub-options of a rule, select the rule in the grid and select the sub-option from the Select a Sub Option drop-down menu to open the window for that sub-option automatically. If the sub-option does not open automatically when you select the sub-option from the menu, then click Go...

Rule Sub-Option

Sub-Option	Purpose
C88 Details on page 334	Maintain C88 details for the shipment.
Charge table on page 337	Link a group of charges or a charge table to a rule.
Commodity Descriptions on page 339	Maintain commodity details for the shipment.
Documents on page 340	Specify documents that are associated with the shipment.
ECSI details on page 340	Specify Export Cargo Shipping Instructions (ECSI) details related to the shipment. The ECSI contains details of your consignment, including customs information and an allocation of costs.
Foreign bill details on page 344	Set up, in advance of shipment, default information to print on the Foreign Bill or Bill of Exchange.
General information on page 347	Maintain various default values to apply to a shipment when the information is not available on the sales order or other master tables in QAD GTTE.
Other information on page 349	Maintain information about the shipment that appears on the Export Cargo Shipping Instruction (ECSI). Update user-defined fields.
Partner Address Changes on page 351	Set up alternative addresses to override addresses related to the shipment.
Partners – trading internal on page 353	Set up, in advance of shipment creation, default values for parties to add to a shipment; for example, the sales agent, contact or shipping officer, and so on. Any party that you specify must exist in option NR.
Partners – transport customs	Set up the various parties in advance of shipment creation such as haulier, carrier, and declarant.

Sub-Option	Purpose
financial on page 354	
Procedure notes on page 357	Set up procedure notes or reminders to complete tasks in advance of creating a shipment.
Product descriptions on page 359	Set up an alternative product description, which can be used when a shipment is created. This option is used mainly in conjunction with a sales order system interfacing to QAD GTTE, and the alternative description overrides the product description from the sales order.
Product prices on page 362	Set up an alternative product price, which can be used when a shipment is created. This option is used mainly in conjunction with a sales order system interfacing to QAD GTTE, and the alternative price overrides the product price from the sales order.
Route on page 367	Define and maintain details relating to the route taken by a shipment.
Rule/Shipment Plan on page 374	Assign a shipping plan to a shipment. Note PEM is deprecated in QAD GTTE v20 and later. Therefore, this sub-option is no longer used.
Texts on page 368	Associate texts with documents; documents are associated with box IDs, which are associated with text IDs.
Vessels/legs on page 369	Set up information about the shipment route.
Virtual Fields Overrides on page 371	Associate particular virtual fields with the rule, and assign a value to the virtual field when the rule fires.

C88 Details

This sub-option allows you to link C88 details—also known as Single Administrative Document (SAD) details—with this rule.

C88 Details Sub-Option

C88 Details [X]

Client: TGL

Rule: 00053TEST

Start date: 09/01/2015

Air waybill copies: 0

Air waybill originals: 0

Country of despatch 2: [] [🔍]

Country of destination 2: [] [🔍]

Country of 1st Destination: [] [🔍]

Trading Country: [] [🔍]

Location Of Goods: [] [🔍]

Shipped in containers

Transport mode - inland: [] [🔍]

Customs office: BM [] [🔍]

Intended office of transit 1: [] [🔍]

Intended office of transit 2: [] [🔍]

Intended office of transit 3: [] [🔍]

Intended office of transit 4: [] [🔍]

Intended office of transit 5: [] [🔍]

Intended office of transit 6: [] [🔍]

Guarantee Text: []

Warehouse Id: [] [🔍]

Guarantee Ref: []

Deferred Payment: []

Account details: []

[Save] [Close]

C88 Details Fields

Field	Description
Client, Rule, Start date	These values are read only, and depend on the rule.
Air waybill copies	The number of air waybill copies to include with the SAD.
Air waybill originals	The number of original air waybill documents to include with the SAD.
Country of despatch 2	The second country of despatch associated with the rule being maintained. This field corresponds to box 15b on the SAD. Complete this field only when it is required by customs.
Country of destination 2	The second country of destination associated with the rule being maintained. This field corresponds to box 17b on the SAD. Complete this field only when it is required by customs.
Country of 1st Destination	The last country (known at time of export) to which the goods are specifically directed on their outward movement from the state. This field corresponds to box 10 of the SAD.
Trading Country	The trading country associated with the rule being maintained. This field corresponds to box 11 on the SAD. Complete this field only when it is required by customs.
Location of Goods	The name of the control station; this field only applies in the case of an export from an approved consignor's premises or to an approved consignee's premises. This field corresponds to box 30 of the SAD.
Shipped in Containers	If the shipment is being transported in containers, then select this field. If you select this field, then box 19 of the SAD contains 1; otherwise, box 19 contains 0.
Transport mode – inland	The inland transport mode associated with the rule being maintained. This field corresponds to box 26 on the SAD. Complete this field only when it is required by customs.
Customs office	The customs office from where the goods will be exported, for the rule being maintained. This value can be overridden at the time of shipment. This field corresponds to box 29 on the SAD.

Field	Description
Intended office of transit 1, 2, 3, 4, 5, and 6	These fields apply only when community transit is involved. Enter the intended offices of each country through which the shipment crosses during the course of its transport. These fields correspond to box 51 of the SAD. These fields are not applicable at the import stage.
Guarantee Text	This field is not applicable at the import stage. This field applies only when community transit is involved. When a comprehensive guarantee is used, enter the name of the guarantee office. When guarantee vouchers are used, enter the voucher numbers. If neither of these guarantees is valid for the countries in the community transit system, enter the country codes entered in the intended offices of transit 1–6 fields. This field relates to box 52 of the SAD.
Warehouse Id	The warehouse ID associated with the rule being maintained. This field relates to box 49 of the SAD.
Guarantee Ref	This field is not applicable at the import stage and needs to be completed only where community transit is involved. Enter a one-digit numeric code to identify the type of guarantee. This information relates to box 52 of the SAD.
Deferred Payment	Where deferment is claimed, enter the Deferred Payment Approval Number of the person responsible for paying the duty. This information corresponds with box 48 on the SAD.
Account details	Enter the account details associated with the rule being maintained. This information corresponds with section B on the SAD.

Charge Table

This sub-option allows you to link a group of charges or a charge table to a rule. When the rule fires for a shipment, the charges are automatically added to the shipment for calculation using the calculator button on the Charges page. You can create charge tables in the CH option, and then use the Charge table sub-option to associate a charge table with a rule.

Charge Table Sub-Option

The screenshot shows a window titled "Charges" with a search bar at the top right. Below the search bar, there are three buttons: "PSL", "PSL-USA", and "01-Jan-2001". A table with the following content is displayed:

	In use
TGI-AIR1	✓

At the bottom of the window, there is a pagination bar showing "Page 1 of 1" and a set of icons for navigation. The text "Displaying record 1 - 1 of 1" is on the right, and a "Close" button is at the bottom right.

Use the buttons below the grid to update the charge tables associated with the rule. You can also modify the charge table discount percentage and minimum charge.

Charge Tables [Create]

The screenshot shows a window titled "Charge Tables [Create]". It contains the following fields and controls:

- Client: PSL
- Rule: PSL-USA
- Start date: 01/01/2001
- Charge table: [Empty field with search icon and warning icon]
- In use
- Discount Percentage: 0.0
- Minimum Charge: 0.0

At the bottom left is a "Create" button with a plus icon, and at the bottom right is a "Close" button with an X icon.

Charge Tables [Create] Fields

Field	Description
Client, Rule, Start date	These values are read only, and depend on the rule.
Charge table	Use the lookup to choose a charge table. Charge tables are maintained in the CH option.
In use	To make this charge table applicable to the rule, select this field.
Discount Percentage	This field allows you to apply a discount to this charge table.
Minimum Charge	This field allows you to specify a minimum charge that overrides any calculation for the value elsewhere.

Commodity Descriptions

This sub-option allows you to maintain commodity details for the shipment.

Commodity Descriptions Sub-Option

The screenshot displays the 'Commodity Descriptions' sub-option interface. At the top, there are search filters: 'Classification Group', 'Commodity Code', and 'Description' (with a dropdown arrow). A 'Search' button is located to the right of these filters. Below the filters, the main area is titled 'Commodity Descriptions' and contains a table with columns: 'Classification Group', 'Commodity Code', 'Description', and 'Description'. The table is currently empty, displaying the message 'No records found.' At the bottom of the window, there is a status bar showing 'Page 1 of 1' and 'No records to display'. A 'Close' button is visible in the bottom right corner.

Commodity Descriptions [Create]

Commodity Descriptions [Create] Fields

Field	Description
Client, Rule, Start date	These values are read only, and depend on the rule.
Classification Group	Use the lookup to specify a compliance code.
Commodity Code	Specify the commodity code that the user requires to set up the export license, in order to control quantities and values. Harmonised System (HS) numbers are classification numbers assigned to identify a specific type of product.
Description	Specify an alternative commodity description, if required. This description overrides the commodity description on the shipment.
Description	Specify an extended commodity description, if required.

Documents

See [Adding Documents to a Rule](#) on page 329.

ECSI Details

This sub-option allows you to specify Export Cargo Shipping Instructions (ECSI) related to the shipment. The ECSI contains details of your consignment, including customs information and an allocation of costs.

ECSI Details

The screenshot shows a web form titled "ECSI details" with a close button in the top right corner. The form contains the following fields and options:

- Client:
- Rule:
- Start date:
- Warehouse Id:
- Certification of shipment: A, B, C, D, E, F, Blank
- Air, sea or other: A, B, C, D, E, F, Blank
- Bill of lading: A, B, C, D, E, F, Blank
- Consular formalities/Cor: A, B, C

At the bottom right of the form, there are two buttons: "Create" and "Close".

Note A number of fields on this page allow you to specify the party responsible for a particular task. Different parties are represented by

different letters; A represents the exporter, B represents the consignee, C represents the forwarder, D represents the customer, E represents other, and F represents a user-defined party. If you select Blank, then no party is designated as responsible for that particular task, document, or charge.

ECSI Details Fields

Field	Description
Warehouse ID	The identification code for the warehouse where the goods are stored or dispatched from.
Certification of Shipment	Select the party responsible for preparing the Certificate of Shipment document.
Air, sea or other waybill	Select the party responsible for preparing the air, sea, or other waybill.
Bill of lading	Select the party responsible for preparing the bill of lading document.
Consular formalities/Cor	Select the party responsible for preparing the Consular Formalities document.
Other FOB service charge	Select the party responsible for other free on board service charges.
Customs formalities Export	Select the party responsible for the customs documentation formalities for export shipments.
Customs formalities Transit	Select the party responsible for the customs documentation formalities for goods in transit shipments.
Customs formalities Import	Select the party responsible for the customs documentation formalities for import shipments.
Freight GD/ICD	Select the party responsible for paying the Inland Carriage to Groupage Depot/ICD charge.
Freight UK Port	Select the party responsible for paying the Inland Carriage to UK Port/Airport charge.
Depot/ICD in UK	Select the party responsible for paying the Depot or Port Charges in UK charge.
Freight Payable To	Specify the port name to which the freight is payable.
Freight To	Select the party responsible for paying the Freight To freight charge.

Field	Description
Oncarr. Place delivery	Select the party responsible for paying the On-Carriage at Destination to Place of Delivery freight charge.
Depot/ICD at Destination	Select the party responsible for paying the Depot or Port Charges at Destination freight charge.
Oncarr. Depot/ICD	Select the party responsible for paying the On-Carriage at Destination to Depot freight charge.
Exporter	Select a party to indicate the exporter.
To Order Blank Endorsed	Specify 1 or 0.
To order of	Indicate which party is responsible for FOB service charges.
Notify 1–3	For each of these fields, select the party to be notified.
Ocean Frg payable at	Specify the port name at which ocean freight is payable
Status T1/T2/MIX/T2L	Indicate the transit status of the shipment. There are number of possible values: <ul style="list-style-type: none"> • T1 indicates that the goods are moved under the external Community Transit (CT) procedure. • T2 indicates that the goods are moved under the internal CT procedure. • MIX represents a combination of both T1 and T2. • T2L indicates that the status of the community goods is not certified
Indicate who posts SCP	Specify the name of the party who posts the Simplified Customs Procedures.
User Defined 1–3	These fields are not currently in use.

Foreign Bill Details

This option allows you to set up, in advance of shipment, default information to print on the Foreign Bill or Bill of Exchange.

Foreign Bill Details

Foreign bill details [X]

Client: TGL
 Rule: 00053
 Start date: 01/01/2001

Tenor description: ⓘ

Bill of exchange originals: Release docs on A/P
 Commercial invoices originals: Not taken Up. W/h
 Consular invoices originals: Insure against fire
 Cert of origin originals: Collect ALL Charges
 Insurance cert originals: Corr. charges only
 B/L originals: Return bill by air
 Parcel post originals: Unaccepted protest
 Air waybill originals: Advise reason telex
 Combined trans doc originals: Remit proceeds telx Advise Due date ttx

Other Documents:

Refer to: 🔍

For guidance

[Save] [Close]

Foreign Bill Details Fields

Field	Description
Client, Rule, Start date	These values are read only, and depend on the rule
Tenor description	Enter a relevant description for the clause being maintained within the rule; for example, 30 days from date of invoice.
Bill of exchange originals Commercial invoices originals Consular invoices originals	Specify the number of original documents to forward to the consignee and the bank. In each case, use the second text box to specify the number of document copies for the same purpose.

Field	Description
Cert of origin originals Insurance cert originals B/L originals Parcel post originals Air waybill originals Combined trans doc originals	
Other Documents	If other documents for the rule will be sent with the shipment, then specify the documents in this field.
Refer to	Enter the name of the party to contact in the case of an issue. This party must be a valid Notify Party.
For Guidance	If guidance is to be sought from the Notify Party, then select this field.
Release docs on acceptance	If you want the documents to be released on acceptance, then select this field.
Not taken up at Warehouse	If the documents are not to be taken at the warehouse, then select this field.
Insure against fire	If the goods must be insured against fire, then select this field
Select ALL Charges	If the charges on the shipment are collect, then select this field
Corr. charges only	If only correspondence charges are to be collected, then select this field.
Return bill by air	If the bill is to be returned by airmail, then select this field.
Unaccepted protest	Use this field to select the unaccepted protest option.
Advise reason telex	If you are advising the reason for unpaid protest by telex, then select this field.
Remit proceeds telex	If you are sending remittance details by telex, then select this field.
Advise due date telex	If you are advising the due date by telex, then select this field.

General Information

This sub-option allows you to maintain various default values to apply to a shipment when the information is not available on the sales order or other master tables in QAD GTTE.

General Information Sub-Option

The screenshot shows a window titled "General information" with a close button (X) in the top right corner. The window contains the following fields and controls:

- Client: TGL
- Rule: 00053
- Start date: 01/01/2001
- Nature of transaction: [Empty] [Search icon]
- Currency: [Empty] [Search icon]
- Shipment status: [Empty] [Search icon]
- Payment terms: [Empty] [Search icon]
- Delivery terms: [Empty] [Search icon]
- Delivery terms text: [Empty]
- Language: [Empty] [Search icon]
- Contact: [Empty] [Search icon]
- Document set: [Empty] [Search icon]
- Priority 1-999: 0
- Calculate duty: Yes No

At the bottom right of the window, there are two buttons: "Save" and "Close".

General Information Fields

Field	Description
Client, Rule, Start date	These values are read only, and depend on the rule.
Nature of transaction	Use this field to: <ul style="list-style-type: none"> Define and maintain codes to control the type and form of shipment data in the INTRASTAT and EC Sales List reports. The term transaction refers to any

Field	Description
	<p>operation—commercial or otherwise—that results in a movement of goods between EU member states.</p> <ul style="list-style-type: none"> • Default the nature of transaction for US export shipments for AES filing.
Currency	The currency code for the client or country rules. If your QAD GTTE implementation interfaces with an ERP system, then this field maps directly to the shipment.
Shipment status	This field allows you to assign a status to a shipment. A shipment may go through a number of statuses during normal processing, from order date to actual delivery date. These statuses are then used to maintain the tracking schedule for a particular shipment. You can filter shipments in the Inquiry and Workflow pages based on status, and the shipment status also determines which tasks you can run within Workflow. These statuses do not appear on any standard document.
Payment terms	The payment terms for the rule; the customer and consignor agree payment terms detailing when payment should be received for goods. If your QAD GTTE implementation interfaces with an ERP system, then this field maps directly to the shipment.
Delivery terms	Delivery terms, Incoterms, or International Commercial Terms are a list of internationally recognized codes that indicate which shipment partner—customer or consignor—pays for the delivery of the goods to a particular location.
Delivery terms text	<p>Use this field to add text to the delivery terms of a shipment.</p> <p>Example DDP – Rotterdam; the seller pays all costs involved in bringing the goods to the destination, Rotterdam.</p>
Language	The language used for the shipment.
Contact	The person in your organization responsible for shipping tasks. Typically, shipping officers or contacts are directly associated with specific QAD GTTE users. QAD GTTE users are maintained in option US. The identification of this person is important for workflows.
Document set	A list of documents that are set up through option PS.
Priority 1–999	This field is for reference purposes only.

Field	Description
Calculate duty	Specify whether duty is calculated for the shipment. If duty is calculated, then trade agreements and duty rates are used as the basis for calculating duty for each shipment item.

Other Information

This sub-option allows you to maintain information about the shipment that appears on the ECSI (Export Cargo Shipping Instructions) and in user-defined fields.

Other Information Sub-Option

Other information
✕

Client:

Rule:

Start date:

B/L Original:

Declaration:

Import Permit Number:

Export Traders Ref#:

User defined field 1:

User defined field 2:

User defined field 3:

User defined field 4:

User defined field 5:

User defined 6:

User defined 7:

User defined 8:

User defined 9:

Use and/or dest'n:

User defined 11:

User defined 12:

User defined 13:

User defined 14:

Save
 Close

Other Information Fields

Field	Description
Client, Rule, Start date	These values are read only, and depend on the rule.
B/L Original	<p>Specify the number of bill of lading documents. A bill of lading is a document issued to a shipper by a carrier, and represents a contract for the carriage of goods. There are three bill of lading documents: the carrier bill of lading, the shipper bill of lading, and the bag or consignee bill of lading. There are a number of signed original versions and copies of each of these three bills of lading. Use the six fields to specify the number of:</p> <ul style="list-style-type: none"> • Original carrier bills of lading • Copies of the carrier bill of lading • Original shipper bills of lading • Copies of the shipper bill of lading • Original bag or consignee bills of lading • Copies of the bag or consignee bill of lading
Declaration	Add a customs declaration; some customs documents require a custom declaration, for example the C88 SAD (Single Administrative Document). Customs declarations are maintained in option DA.
Import Permit Number	Specify the import permit number associated with the rule. Typically, this number is a customs number that is issued to an importer granting permission to import an item, and is required on some customs documents.
Export Traders Ref#	Specify the export traders reference associated with the rule. Typically, this number is a customs number that is issued to an exporter granting permission to export an item, and is required on some customs documents
User defined field 1–5, User defined 7–9, User defined 11–14	Use these fields to specify other information that is important to your company's shipping process. You can use the Translations facility to change the label on each of these fields. For more information on the Translation facility, see <i>Translating Web UI Literals</i> .

Field	Description
Use and/or dest'n	Specify the use and/or destination, which prints in Box 104 on the T5 Customs Document. This document is used for Export Refund shipments.

Partner Address Changes

You can use this option to set up alternative addresses to override addresses related to the shipment. For example, a consignee address is taken from a sales order in an ERP system but, in export shipping documents, it is overridden by the alternative address.

Partner Address Changes

Partner type: Sequence no: Search

Partner Address Changes PSL PSL-USA 01-Jan-2001

Prtr type	Sequence no	Name	Address Line 1	Address Line 2	Address Line 3	Address Line
01	0					
02	0	Group International	Buffalo	New York		
08	0					

Page 1 of 1 Displaying record 1 - 3 of 3 Close

Partner Address Changes [Create]

Partner Address Changes [Create]
✕

Client:

Rule:

Rule Start Date:

Partner type:

Sequence no:

Name:

Address Line 1:

Address Line 2:

Address Line 3:

Address Line 4:

Address Line 5:

City:

Postal:

State:

Country:

Contact:

Phone Number:

Fax Number:

E-Mail Address:

Create
✕ Close

Partner Address Changes [Create] Fields

Field	Description
Client, Rule, Rule Start date	These values are read only, and depend on the rule.
Partner Type	Use the lookup to specify the partner type.
Sequence no	Specify the sequence number.
Name	Specify the alternative partner name.

Field	Description
Address Line 1–5, City, Postal, State, Country	Specify the alternative partner address.
Contact, Phone Number, Fax Number, E-Mail Address	Specify alternative contact details for the partner.

Partners – Trading Internal

Set up, in advance of shipment creation, default values for parties to add to a shipment; for example, the sales agent or shipping officer. Any party that you specify must exist in option NR.

Partners - Trading Internal Sub-Option

Partners - trading internal

Client: TGL

Rule: 00053TEST

Start date: 09/01/2015

Customer:

Notify:

Corporate customer:

Profit center:

Deliver from:

Office:

Sales Organisation:

Deliver to:

Sales agent 1:

Contact:

Save | Close

Partners - Trading Internal Fields

Field	Description
Client, Rule, Rule Start date	These values are read only, and depend on the rule.
Customer	The Invoice To party of shipments created based on this rule.
Notify	The Notify party, if applicable; for example, the import agent or customs clearance agent.
Corporate customer	The party to which the invoice will be paid. If this field is specified, it overrides the value of the Customer field.
Profit center	This field is not in use.
Deliver from	The place from which the shipment is sent.
Office	An office is used within QAD GTTE to identify a particular business unit. Depending on how QAD GTTE is configured, an office may consist of one or more consignors, or one consignor may be split into one or more offices, or there may be a direct 1:1 relationship between office and consignor.
Sales Organisation	You can use this field to specify the name of the sales person associated with the shipment for commission processing or analysis reporting.
Deliver to	The place to which goods will be delivered.
Sales agent 1	The sales representative associated with the rule being maintained.
Contact	The contact name—usually the shipping officer—associated with the rule being maintained. This contact name is usually the name that prints on export documents such as SAD. It is used by Workflow

Partner – Transport Customs Financial

This sub-option allows you to set up the various parties in advance of shipment creation such as haulier, carrier, and declarant.


Partner - Transport Customs Financial Sub-Option


Partners - transport customs financial [X]


Client: TGL


Rule: 00053TEST


Start date: 09/01/2015


Carrier: 


Haulier: 


International carrier: 


Broker: 


Customs: 


Principal: 


Declarent: 


Responsible: 


Financial: 


Shipment bank: 


Consignors bank: 


Insurance Agent: 


Credit insurance agent: 

Office: 

Sales agent 1: 

Sales agent 2: 

Sales agent 3: 

Sales agent 4: 

[Save] [X] Close

Partner - Transport Customs Financial Fields

Field	Description
Client, Rule, Rule Start date	These values are read only, and depend on the rule.
Carrier	Specify the carrier associated with the shipment.

Field	Description
Haulier	Specify the haulier associated with the shipment.
International carrier	Specify the international carrier associated with the shipment. This field corresponds to Box 7—Successive Carriers—on the SITPRO CMR document. It also refers to the International Carrier field on SITPRO Standard Shipping Note and it refers to the field International Carrier on SITPRO Dangerous Goods Note.
Broker	Most letters of credit include inspection of goods before exporting; use this field to store information on the inspection agency and name of the inspector. Also, when goods are exported to the United States, for example from Ireland or England, the importer will use a customs broker to check the goods.
Customs	The name of the customs office. This field corresponds to box 29—Office of Exit—on the SAD.
Principal	This field corresponds to box 50 on the SAD. This field is only required for EU companies that are shipping goods outside of the EU.
Declarant	This field corresponds to box 14—Declarant/ Representative—on the SAD. This field is only required for EU companies that are shipping goods outside of the EU.
Responsible	This field corresponds to box 9—Person Responsible for Financial Settlement—on the SAD. This field is only required for EU companies that are shipping goods outside of the EU.
Financial	This field corresponds to box 28—Financial and Banking Data—on the SAD. This field is only required for EU companies that are shipping goods outside of the EU.
Shipment bank	The bank associated with the shipment; typically, this represents the customer's bank, which may be used for Letter of Credit transactions.
Consignors bank	This field corresponds to the To (Bank) field in the SITPRO Foreign Bill Document, which relates to letter of credit transactions.
Insurance Agent	The name of the Insurance Agent that the goods are insured with. This is a requirement for the insurance certificate.

Field	Description
Credit insurance agent	Enter the name of the credit insurance agent associated with this shipment.
Office	An office is used with QAD GTTE to identify a particular business unit. Depending on how QAD GTTE is configured, an office may consist of one or more consignors, or one consignor may be split into one or more offices, or there may be a direct 1:1 relationship between office and consignor.
Sales agent 1-4	Specify sales agent information for analysis purposes.

Procedure Notes

You can use this sub-option to set up procedure notes or reminders to complete tasks in advance of creating a shipment; for example, sending a fax to customs prior to customs clearance.

Procedure Notes Sub-Option

Section:

Search

Procedure Notes

PSL PSL-USA 01-Jan-2001

Section	Description	Mand revw	Note
10	Fax to Customs	✓	Fax Customs with clearance details before the goods are despatched.

Page 1 of 1

Displaying record 1 - 1 of 1

Close

Use the buttons below the grid to add, edit, copy, or delete procedure notes.

Procedure Notes [Create]

Procedure Notes [Create] Fields

Field	Description
Client, Rule, Start date, Section	These values are read only, and depend on the rule.
Description	A short description of the procedure note.
Mandatory Review	<p>If you want the procedure note to display before documents print, then select this field.</p> <p>The Documents workflow task displays mandatory procedure notes every time that you select the preview document or print document option.</p> <p>The Inquiry screen, accessible through menu option REPORT, displays mandatory procedure notes every time that you select the preview document or print document option.</p>

Field	Description
Group	If you want the procedure note to be visible to a particular user group only, then specify the group in this field. If you want all users to see the procedure notes, then leave this field blank.
Note	The message or reminder that you want to display to users.

Product Descriptions

This option allows you to set up an alternative product description, which may be used when a shipment is created. This option is used mainly in conjunction with a sales order system interfacing to QAD GTTE, and the alternative description overrides the product description from the sales order.

Product Descriptions Sub-Option

Product descriptions

Product code: Order number: Order line no.: Description: Search

Product Descriptions TGL 0093TEST 09-Jan-2016

Product code	Order number	Order line no.	Description	Description	Units Inner	Inner	Inner Outer	Outer	External material	Dsc prt
001.009.00		0	Test		0		0			0
011140		0	tewst		0		0			0

Page 1 of 1 | Displaying record 1 - 2 of 2

Close

Use the buttons below the grid to add, edit, copy, or delete product descriptions.

Product Descriptions [Create]

Product Descriptions [Create] [X]

Client: TGL

Rule: 00053TEST

Start date: 09/01/2015

Product code: [] [🔍]

Order number: []

Order line no.: []

External description: [] [!]

External description: []

Extended description: []

Extended description: []

Description to print:

- Code+Desc
- ExternalCode+ExternalDesc
- Code+ExternalCode+Desc+ExternalDesc
- Code+ExternalDesc
- ExternalCode+Desc
- Code+ExternalCode+Desc
- Code+ExternalCode+ExternalDesc

External product code: []

Packing information control:

- Use packing
- Use description
- Use both

Units/Inner, Inner: 0.0 [] [🔍]

Inners/Outer, Outer: 0.0 [] [🔍]

[+ Create] [X Close]

Product Descriptions [Create] Fields

Field	Description
Client, Rule, Start date	These values are read only, and depend on the rule.
Product Code	Select the product code that you want to use as an alternative product description. This field identifies an item, product, or material code for use in a transaction.
Order Number	Specify an order number.
Order Line No	If applicable, specify the order line number related to the order number.
External Description	Specify the alternative external product description. Note For this setting to take effect, Services must customize the Base QAD GTTE system. For more information, contact a member of the Services team.
External Description	Use this field to specify any additional lines of the alternative external product description. Note For this setting to take effect, Services must customize the Base QAD GTTE system. For more information, contact a member of the Services team.
Extended Description	Specify an extended product description. This field is for reference purposes only and does not print on documents.
Extended Description	Specify any additional content for the extended product description. This field is for reference purposes only and does not print on documents.
Description to Print	Select the information that you want to appear on documents. <ul style="list-style-type: none"> • Code+Desc – Print Product Code and Product Description • ExternalCode+ExternalDesc – Print External Product Code and External Product Description • Code+ExternalCode+Desc+ExternalDesc – Print Product Code, External Code, Product Description and External Product Description

Field	Description
	<ul style="list-style-type: none"> • Code+ExternalDesc – Print Product Code and External Product Description • ExternalCode+Desc – Print External Product Code and Product Description • Code+ExternalCode+Desc – Print Product Code, External Product Code and Product Description • Code+ExternalCode+ExternalDesc – Print Product Code, External Product Code and External Product Description
External Product Code	Specify an external product code associated with the product. This code is required for some export documentation in addition to the product code that your company uses.
Packing Information Control	Select one of the available options; this field is not used in QAD GTTE.
Units/Inner, Inner	Use the Units/Inner field to specify the number of units, such as EA, that will be packed into an inner such as a box. This information overrides the corresponding fields on the shipment item when the rule is applied for that shipment. Use the Inner field to specify the unit type into which the units are packed.
Inner/Outer, Outer	Use the Units/Outer field to specify the number of inners, such as boxes, that will be packed into an outer such as a pallet. This information overrides the corresponding fields on the shipment item when the rule is applied for that shipment. Use the Outer field to specify the unit type into which the inners are packed.

Product Prices

This option allows you to set up an alternative product price, which may be used when a shipment is created. This option is used mainly in conjunction with a sales order system interfacing to QAD GTTE, and the alternative price overrides the product price from the sales order.

A special offer on a product runs for three months only, as an introductory price to a new market. Every time that product is shipped, the rule price overrides the actual price on the sales order or the price on the product master table in QAD GTTE. You can set up the alternative product price within rules based on a specified start date and end date or delivery term.

Example A special offer on a product runs for three months only, as an introductory price to a new market. Every time that product is shipped, the rule price overrides the actual price on the sales order or the price on the product master table in QAD GTTE. You can set up the alternative product price within rules based on a specified start date and end date or delivery term.

Product Prices Sub-Option

Product prices

Product code: Delivery terms: Quantity break point: Currency:

Product Prices TGL 00003TEST 00-Jan-2016

Product code	Terms	Qty break	Currency	Prc uom	Selling price	List price	Cost price	Stat price	Charge class	Description	Chg uom
.		0	AOA	KG	2	0	0	0			0

Page 1 of 1 | | Displaying record 1 - 1 of 1

Use the buttons below the grid to add, edit, copy, or delete product prices.

Product Prices [Create]

Product Prices [Create] Fields

Field	Description
Client, Rule, Start date	These values are read only, and depend on the rule.
Product Code	Select the product that the alternative price applies to.
Delivery Terms	The delivery term for the product for which an alternative price is being maintained. This is an optional field. Example If a delivery term of EXW is specified here during rule creation, the delivery term on the shipment must also specify EXW.

Field	Description
Quantity Break Point	<p>The break quantity for the product price being maintained; if this field is blank, then the default value—99,999,999.999—applies.</p> <p>Example If a value of 400 is entered, then 400 units can be shipped with the alternative price from the rule setup. After 400 units, the sales order price is used.</p>
Selling [Ship] Price Per Unit	<p>Specify the alternative ship price for the product being maintained. At shipment creation, when this rule is applied with the alternative price for the product on the shipment, it overrides the sales order price. Use the look up to specify the unit of measure.</p> <p>Note For this setting to take effect, Services must customize the Base QAD GTTE system. For more information, contact a member of the Services team.</p>
List Price Per Unit	<p>Specify the alternative list price for the product being maintained. At shipment creation, when this rule is applied with the alternative price for the product on the shipment, it overrides the list price per unit.</p> <p>Note For this setting to take effect, Services must customize the Base QAD GTTE system. For more information, contact a member of the Services team.</p>
Cost Price Per Unit	<p>Specify the alternative cost price for the product being maintained. At shipment creation, when this rule is applied with the alternative price for the product on the shipment, it overrides the cost price per unit.</p> <p>Note For this setting to take effect, Services must customize the Base QAD GTTE system. For more information, contact a member of the Services team.</p>
Statistical Price Per Unit	<p>Specify the alternative statistical price for the product being maintained. At shipment creation, when this rule is applied with the alternative price for the product on the shipment, it overrides the statistical price per unit.</p>

Field	Description
	<p>Note For this setting to take effect, Services must customize the Base QAD GTTE system. For more information, contact a member of the Services team.</p>
Currency	Specify the currency for the alternative product price being maintained.
Use Pricing	To indicate that the alternative pricing should be used, select this field.
Tax Type	<p>If you want a tax amount to be calculated against the product at shipment creation, specify the alternative tax type for the product price being maintained.</p> <p>Note For this setting to take effect, Services must customize the Base QAD GTTE system. For more information, contact a member of the Services team.</p>
Charge Class	<p>Specify the alternative charge class for the product price being maintained.</p> <p>Note For this setting to take effect, Services must customize the Base QAD GTTE system. For more information, contact a member of the Services team.</p>
Charge Per UOM	<p>Specify the charge value per unit of measure associated with the alternative product price being maintained.</p> <p>Note For this setting to take effect, Services must customize the Base QAD GTTE system. For more information, contact a member of the Services team.</p>
Fixed Charge	<p>Specify the charge value per unit of measure associated with the alternative product price override being maintained.</p> <p>Note For this setting to take effect, Services must customize the Base QAD GTTE system. For more information, contact a member of the Services team.</p>
Cost Currency	Specify the currency for the alternative charges being maintained.

Route

This option allows you to define and maintain details relating to the route taken by a shipment.

Route Sub-Option

The screenshot shows a 'Route' form with the following fields and values:

- Client: TGL
- Rule: 00053
- Start date: 01/01/2001
- Shipment type: [Empty]
- Country of origin: [Empty]
- Country of despatch: [Empty]
- Country of destination: [Empty]
- Place of loading: [Empty]
- Place of destination: [Empty]
- Transport mode: [Empty]
- Route: [Empty]

At the bottom right of the form, there are buttons for 'Save' and 'Close'.

Route Fields

Field	Description
Client, Rule, Start date	These values are read only, and depend on the rule.
Shipment Type	Specify the shipment type for the rule being maintained.
Country of Origin	Specify the country of origin of the goods.
Country of Despatch	Specify the country of despatch of the goods.
Country of Destination	Specify the country of destination of the goods
Place of Loading	Specify the place of loading of the goods; for example, the consignor warehouse.

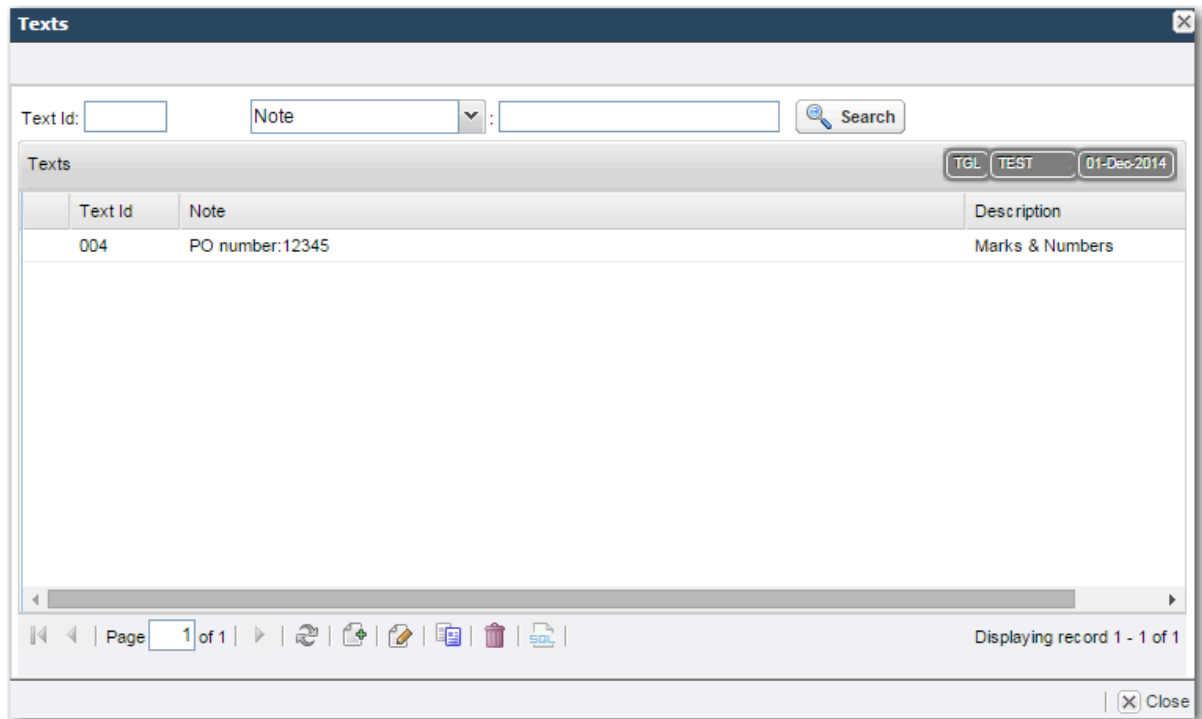
Field	Description
Place of Destination	Specify the place of destination of the goods
Transport Mode	Specify the transport mode of the shipment
Route	Specify the normal shipping route

Texts

This option allows you to associate texts with documents; documents are associated with box IDs, which are associated with text IDs.

Texts set up here default against the shipment when the rule fires. The Document sub-option and Text sub-option within RULES are linked; all the documents in the master table have box IDs set up against them, and these box IDs have text IDs attached. Therefore, when you add a document to a rule, and the Texts sub-option is selected, you see a list of the text IDs. At this point, you can select the relevant text IDs that you can set up default text against. This means that, when the rule is applied to the shipment, these default texts are automatically set up on the shipment for printing on documents, and you can amend or add to the text when necessary.

Texts Sub-Option



Use the buttons below the grid to add, edit, copy, or delete text IDs.

Texts [Create]

Texts [Create]

Client: PSL

Rule: PSL

Start date: 01/01/2002

Text Id: 🔍

Note: !

Create Close

Texts [Create] Fields

Field	Description
Client, Rule, Start date	These values are read only, and depend on the rule.
Text Id	Use the lookup to choose the text ID that identifies the type of text; for example, Marks and Numbers.
Note	Add the default text that you want to print on documents at shipment time.

Vessels/Legs

This allows you to set up information about the shipment when it is created and the rule fires. The option is useful if you know that, when shipping to a certain customer, the goods always ship on the same vessel or mode of transport from the same departure port and always arrive at the same port. To see help information about the contents of columns, hold the mouse over the column heading. The image below shows the help information for the Mode column.

Vessels/Legs

The screenshot shows the 'Vessels / Legs' window. At the top, there is a search bar with 'Line no.' and 'Vessel' dropdown menus, and a 'Search' button. Below the search bar, the window title is 'Vessels / Legs' and there are buttons for 'TGL', 'TEST_RULE_HKR', and '21-Nov-2014'. A table header is visible with columns: 'Line no.', 'Vessel', 'Depart from', 'Arrive at', 'Lead time', 'Lead time uom', and 'Mode'. The table content is empty, displaying 'No records found.' A tooltip on the right side of the table area reads: 'Enter the Transport Mode associated with the Vessel/Flight being maintained within the Rule, i.e. Air, Sea, etc. Transport Mode indicates the way that the goods will be shipped, e.g. by sea, by road, by air etc'. At the bottom, there is a pagination bar showing 'Page 1 of 1' and a 'Close' button.

Vessels/Legs [Create]

The screenshot shows the 'Vessels / Legs [Create]' window. It contains a form with the following fields: 'Client' (TGL), 'Rule' (TEST_RULE with a red warning icon), 'Start date' (21/11/2014), 'Line no.' (10), 'Vessel' (empty with search icon), 'Depart from' (empty with search icon), 'Arrive at' (empty with search icon), 'Lead time' (0.0 with search icon), and 'Transport mode' (empty with search icon). At the bottom left, there is a 'Create' button with a plus icon, and at the bottom right, there is a 'Close' button with an X icon.

Vessels/Legs [Create] Fields

Field	Description
Client, Rule, Start date	These values are read only, and depend on the rule.

Field	Description
Line no	This value is read only and is automatically generated in increments of ten. It is a unique identifier within a given context; for example, when combined with an item line number or charge line number.
Vessel	The vessel name associated with the rule being maintained. When the shipment is created and the rule fires, this vessel name is automatically added to the shipment, but you can change the vessel name before printing the export documents. This field displays in box 18 in the SAD.
Depart from	The departure port for the vessel associated with the rule being maintained. When the shipment is created and the rule fires, this Depart From Port is automatically added to the shipment; however, you can update this information before printing the export documents.
Arrive at	The arrival port for the vessel associated with the rule being maintained. When the shipment is created and the rule fires, this arrival port name is automatically added to the shipment; however, you can update this information before printing the export documents.
Lead time	The time that it takes for the vessel or flight to travel from the departure port to the arrival port.
Transport mode	The transport mode associated with the vessel or flight being maintained within the rule.


Virtual Fields Overrides


When the QAD GTTE Services team implemented the QAD GTTE solution for your company, they may have created one or more virtual fields to represent information for which there is no corresponding database field in QAD GTTE.

You can use the Virtual Fields Overrides sub-option to associate particular virtual fields with the rule, and to assign a value to the virtual field when the rule fires.

Virtual Fields Overrides

Virtual Fields Overrides X

 Translate Literals

Line/sequence number: Field name: Overriden data value: Language:  Search

Virtual Fields Overrides TGL TES Perform a search

Line seq	Field name	Ovr data	Lan	Description
10	SHWHOUSE		D/B	A9903

Page of 1 Displaying record 1 - 1 of 1

X Close

Virtual Fields Overrides [Create]

Virtual Fields Overrides [Create]
✕

Client:

Rule:

Start date:

Line/sequence number:

Field name: !

Overriden data value:

Language: !

Description: !

Create
 Close

Virtual Fields Overrides [Create] Fields

Field	Description
Client, Rule, Start date	These values are read only, and depend on the rule.
Line/sequence number	Specify the line or sequence number.
Field name	Specify the virtual field name.
Overriden Data Value	This field is read only and is not in use.

Field	Description
Language	This field is read only and is always set to D/B.
Description	The actual value for the virtual field.

Rule/Shipment Plan

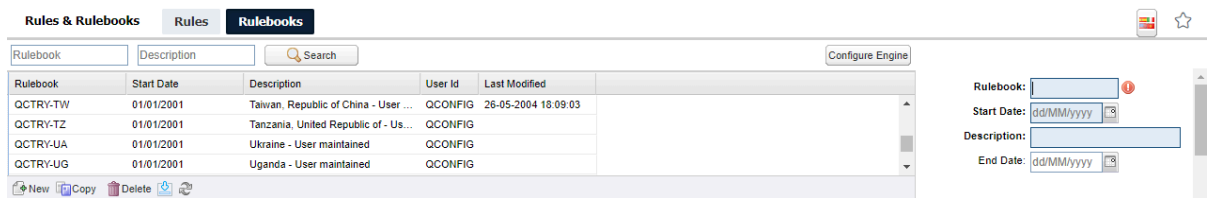
Important PEM is deprecated in QAD GTTE v20 and later. Therefore, this sub-option is no longer used.

Creating and Modifying Rulebooks

In the RULES option, on the Rulebooks tab, the rulebooks grid displays all rulebooks, and enables you to search for a particular rulebook. When you select a rulebook, you can update the rulebook description and end date by updating the fields to the right of the grid and clicking Update.

To create a new rulebook, click the New button below the grid, complete the fields to the right of the grid, and click Create.

Rulebooks Grid, Creating a Rulebook



- **Rulebook.** Specify the rulebook name. This field is mandatory.
- **Start date.** Specify the date when the rulebook comes into effect. This field is mandatory.
- **Description.** Add a description of the rulebook. This field is mandatory.

Adding Rule Determinations for a Rulebook

On the Rulebooks tab, the Rules Determinations for Rulebook section allows you to specify the:

- Rules that the rulebook contains
- Rulebooks that the rulebook contains
- Conditions under which a rule or rulebook within this rulebook applies

Note You can use the Assigned Rules Web UI Workflow task, SHSU, to see a list of the rulebooks and rules that fired against a shipment.

You can select a row in the Rules Determination for Rulebook grid and click the Rules button below the grid to open the Rules tab with the relevant rule displayed in the Rules grid.

To create a rule determination for a rulebook, select the master rulebook in the grid, and click New in the Rules Determinations for Rulebook <RULEBOOK_NAME> section.

Rules Determinations - Create

Rules Determinations - Create [X]

Client: TGL

Rule book: 000532

Start date: 01/09/2014

Rule set:

Sequence: 0

Active

Rule book: [Search]

Rule: [Search]

Charge table: [Search]

Charge Table Discount: 0.0

Minimum Charge: 0.0

Transaction client: [Search]

Transaction Type: [Search]

Consignor: [Search]

Partner Id: [Search] [Search]

Country of destination: [Search]

Place of destination: [Search]

Country of Origin: [Search]

Place of loading: [Search]

Place of Arrival: [Search]

Place of Departure: [Search]

Payment Terms: [Search]

Currency Code: [Search]

Delivery terms: [Search]

Transport mode: [Search]

Route: [Search]

Carrier: [Search]

[Create] [Close]

- *Client, Rule book, Start date.* These fields are read only, and depend on the master rulebook.
- *Rule set.* Rule sets allow you to specify that a rule or rulebook only applies to a shipment when the rule set of the shipment matches the rule set specified in the Rules Determinations - Create page. The system value USE TRANS TYPE AS RULE SET allows you to specify that the values of the Rule set field must refer to a transaction type listed in option Z9; for example, O for order or S for shipment.
- *Sequence.* This field identifies one rule determination from another within the rulebook, and determines the order in which rules or rulebooks in the master rulebook fire. Lower sequence numbers fire before higher numbers.
- *Active.* Specifies whether the rule determination is active.
- *Rule book.* The rulebook to which this rule determination applies.
- *Rule.* The rule to which this rule determination applies.

Note If you want to add multiple rule at once, see [Adding Multiple Rule Determinations for a Rulebook on page 378](#).

Note The Rule book and Rule fields on this page are mutually exclusive; you can specify a value for one field or the other, but you cannot specify a value for both fields. This is because the rule determination can only apply to one rule or rulebook.

The remainder of the fields on this page allow you to specify characteristics that a shipment must have before this rule determination can apply to it. If all of the characteristics specified in these fields are true of a shipment, then this rule determination applies to the shipment, and thus the rule or rulebook specified in the Rule or Rule book fields fires against the shipment.

Note If a field in the rule determination has a value, but the corresponding field in the shipment is blank, then this field does not affect whether the rule determination applies to a shipment. This is the default behavior. You can change the default behavior by setting the system value APPLY FULL FILTERING to Yes. When APPLY FULL FILTERING is set to Yes and a field in the rule determination has a value, but the corresponding field in the shipment is blank, then this field does affect whether the rule determination applies to a shipment. The particular rule determination will not apply to the shipment because not all of the fields match the corresponding fields on the shipment.

- *Charge table.* A charge table comprises one or many charges that can be calculated using one or many of the pre-defined calculation methods.
- *Charge Table Discount.* The percentage of discount to apply to the charge table associated with this rule book rule. This discount is subtracted from the calculated value of this charge table cost.

- *Minimum Charge*. A minimum charge value that overrides any calculation for the value elsewhere.
- *Transaction client*. Fields referred to by this client domain are associated with master tables. The client is used to logically divide tables within the same physical database into data sets.
- *Transaction Type*. The shipment type.
- *Consignor*. The shipper of the shipment.
- *Partner Id*. The partner ID that the rule applies to. Partner IDs are maintained in option PI.
- *Country of destination*. The country of destination of the shipment.
- *Place of destination*. The place of destination of the shipment. Places are maintained in option PL.
- *Country of Origin*. The country of origin of the shipment. Countries are maintained in option CT.
- *Place of loading*. The place of loading of the shipment; for example, the consignor's warehouse. Places are maintained in option PL.
- *Place of Arrival*. The place of arrival of the shipment. Places are maintained in option PL.
- *Place of Departure*. The place of departure of the shipment. Places are maintained in option PL.
- *Payment Terms*. The payment terms of the shipment, detailing when payment of the shipment should be received.
- *Currency Code*. The currency code for transactions related to the shipment. Currency codes are maintained in option CU.
- *Delivery Terms*. The delivery terms or INCOTERMS detailing which partner pays for delivery of the shipment to each point in the journey from the origin to the destination. Delivery terms are maintained in option DE.
- *Transport mode*. The transport mode of the shipment.
- *Route*. The shipment route code. Routes are maintained in option RT.
- *Carrier*. The company that transports the goods from the consignor to the consignee. Typically, within QAD GTTE, the carrier is the international transporter of the shipment; the haulier is the local transporter of the shipment.
- *Freight class*. Freight classes and charge classes are a means of associating charges with the general ledger accounts. When QAD GTTE is integrated with a GL software package, costs calculated by QAD GTTE get charged to the GL accounts specified. Freight classes are maintained in option FC.
- *Classification Group*. The commodity classification group.

- *Commodity*. The commodity code required for classification. Use this field when the rule determination is based on a particular commodity code.
- *Product*. An item, product, or material code related to the shipment. Product codes are maintained in option PR.
- *HazMat class*. A hazardous material classification code. UN codes for hazardous material classification are maintained in option UN.
- *User Defined Field 1, 4-14*. These are user-defined fields, and can be adapted to your business needs.

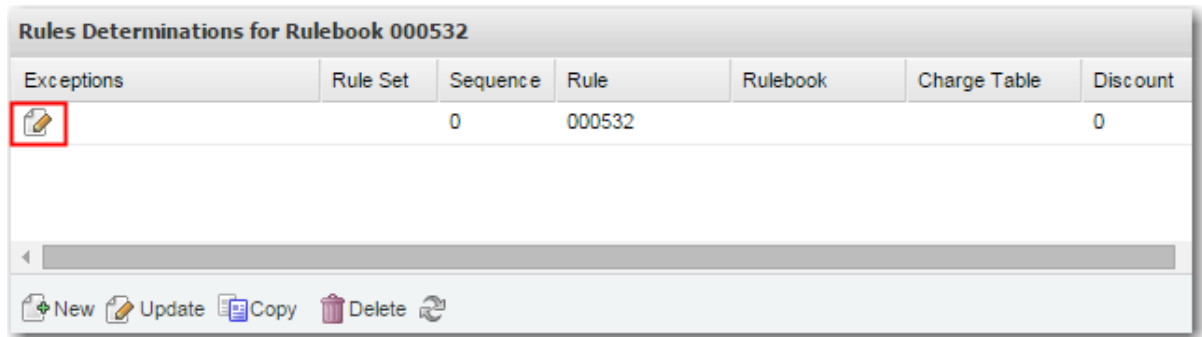
Adding Multiple Rule Determinations for a Rulebook

To add more than one rule to the rulebook at a time, click Add Multiple in the Rules Determinations for Rulebook <RULEBOOK_NAME> section. In the Rule pop-up window that opens, to select a rule from the rules list, click the green plus button in the related row. After selecting the rules that you require, click Close. If the rules do not appear in the Rules Determinations for Rulebook <RULEBOOK_NAME> grid, then click the Refresh button to update the grid.

Adding Rule Determination Exceptions for a Rulebook

A rule determination exception allows you to specify a situation when a particular rule determination does not cause the related rule or rulebook to run. The exception is another rule determination. To view exceptions to a rule determination, click the edit icon in the relevant row in the Rule Determinations for Rulebook <RULEBOOK_NAME> grid.

Edit Icon for Exceptions to Rule Determinations



This action displays the Rule Determinations - Exceptions List pop-up window. To add an exception, click the Create button at the bottom of the window.

Rule Determination Exceptions [Create]

Client: TGL

Rule book: 000532

Start date: 01/09/2014

Rule set:

Sequence: 0

Exception Sequence: 0

Description:

Active

Create Close

Rule Determination Exceptions [Create] Fields

Field	Description
Client, Rule book, Start date, Rule set	These fields are read only, and depend on the rule.
Sequence	The sequence number determines the order in which the exceptions for this rule are checked.
Exception Sequence	The sequence number of the exception. Specify the sequence number of the rule determination that is the exception. Lower sequence numbers fire before higher numbers.
Description	An explanation of the exception.
Active	Select this field to enable the rule determination exception.

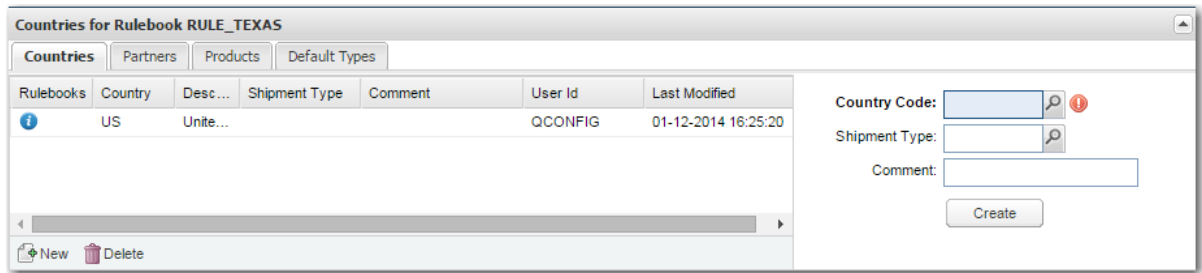
Associating Countries, Partners, Products, and Shipment Types with Rulebooks

On the Rulebooks tab, the <ASSOCIATION> for Rulebook <RULEBOOK_NAME> grid displays all rules associated with the rulebook selected in the Rulebooks grid.

Associating Countries with a Rulebook

The Countries for Rulebook <RULEBOOK_NAME> tab shows the countries associated with the rulebook, and allows you to update this list of countries. This information is also available in the CT option, in the Country Rule Books sub-option. To associate countries with the rulebook, click the New button below the grid, complete the fields to the right of the grid, and click Create. Figure 8.39 shows that the country US is associated with the rulebook RULE_TEXAS.

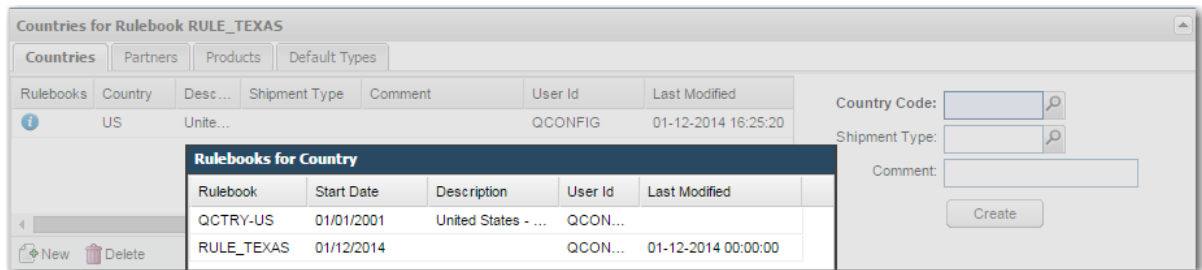
Countries for Rulebook Grid



- *Country Code.* The country code that is associated with the rulebook. This field is mandatory.
- *Shipment Type.* Specify a shipment type.
- *Comment.* Enter a comment.

To view more information about the rulebooks that a country is associated with, click the information icon in the Rulebooks column of the grid entry. The image below shows how the country US is associated with the rulebook RULE_TEXAS through the rulebooks QCTRY-US and RULE_TEXAS.

Countries for Rulebook <RULE_NAME> Grid with Pop-Up Window



Updating the Partners Associated with a Rulebook

The Partners for Rulebook <RULEBOOK_NAME> tab shows the partners associated with the rulebook, and allows you to update this list of partners. To update information about a partner associated with the rulebook, select the partner from the grid, update the fields to the right of the grid, and click Update.

Partners for Rulebook <RULEBOOK_NAME> Grid

Rulebooks	Type	Partner	Desc...	Shpme...	In Use	User Id	Last Modified
TEXAS_...	TEXAS_INC	Texa...		false	QCONFIG	01-12-2014 00:00:00	

- *Partner*. This field is mandatory.
- *Shipment Type*. Specify the shipment type.
- *Comment*. Enter a comment.
- *In Use*. To apply this association, select this field.

Rules and Rulebooks Page with Partners Tab

Rule	Start Date	Description	End Date	Workflow	Workflow Type	User Id	Last Modified
17001-NR	01/01/2008	Rule for shipping to Partner Id 17001				QCON...	01-01-2008 00:00:00
2554423	01/01/2014						

Associating Products with a Rulebook

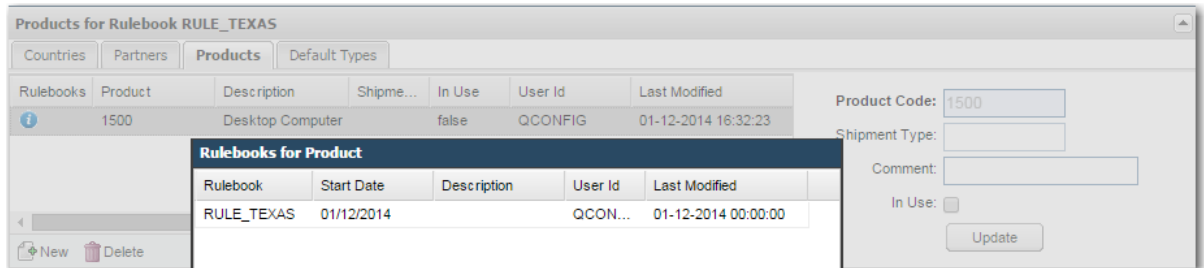
The Products for Rulebook <RULEBOOK_NAME> tab shows the products associated with the rulebook, and allows you to update this list of countries. This information is also available in the PR option, in the Associated Rule Books sub-option. To associate products with the rulebook, click the New button below the grid, complete the fields to the right of the grid, and click Create.

Products for Rulebook <RULEBOOK_NAME> Grid



- *Product Code.* This field is mandatory.
- *Shipment Type.* Specify the shipment type.
- *Comment.* Enter a comment.
- *In Use.* To apply this association, select this field.

Products for Rulebook <RULEBOOK_NAME> Grid with Pop-Up Window



Associating Shipment Types with a Rulebook

The Default Types for Rulebook <RULEBOOK_NAME> tab shows all shipment types related to rulebooks. To associate shipment types with rulebooks, click the New button below the grid, complete the fields to the right of the grid, and click Create.

Default Types for Rulebook <RULEBOOK_NAME> Grid

Shipment Type	Rulebook	Description
01	RULE_TEXAS	Out - Compliance Export 1
17	RULE_TEXAS	Out - US Domestic LTL/TL
EA	RULE_TEXAS	Export Shipment (US>EU)
EX	RULE_TEXAS	Export-domestic workflow (SHIP)

- *Rulebook*. This field is read only, and defaults from the rulebook.
- *Shipment Type*. This field is mandatory.

To associate shipment types with the rulebook using the DEFAULT RULE BOOKS system value in the System Value Setup page, click the Advanced button below the grid. For more information on system values associated with rules and rulebooks, see the *System Values for Rules and Rulebooks* table in the [Configuring the Rules Engine on page 383](#) section.

Deactivating a Rule

To deactivate a rule, clear the Active field in the associated rule determination within the relevant rulebook.

Configuring the Rules Engine

There are a number of system values that you can use to configure how rules processing works.

System Values for Rules and Rulebooks

Category	Key	Description
RULES	ADDITIONAL RULE PROGRAM S	Specify the name of a custom program that you want rules processing to call when rules are fired.
RULES	ALWAYS OVERRIDE ADDR CHANGES	Possible values: Yes, No.
RULES	ALWAYS USE XMSMDS0 FIELDS	When an override field is populated by a rule, this value checks where the value should be put on the shipment (XMSHDR0 or XMSMDS0). This parameter lists fields that may exist in both the shipment header file and the shipment header extension file.

Category	Key	Description
		<p>The fields may also exist on the shipment override file xmsmds0. If a field is listed here and it exists in both files, then the value in xmsmds0 is always used and the one in the shipment header file is ignored.</p> <p>Consult the QAD GTTE Services team before updating this system value. It is used when xmsmds0 fields have been added to the shipment files but these fields are not yet in use by the system.</p>
RULES	APPLY CONSIGNEE RULES	<p>Possible values:</p> <ul style="list-style-type: none"> • Yes - When running rules processing, check for rules associated with consignees. • No - When running rules processing, for improved performance, do not check for rules associated with consignees. <p>Default value: Yes</p>
RULES	APPLY CONSIGNOR RULES	<p>Possible values:</p> <ul style="list-style-type: none"> • Yes - When running rules processing, check for rules associated with consignors. • No - When running rules processing, for improved performance, do not check for rules associated with consignors. <p>Default value: Yes</p>
RULES	APPLY CUSTOMER RULES	<p>Possible values:</p> <ul style="list-style-type: none"> • Yes - When running rules processing, check for rules associated with customers. • No - When running rules processing, for improved performance, do not check for rules associated with customers. <p>Default value: Yes</p>

Category	Key	Description
RULES	APPLY EXPORT REFUND RULES	<p>Possible values:</p> <ul style="list-style-type: none"> • Yes - When running rules processing, check for rules associated with shipments that are flagged for calculation of an export refund. • No - When running rules processing, for improved performance, do not check for rules associated with shipments that are flagged for calculation of an export refund. <p>Default value: Yes</p> <p>Shipments that are flagged for calculation of an export refund have the shipment header field XMSHDR0.SHCALCEXP set to true. This field is set to true when:</p> <ul style="list-style-type: none"> • The shipment country of despatch (identified by the shipment header field XMSHDR0.SHCDS1) is in the EU. Countries within the EU have the country field XMCTRY0.CTEGRP set to 01. • The shipment country of destination (identified by the shipment header field XMSHDR0.SHCDT1) is not in the EU. Countries outside of the EU have the country field XMCTRY0.CTEGRP set to a value other than 01.
RULES	APPLY FULL FILTERING	<p>This field controls how blank fields in a shipment are treated when checking rule determinations against a shipment.</p> <p>Possible values:</p> <ul style="list-style-type: none"> • No - If a field in the rule determination has a value, but the corresponding field in the shipment is blank, then this

Category	Key	Description
		<p>field does not affect whether the rule determination applies to a shipment.</p> <ul style="list-style-type: none"> • Yes - When a field in the rule determination has a value, but the corresponding field in the shipment is blank, then this field does affect whether the rule determination applies to a shipment. The particular rule determination will not apply to the shipment because not all of the fields match the corresponding fields on the shipment. <p>Default value: No</p>
RULES	APPLY PARTNER ADDRESS LINKS	Default value: No
RULES	APPLY PRODUCT RULES	<p>Possible values:</p> <ul style="list-style-type: none"> • Yes - When running rules processing, check for rules associated with products. • No - When running rules processing, for improved performance, do not check for rules associated with products. <p>Default value: Yes</p>
RULES	ASSIGN CONSIGNEE TO CUSTOMER	Possible values: Yes, No.
RULES	AutoCreateRuleBookForPartner	<p>Possible values:</p> <ul style="list-style-type: none"> • Yes - a rulebook is created automatically when a new partner is created. This rulebook has the same name as the rule. • No - a rulebook is not created automatically when a new partner is created. <p>Default value: No</p>
RULES	DEFAULT-CONTACT-TO-USER	<p>Use this system value to default the shipping officer for documents.</p> <p>Possible values:</p>

Category	Key	Description
		<ul style="list-style-type: none"> • Yes - the value of the shipment Contact field is set to the person who is processing the shipment. • No
RULES	DEFAULT RULE BOOKS	<p>Use this system value to specify the default rule book to be used by QAD GTTE. Format: A two-pair comma-separated listing, <SHIPMENT_TYPE>, <RULEBOOK_NAME>.</p> <p>Example: EX,QDEFAULT where EX is a shipment type listed in option ZS and QDEFAULT is a rulebook listed in option RB.</p> <p>The value can also be specified as ?,QDEFAULT where ? represents all shipment types, and QDEFAULT is listed in option RB as the default rulebook fired for all shipments that are created.</p> <p>Updating this system value updates the Default Types for Rulebook <RULEBOOK_NAME> tab on the RULES page.</p>
RULES	OVERWRITE-NON-BLANKTEXTS	<p>In the case of a rule that associates texts with a shipment, and those texts already exist on the shipment, this system value determines whether the existing texts are overwritten.</p> <p>Possible values: Yes, No.</p>
RULES	OVERWRITE SHDSTR	<p>Possible values:</p> <ul style="list-style-type: none"> • Yes - Update the Delivery Terms field of a transaction based on a rule. • No - Do not allow rule information to overwrite the Delivery Terms field of a transaction.
RULES	OVERWRITE-WITH-BLANKRULE-TEXT	<p>Possible values: Yes, No.</p>

Category	Key	Description
RULES	RESET NOTES AND TEXT IDS	<p>Possible values:</p> <ul style="list-style-type: none"> • Yes - When a rule adds a document to a transaction and the document already exists on the transaction, the texts and notes associated with the document are overwritten. • No - When a rule adds a document to a transaction and the document already exists on the transaction, the texts and notes associated with the document are not overwritten. <p>Default value: No</p>
RULES	RESET PRINT COUNTER	<p>The print counter increases by one each time a document is printed.</p> <p>Possible values:</p> <ul style="list-style-type: none"> • Yes - Increments the print counter when a rule adds a document to a transaction and the document is already attached to the transaction. • No - Does not increment the print counter when a rule adds a document to a transaction and the document is already attached to the transaction. <p>Default value: No</p>
RULES	RULE DEBUG MODE	<p>Debug mode displays information messages when rules are run in the foreground in the Windows UI.</p> <p>Possible values:</p> <ul style="list-style-type: none"> • Yes - Debug mode is switched on. • No - Debug mode is switched off. <p>Default value: No</p>
RULES	RUN CHARGE CALCULATION	<p>Possible values: Yes, No.</p> <p>Default value: No</p>

Category	Key	Description
RULES	SHIP CARRIER MATCH CHARGE TAB	<p>If you want to specify that a particular charge table should only be associated with a rule when the charge table carrier matches the shipment carrier, then set this field to Yes.</p> <p>Possible values: Yes, No</p> <p>Default value: No</p>
RULES	SUB OPTIONS TO USE	<p>A CSV list of sub-options to ignore when running rules processing. This allows you to speed up performance by not checking sub-options specified in the list.</p> <p>Possible values: A comma-separated list of option codes, which can include:</p> <ul style="list-style-type: none"> • RUR0 (virtual fields overrides) • RUR101(general information) • RUR102 (partners - trading internal) • RUR103 (route) • RUR104 • RUR105 (partners - transport customs financial) • RUR2 • RUR201 (ECSI details) • RUR202 • RUR203 • RUR3 (documents) • RUR4 (texts) • RUR5 (tracking details) • RUR6 (procedure notes) • RUR7 (product descriptions) • RUR8 (product prices) • RUR9 (charge tables) • RURM (EDI messages)

Category	Key	Description
		<ul style="list-style-type: none"> • RURN (partner address changes) • RURV (vessels/legs) <p>Example: RUR7, RUR8</p> <p>Default value: blank</p>
RULES	USE TRANS TYPE AS RULE SET	<p>Rule sets allow you to specify that a rule or rulebook only applies to a shipment when the rule set of the shipment matches the rule set specified in the Rules Determinations - Create page.</p> <p>Use this system value to specify that rule sets are based on transaction types such as shipments or orders. Option Z9 lists transaction types.</p> <p>Possible values:</p> <ul style="list-style-type: none"> • Yes - rule sets are based on transaction types such as shipments or orders. • No - rule sets do not play a role in rules processing. <p>Default value: No - rule sets do not play a role in rules processing.</p> <p>For more information on the Rule Determinations - Create page, see the Adding Rules Determinations for a Rulebook section in Rules and Rulebooks Page on page 326.</p>

Rules and Rulebooks Example

This rules and rulebooks example contains a country-specific rule, a customer-specific rule, and an exception rule. The purpose of the country-specific rule is to attach an invoice and packing list to all shipments to India. The purpose of the customer-specific rule is to attach a certificate of origin to all shipments to a specific customer in India. The rule exception specifies that all shipments to India except shipments to one particular customer will have an invoice and packing list attached to them.

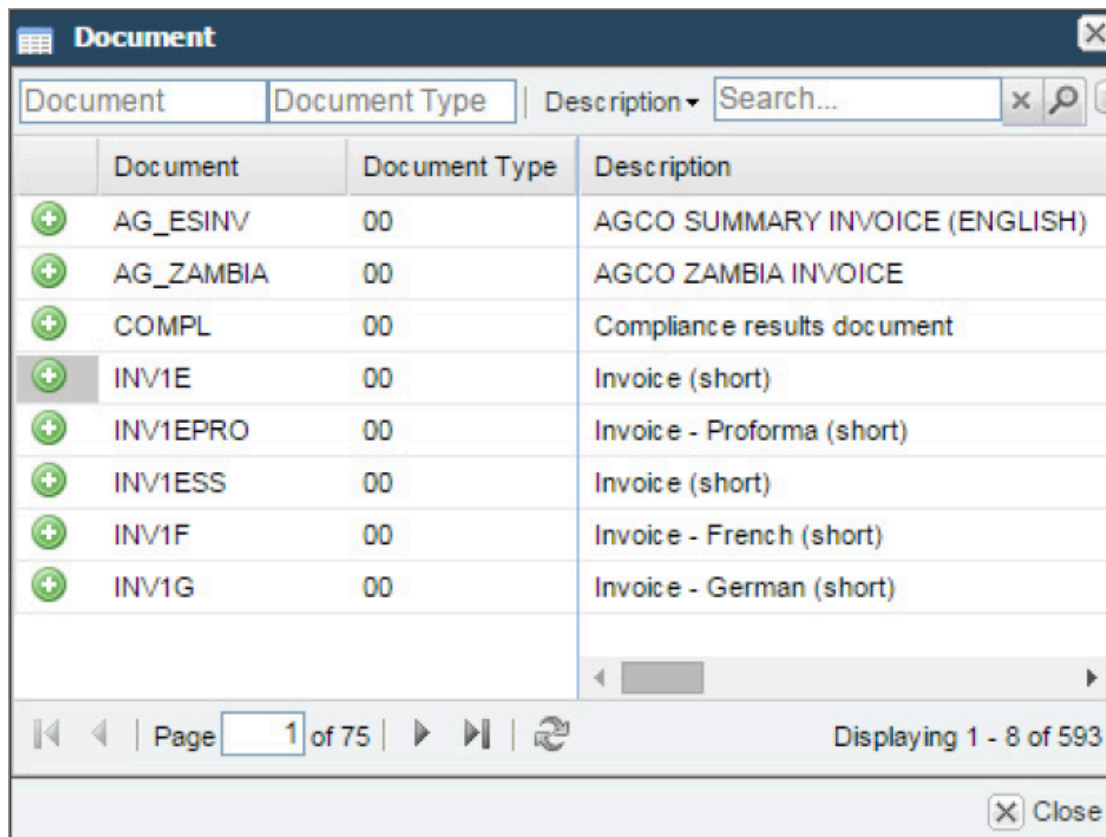
For a detailed description of each page mentioned in this example, see [Rules and Rulebooks Page on page 326](#).

Creating a Country-Specific Rule

To set up a country-specific rule attaching an invoice and packing list to every shipment to Bulgaria:

1. On the RULES page, on the Rules tab, select the preloaded country-specific rule for India, QCTRY-IN, in the Rules grid.
2. Click the Documents link at the bottom of the Rules grid; the Documents pop-up window appears.

Adding Multiple Documents to a Rule



The screenshot shows a window titled "Document" with a search bar and a table of document types. The table has columns for Document, Document Type, and Description. The following table represents the data shown in the screenshot:

Document	Document Type	Description
AG_ESINV	00	AGCO SUMMARY INVOICE (ENGLISH)
AG_ZAMBIA	00	AGCO ZAMBIA INVOICE
COMPL	00	Compliance results document
INV1E	00	Invoice (short)
INV1EPRO	00	Invoice - Proforma (short)
INV1ESS	00	Invoice (short)
INV1F	00	Invoice - French (short)
INV1G	00	Invoice - German (short)

At the bottom of the window, there is a pagination bar showing "Page 1 of 75" and "Displaying 1 - 8 of 593". A "Close" button is located in the bottom right corner.

3. Click the Add multiple rule documents icon and, in the new pop-up window, search for and add the INV1E and PACK1 documents to the rule. Click Close. The added documents now appear in the Documents pop-up window.

List of Documents Attached to the QCTRY-BG Rule

Document type: Document: Image: Output type:

Documents TGL LKN-TEST 03-Mar-2017

Doc type	Document	Image	Number of copies	Output type	Description	Printer
00	INV1E		1		Compliance results document	
01	PACK1		1		Invoice (short)	QDEFA

Page 1 of 1 |

Displaying record 1 - 8 of 8 |

4. Click Close.


As preloaded country rules are already attached to preloaded country rulebooks in QAD GTTE, you do not need to attach this country rule to a rulebook.

Creating a Company-Specific Rule

Setting up a company-specific rule that attaches a certificate of origin to every shipment to Ramar Chemicals in Bulgaria involves a number of steps. Firstly, create a company-specific rule and rulebook to attach a certificate of origin to shipments to a particular company. Then, link the company-specific rule to the country rulebook for Bulgaria, QCTRY-BG.

1. Ensure that the partner record for the company described has the consignee role.


Partner Record for Ramar Chemicals, Roles Sub-Option

 **Partners** **Partner** Partner Import

Address book: Partner:

PERSONAL **GLOBAL**

Partners

	Address book	Partner	Name
	01	RC	Ramar Chemicals

- Additional details
- Associated partners
- Calendar periods
- Commission - Agents
- Commission - Forwarding
- Compliance - Disable partner checks
- Contacts
- Documents
- Preferential - Proof Document Setup
- Preferential - Raw Material Imports
- Products
- **Roles**
- Rule books

Partner Record for Ramar Chemicals, with Consignee Role

- On the RULES page, on the Rules tab, create a rule called RAMAR. Set the start date to the day before the current date, and select the Auto Create Rulebook field.

Adding RAMAR Rule

Rule	Start Date	Desc...	End Date	Workflow	Workflo...	User
QCTRY-BB	01/01/2001	Barba...				
QCTRY-BD	01/01/2001	Bangl...				
QCTRY-BE	01/01/2001	Belgiu...		WEB-COMP	S	C
QCTRY-BF	01/01/2001	Burki...				
QCTRY-BG	01/01/2001	Bulga...				
QCTRY-BH	01/01/2001	Bahra...				
QCTRY-BI	01/01/2001	Burun...				
QCTRY-BJ	01/01/2001	Benin ...				

Note If you set the rule start date to the current date, it is not effective until the following day. This is a safeguard to protect current transactions in the event that a rule is created accidentally. For this example, choose a date prior to the current date.

3. Select the rule and click the Documents link.
4. In the Documents pop-up window, click the Add icon to open the Documents [Create] pop-up window. Select COO from the lookup in the Document field, specify the number of copies, complete any other relevant fields, and click Create.

Adding a Certificate of Origin Document to the RAMAR Rule

The screenshot shows a 'Documents [Create]' window with the following fields and values:

- Client: TGL
- Rule: RAMAR
- Start date: 02/01/2015
- Document type: 27
- Document: COO
- Image: (empty)
- Printer: (empty)
- Printer for continuation page: (empty)
- Number of copies: 1
- Note 1: (empty)
- Note 2: (empty)
- Note 3: (empty)
- Note 4: (empty)

Buttons: Create, Close

5. The message: "The record has been successfully created." appears at the top of the window. To close the Documents [Create] pop-up window, click Close.
6. The added document now appears in the Documents pop-up window; click Close.
7. On the Rulebooks tab, select RAMAR in the rulebooks grid and select the RAMAR row in the Rule Determinations for Rulebook RAMAR grid. Click Update to open the Rule Determinations - Update pop-up window. Select the Active field, and specify the partner code and partner type for Ramar Chemicals in the Partner Id fields.

Updating the Rule Determination for the RAMAR Rule to the RAMAR Rulebook

Rules Determinations - Update

Client: TGL

Rule book: RAMAR

Start date: 02/01/2015

Rule set:

Sequence: 0

Active

Rule book:

Rule: RAMAR

Charge table:

Charge Table Discount: 0.0

Minimum Charge: 0.0

Transaction client:

Transaction Type:

Consignor:

Partner Id: 01 RC

Country of destination:

Place of destination:

Country of Origin:

Place of loading:

Place of Arrival:

Save Close

8. Click Save and click Close.

Linking the Country-Specific Rule to the Company-Specific Rule

The next step is to link the RAMAR rulebook with the QCTRY-BG rulebook:

1. On the Rulebooks tab, select the QCTRY-BG rulebook in the Rulebooks grid. In the Rules Determinations for Rulebook QCTRY-BG grid, click New to open the Rules Determinations - Create pop-up window. Set the Sequence field to 20 so that this rule runs after the QCTRY-BG rule. Specify the RAMAR rulebook in the Rule book field, and specify the partner code and partner type for Ramar Chemicals in the Partner Id fields.

Adding a Rule Determination for the RAMAR Rulebook to the QCTRY-BG Rulebook

Rules Determinations - Create

Client: TGL

Rule book: QCTRY-BG

Start date: 01/01/2001

Rule set:

Sequence: 20

Active

Rule book: RAMAR

Rule:

Charge table:

Charge Table Discount: 0.0

Minimum Charge: 0.0

Transaction client:

Transaction Type:

Consignor:

Partner Id: 01 RAMAR

Country of destination:

Create Close

- Click Create and click Close. The Rule Determinations for Rulebook QCTRY-BG grid now shows determinations for the preloaded QCTRY-BG country rule and the RAMAR rulebook.

QCTRY_BG Rule Determinations

Rules Determinations for Rulebook QCTRY-BG						
Excepci...	Rule Set	Sequence	Rule	Rulebook	Charge Table	Discount
		10	QCTRY-BG			0
		20		RAMAR		0

New Update Copy Delete Add Multiple

To see the country-specific and company-specific rules implemented, create a manual shipment to Ramar Chemicals in the Manual Shipment option, MANSH.

Creating a Manual Shipment to Ramar Chemicals in Bulgaria

Manual Shipment
Details
1 2 ☆

Consignor:

Ship To: [Show Address Details](#)

Overwrite Address

Consignee:

Contact:

Address 1:

Address 2:

Address 3:

Address 4:

City:

State/Province:

Phone:

Postal/Zip Code:

Consignee Country:

Order Number:

Buyers Ref No:

Service/Route:

Despatch Date:

Shipment Type:

Sold To: [Show Address Details](#)

Overwrite Address

Name:

Contact Name:

Address 1:

Address 2:

Address 3:

Address 4:

City:

State/Province:

Phone:

Postal/Zip Code:

Customer Country:

Delivery Terms:

Carrier:

Transport Mode:

Currency:

+
-

Remove	Item	Code	Description	Price	Weight	Volume	Size
<input type="checkbox"/>		<input type="text" value="013800"/>	<input type="text" value="Potassium hydrogen sulfate, fused, ACS,"/> Show Product Details	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="0.0"/> x <input type="text" value="0.0"/> x <input type="text" value="0.0"/>

View the shipment documents using the Inquiry option.

Documents Attached to a Shipment to Ramar Chemicals in Bulgaria

Shipment Type: Carrier: *United States Postal Service (Endicia)* STGL A9901 0124729 0

		Document Type	Document	Image	Description	Printer	Number of Copies	Times Printed	Note 1	Note 2
		00	INV1E		Invoice (short)	QPDF	1	0	INV	
		01	PACK1		Packing List - Lines -> How Packed (short)	QDEFAULT	1	0		
		27	COO		US Standard Cert of Origin		1	0		

Creating a Rule Exception

The final part of the example involves attaching the invoice and the certificate of origin to all shipments to Bulgaria, except for shipments to Ramar Chemicals.

To do this, add a rule exception to the rule that you do not want to fire when shipping to Ramar Chemicals—the QCTRY-BG rule:

1. On the Rulebooks tab, select the QCTRY-BG rulebook. On the Rules Determinations for Rulebook QCTRY-BG grid, click the edit icon in the Exceptions column of the QCTRY-BG row.
2. In the Rules Determinations - Exceptions List pop-up window, click the Create a new record icon. Specify 20 in the Exception Sequence field to signify that the QCTRY-BG rule is ignored when the rule related to the rule determination with the sequence number 20—RAMAR—fires.

Adding an Exception to the Rule

The screenshot shows a dialog box titled "Rule Determination Exceptions [Create]". It contains the following fields and controls:

- Client: TGL
- Rule book: QCTRY-BG
- Start date: 01/01/2001
- Rule set: (empty)
- Sequence: 10
- Exception Sequence: 10
- Description: (empty text area)
- Active
- Buttons: Create, Close

3. Click Create. Click Close. The exception displays in the Rules Determinations - Exception List pop-up window.
4. Click Close.

To see the country-specific rule, the company-specific rule, and the country rule exception implemented, create a manual shipment to Ramar Chemicals in the Manual Shipment option, MANSH. View the shipment documents using the Inquiry option, NQ. The certificate of origin appears in the Documents tab of the shipment inquiry. The invoice and packing list do not appear

Scan, Pack and Ship

Scan, Pack and Ship enables the user to record packing information for a shipment and other Transport Management System (TMS) transactions through a Web browser. The supported browsers are Internet Explorer 11, Firefox, Edge, and Chrome. Packing information can be captured using:

- Keyboard
- Mouse
- Electronic weighing scales
- Barcode scanner

Scan, Pack and Ship is highly configurable. Therefore, whatever way your organization approaches packing, you can configure the system to meet your needs. There are three configurable approaches for recording packing information.

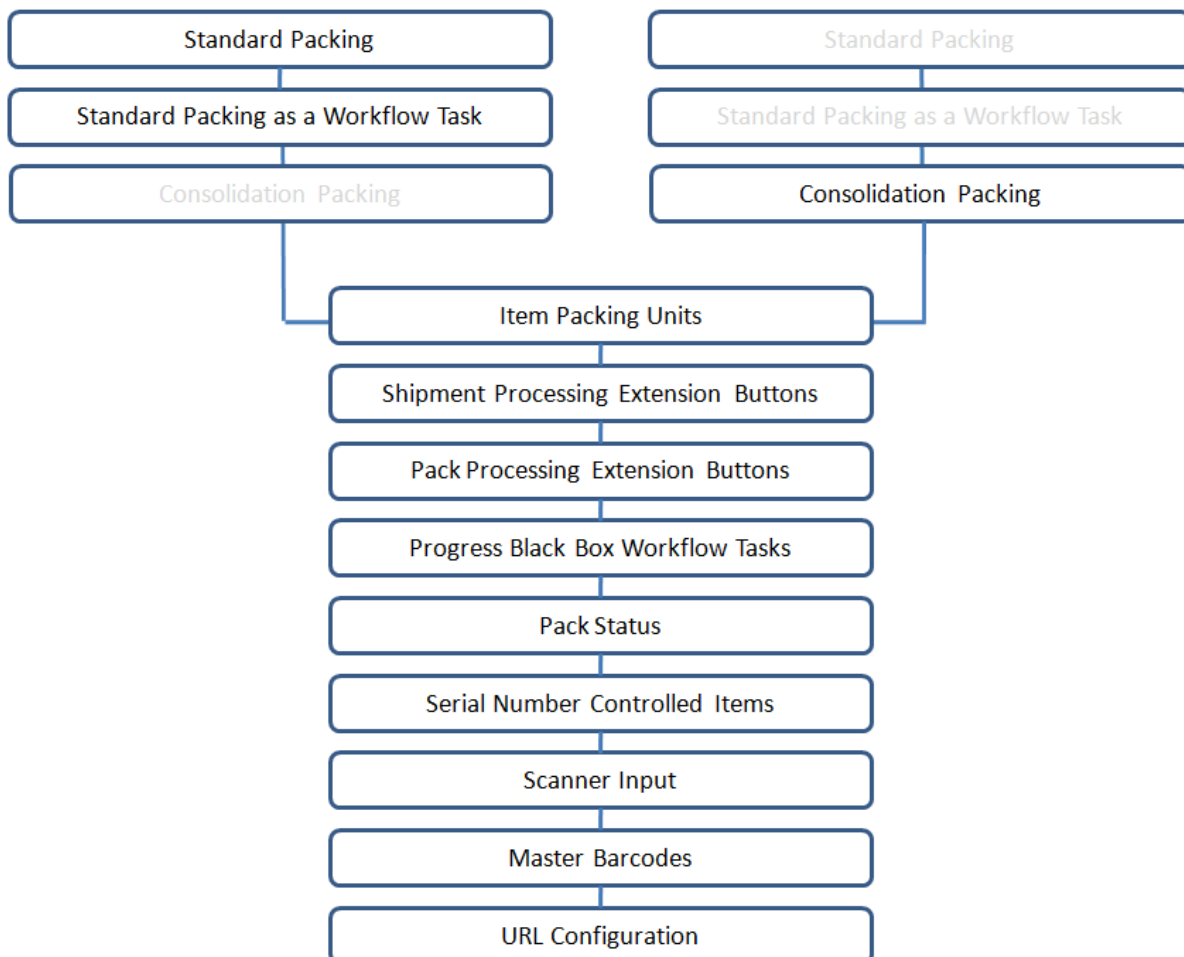
Packing Approaches

Approach	Features
Standard Packing	In Standard Packing mode, you pack orders that are already part of a shipment. You can also add buttons to allow you to perform other operations on the shipment.
Standard Packing Workflow Task	In Standard Packing as a workflow task, you pack orders that are already part of a shipment. In the workflow pop-up, you can perform the packing operation on a single shipment only. No other operations on the shipment are allowed.
Consolidation Packing	In Consolidation Packing mode, you pack orders that are not already part of a shipment. You add the orders to a new or existing shipment as you pack them. You can also add buttons to allow you to perform other operations on the shipment.

Before configuring the Scan, Pack and Ship functionality, it is recommended that you read the packing sections in [Using Base on page 45](#). Those sections describe the packing functionality from a user perspective and provide more information on the differences between the packing approaches. In addition, a full list of the system values to configure your system are available in the Appendix A document, which is available on the QAD Document Library.

The image below displays the relevant sections of this document, depending on the packing approach that your organization wants to implement.

Reading Paths: Standard or Consolidation Packing



Standard Packing

Standard Packing mode is the default method of packing shipments. In Standard Packing mode, you pack orders that are already part of a shipment when they arrive for packing. You record packing information for the shipment as you pack the shipment lines. The unpacked shipment lines belonging to the shipment are displayed as available for packing.

Standard Packing Options

Within Standard Packing, there are different options to help you select a system value category that best matches the way your organization approaches packing in the warehouse. The options available are listed in the table below.

Standard Packing Modes

System Value Category	Option/Mode
SNPKSD	Standard Packing Demo configuration. This configuration provides an example of how an organization typically sets up packing. If this configuration suits your organization, you can use it as a starting point.
SNPKSH	Standard Packing Developer configuration. Typically, this configuration provides the framework for an administrator to set up packing to suit organization needs.
SNPKPS	Standard Packing Station. Some organizations have a separate workstation for packing and for rating. This option enables you to set up a page to reflect the workflow at a packing station. Use this option with SNPKRS.
SNPKRS	Standard Packing Rating Station. This option enables you to set up a separate page to handle the workflow that takes place at a rating station. When packed shipments arrive from the packing station, you can rate and ship the shipments from here. Use this option with SNPKPS.
SNPKWF	Workflow task Packing. If your organization is running the Workflow Portal, this option enables you to run packing as a workflow task.

The program parameters attribute identifies the system value category to use to configure the Scan, Pack and Ship functionality. To specify the system value category, type the program parameter and the value. For example, this example sets the system value category to Standard Packing Demo configuration.

```
systemConfigCategory=SNPKSD
```

You can configure multiple options based on the expressed system value category. Where no system value category is specified for an option, SNPKSH is used. Although the packing modes present the user with different page layouts, they use the same underlying source code. However, the options are configured differently through the assigned system value category. If you want to use one of the other system value categories such as SNPKSD, simply copy the system values under SNPKSH to the system value category SNPKSD.

Standard Packing Transactions

By default, the transaction type being packed in Standard Packing mode is a shipment. However, if your organization packs something other than shipments, you can change the transaction type being packed. Using the system values in the table below, you can configure the system to pack any QAD GTTE transactions stored in the XMSHDR0 database tables.

A transaction being packed in Standard Packing mode is known as an output transaction. In Standard Packing mode, the input transaction from which the unpacked items are determined and the output transaction onto which you record the packing information are the same transaction. Therefore, you do not need to modify input transaction system values. For the purposes of this document, Standard Packing mode refers to the transaction being packed as a shipment.

System Values: Standard Packing Mode

System Value Key	Function
OUTPUT_TRANSACTION_TYPE	Specifies the transaction type prefix for the output transactions. In Standard Packing mode, it defaults to S for shipment. The output transaction is always the same as the input transaction.
OUTPUT_TRANSACTION_CLIENT	Specifies the QAD GTTE client for the output transaction. Where no value is supplied, the transaction client is assumed to be the current session client.

There are a number of ways to improve transaction processing times within the Scan, Pack and Ship page:

- You can define a function to automatically execute on loading a transaction. It is also now possible to configure preconditions to running this action.
- You can define a function to automatically execute when the All items packed state of a shipment changes during the packing process. It is also possible to configure preconditions to this action.

Transaction Search Fields

The shipment reference is the default search field for the output transaction. Configure the output search field using the system value key OUTPUT_SHIPMENT_SEARCH_CONFIG. The following code example is the output search field configured for SNPKSD.

```
[[
```

```
"label" : "Shipment",
```

"field" : "reference",

"fieldContext" : "shipment reference"]}

Packing a Shipment

Before reading this section, it is recommended that you familiarize yourself with the [Scan, Pack and Ship: Standard Packing on page 98](#) section on packing a shipment in Standard Packing mode. This section describes the packing process from an administrator perspective. The steps assume that you are using a keyboard and mouse to capture packing information. If you are using a barcode and scanner, the same principles apply. See [Scanner Input on page 110](#).

Standard Packing Mode Steps

1. To open Scan, Pack and Ship, in the menu search, enter SNPKSD and press Enter.
2. Enter a shipment reference in the Shipment field and press Enter. The shipment is loaded and any existing packs on the shipment are displayed in the Packs panel. Unpacked items are available for packing in the Items to be Packed panel.
3. When you have loaded the shipment to pack, create a pack. When you create a pack, the pack automatically defaults to a type, based on the configuration of the system value key DEFAULT_PACK_TYPE. The weights, dimensions, and volume information also default based on this master pack type. To maintain master pack types, use the QAD GTTE option PY.
4. You can select an alternative pack type. Where there are no pack lines on the shipment pack, the pack weights, dimensions, and volume information default to the values of the selected pack master.
5. Select the items you want to append to the current pack. In the packing column, you can manually enter the quantity of items to add. Alternatively, you can use one of the pack line buttons provided to update the packing quantity for the selected records.
6. Append the items to the pack.
7. To remove items from a pack, select the items and delete them. This action removes the pack line and makes the items available for packing.
8. As items are added to the pack, the shipment packing totals are incremented in the top right corner of the page. The totals on the pack header are also updated. The totals are updated each time packing changes are saved to the database.
9. You can close the current pack by choosing the Packs tab or by clicking the Create a new pack button.
10. You can process the shipment by clicking a button associated with the configured workflow tasks. These buttons are known as shipment

extension buttons. For example, you can assign a carrier, rate shop, or print labels.

11. The shipment input field is read-only if unsaved changes exist for the current shipment. After you save the changes for the current shipment, you can edit the shipment input field and load the next shipment for packing.

Auto-Save Feature

Packing data entered through the Web browser is automatically saved to the database when you:

- Append a pack
- Append an item to a pack
- Close a pack
- Use any auto pack button
- Copy a pack
- Delete a pack line
- Delete a pack

Packing data is not saved automatically when you modify the pack header information such as the pack type, weight, volume, or dimensions. To save modified pack header information, complete one of the following actions:

- Close the pack
- Create a pack
- Click the Save pack button
- Modify a pack line
- Initiate a workflow task at a pack or shipment level

Short Shipping

Short Shipping describes the process of shipping a shipment without all its items to ensure on-time delivery of the items that are available. This functionality is available through the Consolidate and Ship page that can be used along with Standard Packing mode to reorganize shipments. You can also use this functionality to move items from one shipment to another. To create a link to the Consolidate and Ship page, set up the system value EXTRA_EXIT_LINKS_CONFIG as follows:

```
{
"width" : "160",
"links" : [{
"label" : "Consolidating",
```

```

"url" : "scan-pack-ship.htm?systemConfigCategory=SNPKCP",
"exitFn" : "controlledWebPageExitWithShipmentKeyParam"
}}
}

```

If you do not want all users to be able to consolidate, only enable this link for the users or user groups that need access. You can use the Consolidate and Ship functionality from any Standard Packing option. For more information, see *Consolidate and Ship*.

Scan, Pack and Ship as a Workflow Task


Instead of running Scan, Pack and Ship as a stand-alone page, you can choose to run it from within the Workflow Portal. The system value that controls this setting is BATCH_MODE_PACKING. By default, it is set to yes, which means you run the page as a QAD GTTE module that can process multiple transactions.

However, if you set this value to no, it means that you access Scan, Pack and Ship as a workflow task. In this case, the shipment key must pass through parameters.

Scan, Pack and Ship Workflow Task

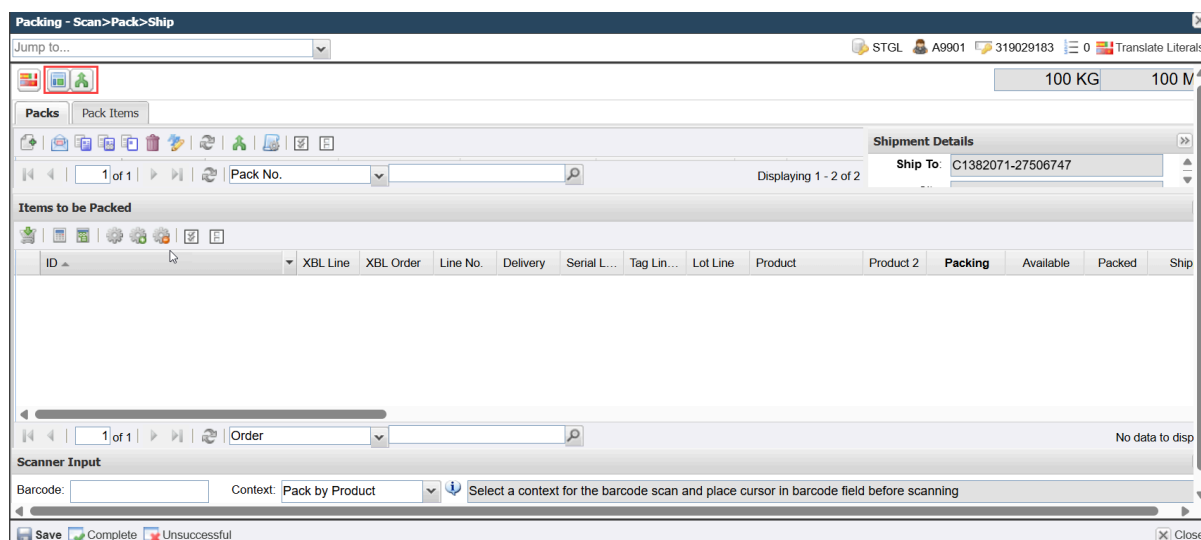
You can configure the workflow task under the system value category SNPKWF. In this mode, you can perform packing operations only on the current shipment.

The `ADVANCED_PACKING_MODE` system value, when set to yes, allows you to enable extended packing options. The extended packing

options include an Extended Packing button  that you can click to open the Standard Packing Workflow task. Then, within the Standard Packing task, you can pack inner packs within outer packs. By default, this system value is set to No. The other extended packing option is the

Serial Number and TAG links button  that you can click to link a serial number to TAG or unlink a serial number from TAG.

Scan, Pack and Ship Workflow Task with Extended Packing Buttons



The `BARCODE_ONLY_PACKING` system value, when set to yes, allows you to disable the Copy Selected Pack, Copy Selected pack - Infinite, and Copy Selected Pack Header buttons on the [Packs tab on page 102](#) and all buttons on the [Items To Be Packed toolbar on page 107](#). This configuration ensures that users can only enter pack information using a barcode scanner. By default, this system value is set to No.

Consolidation Packing

You use Consolidation Packing mode when your organization creates consolidation shipments as orders are packed. In this scenario, the orders arriving for packing are not already part of a shipment, but as you pack the orders, you add them to a new or existing shipment.

On the Scan, Pack and Ship page, unpacked order lines are displayed as available for packing. As you record packing information for an order, the items are packed and new consolidation shipments are generated. You can pack multiple orders into a single shipment or multiple orders into multiple shipments. When you consolidate multiple orders into a single consolidation shipment, you can configure packing restriction criteria to restrict the orders that can be mixed.

Consolidation Packing Options

There are two different system value categories for Consolidation Packing. The system value categories are listed in the table below.

Consolidation Packing Mode

System Value Category	Option/Mode
SNPKCD	Consolidation Packing Demo configuration. This option is designed as a demonstration configuration, giving a flavor of Consolidation Packing mode capabilities.
SNPKCS	Consolidation Packing Developer configuration. This option is intended for development to suit the needs of your organization.

The program parameters attribute identifies the system value category to use to configure the scan, pack, and ship functionality. To specify the system value category, type the program parameter and the value. For instance, this example sets the system value category to Consolidation Packing Demo configuration.

```
systemConfigCategory=SNPKCD
```

You configure multiple options based on the expressed system value category. Where no system value category is specified for an option, SNPKSH is used. Although the packing modes present the user with different page layouts, they use the same underlying source code. However, the options are configured differently through the assigned system value category.

Consolidation Packing Transactions

In the default behavior, orders are packed and shipments are created but you can override this behavior using system value configuration. Using the system values in Table 9.5, you can configure the system to pack items of another transaction type by configuring the items as lines from any QAD GTTE transaction stored in the XMSHDR0 database tables. You can also configure the generated transaction to be any QAD GTTE transaction stored in the XMSHDR0 database tables.

In the system values setup, the term input transaction refers to the type of transaction containing the unpacked items, such as order lines. The term output transaction refers to the type of packed transaction, such as a shipment. In this document, Consolidation Packing refers to the process of packing order lines to generate new consolidation shipments.

System Values: Consolidation Packing Mode

System Value Category	Function
INPUT_TRANSACTION_SPECIES	Specifies the transaction type prefix for input transactions. In Consolidation Packing mode, it defaults to O for order item lines.
INPUT_TRANSACTION_SPECIES_CLIENT	Specifies the client for the input transaction. Where no value is supplied, the transaction client is assumed to be the current session client.
OUTPUT_TRANSACTION_SPECIES	Specifies the QAD GTTE transaction type prefix for the output transactions. In Consolidation Packing mode, it defaults to Y for consolidation shipments. The output transaction type must be a different transaction type to the items being packed.
OUTPUT_TRANSACTION_SPECIES_CLIENT	Specifies the QAD GTTE client for the output transaction. Where no value is supplied, the transaction client is assumed to be the current session client.

Transaction Search Fields

The shipment reference is the default search field for the input and the output transaction. Using system value key INPUT_SHIPMENT_SEARCH_CONFIG, you can configure one or more input search fields. Where multiple search fields are expressed, you select the search field before entering the search value. Using system value key OUTPUT_SHIPMENT_SEARCH_CONFIG, you can configure one or more output search fields. Where multiple search fields are expressed, you select the search field before entering the search value. The following code example is taken from the SNPKCD configuration of the system value INPUT_SHIPMENT_SEARCH_CONFIG, where the input search field is an order number

```

{{
  "label" : "Order No",
  "field" : "orderNumber",
  "fieldContext" : "order number"
}}

```

For SNPKCD, the output value of OUTPUT_SHIPMENT_SEARCH_CONFIG is a shipment reference.

```
{
  "label" : "Shipment",
  "field" : "reference",
  "fieldContext" : "shipment reference"
}
```

Consolidation Shipment

In Consolidation Packing mode, the consolidation shipments are automatically generated when you save the packing information. To save a new consolidation, the shipment must contain at least one pack with a packed order line item. In generating the new consolidation shipment, the order associated with the first pack line is used as a template for the consolidation shipment.

The shipment type assigned to the new consolidation shipment defaults from the template order. You can override the default shipment type assigned to the consolidation shipment with the system value key NEW_CONSOL_SHIPMENT_TYPE. This system value holds the default override shipment type value. You can also override the shipment type assigned to the consolidation shipment based on the shipment type associated with the order. Use the system value key NEW_CONSOL_SHIPMENT_TYPE_{Order shipment type}.

Packing a Shipment

Before reading this section, it is recommended that you familiarize yourself with the section on packing a shipment in Consolidation Packing mode in the [Using Base on page 45](#) section. This section describes the packing process from an administrator perspective. The steps assume that you are using a keyboard and mouse to capture packing information. If you are using a barcode and scanner, the same principles apply. See *Scanner Input*.

Consolidation Packing Mode Steps

1. To open Scan, Pack and Ship, type SNPKSD in the menu search and press Enter.
2. Enter the order reference in the Order field and press Enter. You can enter multiple order references. All order items are displayed as available for packing in the Items to be Packed panel.

Note You can configure the system so that the Barcode field in the Scanner Input panel has context. You can then scan the required order number, which is automatically loaded on the page.

3. Click the New Shipment button to create a consolidation shipment. To load an existing shipment, enter the shipment reference in the Shipment field and press Enter.
4. When you have loaded the order and shipment, create a pack. When you create a pack, the pack automatically defaults to a type, based on the configuration of the system value key DEFAULT_PACK_TYPE. The weights, dimensions, and volume information also default based on this master pack type. To maintain master pack types, use the QAD GTTE option PY.
5. You can select an alternative pack type. Where there are no pack lines on the shipment pack; the pack weights, dimensions, and volume information default to the values of the selected pack master.
6. Select the items you want to append to the current pack. In the packing column, you can manually enter the quantity of items to add. Alternatively, you can use one of the pack line buttons provided to update the packing quantity for the selected records.
7. Append the items to the pack.
8. To remove items from a pack, select the items and delete them. This action removes the pack line and makes the items available for packing.
9. As items are added to the pack, the shipment packing totals are incremented in the top right corner of the page. The totals on the pack header are also updated. The totals are updated each time packing changes are saved to the database.
10. You can close the current pack by choosing the Packs tab or by clicking the Create a new pack button.
11. You can process the consolidation shipment by clicking a button associated with the configured workflow tasks. These buttons are known as shipment extension buttons. For example, you can assign a carrier, rate shop, or print labels.
12. The shipment input field is read-only while unsaved changes exist for the current shipment. After you save the changes for the current shipment, you can edit the shipment input field and load the next shipment for packing.

Auto-Save Feature

Packing data entered through the web browser is automatically saved to the database when you:

- Append a pack
- Append an item to a pack
- Close a pack
- Use any auto pack button
- Copy a pack

- Delete a pack line
- Delete a pack

Packing data is not saved automatically when you modify the pack header information such as the pack type, weight, volume, or dimensions. To save modified pack header information, complete one of the following actions:

- Close the pack
- Create a pack
- Click the Save pack button
- Modify a pack line
- Initiate a workflow task at a pack or shipment level

Restricted Packing Criteria

You can enforce restrictions when packing items from multiple orders into a consolidation shipment. These restrictions refer to attributes on the order header that must match attributes on the consolidation shipment header before items from the order can be added to the consolidation shipment.

Options and Configuration

Use the system value key `PACKING_RESTRICTION_CRITERIA` to configure packing restrictions. This system value displays a list, in CSV format, of the orders and consolidation shipment attributes that must be equal before you can load order lines and append them to the consolidation shipment. By default, no restriction criteria are applied. The attributes you can specify using `PACKING_RESTRICTION_CRITERIA` are listed in the table below.

PACKING_RESTRICTION_CRITERIA Attributes

Transaction Attribute	Description
CLIENT	Transaction client attribute without the transaction type prefix (xmshdr0.client)
PACKING_LOCATION	Transaction locale attribute (xmshdr0.shwarehouse)
CONSIGNOR	Transaction consignor attribute (xmshdr0.shcono)
DELIVER_FROM	Transaction delivered from attribute (xmshdr0.shdlvr)
DELIVER_TO	Transaction delivered to attribute (xmshdr0.shdlvrt)
CARRIER	Transaction carrier attribute (xmshdr0.shshpc)

Transaction Attribute	Description
CUSTOMER	Transaction customer attribute (xmshdr0.shcust)
CONSIGNEE	Transaction consignee attribute (xmshdr0.shcnse)
ULTIMATE_CONSIGNEE	Transaction ultimate consignee attribute (xmshdr0.shucnse)
ORDER_NUMBER	Transaction order number attribute (xmshdr0.shordn)
OTHER_REFERENCE	Transaction other reference attribute (xmshdr0.SHOREF)

Implementation

The Web browser maintains stateless session information for the configured packing restriction attributes. The session information for the configured restricted packing criteria is set when you load the first order or consolidation shipment. Any additional order or consolidation shipment you load must match the restricted packing criteria of the session.

When no order lines are available in the Items to be Packed list and you choose to load a fresh consolidation shipment or create a new one, you can reset session restricted packing criteria. When you load a fresh consolidation shipment, the session restriction criteria are set based on the consolidation shipment attributes. When you create a shipment, the session restriction criteria are cleared and reset based on the first order that is loaded.

Consolidated Transactions Stored Link

When you create shipments in Consolidation Packing mode, a link is maintained between the shipment lines and the order lines within the data flow tables. This link allows you to derive the association between:

- The shipment header and the first order header used to generate the shipment.
- The shipment item lines and the order item lines.
- The shipment item lot lines and the order item lot lines.
- The shipment item serial numbers and the order item serial numbers.

The link between the shipment header and the order header used as a template to generate the shipment is maintained through the Interface-Control Shipment Header (XMINHD0) table. The link is maintained as a child of the generated consolidation shipment. If order lines from multiple orders are used in generating the consolidation shipment, you can identify these orders by looking at the link in the database between the

consolidation shipment items and the order lines. This information allows you to identify the order line from which the shipment was generated and determine the order from the order line.

The link is maintained between each shipment item line and the corresponding order item line through the Interface-Control Shipment Items (XMINDT0) table. These records are maintained as children of the Interface-Control Shipment Header record associated with the consolidated shipment.

The link between the shipment item lot lines and the order item lot lines is not maintained through data records. The link is based on the lot allocation line number. The system assumes that the same allocation line number is used on the shipment item lot line and the order item lot line. When the system appends a new lot to a consolidation shipment, it uses the value of the allocation line number from the associated order item lot record.

Note The allocation line numbers used can result in a discontinuous sequence.

The link between shipment item serial numbers and order item serial numbers is maintained using the serial line number. When the system appends a new serial number to a consolidation shipment, it uses the value of the serial line number from the associated order item serial number record.

Note The line serial numbers used can result in a discontinuous sequence.

Consolidation Picking

There is another QAD GTTE page that enables you to build consolidations without packing them. This approach is useful when you are picking orders and moving the goods to a staging area for packing and shipment later, for example. You also have the choice of adding the picked items to shipments as you consolidate or later at the packing stage. This functionality is available through the Consolidate and Ship page. To create a link to this page, set up the system value EXTRA_EXIT_LINKS_CONFIG as follows:

```
{
  "width" : "160",
  "links" : [{
    "label" : "Picking",
    "url" : "scan-pack-ship.htm?systemConfigCategory=SNPKCP",
    "exitFn" : "controlledWebPageExitWithShipmentKeyParam"
```

```
}}
```

```
}
```

If you do not want all users to be able to consolidate, only enable this link for the users or user groups that need access. You use this functionality in SNPKCD and SNPKCS configuration mode. For more information, see *Consolidate and Ship*.

Item Packing Units

In Scan, Pack and Ship, the packing approach affects the quantity unit used to express the quantity of an item available for packing.

Packing Quantity Units

The packing quantity unit is expressed as one of the following:

- Item ship quantity
- Item inner quantity
- Item outer quantity
- Lot ship quantity
- Lot inner quantity
- Lot outer quantity
- Serial number

The packing quantity is determined at an item line level. Therefore, you can pack items on the same transaction in different quantity units

Selecting the Packing Quantity for an Item Line

To determine the quantity to use when packing an item, the system first checks if serial numbers are to be used. If not, the system checks for lots. If lots are not used, the system uses item ship quantities by default.

Serial Numbers

Use the system value key `PACK_BY_SERIAL_NUMBER` to specify if serial numbers are to be used when packing an item line. This system value key has two possible values.

- **NEVER**: Never pack items using serial numbers. If item serial numbers exist, they are ignored during the packing process. This approach is the default approach.
- **CONFIG_PER_ITEM**: The decision to pack using serial numbers is based on the item setup value in the serial number control field (`XMSITM0.SIPSL04` | `XMPROD0.PRPSL04`). The table lists the possible item setup values in this field.

CONFIG_PER_ITEM Values

Item Setup Value	Action
PREDEFINED	Always pack using serial numbers. The serial number you provide is validated against the preconfigured list of available serial numbers on the shipment item. If serial numbers are not available for the item line, it cannot be packed.
AT_SHIPPING_CAPTURE	<p>Serial numbers are captured during the packing process. If a user enters the same serial number more than once for the same product on different shipments, the system response depends on how you have configured this value:</p> <ul style="list-style-type: none"> • Does this user have permission to duplicate serial numbers? You can configure access at user or system level. • Are duplicate serial numbers allowed for this transaction type? You can configure the transaction types that allow duplicates. <p>If a user has permission to enter duplicate serial numbers on different shipments, the default is to display a field that the user must select before resubmitting the packing request. Alternatively, you can choose to display the field as already selected or automatically allow duplicate serial numbers for this user.</p>
NO_CONTROL or no value	Never pack the items using serial numbers. If item serial numbers exist, they are ignored during the packing process. This approach is the default approach.

Lots

Use the system value key PACK_BY_LOT to specify if lots are used when packing an item line. The possible values for PACK_BY_LOT are:

- ALWAYS: Always pack items using lots. If lots are not available for the item line, you cannot pack the items.
- NEVER: Never pack items using lots. If item lots exist, they are ignored during the packing process. This value is the default value.
- IF_AVAILABLE: If lots are available, the item is packed using lots. Otherwise, lots are not used. If lots are specified but the sum of the lot quantities is not equal to the item ship quantity, you cannot pack the item line.

- **CONFIG_PER_ITEM:** The decision to pack using lots is based on the item setup in the lot control field (XMSITM0.SIPSL03 | XMPROD0.PRPSL03).
 - If the item line is set up as lot controlled, always pack using lots. If lots are not available for the item line, you cannot pack the item line.
 - If the item line is not set up as lot controlled, lots are not used during the packing process. If item lots exist, they are ignored. This behavior is the default.

Lots and Items

When you pack an item line using lots or items, define the packing quantity unit. Use the system values key **PACKING_QUANTITY_TO_USE**. There are three possible values.

PACKING_QUANTITY_TO_USE

Value	Action
ITEM	Use the shipping quantity
INNER	Use the inner quantity if it is greater than zero. Otherwise, use the shipping quantity.
OUTER	Use the outer quantity if it is greater than zero. If not, use the inner quantity. If the inner quantity is not greater than zero, use the shipping quantity.

Shipment Processing Extension Buttons

You can add workflow buttons to the Scan, Pack and Ship page using the system value key **SHIPMENT_EXTN_BUTTON_CONFIG**. This system value enables you to initiate workflow tasks from Scan, Pack and Ship. It is expressed through a Java Script Object Notation (JSON) representation of a JavaScript literal object. The administrator takes the following steps:

- Configures the workflow tasks that initiate from the Scan, Pack and Ship page.
- Specifies the buttons to display for a shipment using the system value key **SHIPMENT_WORKFLOW_{WorkflowCode}**, depending on the workflow assigned to the shipment.

A sample configuration of workflow buttons is available for use as a template under **SHIPMENT_EXTN_BUTTON_CONFIG**. In the sample configuration, ten buttons are added. Each button executes a workflow task using the configured workflow task ID.

```
[[
```

```
"id" : "shExtnBtn1Id",
```

```
"iconCls" : "serviceAssignShipmentBtn",  
"tooltip" : "Auto Service assignment",  
"readOnlyDisable" : "true",  
"enableOnShipmentStatus" : ["CREATED"],  
"enableStatusList" : ["SEALED", "WEIGHTED"],  
"disableOnZeroPackCount" : "true",  
"allItemsPacked" : "true",  
"taskKeyId" : "BBSRAS50",  
"handler" : "function(){performWfTaskButton.call(this);}"  
}, {  
"id" : "shExtnBtn2Id",  
"iconCls" : "rateShipmentBtn",  
"tooltip" : "Auto Manifest",  
"readOnlyDisable" : "true",  
"enableOnShipmentStatus" : ["CREATED"],  
"enableStatusList" : ["SEALED", "WEIGHTED"],  
"disableOnZeroPackCount" : "true",  
"allItemsPacked" : "true",  
"taskKeyId" : "BBSHP50",  
"handler" : "function(){performWfTaskButton.call(this);}"  
}, {  
"id" : "shExtnBtn3Id",  
"iconCls" : "defaultPrinterBtn",  
"tooltip" : "Print packing list",
```

```

"enableStatusList" : ["SEALED", "WEIGHTED"],

"disableOnZeroPackCount" : "true",

"allItemsPacked" : "true",

"taskKeyId" : "BBSVRTPL50",

"handler" : "function(){performWfTaskButton.call(this);}"

},{

"id" : "shExtnBtn4Id",

"iconCls" : "shipConfirmShipmentBtn",

"tooltip" : "Ship-confirm",

"enableOnShipmentStatus" : ["RATED"],

"taskKeyId" : "DEMOSCCL",

"progress" : "true",

"confirmRun" : "true",

"responseStatus" : { "WARN-364" : {

"id" : "shExtnBtn3Id",

"packStatusList" : ["", "SEALED", "WEIGHTED"],

"prompt" : "true",

"packCountCheck" : "true"},

"WARN-4347" : {

"id" : "shExtnBtn3Id",

"packStatusList" : ["", "SEALED", "WEIGHTED"],

"prompt" : "true",

"packCountCheck" : "true"}

},

"handler" : "function(){performWfTaskButton.call(this);}"

```

```
},{
  "id" : "shExtnBtn5Id",
  "iconCls" : "closeShipmentBtn",
  "tooltip" : "Close shipment",
  "enableOnShipmentStatus" : ["SHIPPED"],
  "taskKeyId" : "BBSCLS50",
  "handler" : "function(){performWfTaskButton.call(this);}"
},{
  id : 'wfTaskBtnAutoSpacer',
  xtype : 'pslspacer',
  width : 20
},{
  "id" : "shExtnBtnX1Id",
  "iconCls" : "shipmentSummaryBtn",
  "tooltip" : "Summary",
  "taskKeyId" : "WFTSDE50",
  "handler" : "function(){performWfTaskButton.call(this);}"
},{
  "id" : "shExtnBtnX2Id",
  "iconCls" : "shipmentAddressesBtn",
  "tooltip" : "Addresses",
  "taskKeyId" : "WFTADD50",
  "enableReadWriteList" : [""],
  "handler" : "function(){performWfTaskButton.call(this);}"
```

```
},{
  "id" : "shExtnBtnX3Id",
  "iconCls" : "rateShopShipmentBtn",
  "tooltip" : "Rate Shop",
  "readOnlyDisable" : "true",
  "enableStatusList" : ["SEALED", "WEIGHTED"],
  "disableOnZeroPackCount" : "true",
  "allItemsPacked" : "true",
  "taskKeyId" : "WFTRAT50",
  "handler" : "function(){performWfTaskButton.call(this);}"
},{
  "id" : "shExtnBtnX4Id",
  "iconCls" : "manifestShipmentBtn",
  "tooltip" : "Manifest",
  "readOnlyAllowReadWrite" : ["shipmentRated"],
  "enableStatusList" : ["SEALED", "WEIGHTED"],
  "disableOnZeroPackCount" : "true",
  "allItemsPacked" : "true",
  "taskKeyId" : "WFTMAN50",
  "handler" : "function(){performWfTaskButton.call(this);}"
},{
  "id" : "shExtnBtnX5Id",
  "iconCls" : "defaultPrintBtn",
  "tooltip" : "Re-print Shipment Labels",
  "enableStatusList" : ["SEALED", "WEIGHTED"],
```

```

"disableOnZeroPackCount" : "true",

"allItemsPacked" : "true",

"taskKeyId" : "BBSVRT50",

"handler" : "function(){performWfTaskButton.call(this);}"

}]

```

Note To validate JSON content, go to www.jsonlint.com.

The following table lists the parent object members in the JavaScript literal object and describes how to use each object member when defining an extension button.

Parent Object Members

Member	Function
id	Holds the unique ID for the ExtJs component.
iconCls	Specifies the CSS class for the button, which in turn determines the icon used on the button.
tooltip	Provides the button tooltip.
taskKeyId	Holds the ID of the workflow task set for execution
readOnlyDisable	Specifies if a button is visible when you open a transaction in read-only mode. The possible values are true or false.
enableStatusList	Lists the pack statuses that enable this button. The button is only enabled when every pack on a shipment has a status on this list.
disableOnZeroPacks	Specifies whether the shipment extension button is disabled when no packs exist on the selected shipment. By default, the shipment extension button is enabled. The possible values are true or false. In the sample configuration, this value is set to true for the Rate Shop button, because you cannot rate shop for an empty shipment.
allItemsPacked	Activates a precondition check to determine whether all items on the shipment have been packed before the configured workflow task is executed.
confirmRun	Specifies if a pop-up message is displayed, prompting you to confirm that you want to execute the workflow task.

Member	Function
handler	Provides the function that is executed when you click the button.
readOnlyAllowReadWrite	<p>Allows you to execute a shipment-level workflow task in read-write mode when the shipment has been loaded in read-only mode. A shipment can be in read-only mode for different reasons:</p> <ul style="list-style-type: none"> • shipmentLockIssue - Another user has locked the shipment. • shipmentClosed - The shipment is flagged as closed. • shipmentProtectedAsPerClosed - The shipment is flagged as protected. • shipmentRated - The shipment has been rated. <p>Where you load a shipment in read-only mode, the workflow task is executed in read-only mode. To allow the task to execute in read-write mode, you add the member readOnlyAllowReadWrite to the workflow task configuration object. The member readOnlyAllowReadWrite is expressed as an array of values. It must include all reasons why the shipment was loaded in read-only mode before the workflow task can be executed in read-write mode. In the sample configuration, you can execute the Manifest button when a rated shipment is loaded in read-only mode.</p>
progress	<p>When set to true, indicates that the shipment header workflow task must be executed through a black-box message to the Progress logic. By default, this member is set to false and the task is executed as a Web UI workflow task.</p> <p>You can configure a Web UI workflow task to initiate a Progress-based workflow task. However, this approach involves additional setup that you avoid by using the Progress member. It also enables handling of error, information, and warning status codes on the browser client by initiating response actions using the member responseStatus.</p>
responseStatus	<p>Specifies handler actions for the response codes that can be returned by a black box call to execute a Progress-based workflow task. The handler action is implemented to initiate a button on the Scan, Pack and Ship page. You configure the handler action using a JavaScript object with the following members:</p>

Member	Function
	<ul style="list-style-type: none"> • id determines the ID of the pack- or shipment-level button to be executed. • packStatusList outlines a list of pack statuses. All packs on the transaction must have a status on this list before the transaction level button can be executed. • prompt specifies if a popup message is displayed, asking the user to confirm they want to execute the pack- or shipment-level button. • packCountCheck activates a pre-execution check. This check verifies that the pack count override is equal to the number of packs on the transaction before the pack- or shipment-level task is executed.
enableReadWriteList	<p>Lists the pack statuses for which the button can be executed in read-write mode. Use this condition to further restrict read-write access when:</p> <ul style="list-style-type: none"> • A shipment is opened in read-write mode. • The member readOnlyAllowReadWrite is configured to allow read-write on a read-only shipment. <p>When you set enableReadWriteList, the button is executed in read-write mode only when all packs on the shipment have a status on the list. Use enableReadWriteList to force readOnly access to a workflow task. This member appears in the sample configuration under the Addresses button.</p>
enableOnShipmentStatus	<p>Lists the shipment statuses for which a button is enabled. If enableOnShipmentStatus is not included in the button configuration, shipment status is not considered when determining if the button is enabled.</p> <ul style="list-style-type: none"> • CREATED - Shipment created • RATED - Shipment rated • SHIPPED - Shipment ship-confirmed • CLOSED - Shipment closed

Pack Processing Extension Buttons

You can add pack-level buttons to the Scan, Pack and Ship page using the system value key `PACK_EXTN_BUTTON_CONFIG`. This system value enables you to initiate pack-level tasks from Scan, Pack and Ship. It is expressed through a JSON representation of a JavaScript literal object. The administrator takes the following steps:

- Configures the pack-level tasks that initiate from the Scan, Pack and Ship page.
- Specifies the buttons to display for a shipment using the system value key `PACK_WORKFLOW_{WorkflowCode}`, depending on the workflow code assigned to the shipment

To simplify the setup process, a sample configuration is provided under the system value key `PACK_EXTN_BUTTON_CONFIG`. In this sample configuration, each button executes a pack-level task using the configured workflow task ID.

```
[{
  "id" : "packExtnBtn1Id",
  "iconCls" : "packSealBtn",
  "tooltip" : "Mark pack as sealed",
  "readOnlyDisable" : "true",
  "enableStatusList" : [""],
  "packMaintenanceShow" : "true",
  "autoOnWeightScan" : "true",
  "closePack" : "true",
  "handler" : "function(){performPackStatusUpdate.call(this,\"SEALED\",
  \"Sealed\");}"
},{
  "id" : "packExtnBtn2Id",
  "iconCls" : "defaultPrint3Btn",
  "tooltip" : "Reprint content label",
  "readOnlyDisable" : "false",
```

```
"enableStatusList" : ["SEALED"],  
"packMaintenanceShow" : "true",  
"taskKeyId" : "W-SNPKCL",  
"responseStatus" : {"WARN-003" : {  
"id" : "shExtnBtnX4Id"}  
},  
"handler" : "function(){performWfTaskPackButton.call(this);}"  
},{  
"id" : "packExtnBtn3Id",  
"iconCls" : "defaultPrint14Btn",  
"tooltip" : "Reprint carrier label",  
"readOnlyDisable" : "false",  
"enableOnShipmentStatus" : ["RATED", "SHIPPED", "CLOSED"],  
"packMaintenanceShow" : "true",  
"handler" : "function(){performPackPdfPrint.call(this);}"  
},{  
"id" : "packExtnBtn4Id",  
"iconCls" : "packVoidBtn",  
"tooltip" : "Open sealed pack",  
"readOnlyDisable" : "true",  
"enableStatusList" : ["SEALED"],  
"enableOnShipmentStatus" : ["CREATED"],  
"packMaintenanceShow" : "true",  
"confirmRun" : "true",
```

```
"handler" : "function(){performPackStatusUpdate.call(this,`\`,
\`Open\`);}"

}]
```

Note To validate JSON content, go to www.jsonlint.com.

Aside from the three members in the table below, the parent object members in the JavaScript literal object are described in the [Black Box Workflow Task Members](#) table in the [Progress Black Box Workflow Tasks on page 427](#) section.

Parent Object Members - Pack-Level Extension Buttons

Member	Function
packMaintenanceShow	Determines if the pack-level button is visible on the Pack Maintenance panel as well as the Packs panel.
autoOnWeightScan	Executes this workflow task if a weight is successfully scanned for a selected pack. To activate execution of this task, set its value to true. You can configure multiple buttons to execute simultaneously using this configuration member.
closePack	Determines if the pack closes when this action runs. If no pack is open, this member is not applicable. If a pack is open, by default it remains open when the action is complete. By adding this member with a value of true, the pack is closed when the action is complete.

Progress Black Box Workflow Tasks

When you implement a shipment- or pack-level button through a black box call to Progress logic, the Progress logic responds with a status code. The following sample code is an example of a pack-level extension button that makes a black box call to Progress logic and returns an information message.

```
{
  "id" : "packExtnBtn1Id",
  "iconCls" : "packSealTickBtn",
  "tooltip" : "Seal Pack",
  "readOnlyDisable" : "true",
  "enableStatusList" : [""],
  "packMaintenanceShow" : "true",
```

```

"responseStatus" : { "INFO001" : {
"id" : "shExtnBtn3Id",
"packStatusList" : [ "", "SEALED", "RATED"],
"prompt" : "true",
"packCountCheck" : "true" }
},
"shipmentTask" : {
"id" : "shExtnBtn3Id",
"packStatusList" : [ "", "SEALED", "RATED"],
"prompt" : "true",
"packCountCheck" : "true"
},
"handler" : "function(){performWfTaskPackButtonAction.call(this,\"Seal
Pack\", \"W-SNPKCL\");}"
}

```

Aside from the members in the table below, the object members in the sample code are described in [Parent Object Members - Pack-Level Extension Buttons](#) from the [Pack Processing Extension Buttons](#) on page [425](#) section.

Black Box Workflow Task Members

Member	Function
responseStatus	<p>The member responseStatus has a member for each response code you want to link with a handler action. In the sample code, the status code key is INFO. There are three different status code keys:</p> <ul style="list-style-type: none"> • INFO means an information message. • WARN means a warning message. • ERROR means an error message.

Member	Function
shipmentTask	<p>This member allows you to configure a shipment-level button to run automatically when the pack-level button action completes successfully. You can also express conditions before the shipment-level action is run. Configure the handler action using a JavaScript object with the following members:</p> <ul style="list-style-type: none"> • id - determines the ID of the pack- or shipment-level button to execute. • packStatusList - outlines a list of pack statuses. All packs on the transaction must have a status on this list before the transaction-level button can be executed. • prompt - specifies if a popup message is displayed, asking the user to confirm they want to execute the pack- or shipment-level button. • packCountCheck - activates a pre-execution check. This check verifies that the pack count override is equal to the number of packs on the transaction before the pack- or shipment-level task is executed.

Progress logic through a black box call can return many status messages. The client browser joins all information and warning response messages and displays them in a single user message. The client browser displays a separate user message for each error message. If a response code is returned without any text message, the response is not displayed. However, the response code can be used to trigger a response action on the client. On the extension button, you can configure event handling for the response status codes that the black box message request returns. The event is the status code. You can configure the handler using the extension button member responseStatus. This member is a JavaScript object that has a member for each response code you want to link with a handler action. The handler action identifies the button to execute. Configure the handler action using a JavaScript object with the members:

- id
- packStatusList
- prompt

When a black box message returns multiple status codes, the response handler is only executed for the first returned status code for which a handler has been configured. When a response handler is executed, the member shipmentTask for that configured button is not processed. The member shipmentTask is executed only if no response status matches an entry in the member responseStatus.

Pack Status

You set up pack statuses using the domain lookup PACK_STATUS. By default, there are three pack statuses:

- PACKED
- SEALED
- RATED

These pack statuses have no hard-coded meaning. You can delete, modify, or add them during configuration. After you configure the pack statuses, define the statuses for which a pack is considered unlocked. Use the system value UNLOCKED_PACK_STATUS_LIST. You can only update a pack if it is not assigned a locked status. You can configure a pack status as locked for one user and unlocked for another.

The system value ACTIVE_PACK_STATUS_LIST allows you to create a list of pack statuses for which a pack is considered active or requiring processing. On the Items to be Packed panel, use Filter By Active Packs to identify packs on a shipment requiring user action.

You can configure the shipment-level workflow task buttons to run only when all packs on the shipment have specific pack statuses. Configure this behavior separately for each button.

You can also configure the pack-level workflow task buttons as available, depending on the status of the selected pack. Configure this behavior separately for each button.

Serial Number Controlled Items

To learn how serial number packing works, see [Item Packing Units on page 415](#). This section covers the control of items that use serial numbers.

Determining Duplicate Serial Numbers

The list of serial numbers used for each product is stored in the QAD GTTE master audit table. If possible, you also log the shipment item line where the serial number is used. This storage method allows you to:

- Do a quick search based on the client, product code, and serial number to find if the serial number has already been used.
- Load pre go-live serial numbers into the list.

When you delete a serial number from a shipment item line, the system checks whether the serial number can also be deleted from the master serial number list.

- If the serial number is currently being used on a different shipment, it cannot be deleted.

- If it is not being used, the serial number can be deleted, provided it is not a pre go-live serial number or has been used on an archived transaction.

When a serial number is rejected on a transaction due to duplication, the user is notified and a sample shipment that contains the serial number is displayed.

Implementation of Master Serial Number List

The table below displays the table field values you set to implement a master serial number list.

Master Serial Number List

Field Value	Further Information
XTAUDT0.CLIENT = {MasterProductClient}	
XTAUDT0.AUTABL = "VIRTUAL"	
XTAUDT0.AUKFL1 = "SERIAL"	
XTAUDT0.AUKFL2 = {Product code}	
XTAUDT0.AUKFL3 = {Serial number}	
XTAUDT0.AUKFL4 = {TransactionClient}	Left blank on serial numbers loaded as part of a batch load.
XTAUDT0.AUKFL5 = {Consignor}	Left blank on serial numbers loaded as part of a batch load.
XTAUDT0.AUKFL6 = {ShipmentReference}	Left blank on serial numbers loaded as part of a batch load.
XTAUDT0.AUKFL7 = {Despatch Number}	Left blank on serial numbers loaded as part of a batch load.
XTAUDT0.AUKFL8 = {ItemLineNumber}	Left blank on serial numbers loaded as part of a batch load.
XTAUDT0.AUKFL9 = {SerialLineNumber}	Left blank on serial numbers loaded as part of a batch load.
XTAUDT0.AUKFL10 = ""	Left blank.
XTAUDT0.AUPSL01 = [{"BATCH_LOAD"	BATCH_LOAD: Indicates that the serial number was loaded as part of a pre go-live batch.

Field Value	Further Information
"TRANSACTION" "SERIAL_VOID"]}	TRANSACTION: Indicates that the serial number was assigned to a transaction within QAD GTTE. SERIAL_VOID: Voids the use of an existing serial number when you set the field XTAUDT0.AUKFL1 to this value. Any subsequent search for uniqueness ignores this serial number.

Note For a description of packing by serial number with a scanner, see [Scanner Input on page 110](#).

Scanner Input

Instead of using a keyboard and mouse, you can use a barcode scanner as an input device during the packing process. Configure the barcode scanner as a keyboard rather than a serial port input device.

Barcode Scanner Input Frame

Scanner input is activated by setting the system values key SHOW_SCANNER_INPUT to TRUE. When activated, the scanner input panel is displayed at the bottom of the page. The scanner input frame consists of three fields, as displayed in the image below.

Scanner Input Panel

Barcode Input Field

The barcode input field is used to receive the scanned barcode data. This field must have input focus before a barcode is scanned. There must be a carriage return after each barcode is entered to indicate the end of a barcode scan. You can manually enter data in this field and press the Enter key to simulate barcode input during the testing phase.

Barcode Context Field

You use the barcode context field to control how the data from a barcode input scan is interpreted. The following table lists the barcode scan contexts provided by default. You can alter the list using the system value key SCANNER_CONFIG, which is used to configure scanner input.

SCANNER_CONFIG System Value

Scan Context	Interpretation
Order Reference	An order reference code. The system loads the items to pack for this order.

Scan Context	Interpretation
Shipment Reference	A shipment reference code. The system loads the shipment or consolidation shipment for packing.
Pack Type	A pack type. The pack type for the current open pack is updated.
Tare Weight	The tare weight override for the current open pack.
Gross Weight	The gross weight override for the current open pack.
Weight UOM (Unit of measure)	The weight unit of measure for the current open pack.
Dimension 1, Dimension 2, Dimension 3	The dimension [1 2 3] for the current open pack.
Dimension UOM	The dimension unit of measure for the current open pack.
Volume	The volume for the current open pack.
Volume UOM	The volume unit of measure for the current open pack.
Pack by Product	An item code. One of these items is added to the current open pack.
Pack by Product by Qty	An item code. One or more of these items is added to the current open pack. You can specify the quantity.
Pack by Serial No. (Number)	A serial number. The unpacked item line with this serial number is added to the current open pack.
Pack by Lot No. (Number)	A lot number. One of the items from this lot is added to the current open pack.
Pack by Batch No. (Number)	A lot batch number. One of the items from this lot batch is added to the current open pack.
Find Pack via Pack No. (Number)	Search for the shipment containing the scanned pack number and filter on the pack number.
Search via Tracking Number	Search for the shipment containing the scanned tracking number and filter on the tracking number.
Pack Weight Scan	A weight scan assigned to the selected pack. Select a single pack before performing the scan. The scan can be an input from a weighing scale.

Barcode Message Field

The barcode message field is used to provide the user with information about the last barcode scan. It provides a description of the last barcode scan, with the barcode enclosed in [] brackets.

Barcode Interpretation

There are three methods of interpreting a barcode scan, which the system performs in the following order:

1. Test the barcode input against a list of predefined text values. If a match is found, a corresponding action is performed.
2. Test the barcode input against a list of predefined regular expression patterns. If a match is found, the barcode is interpreted based on the configured action of the regular expression.
3. Interpret the barcode scan based on the selected value in the barcode context field.

Predefined Text Values

The first way of interpreting the barcode input is to compare it against a list of predefined text values that represent actions. These predefined text values begin and end with a \$ character to distinguish them from other barcode inputs. For example, \$NEW_PACK\$ creates a pack.

For a full list of predefined text values, see [Master Barcodes on page 438](#). You can add more predefined text values using the system value key SCANNER_CONFIG. For more details, see [Master Barcodes on page 438](#). You can add further predefined text values using the system value key SCANNER_CONFIG.

Pattern Matching

The second way of interpreting barcode input is to compare it against a list of predefined regular expressions. This approach is possible when barcode inputs that match a regular expression are always treated in the same manner. For example, you can specify that all barcode input beginning with ORD and ten characters in length is treated as order reference numbers. This approach avoids the need to set the barcode input context to Order Reference before scanning an order reference. You can set up a list of regular expressions using the system value key SCANNER_CONFIG.

Barcode Scan Context

The third way of interpreting the barcode input is to use the method selected in the barcode scan context input field. For example, if the selected barcode context value is set to Pack by Product, the scanned barcode is treated as the product code of an item you want to append to the current open pack. The list of barcode scan contexts is predefined. You can alter the list using the system value key SCANNER_CONFIG.

Barcode Input Validation

You can restrict the data that can be entered for a given barcode context. Add a regular expression to validate the input data before it is processed. The validation can check the type of data that is added or verify that entered codes meet standard guidelines. For example, you want to ensure that a shipment reference is always ten characters long or verify that a numeric value is scanned for the tare weight.

Changing Barcode Scan Context Automatically

You can configure the system to change the barcode scan context value automatically when it receives an input value that is successfully interpreted using barcode input validation logic. The new scan context depends on how the last barcode scan was interpreted and processed. The table outlines the hard-coded automatic context changes. Override these settings using the system value key `SCANNER_CONFIG`.

Hard-Coded Automatic Context Changes

Scanned Input	Barcode Context
New pack master barcode	Pack Type
Pack type	Tare Weight
Tare Weight	Gross Weight
Gross weight	Weight UOM
Weight unit of measure	Dimension 1
Dimension 1	Dimension 2
Dimension 2	Dimension 3
Dimension 3	Dimension UOM
Dimension unit for measure	Volume
Volume	Volume UOM
Volume unit of measure	Pack by Product

Configuring Scanner Input

The system value key `SCANNER_CONFIG` is expressed via a JSON representation of a JavaScript literal object. This system value enables you to:

- Configure the default barcode context.
- Set up predefined text values and their corresponding actions.
- Add scanner pattern matching for scanner contexts.
- Drop default scanner contexts.

- Add new scanner contexts.
- Add validation patterns for data received under scanner contexts.
- Modify the automatic switching of barcode contexts.

To simplify the setup process, a sample configuration is provided under the system value key SCANNER_CONFIG *SAMPLE*. The following table lists the parent object members in the JavaScript literal object and describes the function of each object member in configuring the Scan, Pack and Ship page.

Parent Object Members

Object Member	Function
defaultBarcodeContext	Defines the default scanner context.
barcodeActionObject	Used to add new barcode action objects or override existing barcode action objects.
scanRegExpList	Used to match regular expression patterns with barcode scan contexts. The entered barcode value is compared against these regular expressions. If it matches one of them, you use the configured context for interpreting the barcode scan. In system values, the character sequence BACKSLASH can be used to represent a \ when expressing a validation regular expression.
droppedScanContext	Can be used to drop default contexts.
scanContextList	Allows you to update existing barcode scanner contexts or add new barcode scan contexts. As the member droppedScanContext is evaluated first, you can replace a barcode context by including it in the droppedScanContext and scanContextList members.

Scanner Context

Before you configure scanner input, review the defined scanner contexts. The following table lists the scanner contexts that are defined by default.

Scanner Contexts

Scanned Context	Meaning
InputReference	Order Reference
OutputReference	Shipment Reference
PackType	Pack Type
TareWeight	Tare Weight

Scanned Context	Meaning
GrossWeight	Gross Weight
WeightUom	Weight UOM
Dimension1	Dimension 1
Dimension2	Dimension 2
Dimension3	Dimension 3
DimensionUom	Dimension UOM
Volume	Volume
VolumeUom	Volume UOM
UnpackedProduct	Pack by Product
UnpackedSerialNo	Pack by Serial No.
UnpackedLotNo	Pack by Lot No.
UnpackedBatchNo	Pack by Batch No.
FindPackViaPackId	Find Pack via Pack No.
FindPackViaTrackingNo	Search via Tracking Number
FindPackViaAddRef	Search via Additional Reference
PackWeightScan	Pack Weight Scan

Scanner Context Configuration Object Members

You can update existing barcode scanner contexts or add new scanner contexts. The following table lists the members of a scanner context configuration object.

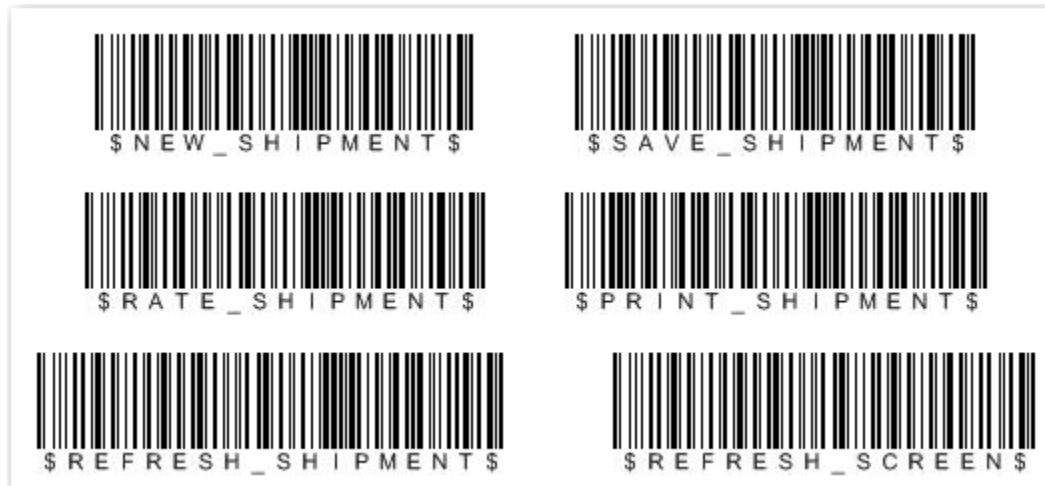
Scanner Context Configuration Object Members

Member	Function
scanContextID	The ID of the scanner context.
elementId (optional)	The underlying JavaScript element that this scanner context places data into.
displayText	The label displayed for the scanner context in the context selection list.
Msg	The message displayed in the barcode message field on processing a barcode input using this scanner context. Any reference to {0} is replaced with the actual barcode input value.

Member	Function
nextScanContextId (optional)	The ID of a scanner context. On processing a barcode value using this context, the barcode context field is set to this scanner context, which is then used for interpreting the next barcode input.
packRequired (optional)	A true/false flag that indicates if a pack must be selected or opened before a barcode value can be processed using this context; for example, Pack type.
dataType (optional)	The data type used to interpret the barcode input value. The default is string.
handlerParam (optional)	The parameters for the handler function, in addition to the default callback function and barcode value.

Master Barcodes

Shipment-level Scan



Pack-level Scan



Pattern Match Types



Barcode Scan Context Switch



Note To create additional barcode entries, you can find free barcode generators online.

Shipment-Level Buttons

Tooltip	Button ID	Shortcut	Master Barcode Scan	Icon Class
New Shipment	createShipmentBtnId	CTRL+1	\$NEW_SHIPMENT\$	DefaultCreateBtn
Screen Reset	screenResetBtnId	CTRL+5	\$RESET_SCREEN\$	DefaultResetBtn
Shipment Tasks	showShipmentObjectTasksBtnId		...	showShipmentObjectTasksBtn
Re-sequence Box Numbers	reSequenceBoxNumbersPackBtnId		...	resequenceBoxNumbersPackBtn
{Configurable}	{shExtnBtn1Id}...		...	shipmentExtn1Btn*
{Configurable}	{shExtnBtn2Id}...		...	shipmentExtn2Btn*
{Configurable}	{shExtnBtn3Id}...		...	shipmentExtn3Btn*
{Configurable}	{shExtnBtn4Id}...		...	shipmentExtn4Btn*

Tooltip	Button ID	Shortcut	Master Barcode Scan	Icon Class
{Configurable} {shExtnBtn5Id}...			...	shipmentExtn5Btn*

*Dynamically applied or set up in default configuration.

Packs Panel Buttons

Tooltip	Button ID	Shortcut	Master Barcode Scan	Icon Class
Create pack	createPackBtnId	CTRL+7	\$NEW_PACK \$	defaultCreateBtn
[Toolbar Separator]	packEditBtnSeparator			
Open selected pack	openPackBtnId		\$OPEN_PACK \$	defaultOpenBtn
Copy selected pack	copyPackBtnId		\$COPY_PACK \$	defaultCopyBtn
Copy selected pack - Infinite	copyPackInfiniteBtnId		\$COPY_PACK \$	defaultCopyInfiniteBtn
Copy selected pack header	copyPackHeaderBtnId		\$COPY_PACK \$	defaultCopyHeaderBtn
Delete selected pack(s)	deletePackBtnId			defaultDeleteBtn
Update box number	updatePackBoxNumberBtnId			updatePackBoxNumberBtn
[Toolbar Separator]	packExtnBtnSeparator			
{Configurable} {packExtnBtn1Id}				packExtn1Btn
{Configurable} {packExtnBtn2Id}				packExtn2Btn
{Configurable} {packExtnBtn3Id}				packExtn3Btn
{Configurable} {packExtnBtn4Id}				packExtn4Btn

Tooltip	Button ID	Shortcut	Master Barcode Scan	Icon Class
{Configurable}	{packExtnBtn5Id}			packExtn5Btn
[Toolbar Separator]	packRefreshBtn Separator			
Refresh shipment	refreshPackBtnId	CTRL+6	\$REFRESH_SHIPMENT \$	refreshPackBtn
[Toolbar Separator]	packSelectAllBtn Separator			
Select all packs	selectAllPackBtnId		\$PACK_SELECT_ALL \$	selectAllPackBtn
Deselect packs	deselectAllPackBtnId		\$PACK_DESELECT \$	deselectAllPackBtn

Pack Maintenance Buttons

Tooltip	Button ID	Shortcut	Master Barcode Scan	Icon Class
Create a new pack	createPack2BtnId			defaultCreateBtn
Clear weight/volume overrides	clearWeightVolume OverridesBtnId			clearWeightVolume OverridesBtn
Save Pack	saveShipment PackBtnId	CTRL+2	\$SAVE_PACK \$	defaultSaveBtn

Pack Line Maintenance Buttons

Tooltip	Button ID	Shortcut	Master Barcode Scan	Icon Class
Close pack	closePackBtnId	CTRL+8	\$CLOSE_PACK \$	defaultCloseBtn
Close pack without saving	closePackWithoutSavingBtnId		\$CLOSE_PACK WITHOUT_SAVE \$	defaultCloseWithoutSaveBtn

Tooltip	Button ID	Shortcut	Master Barcode Scan	Icon Class
Delete selected pack line(s)	deletePackLineBtnId			defaultDeleteBtn
[Toolbar Separator]	packLineSelectAllBtnSeparator			
Select all pack lines	selectAllPackLineBtnId		\$PACK_LINE_SELECT_ALL\$	defaultSelectAllBtn
Deselect pack lines	deselectAllPackLineBtnId		\$PACK_LINE_DESELECT_ALL\$	defaultDeselectAllBtn

Items to be Packed Panel Buttons

Tooltip	Button ID	Shortcut	Master Barcode Scan	Icon Class
Append to pack	appendToPackUnpackedBtnId	*CTRL+ALT+1	\$APPEND_TO_PACK\$	defaultAppendToBtn
[Toolbar Separator]	unpackedAutoBtnSeparator			
Append all available items to pack	appendAllItemsToPackBtnId	*CTRL+ALT+2	\$APPEND_ALL_ITEMS\$	defaultAutoPackBtn
Auto Pack Available Items - Maximum Equal Product Quantity Split	autoPackItemsMaxEqualProductBtnId	CTRL+ALT+3	\$AUTO_PACK_MAX_EQUAL_PROD\$	autoPackItemsMaxEqualProductBtn
Auto Pack Available Items - Maximum Product Quantity Split	autoPackItemsMaxProductBtnId	CTRL+ALT+4	\$AUTO_PACK_MAX_PROD\$	autoPackItemsMaxProductBtn

Tooltip	Button ID	Shortcut	Master Barcode Scan	Icon Class
Auto Pack Available Items - Item Inner/Outer Quantity Split	autoPackItemsItemInnerOuter		\$AUTO_PACK_ITEM_INNER_OUTER\$	autoPackItemsItemInnerOuterBtn
Auto Pack Available Items - Master Inner/Outer Quantity Split	autoPackItemsMasterInnerOuter		\$AUTO_PACK_MST_INNER_OUTER\$	autoPackItemsMasterInnerOuterBtn
Auto Pack Available Items - Maximum Quantity Split	autoPackItemMaxQuantity		\$AUTO_PACK_MAX_QTY\$	autoPackItemMaxQuantityBtn
[Toolbar Separator]	unpackedPackingQtyBtnSeparator			
Assign packing quantity to available quantity	assignPackingQtyToAvailableQtyBtnId	CTRL+ALT+5	\$MAX_PACKING_QTY\$	assignPackingQtyToAvailableQtyBtnId
Increment packing quantity by: X	incrementPackingQtyByOneBtnId	CTRL+ALT+6	\$INCREMENT_PACKING_QTY\$	assignPackingQtyToZeroBtnId
Assign packing quantity to zero	assignPackingQtyToZeroBtnId	CTRL+ALT+7	\$ZERO_PACKING_QTY\$	incrementPackingQtyByOneBtnId
[Toolbar Separator]	unpackedResetBtnSeparator			
Reset items to be packed	unpackedGridResetBtnId	CTRL+ALT+8	\$RESET_UNPACKED_ITEMS\$	defaultGridResetBtn
[Toolbar Separator]	unpackedSelectAllBtnSeparator			

Tooltip	Button ID	Shortcut	Master Barcode Scan	Icon Class
Select all items	selectAllUnpacked BtnId	CTRL+ALT +9	\$UNPACKED_SELECT_ALL \$	defaultSelect AllBtn
Deselect items	deselectAllUnpacked BtnId	CTRL+ALT +0	\$UNPACKED_DESELECT_ALL \$	defaultDeselect AllBtn

Barcode Context Switching Scan

Move to Context	Context ID	Shortcut	Master Barcode Scan
Next barcode context	-		\$CONTEXT_NEXT \$
Previous barcode context	-	CTRL+9	\$CONTEXT_PREVIOUS \$
Pack by Product	UnpackedProduct		\$CONTEXT_UNPACKED_PRODUCT \$
Pack by Serial No.	UnpackedSerialNo		\$CONTEXT_UNPACKED_SERIAL_NO \$
Pack by Lot No.	UnpackedLotNo		\$CONTEXT_UNPACKED_LOT_NO \$
Pack by Batch No.	UnpackedBatchNo		\$CONTEXT_UNPACKED_BATCH_NO \$
Find Pack via Pack No.	FindPackViaPackId		\$CONTEXT_FIND_VIA_PACK_ID \$
Search via Tracking No.	FindPackViaTrackingNo		\$CONTEXT_FIND_VIA_TRACKING_NO \$
Search via Addit.I Ref.	FindPackViaAddRef		\$CONTEXT_FIND_VIA_ADD_REF \$
Pack Weight Scan	PackWeightScan		\$CONTEXT_PACK_WEIGHT_SCAN \$
Order Reference	InputReference		\$CONTEXT_INPUT \$ or \$CONTEXT_ORDER \$
Order - Order Number	InputOrderNumber		\$CONTEXT_OUTPUT_ORD_NO \$

Move to Context	Context ID	Shortcut	Master Barcode Scan
Order - Other Reference	InputOtherReference		\$CONTEXT_INPUT_OTH_REF \$
Order - Invoice Number	InputInvoiceNumber		\$CONTEXT_INPUT_INV_NO \$
Order - Invoice 2 Number	InputInvoice2Number		\$CONTEXT_INPUT_INV2_NO \$
Order - Buyer Reference	InputBuyerReference		\$CONTEXT_INPUT_BUY_REF \$
Order - Customs Reference	InputCustomsRef		\$CONTEXT_INPUT_CUS_REF \$
Order - Master Air Waybill	InputMasterAirWaybill		\$CONTEXT_INPUT_MAWB \$
Order - House Air Waybill	InputHouseAirWaybill		\$CONTEXT_INPUT_HAWB_NO \$
Order - Booking Number	InputBookingNumber		\$CONTEXT_INPUT_BK_NO \$
Order - Forwarders Reference	InputForwardersRef		\$CONTEXT_INPUT_FRD_REF \$
Order - Additional Reference	InputAdditionalRef		\$CONTEXT_INPUT_ADD_REF \$
Shipment Reference	OutputReference		\$CONTEXT_OUTPUT \$ or \$CONTEXT_SHIPMENT \$
Shipment - Order Number	OutputOrderNumber		\$CONTEXT_OUTPUT_ORD_NO \$
Shipment - Other Reference	OutputOtherReference		\$CONTEXT_OUTPUT_OTH_REF \$
Shipment - Invoice Number	OutputInvoiceNumber		\$CONTEXT_OUTPUT_INV_NO \$
Shipment - Invoice 2 Number	OutputInvoice2Number		\$CONTEXT_OUTPUT_INV2_NO \$

Move to Context	Context ID	Shortcut	Master Barcode Scan
Shipment -Buyer Reference	OutputBuyerReference		\$CONTEXT_OUTPUT_BUY_REF \$
Shipment - Customs Reference	OutputCustomsRef		\$CONTEXT_OUTPUT_CUS_REF \$
Shipment - Master Air Waybill	OutputMasterAirWaybill		\$CONTEXT_OUTPUT_MAWB \$
Shipment - House Air Waybill	OutputHouseAirWaybill		\$CONTEXT_OUTPUT_HAWB_NO \$
Shipment - Booking Number	OutputBookingNumber		\$CONTEXT_OUTPUT_BK_NO \$
Shipment - Forwarders Reference	OutputForwardersRef		\$CONTEXT_OUTPUT_FRD_REF \$
Shipment - Additional Reference	OutputAdditionalRef		\$CONTEXT_OUTPUT_ADD_REF \$
-	-	CTRL+0	\$SET_FOCUS_TO_BARCODE_INPUT \$

Barcode Scan Contexts

Context Label	Context ID	On Scan Move to Context
Order Reference	InputReference	
Order: Order No	InputOrderNumber	
Order Other Ref.	InputOtherReference	
Order Invoice No.	InputInvoiceNumber	
Order Invoice2 No.	InputInvoice2Number	
Order Buyer Ref.	InputBuyerReference	
Order Customs Ref.	InputCustomsRef	
Order MAWB	InputMasterAirWaybill	
Order HAWB	InputHouseAirWaybill	

Context Label	Context ID	On Scan Move to Context
Order Booking No	InputBookingNumber	
Order Forwarder No.	InputForwardersRef	
Order Add Ref.	InputAdditionalRef	
Shipment Reference	OutputReference	
Shipment: Order No.	OutputOrderNumber	
Shipment Other Ref.	OutputOtherReference	
Shipment Invoice No.	OutputInvoiceNumber	
Shipment Invoice2 No.	OutputInvoice2Number	
Shipment Buyer Ref.	OutputBuyerReference	
Shipment Customs Ref.	OutputCustomsRef	
Shipment MAWB	OutputMasterAirWaybill	
Shipment HAWB	OutputHouseAirWaybill	
Shipment Booking No.	OutputBookingNumber	
Shipment Forwarder No.	OutputForwardersRef	
Shipment Add Ref.	OutputAdditionalRef	
Pack Type	PackType	TareWeight
Tare Weight	TareWeight	GrossWeight
Gross Weight	GrossWeight	WeightUom
Weight UOM	WeightUom	Dimension1
Dimension	Dimension1	Dimension2
Dimension 2	Dimension2	Dimension3
Dimension 3	Dimension3	DimensionUom
Dimension UOM	DimensionUom	Volume
Volume	Volume	VolumeUom
Volume UOM	VolumeUom	UnpackedProduct
Pack by Product	UnpackedProduct	
Pack by Serial No.	UnpackedSerialNo	

Context Label	Context ID	On Scan Move to Context
Pack by Lot No.	UnpackedLotNo	
Pack by Batch No.	UnpackedBatchNo	
Find Pack via Pack No.	FindPackViaPackId	
Search via Tracking No.	FindPackViaTrackingNo	
Search via Addit.I Ref.	FindPackViaAddRef	
Pack Weight Scan	PackWeightScan	

URL Configuration

Automatically Load a Shipment

To set an output transaction such as a shipment to automatically load when you open Scan, Pack and Ship, add the attribute autoLoadOutput to the URL with a value of autoLoadOutput=true. Next, specify the criteria for the loaded output transaction using one or more of the following parameters:

Criteria for Loaded Output Transaction

Criteria	URL Attribute
Client	outputClient
Consignor	outputConsignor
Reference	outputReference
Despatch Number	outputDespatchNumber
Order Number	outputOrderNumber
Other Reference	outputOtherReference
Invoice Number	outputInvoiceNumber
Invoice 2 Number	outputInvoiceNumber2
Buyer Reference	outputBuyersReference
Customs Reference	outputCustomsRef
Master Air Waybill	outputMasterAirWaybill
House Air Waybill	outputHouseAirWaybill
Booking Number	outputBookingNumber
Forwarders Number	outputForwardersRef

Criteria	URL Attribute
Additional Reference	outputAdditionalReference

Automatically Load an Order

To set an input transaction such as an order to automatically load when you open Scan, Pack and Ship, add the attribute `autoLoadInput` to the URL with `autoLoadInput=true`. Next, specify the criteria for the loaded input transaction using one or more of the following parameters:

Criteria for Loaded Input Transaction

Criteria	URL Attribute
Client	inputClient
Consignor	inputConsignor
Reference	inputReference
Despatch Number	inputDespatchNumber
Order Number	inputOrderNumber
Other Reference	inputOtherReference
Invoice Number	inputInvoiceNumber
Invoice 2 Number	inputInvoiceNumber2
Buyer Reference	inputBuyersReference
Customs Reference	inputCustomsRef
Master Air Waybill	inputMasterAirWaybill
House Air Waybill	inputHouseAirWaybill
Booking Number	inputBookingNumber
Forwarders Number	inputForwardersRef
Additional Reference	inputAdditionalReference

Extra Exit Links

To exit the Scan, Pack and Ship page, use the function `controlledWebPageExit` as the default exit function. This function handles page state on exiting the page using a configured URL. You can also configure the function `controlledWebPageExitWithShipmentKeyParam`, which appends the shipment search parameter within the URL.

The parameters are:

- `outputConsignor`

- outputReference
- outputDespatchNumber

Screen Rendering

Using the system value `UI_CALLBACK_AFTER_RENDER`, you can configure an optional JavaScript function declaration to alter the page layout and to perform additional processing or additional configuration. The function is called after the page has been rendered.

Default Focus

You can set the default focus when you open the page. In the example, the default focus is set to the barcode scan field.

```
var barcodeScan = Ext.getCmp(\ "barcodeScan\");

if (barcodeScan ){

barcodeScan.focus(true, true);

}
```

Auto Action on Loading a Transaction

Using the `pageInfo` object member `loadOutputTranCallback`, you can configure a function to automatically execute on loading a transaction. You can also configure preconditions to this action. In this example, the auto pack button is configured to be executed on loading a transaction and the logic is not to run when the pack count is greater than one.

```
pageInfo.loadOutputTranCallback = {

fn : initiateBtnActionOnShipmentLoad,

disableOnPositivePackCount : true,

id : \ "autoPackItemsMaxProductBtnId\ "

};
```

Note The members used to configure the `loadOutputTranCallback` object are displayed in the "*Object Members*" table.

Auto Action on Changing All Items Packed State

Using the `pageInfo` object member `itemPackingCallback`, you can configure a function to automatically execute when the "All items packed" state of a shipment changes during the packing process. You can also configure preconditions to action. In this example, the shipment tasks button is executed when the "All items packed" state changes. A precondition is configured so that the logic is only executed when all items have been packed.

```

pageInfo.itemPackingCallback = {

fn : initiateBtnActionOnItemPacking,

allItemsPacked : true,

id : \"shExtnBtn1Id\"

};

```

Note The members used to configure the itemPackingCallback object are displayed in the "*Object Members*" table.

Full Auto Action Example

The following is an example of the system value configuration using the code snippets in the previous sections.

```

function (){

var barcodeScan = Ext.getCmp(\"barcodeScan\");

if (barcodeScan ){

barcodeScan.focus(true, true);

}

pageInfo.loadOutputTranCallback = {

fn : initiateBtnActionOnShipmentLoad,

disableOnPositivePackCount : true,

id : \"autoPackItemsMaxProductBtnId\"

};

pageInfo.itemPackingCallback = {

fn : initiateBtnActionOnItemPacking,

allItemsPacked : true,

id : \"shExtnBtn1Id\"

};

}

```

Configure the objects `loadOutputTranCallback` and `itemPackingCallback` using the members in the table below.

Object Members

Member	Purpose
<code>fn</code>	Holds a reference to the function. This member is mandatory.
<code>id</code>	Holds a reference to the button. This member is mandatory.
<code>disableOnPositivePacks</code>	Activates a precondition check that determines whether the shipment contains no packs before the configured button handler is executed.
<code>disableOnZeroPacks</code>	Activates a precondition check that determines whether the shipment contains one or more packs before the configured button handler is executed.
<code>readOnlyDisable</code>	Activates a precondition check that determines whether the shipment is loaded in read-write mode before the configured button handler is executed.
<code>enableOnShipmentStatus</code>	Lists the shipment statuses for which the button handler is executed. The button is only executed when the shipment is equal to one of these statuses. If this member is not included in the configuration, the shipment status is not considered when determining whether to execute the button.
<code>enableStatusList</code>	Lists the pack statuses for which the button handler is executed. The button handler is only executed when all packs on the shipment have one of these statuses.
<code>allItemsPacked</code>	Activates a precondition check that determines whether all items on the shipment have been packed before the configured button handler is executed.
<code>hasUnpackedItems</code>	Activates a precondition check that determines whether all items on the shipment have not been packed before the configured button handler is executed.

Consolidate and Ship

Before reading this section, please read [Scan, Pack and Ship on page 400](#). Nearly all the details on configuring Consolidate and Ship are covered in that section because the system values used to configure the functionality and barcode setup are similar. In addition, read [Consolidate and Ship on page 134](#) for details on user steps to build consolidations and perform short shipping.

This section describes possible scenarios where an organization would use Consolidate and Ship. It also covers the system values that are different from the Scan, Pack and Ship values.

There are several ways of using Consolidate and Ship functionality. For example, you can use it to:

- Build and ship consolidations transactions, such as building a consolidation shipment from multiple orders for packing later. This function is used along with Consolidation Packing.
- Short ship a shipment. You can remove a currently unavailable item from a shipment to allow the other items to be delivered on time. The removed item is then added to a new transaction for backordering or it is consolidated onto an existing transaction. Short shipping is used along with Standard Packing mode

The system value category used to configure Consolidate and Ship is SNPKCP. To create this category, set the following program parameter and category:

```
systemConfigCategory=SNPKCP
```

You can copy the full set of system values you use for SNPKSH or any other category to SNPKCP. Next, configure the system values you have copied to suit your needs. Finally, configure the few system values that are unique to the Consolidate and Ship page.

Building Consolidations

One way you can use Consolidate and Ship is to build consolidations by doing Consolidation Picking. Consolidation Picking enables you to combine orders or some other type of transaction for packing and shipment later.

Its administration functions similar to Consolidation Packing. The difference is that Consolidation Packing packs the orders into shipments. Consolidation Picking does not pack any orders for shipment. It simply combines them for storage purposes or in preparation for packing later.

For example, some organizations deal with hazardous goods. Different laws restrict what goods can be shipped together. Therefore, the organization can decide to stage goods at a consolidation point before packing to help ensure that no more hazardous material can go onto a shipment than is legally allowed.

As with Consolidation Packing, you can restrict the orders that a user can consolidate by choosing transaction attributes that must be the same. Criteria can include:

- The orders are requested through the same customer account.
- The ship-to address is the same.
- The orders are requested at around the same time.
- The carrier is the same

Consolidate and Ship allows you to choose if you want to create shipments from orders at picking stage or later during packing. You have the same freedom of choice to decide when to capture barcode information or serial numbers. You can jump from the Consolidate and Ship page to the Scan, Pack and Ship page by setting up the system value EXTRA_EXIT_LINKS_CONFIG as follows:

```
{
"width" : "160",
"links" : [{
"label" : "Packing",
"url" : "scan-pack-ship.htm?systemConfigCategory=SNPKCS",
"exitFn" : "controlledWebPageExitWithShipmentKeyParam"
}]
}
```

You can set this system value to link to any Consolidation Packing option. For more information, see the Consolidation Picking section in [Consolidation Packing on page 407](#).

Consolidation Picking System Values

There are nine system values unique to Consolidate and Ship that you use for performing consolidations. The system values and their use are described in the table below.

Consolidation Picking System Values

System Value	Details
CONSOLIDATION PICKING MODE	In consolidation mode, this system value determines if you are packing as you add items to the consolidation. If set to NO, items are added to the consolidation and automatically packed. If set to YES, items are

System Value	Details
	added to the consolidation and not packed. By default, the value is NO.
NEW_CONSOL_SHIPMENT_TYPE	This system value holds the shipment type assigned to the new consolidation shipment that is created. Where no value is specified, the new consolidation shipment is assigned the shipment type of the first order associated with the shipment.
NEW_CONSOL_SHIPMENT_TYPE {Order shipment type}	This system value holds the shipment type assigned to the new consolidation shipments that are created. This system value allows you to assign a shipment type to the consolidation based on the shipment type of the first order associated with the shipment. Where no matching system value is found, the default value under NEW_CONSOL_SHIPMENT_TYPE is applied. If this value is also blank, the new consolidation shipment is assigned the shipment type of the first order associated with the shipment.
SHOW_INPUT_LINK_ON_TRANSACTION	This system value enables you to build in a link to the transaction that each item on the consolidation came from. It is useful for information and tracking purposes. However, this functionality does affect performance due to the cost of identifying and displaying this information.
PICK_BY_LOT	PICK_BY_LOT is used to determine whether lots are used during the consolidation picking process. This value behaves in the same way as PACK_BY_LOT.
PICK_BY_SERIAL_NUMBER	PICK_BY_SERIAL_NUMBER is used to determine if serial numbers are to be used during the consolidation picking process. This value behaves in the same way as PACK_BY_SERIAL_NUMBER.
PICKING_RECORD_SERIAL_NUMBER	This system value determines if serial numbers for item lines that are marked AT_SHIPPING_CAPTURE are captured during the picking process or later at packing time. If you want to capture them during picking, set this value to YES. Where the value is set

System Value	Details
	to YES, the user is prompted for the serial numbers during the picking process. The default value is NO, delaying the capturing of the serial numbers until packing.
NEW_INPUT_SHIPMENTTYPE	This system value specifies the transaction type to apply to the new consolidation. To enable the user to move order lines from one shipment to another, the current shipment must be enabled as a consolidation shipment. The system must create a replica picking shipment from which the current consolidation shipment is composed. This system value holds the shipment type to assign to the new replica picking shipments that are created. Where no value is specified, the new replica picking shipment is assigned the shipment type of the associated consolidation shipment.
NEW_INPUT_SHIPMENTTYPE {shipment type}	This system value is similar to the NEW_INPUT_SHIPMENT_TYPE system value but allows you to configure the replica picking shipment transaction type based on the shipment type currently assigned to the consolidation shipment.

Consolidations and Short Shipping

When you remove an item from a shipment, the outstanding item is displayed in QAD GTTE as an unassigned consolidation. You can add it to a new transaction for backordering. When the item becomes available, it can be consolidated onto another shipment.

Depending on your workflow, you may remove items as you pack. In this case, create a link to the Scan, Pack and Ship page from Consolidate and Ship. Set up the system value EXTRA_EXIT_LINKS_CONFIG as follows:

```
{
"width" : "160",
"links" : [{
"label" : "Packing",
"url" : "scan-pack-ship.htm?systemConfigCategory=SNPKSH",
"exitFn" : "controlledWebPageExitWithShipmentKeyParam"
```

}}

}

You can set this system value to link to any Standard Packing option. For more information, see the Short Shipping section in [Standard Packing on page 401](#).

Short Shipping System Values

There are five system values unique to Consolidate and Ship that you use when Short Shipping. The system values and their use are described in the table below.

Short Shipping System Values

System Value	Details
CONSOLIDATION PICKING MODE	In consolidation mode, this system value determines if you are packing as you add items to the consolidation. If set to NO, items are added to the consolidation and automatically packed. If set to YES, items are added to the consolidation and not packed. By default, the value is NO.
SHOW_INPUT_LINK_ON_PACK_LINE	This system value enables you to view the item line (Item Line Number) that is linked to the pack line. It is useful for information and tracking purposes. However, identifying and displaying this information affects performance.
PICK_BY_LOT	PICK_BY_LOT is used to determine whether lots are used during the consolidation picking process. This value behaves in the same way as PACK_BY_LOT.
PICK_BY_SERIAL_NUMBER	PICK_BY_SERIAL_NUMBER is used to determine if serial numbers are to be used during the consolidation picking process. This value behaves in the same way as PACK_BY_SERIAL_NUMBER
PICKING_RECORD_SERIAL_NUMBER	This system value determines if serial numbers for item lines that are marked AT SHIPPING CAPTURE are captured during the picking process or later at packing time. If you want to capture them during picking, set this value to YES. Where the value is set to YES, the user is prompted for the serial numbers during the picking process. The default

System Value	Details
	value is NO, delaying the capturing of the serial numbers until packing.

Inquiry

Note The Using Base section contains a description of the Inquiry functionality from a user perspective. For more information, see [Inquiry on page 141](#).

As an administrator, you can configure the appearance of the Inquiry page to suit the needs of your organization. This section lists the most commonly used Inquiry system values. For a full list of the Inquiry system values, refer to [Inquiry System Values on page 543](#). For general information on viewing and updating system values, see [System Values on page 473](#).

Configuring the Inquiry Page

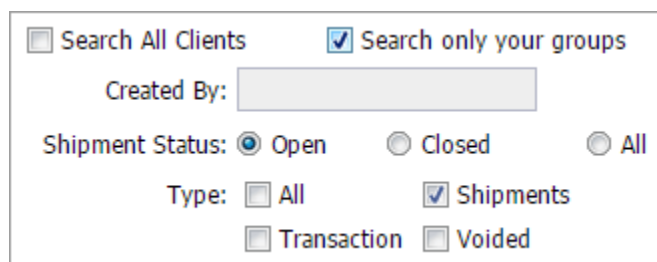
Configuring the Search Panel

Search All Clients/Search only your groups Fields

INQ:YOUR GROUPS ONLY MANDATORY

If you want to restrict users to searches within their own group, then set this system value to yes. In this case, the search option appears as in the image below. Search All Clients is not selected and Only Your Groups is selected. By default, this system value is set to no.

Your Groups Only Mandatory



Search All Clients Search only your groups
 Created By:
 Shipment Status: Open Closed All
 Type: All Shipments
 Transaction Voided

Created By Field

INQ CREATED BY FIELD DISABLED This system value is used in conjunction with INQ DEFAULT CREATED BY VALUE, and determines if you can enter a value in the Created By field. The image below shows the Created By field with a default user ID. The gray border around the field indicates that it is disabled.

Created By Field Disabled

By default, this value is set to no, which means that you can edit the Created By field. If you want this field to always contain a particular user ID, then set INQ CREATED BY FIELD DISABLED to yes and set the default user ID using INQ DEFAULT CREATED BY VALUE.

INQ DEFAULT CREATED BY VALUE

Use this system value to specify the default user ID in the Created By field. To specify the current user ID, set this value to *CURRENT. You can make the Created By field a read-only field by setting INQ DEFAULT CREATED BY FIELD DISABLED to yes.

Type Field

INQUIRY SEARCH TYPES

Use this system value to determine the types of transactions that the Inquiry search includes. The Type field in the Search panel reflects this system value. The format of the system value is a comma-separated list of entries in the format <TYPE>, <NAME>, where <TYPE> is a character representing a transaction type from option Z9, and <NAME> is a description of this transaction type, which appears as an option in the Type field. The All option is always available for the Type field.

The image below shows the Type field when the INQUIRY SEARCH TYPES system value is set to T,Transaction,S,Shipments,V,Voided.

If this system value contains an entry for transaction type S, then this option is selected, as in the image below.

Type Field

Select Criteria Field

INQ SEARCH FIELDS

This system value allows you to specify the search criteria available in the Select Criteria drop-down list.

Select Criteria Field

The screenshot shows a 'Search' panel with a 'Select Criteria:' dropdown menu. The menu is open, showing options: Reference, Description, Client, Consignor, and Customer. The 'Reference' option is highlighted. To the right of the dropdown is a 'Select a template...' dropdown menu and a 'Enter a template name...' input field with a save icon.

Shipments Panel**Shipments Grid Fields**

The INQ DYNAMIC GRID FIELDS system value allows you to dynamically show additional transaction columns in the Shipments grid.

The Inquiry screen also allows filtering over the dynamic columns that are added to the grid.

INQ DYNAMIC GRID FIELDS System Value

Category	Key	Description
ITRAX	INQ DYNAMIC GRID FIELDS	A comma-separated list of additional columns that display in the Inquiry results grid. Example: userDefinedField3,userDefinedField4,taxCode,...,flag4,bankDate

View last SQL query

The GENERIC - ALL SQL DEBUG system value allows you to display the view Last SQL query icon below the grid in the Shipments panel.

View Last SQL Query Icon

Shipments				
Client ^	Reference	Despatch Number	Despatch Date	Compliance Status
STGL	S00125999	0	11/09/2015	U
STGL	S00125880	0	11/09/2015	U
STGL	M223554	0	07/12/2016	
STGL	8160285	0	06/21/2016	FA
STGL	8000814	0	06/07/2016	
STGL	62982099	0	06/13/2016	U
STGL	1000229	0	04/28/2016	PA
STGL	0333081	0	06/29/2016	

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Maximum Export Size

The REPORT: MAX EXPORT SIZE system value allows you to limit the number of rows that you can export from the search results generated by clicking the Search and Export button.

REPORT: MAX EXPORT SIZE System Value





Category	Key	Description
ITRAX	REPORT: MAX EXPORT SIZE	Specify the maximum number of rows that it is possible to export to Excel from the Inquiry search results grid. Example: 100000

Shipment Line Details Panel

Documents Tab

The INQ DOCUMENTS PRINTED ONLY and INQ DOCUMENTS HIDDEN DOCS system values allow you to determine the documents that appear in the Documents tab.


Documents Tab with Documents

Packages		Items		Documents		Parties		Charges		Errors		Texts	
Document				Search									
		Document Type	Document	Image	Description								
		00	INV1E										
		01	PACK1										
		50	UPS_DOM										

Packages Tab

The [CARRIER_CODE]: TRACKING SITE system value allows you to add links to Tracking Web pages provided by carriers.

Package Tab with Tracking Link

Packages		Items		Documents		Parties		Charges		Errors		Texts	
Tracking Number				Search									
	Pack Number	Pack Type	Tracking Number	RFID Tag									
	1000003124	LETTER	1Z1234510400457731										

Adding Dynamic Fields to the Inquiry Screen

Use dynamic fields to add extra predefined fields to the **Inquiry** screen. You can add dynamic fields using the system value INQ DYNAMIC GRID FIELDS. For the list of dynamic fields, see [List of Dynamic Fields on page 549](#).

1. Open the **System Values** screen (menu option FNDCY3).
2. Click the Database tab.
3. In the Category field, enter the category ITRAX.
4. In the Key field, enter the key INQ DYNAMIC GRID FIELDS.
5. Click Search.
6. Navigate to the INQ DYNAMIC GRID FIELDS system value, then double-click the Value field.
7. In the Value field, enter the names of the dynamic fields from [List of Dynamic Fields on page 549](#) that you want to add to the **Inquiry** screen; for example, taxCode,bankDate. Separate the fields by commas. Do not add spaces between the values.
8. Click Update.
9. Ensure the In Use field is set to true.
10. Open the **Inquiry** screen (menu option REPORT).

11. Scroll to the right of the grid in the Transactions panel. You and other users should be able to see the new dynamic fields at the end of the grid.

Filtering by Dynamic Fields on the Inquiry Screen

You can use dynamic fields as filters on the **Inquiry** screen.

1. Open the **Inquiry** screen (menu option REPORT).
2. In the Search panel, from the Select Criteria dropdown menu, select a dynamic field that is defined in the [INQ DYNAMIC GRID FIELDS system value on page 463](#).
3. Optionally, to add another dynamic field as a filter, repeat Step 2.
4. Hover over the gray dynamic field bubble or bubbles that were added to the Search panel when you selected the criteria; for example, Tax Code. A new dropdown menu is displayed.
5. From the dropdown menu, select equals, contains, starts with, or ends with.
6. In the field on the right of the dropdown menu, enter a value to filter the transactions by.
7. Optionally, to remove the filter, click the x on the bubble you want to remove.
8. To filter the results in the Transactions panel by the dynamic field values, click Search.

Manual Shipment

Before configuring Manual Shipment, it is recommended that you read [Manual Shipment on page 153](#) for a description of how the manual shipment functionality works from a user perspective. There are three ways of implementing manual shipment functionality in the Web UI, as shown in the table below.

Manual Shipment Functionality

Implementation Option	Features
Stand-alone Manual Shipment Screen (MANSH)	A stand-alone page that enables you to create a shipment in QAD GTTE.
Workflow Task	A pop-up in Workflow that allows you to create a manual shipment.
Desktop Shipping	Desktop Shipping is outside the scope of this document. See TMS documentation for more details.

Stand-alone Manual Shipment Page

The stand-alone manual shipment functionality, option MANSH, captures partner and product information and enables you to create a shipment. For the functionality to work, it requires a listener. An XML message containing the shipment details is created, and the Progress4GL listener creates the manual shipment. This listener should already be set up for you. The manual shipment page allows users to create a shipment by completing the fields displayed in the image below.

Default Create Manual Shipment Page

Stand-alone Manual Shipment Page System Values

The image above shows the default layout of this page. Although some of the fields on this page are mandatory, you can add or remove a number of fields from the Create Manual Shipment page. You can tailor the page to suit the needs of specific users or clients, and you can specify default values for a field. For example, if a user always creates EX type shipments, the Shipment Type field could default to EX for convenience.

You can change the appearance of a field by accessing the associated system value in the Windows UI or Web UI. The table below lists the system values that you can edit to change the appearance of the stand-alone manual shipment page.

System Values for Stand-alone Manual Shipment Page

Key	Category	UI Availability
DEFAULT SHIPMENT TYPE	SHIPMENT	Windows
DEFAULT CURRENCY	SHIPMENT	Windows
DEFAULT CONSIGNOR	SHIPMENT	Windows
SHOW MANU SHIP SPS TAB	ITRAX	Windows

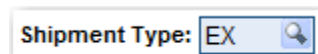
Key	Category	UI Availability
MANUAL SHIPMENT HEADER 1	Manual Shipment Settings or ITRAX	Web or Windows
MANUAL SHIPMENT HEADER 2	Manual Shipment Settings or ITRAX	Web or Windows
MANUAL SHIPMENT DETAILS 1	Manual Shipment Settings or ITRAX	Web or Windows
MANUAL SHIPMENT DETAILS 2	Manual Shipment Settings or ITRAX	Web or Windows
MANUAL SHIPMENT FOOTER 1	Manual Shipment Settings or ITRAX	Web or Windows
MANUAL SHIPMENT FOOTER 2	Manual Shipment Settings or ITRAX	Web or Windows
MANUAL SHIPMENT SHOW DETAILS 1	Manual Shipment Settings or ITRAX	Web or Windows
MANUAL SHIPMENT SHOW DETAILS 2	Manual Shipment Settings or ITRAX	Web or Windows
MANUAL URL	ITRAX	Windows

See [System Values on page 473](#) for more information on how to edit system values.

DEFAULT SHIPMENT TYPE

This value determines the contents of the Shipment Type field in the second column of the Create Manual Shipment page. By default, this field is left blank. If you want it to default to a particular shipment type, enable the In Use option and enter a shipment type in the text box.

Shipment Type Field

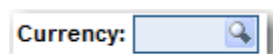


Shipment Type:

DEFAULT CURRENCY

This value determines the contents of the Currency field in the second column of the Create Manual Shipment page. You can set this value to any valid currency.

Currency Field

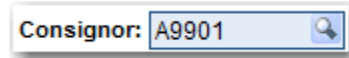


Currency:

DEFAULT CONSIGNOR

This value determines the contents of the Consignor field in the first column of the Create Manual Shipment page. By default, this field is left blank. If you want it to default to a particular consignor, enable the In Use option and enter the code for the consignor in the text box.

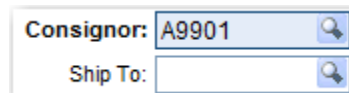
Consignor



MANUAL SHIPMENT HEADER 1

This value determines if the Consignor and Ship To fields appear in the first column of the Create Manual Shipment page. By default, both fields are displayed and the Value field contains the values CONSIGNOR,SHIPTO. To remove a field from the Create Manual Shipment page, remove the value from this list. To remove both fields from the page, set the value to *NONE.

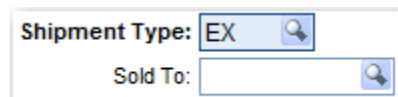
Manual Shipment Header 1 Fields



MANUAL SHIPMENT HEADER 2

This value determines if the Shipment Type and Sold To fields appear in the first column of the Create Manual Shipment page. By default, both fields are displayed and the Value field contains the values SHIPMENT_TYPE,SOLDTO. To remove a field from the Create Manual Shipment page, remove the value from this list. To remove both fields from the page, set the value to *NONE.




Manual Shipment Header 2 Fields



MANUAL SHIPMENT DETAILS 1

This value determines the ship to address fields that appear in the first column of the Create Manual Shipment page. By default, all fields are displayed and the Value field contains the values CONSIGNEE,CONTACT,ADDRESS_1,ADDRESS_2,ADDRESS_3,ADDRESS_4,CITY,STATE-PR OVINCE,PHONE,POSTAL-ZIP-CODE,CONSIGNEE_COUNTRY. To remove a field from the Create Manual Shipment page, remove the value from this list. To remove all fields from the page, set the value to *NONE.



Manual Shipment Details 1 Fields

Consignee:	<input type="text"/>
Contact:	<input type="text"/>
Address 1:	<input type="text"/>
Address 2:	<input type="text"/>
Address 3:	<input type="text"/>
Address 4:	<input type="text"/>
City:	<input type="text"/> 
State/Province:	<input type="text"/>
Phone:	<input type="text"/>
Postal/Zip Code:	<input type="text"/> 
Consignee Country:	<input type="text"/> 

MANUAL SHIPMENT DETAILS 2

This value determines the sold to address fields that appear in the second column of the Create Manual Shipment page. By default, all fields are displayed and the Value field contains the values NAME,CONTACT_NAME,CUST_,ADDRESS_1,CUST_ADDRESS_2,CUST_ADDRESS_3,CUST_ADDRESS_4,CUST_CITY,CUST_STATE-PROVINCE,CUST_PHONE,CUST_POSTAL-ZIP-CODE,CUSTOMER_COUNTRY. To remove a field from the Create Manual Shipment page, remove the value from this list. To remove all fields from the page, set the value to *NONE.

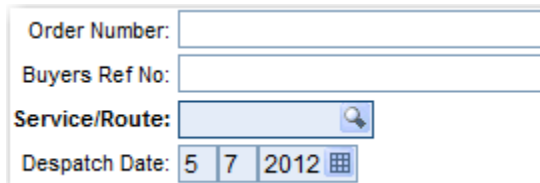
Manual Shipment Details 2 Fields

Name:	<input type="text"/>
Contact Name:	<input type="text"/>
Address 1:	<input type="text"/>
Address 2:	<input type="text"/>
Address 3:	<input type="text"/>
Address 4:	<input type="text"/>
City:	<input type="text"/>
State/Province:	<input type="text"/>
Phone:	<input type="text"/>
Postal/Zip Code:	<input type="text"/> 
Customer Country:	<input type="text"/> 

MANUAL SHIPMENT FOOTER 1

This value determines the fields that appear below the ship to address in the second column of the Create Manual Shipment page. By default, all fields are displayed and the Value field contains the values ORDER_NUMBER,BUYERS_REFNO,SERVICE-ROUTE,DESPATCH_DATE. To remove a field from the Create Manual Shipment page, remove the value from this list. To remove all fields from the page, set the value to *NONE.

Manual Shipment Footer 1 Fields

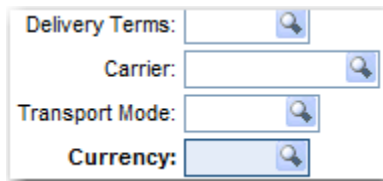


A screenshot of a web form titled "Manual Shipment Footer 1 Fields". It contains four input fields: "Order Number:" (text), "Buyers Ref No:" (text), "Service/Route:" (text with a search icon), and "Despatch Date:" (calendar picker showing 5/7/2012).

MANUAL SHIPMENT FOOTER 2

This value determines the fields that appear below the sold to address in the second column of the Create Manual Shipment page. By default, all fields are displayed and the Value field contains the values DELIVERY_TERMS,CARRIER,TRANSPORT_MODE,CURRENCY. To remove a field from the Create Manual Shipment page, remove the value from this list. To remove all fields from the page, set the value to *NONE.

Manual Shipment Footer 2 Fields



A screenshot of a web form titled "Manual Shipment Footer 2 Fields". It contains four input fields, each with a search icon: "Delivery Terms:", "Carrier:", "Transport Mode:", and "Currency:".

MANUAL SHIPMENT SHOW DETAILS 1

This value determines if the Overwrite Address field in the first column of the Manual Shipment page is selected. By default, this field is selected. To clear the field, select no from the Value list on the System Value Setup page in the Web UI.

MANUAL SHIPMENT SHOW DETAILS 2

This value determines if the Overwrite Address field in the second column of the Manual Shipment page is selected. By default, this field is selected. To clear the field, select no from the Value list on the System Value Setup page in the Web UI.

MANUAL URL

When a shipment is created, the results page shows the generated shipment reference number. This number is associated with a hyperlink. The hyperlink can be configured using this system value. The value allows a number of substitution tokens that are replaced with the shipment details.

<client> (e.g. "TGL")

<transactionclient> (e.g. "STGL")

<reference>

<consignor>

To link to the Inquiry page, the hyperlink value needed is:

```
/precision/servlet/controller?update=Update&method=get&style=inquiry-header
&uid=tx-;;;0&request=Shipment
```

Pop-up in Workflow Workbench

To add a button to the workflow toolbar that allows you to invoke the Manual Shipment page from Workflow, add the following to the TOOLBAR - S system value:

```
label:Manual Shipment;tooltip:Create Manual
Shipment;option:WFONWS;icon:icon14;width:900;height:600
```

Workflow System Values

The Manual Shipment page in Workflow can also be adjusted by using system values. The possible changes are documented here. Other changes to this page are not possible at this time. For an explanation of this page from a user perspective, see [Creating a Manual Shipment in the Workflow Portal on page 157](#).

System Values for Standalone Manual Shipment Page

Key	Category	UI Availability
CREATESHIPMENT- [TEMPLATENAME]	ITRAXSTORE	Windows
CREATE - ONCE OFF CODE	Workflow Portal or WORKLOAD	Web or Windows
CREATE - WEIGHT FORMAT	Workflow Portal or WORKLOAD	Web or Windows
UOM - DEFAULT PROD	SYSTEM	Windows
UOM - DEFAULT MASS	SYSTEM	Windows

Key	Category	UI Availability
UOM - DEFAULT VOLUME	SYSTEM	Windows
DEFAULT CURRENCY	SYSTEM	Windows

CREATESHIPMENT-[TEMPLATE NAME]

Details of a saved template are stored in this system value. The system value key corresponds to the template name. Templates are saved at a user level and are only available to that user by default. To make a template global, copy the user level system value.

CREATE - ONCE OFF CODE

This system value defines the partner code to be used as the ship-to when the shipment is a once-off shipment and the ship-to details are not set up as a record in the partner table. The default value is ONETIME.

CREATE - WEIGHT FORMAT

This system value can be set to LB or LB/OZ. If set to LB/OZ, the weight field is split in two so the user can enter a specific pounds value and ounces value. Otherwise, there is only one weight input field. The default value is LB.

UOM - DEFAULT PROD

This system value allows you to specify a default quantity unit of measure. The default value is LTR.

UOM - DEFAULT MASS

This system value sets the default for the weight unit of measure. The default value is LB.

UOM - DEFAULT VOLUME

This system value sets the default for the volume unit of measure. The default value is CF.

DEFAULT CURRENCY

This system value sets the default currency. The default value is USD.

System Values

System values allow you to configure the appearance and behavior of the Web UI. For example, you can add and remove tabs and fields, make fields read-only, or make fields default to certain values. System values also allow you to make changes to the system, such as enabling permissions. You can configure system values at group level, client level, client/user level, and user level. This online help section describes how to access and edit system values using the **System Values** screen.

System Values Screen

The **System Values** screen, menu option FNDCY3, allows you to view and update system values. It is part of the Foundation Portal.

The Foundation Portal, menu option FOUND, consists of a number of screens that you can access by clicking the corresponding link in the Foundation Menu Panel.

Most screens in the Foundation Portal, including the **System Values** screen, contain:

- A Home link to the QAD GTTE home screen.
- The Foundation Menu Panel on the left of the screen, which provides links to the Foundation screens. It is divided into a number of sections, including System Configuration, Screen Metadata, Utilities, Store, and Database. Search for Foundation screens using the Menu Search text box at the top of the panel. Collapse the Foundation Menu Panel by clicking the left arrow at the top right of the panel. Similarly, expand the Foundation Menu Panel by clicking the right arrow at the top right of the collapsed panel.
- An Information Panel, which includes:
 - A template menu, which allows you to save a combination of search, sort, and filter queries configured in the browse grid and search panel. These queries determine the results that display in the browse grid. To save a template, click the check icon. To select an existing template, click the arrow in the Select a Search Template field and then click the template that you want.
 - A search panel, which allows you to search the records in the browse grid based on key attributes. To search records, complete one or more of the search fields and click the Search button, or press Enter in a search field. Search results display in the browse grid. Search fields accept wildcard searches (*). To clear the search field, click the Clear button.
 - A browse grid, which contains records relevant to the particular Foundation screen that you are on; for example, system values. The records in the grid depend on the search criteria specified in the search panel. In some Foundation screens, the grid includes a column with a button to access sub-options relevant to the type

of record; for example, each record in the Locales grid includes a Locale Documents sub-option. There are no sub-options available for system value records. Grid columns provide filter and sort options, which allow you to narrow down search results. You can also move columns around or hide columns in the grid. For more information, see the detailed explanations of this functionality in the [FBAP Portal on page 1325](#) section of the help.

- A toolbar, which relates to the browse grid content. It displays the number of results pages returned in a search, and allows you to perform actions on one or more records.

Use the search panel to search for system values by category, key, user, client, environment, group, value, and the last user who modified them. Search results appear in the browse grid.

The columns that you can make visible in the grid of system values are listed in the following table.

System Values Grid Columns

Field	Description
Category	The category associated with the system value.
Key	The key associated with the system value
Value	The value assigned to the system value. When the system value exists in the database, the In Use field is set to true, and the value field is blank, the default value for the system value applies.
User	The user associated with the system value. For more information, see System Value Granularity on page 476 .
Client	The client associated with the system value. For more information, see System Value Granularity on page 476 .
Group	The group that the system value is associated with, if applicable. For more information, see System Value Granularity on page 476 .
In Use	This field must be selected for the system value to take effect. To disable the system value, clear this field.
Environment	The environment that the system value relates to.
Last Modified User	The user who most recently modified the system value.
Last Modified ID	The ID of the user who most recently modified the system value.

Field	Description
Last Modified Time	The time when the system value was most recently modified.
Last Modified Date	The date when the system value was most recently modified.

To copy or delete a system value, select the system value in the grid and click the appropriate button in the toolbar below the grid.

To update a system value, double-click the relevant row in the grid or select the row and click the appropriate button in the toolbar below the grid. In the Update System Values dialog, edit the appropriate fields and click Save. A message appears at the top of the screen to advise you that the system value and the cache were updated successfully

Important After you update a system value, in a multi-instance environment, ensure that you clear the system value cache so that your update takes effect. To clear the system value cache, go to **Clear Caches**, menu option ADMIN, and click the Clear System Value Cache button. In a single-instance environment, you don't have to clear the cache manually. If you are unsure if your environment is a single-instance or multi-instance environment, check with your administrator.

To create or update the system value rule, select the system value in the grid and click the Edit Rule button in the toolbar below the grid. When you click Edit Rule and the rule does not already exist, the Create System Value Rule pop-up dialog opens. When you click Edit Rule and the rule already exists, the Update System Value Rule pop-up dialog opens. Complete and save the field values:

Category

This field is read only and displays the system value category.

Key

This field is read only and displays the system value key.

Description

The system value description.

Note

A note related to the system value.

Value Type

The acceptable value type for the system value.

Maximum Length

The maximum length, in characters, of the system value.

Maximum Decimals

The maximum decimal

User Level

If this system value is at the user level, this field is selected.

Mandatory

If this system value is mandatory, this field is selected.

Important GTTE supports only one system value rule for each system value, even if that system value has multiple values at different levels of granularity. You can create or update the system value rule by selecting any of the related system values. After you create the system value rule, it is not possible to delete it.

The Edit Template button in the toolbar below the grid allows you to update the system values that control the Desktop Shipping templates. For more information, see [Setting Up Desktop Shipping Wizard Steps on page 1684](#).

System Value Granularity

You can set system values at different levels of granularity. System values applied at lower levels of granularity override system values at higher levels of granularity

System Value Granularity

Granularity	Level	Scope
Lowest	Client and user	A client/user level system value allows you to assign different values to a system value for a user depending on the client the user chooses when logging in. System values created at this granularity apply only to the specific user who has logged in for the specific client, and as such are very specific in their application.
	User	A user-level system value applies to a particular user regardless of the client that they specified on login. You can specify the user associated with the system value using the User field in the Category Values table.
	Group and client	A group/client level system value allows you to assign different values to a system value for a user group depending on the client that member of the user group chooses when logging in.
	Client	A client system value applies to all users logged in using a particular client. You can

Granularity	Level	Scope
		specify the client associated with the system value using the Client field in the Category Values table.
	Group	<p>A client system value applies to all users logged in using a particular client. You can specify the client associated with the system value using the Client field in the Category Values table.</p> <p>Group-level system values are very useful when there are a few distinct groups of users for which a system value applies, and there are a large number of users in the organization; for example, the popular links that appear on the home page for regular users may differ from the links for users with higher privileges. Rather than setting up the link system values for each user, you can use two user groups along with a single system value for each of these groups.</p>
Highest	Global	If there is no client, group, or user associated with a system value, then it applies to all users.

System Value Groups

To create a system value at the group level, create the user group in option GU and set the User Group Responsibility Field to SYSTEM_VALUE_GROUP. For more information on creating user groups, see the [Creating a User Group for a Permission Set](#) section in [Configuring Permissions on page 249](#).

Translations

The translations facility allows translation administrators to change the text strings—also known as literals—that appear in the UI. There are a number of different ways to use the translations facility:

- Replace English terms in the UI with other English terms; for example, your organization uses the word delivery instead of shipment.
- Create new non-English languages. You can create a language based on one of the non-English core language packs.
- Include translations for UI customizations. For example, you add a button and tooltip for a task within the Workflow page; the translations facility allows you to add a translation for the button label and tooltip. This capability is an advanced feature.

You can add a translation on one of three levels:

- System level: Changes apply throughout the UI. All pages support this feature.
- Page level: Changes apply to the current page only. Use this option if the translation is context-specific and the general translation is insufficient to convey understanding. Not all pages support this feature.
- Widget attribute level: Changes apply to the current widget or page element only. For example, you want to increase the size of a button to better display the action text for a given language. This capability is an advanced feature and beyond the scope of this document.

Language Pack and Deployment

Translation literals are loaded into the database using XML content files. When the Web UI is installed, a language pack exploded WAR file is deployed in the JBoss deploy folder. The LANG_PACK_DIR system value should point to this exploded WAR file at ...PRECISION\WebUI\jboss\server\default\deploy\precision-webui-translation.war

Assigning Translation Administrator Privileges

To create and edit translations, a user must have translation administrator privileges. To give users translation permissions, set the TRANSLATION_ADMIN system value to true. You can give a translator system or page-level privileges by setting the system value TRANSLATION_ADMIN_ROLE, as displayed in the table below.

System Values Related to Translations

Category	Key	Description
TRANSLATE	TRANSLATION_ADMIN	Controls whether a user has access to the translations facility. Possible values:

Category	Key	Description
		<p>true - user has access to the translations facility.</p> <p>false - user does not have access to the translations facility.</p>
TRANSLATE	TRANSLATION_ADMIN_ROLE	<p>This system value controls the level at which the user can apply translations by making certain tabs in the Translate Web UI Literals window visible. Before applying this system value to a user, set the TRANSLATION_ADMIN system value to true for that user.</p> <p>Possible values:</p> <p>GLOBAL_TRANSLATE_USER - the user has access to the System literals tab in the Translate Web UI Literals window, and translation updates apply to all of the Web UI.</p> <p>PAGE_TRANSLATE_USER - the user has access to the System literals and Page literals tabs in the Translate Web UI Literals window, and so can apply translation updates to all Web UI pages or to the current Web UI page.</p> <p>any other value (including blank, which is the default value) - the user has access to all five tabs in the Translate Web UI Literals window, and can apply translations at system and page level and modify widget attributes.</p> <p>For information on the Translate Web UI Literals window, see Translating Web UI Literals on page 483.</p>
TRANSLATE	LANG_PACK_DIR	<p>The path to the exploded language pack installed with QAD GTTE.</p> <p>Default value: ...\\PRECISION\\WebUI\\jboss\\server\\default\\deploy\\precision-webui-translation.war</p>
TRANSLATE	TRANSLATION_ADMIN_ROLE	<p>INCSIDE_WIDGETS on the Translate Web UI Literals window</p>

Category	Key	Description
		<p>that you want to hide from the user. The default system value contains the full list of widgets that it is possible to hide.</p> <p>The system value is disabled by default. To enable it, set the value of the In Use field to true. You can then include the values for the widgets that you want to hide from the Translate Web UI Literals window.</p> <p>Possible values:</p> <p>createPageLiteralBtnId,editPageLiteralBtnId,deletePageLiteralBtnId,pageLiteralSeperator, ,editPageLiteralTranslateBtnId, delPageLiteralTranslateBtnId,pageLiteralTranSeperator,editPageGlobalLiteralBtnId,delGlobalLiteralTranslateBtnId,globalLiteralTranSeperator,gener ateTranFileSeparator,uploadJsLiteralTranSeperator, ,globalLiteralTranSeperator,uploadJsPageLiteralBtnId,uploadJaPageLiteralBtnId,uploadGlobalTranslationLiteralBtnId,uploadLit ortUntranslatedLiteralBtnId,exportLiteralSeperator,generateJsTrnslationFileBtnId,generateJsDynamicFileBtnId,generateTranFile eparator,generat eAllJsTranFilesBtnId,generateAllTranFilesSeparator, ,createGlobalLiteralBtnId,editGlobalLiteralBtnId,deleteGlobalLit eralBtnId,globalLiteralSeperator,editGlobalLiteralTranBtnId,delG lobalLiteralTranBtntl d,globalTranLiteralSeperator, ,uploadHardcodedPageLiteralBtnId, ,translateValidateIdLengthBtnId,createWidgetOverrideBtnId,dro ColumnBtnId, editWidgetOverrideBtnId,deleteWidgetOverrideBtnId,applyAsDe faultSeparator,applyUserConfigAsDefautBtnId,psltbseparator, ,translationGlobalLiteralsPanelId,translationPageLiteralsPanello ranslateHardcodedPanelId,translateHardcodedWidgetPanelId, uploadAllJsPageLiteralBtnId,uploadAllJsFilesSeparator</p>
TRANSLATE LANGUAGE_<LANG_	CODE	<p>System Based on applies to languages that you create within QAD GTTE using the DL menu option. It identifies the existing</p>

Category	Key	Description
		<p>language that the new language is based on.</p> <p>Possible values: A language code representing a language stored in QAD GTTE. Languages codes are listed in the DL option.</p> <p>Example: If you create a new language based on English and assign it the language code ENX, then the associated system value is LANGUAGE_ENX_BASED_ON, and its value is ENG.</p> <p>The convention for customized languages is to end the language code with the letter X. This approach avoids conflicts with base languages during an upgrade; none of the base released languages end with X.</p>

Note To see the effect of changing the TRANSLATION_ADMIN and TRANSLATION_ADMIN_ROLE system values described in the table above, the user must refresh the Web UI page in the browser.

Note It is important to test translation changes with a user that is not configured as a translation administrator. This is because the literal data used on Web UI pages is sourced from different locations depending on whether the TRANSLATION_ADMIN system value is set to true or false.

Note When translation administration privilege is activated for a user, it puts a greater load on the database and network as each page is loaded. When there are only a few translation administration users, this additional load has a negligible effect. When there are a lot of translation administration users, this additional load can cause a significant decline in database and network performance. Therefore, consider the number of users with translation administration privilege carefully.

Creating Custom Languages

You can create a language based on one of the primary languages. Copy an existing language in the database.

Creating a Language Based on English

1. Access the DL menu option.
2. The Language page displays, with the list of languages available in QAD GTTE. Select English as the language that you want to copy.
3. Click the copy button on the menu below the table. The Language [Copy] pop-up window displays, as shown in the image below.

Language [Copy]

The screenshot shows the 'Languages' table with the following data:

Language	Description	Primary language	In Use
CHI	中文 (简体) / Chinese (S)		✓
D/B	virtual field indicator		✓
DUT	Nederlands / Dutch		✓
EN2	English 2 Uppercase		✓
ENG	English		
ENX	Customer English		
ESL	Español de América Lat/S		
FRE	Français / French		
GER	Deutsch / German		
ITL	Italiano / Italian		
JPN	日本語 / Japanese		
KO	Korean		
KOR	한국인 / Korean		
LKN	Release Test Language		
PAM	Pattys Test Language		
PMU	Paul English		
PTB	Português do Brasil/Portug		
RON	Român		
RUS	Русский / Russian		
SPA	Español / Spanish		
TST	Test English		
ZHO	正體字/繁體字 / Chinese (T)		✓

The 'Language [Copy]' pop-up window contains the following fields and options:

- Language: ENG
- Description: English
- Primary language
- In Use
- UTF-8 Language
- UTF-8 Font: []
- Web Language: en

4. Complete the fields in the Language [Copy] pop-up window:

- **Client:** This field is read only.
- **Language:** Specify a language code for the new language.

Note The convention for customized languages is to end the language code with the letter X. This approach avoids conflicts with base languages during an upgrade; none of the base released languages end with X.

- **Description field:** Enter a description of the new language.

Web Language: Specify a web language code. The naming convention is to add `_xx` to the language abbreviation. For example, `en_xx` is a language built on English. This code is used as the name of the resource file containing the translations for this new language.

Primary Language: This option allows you to set your new language as the primary language. Before you select this option

for your new language, clear the Primary Language field on the original language.

In Use: If you want this language to be available in the UI, then select this option.

Now that the language has been created, you can select it from the Language drop-down menu on the QAD GTTE login page. When you log in using the new language, you can click the translation icon to edit the translations in the new language.

Note The Web UI caches languages. If you use the Windows UI to create the language record, then clear the Web UI cache before viewing the language in the Web UI. To clear the Web UI cache, in the ADMIN option, click Clear Translation Literals File.

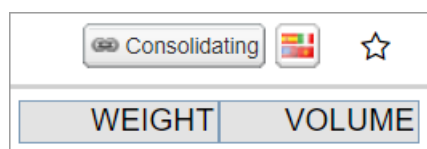
Creating a Language Based on a Non-English Language

If a language is based on English, it is based on the hard-coded page literals. However, if you are creating a language based on a primary language other than English, it is based on a language pack delivered with QAD GTTE. Therefore, in addition to the steps in *Creating a Language Based on English*, specify the relevant primary language using the LANGUAGE_<LANG_CODE>_BASED_ON system value.

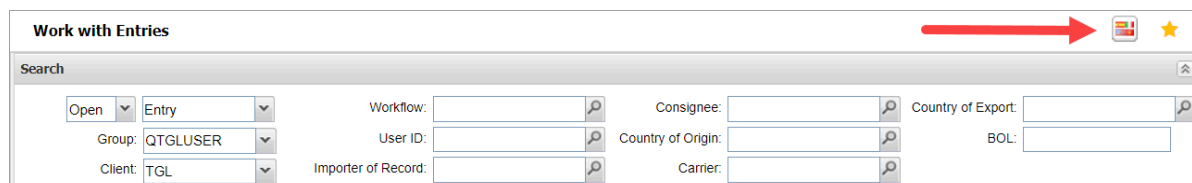
Translating Web UI Literals

When you have created a language, you can log in to the Web UI using this language and update the translations of literals. When a translation administrator logs in, a translate button displays on pages that offer the translation functionality, as shown in the images below.

Translate Button on Scan, Pack and Ship Page



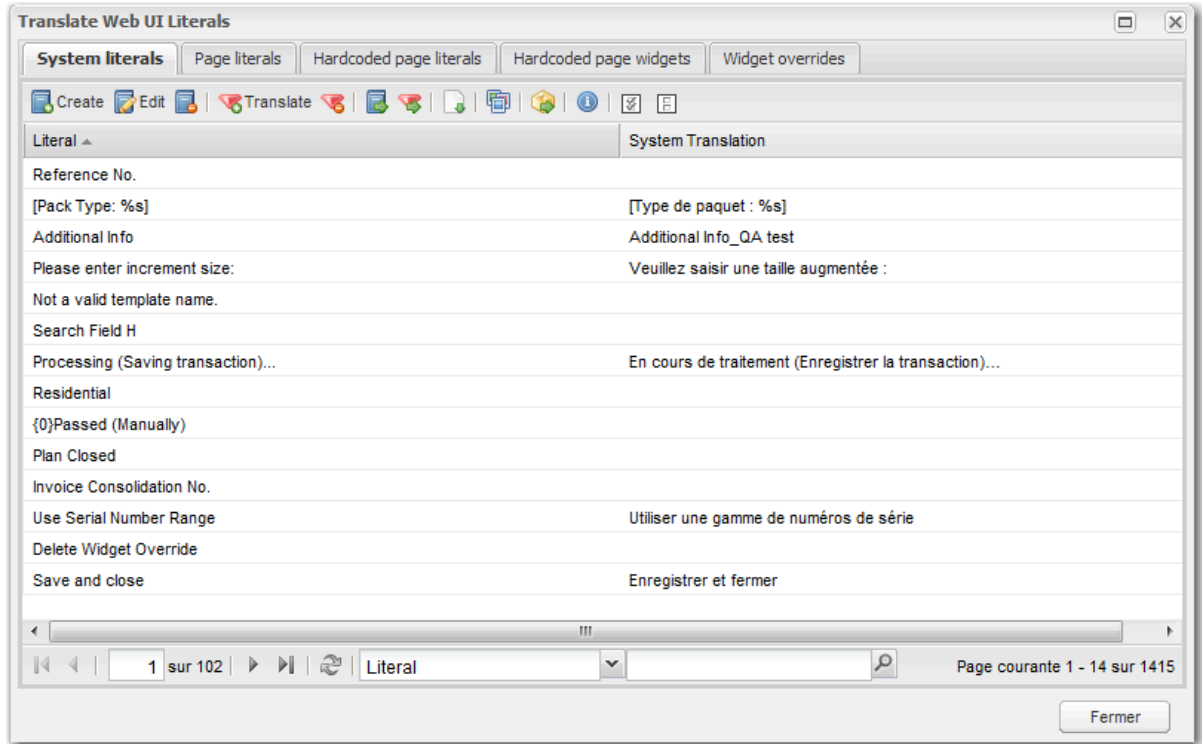
Translate Button on Workflow Portal Page



Note The translation functionality is being introduced gradually. Currently, the Login, Home, Inquiry, Desktop Shipping, and Cancel or Reprint Label pages do not support page-level translation. If a page does not display the translate button, then that page supports system-level translation only.

Click the Translate button to open the Translate Web UI Literals window.

Translate Web UI Literals



Depending on the contents of the TRANSLATION_ADMIN_ROLE system value, up to five tabs can be displayed in this window.

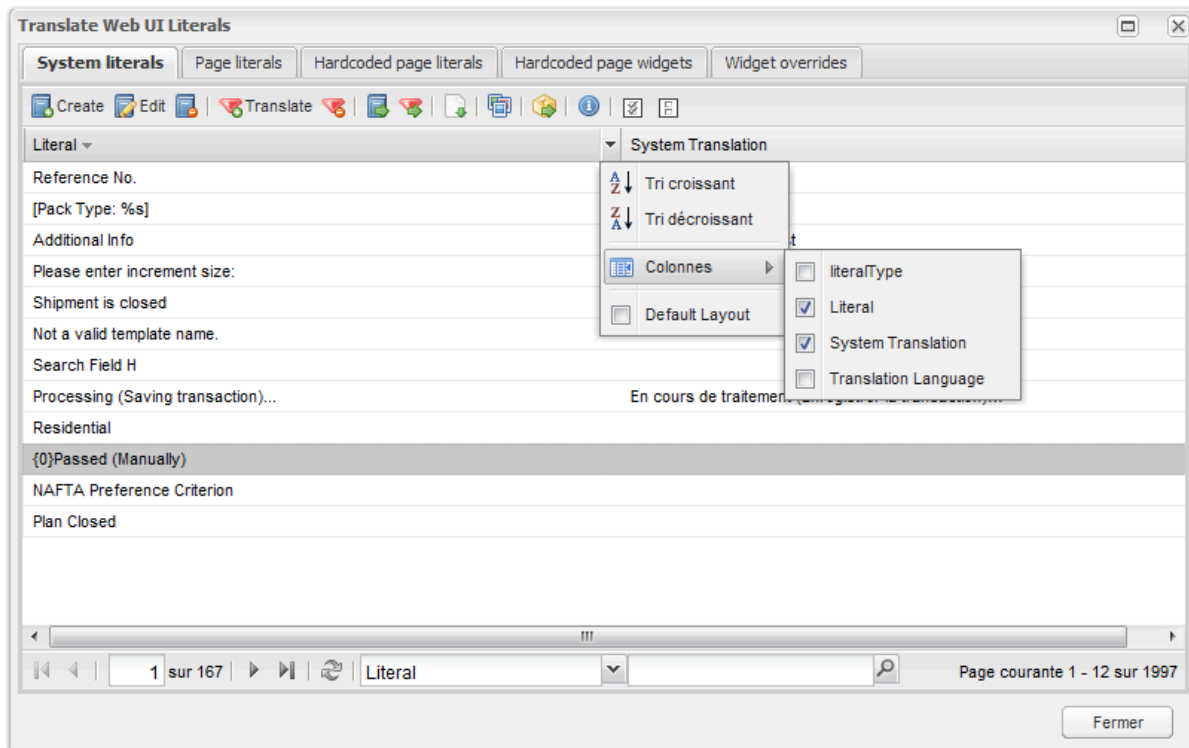
- If TRANSLATION_ADMIN_ROLE is set to GLOBAL_TRANSLATE_USER, only the System literals tab appears.
- If TRANSLATION_ADMIN_ROLE is set to PAGE_TRANSLATE_USER, the System literals and Page literals tabs appear.
- If TRANSLATION_ADMIN_ROLE is left blank, all five tabs appear, as in the image below.

Implementing a Translation Throughout the Web UI

The System literals tab lets you implement translation changes across all pages of the Web UI. This tab displays a list of system literals, along with corresponding system translations.

By default, the Literal and System Translation columns appear in the header row at the top of the list. You can configure the columns that appear. Click the arrow in any field in the header row, click Columns, and select the fields you want to display.





System Literals Tab Columns












If the list of system literals extends beyond one page, you can scroll through the list by clicking the left and right arrows at the bottom of the window. It is possible to search on different criteria using the drop-down search menu. This capability allows you to search through all literals or system translations. You can view a list of the literals that have no system translations by choosing No System Translation from the drop-down search menu.

There are a number of buttons above the list of system literals, which allow you to carry out different functions.

System Literal Buttons

Button	Function
	Create system literal. If you see some text on the page that does not have a corresponding system literal, you can add it to the list of system literals by clicking this button.
	Edit system literal. This option allows you to update an existing literal.
	Delete system literal. You can delete system literals that are no longer needed.
	Create/Edit system literal translation. Select a literal from the system literals table and click this button to enter a

Button	Function
	new translation in the System Translation field. The new translation appears on the page immediately, with no need to explicitly update the page.
	Delete system literal translation. You can delete system translations that are no longer necessary
	<p>Upload Java system literals from file. You can upload system literals from a file rather than creating them one by one using the Translations Web UI interface. The format of this file is as follows:</p> <ul style="list-style-type: none"> • Each literal has its own line. • There can be no leading or trailing spaces. • The # character is used for commenting. • The substitution token format {0} is used.
	Upload system translation literals from CSV file. (During the upload '&comma ;' is replaced with ';'). You can upload system translations from a CSV file rather than adding them one by one using the Translations Web UI interface. Each line in this CSV file has the following format: SYSTEM LITERAL, translated literal.
	Export untranslated literals to file. This option allows you to export all untranslated literals to an Excel file. You can then add translations to the Excel file and upload them to the system.
	Generate All JavaScript Translation Files. This updates the JavaScript files for the UI, so that all users can see the latest translations.
	Upload JavaScript page literals from all files. QAD GTTE tracks the literals for translation for a specific web page. This button uploads this information into the system and displays the data as page literals. Where a corresponding system literal does not exist for a page literal, it is created as part of the upload. The system values in the category TRANSLATION that have a key that starts with JSFILE_ identify the file that is to be uploaded for the various Web UI pages or options.
	Show translation system information. This option identifies the primary language that the user language is based on. It also provides useful information for debugging purposes.
	Select system literals. This option allows you to select all the literals in the list. You may want to select the literals before

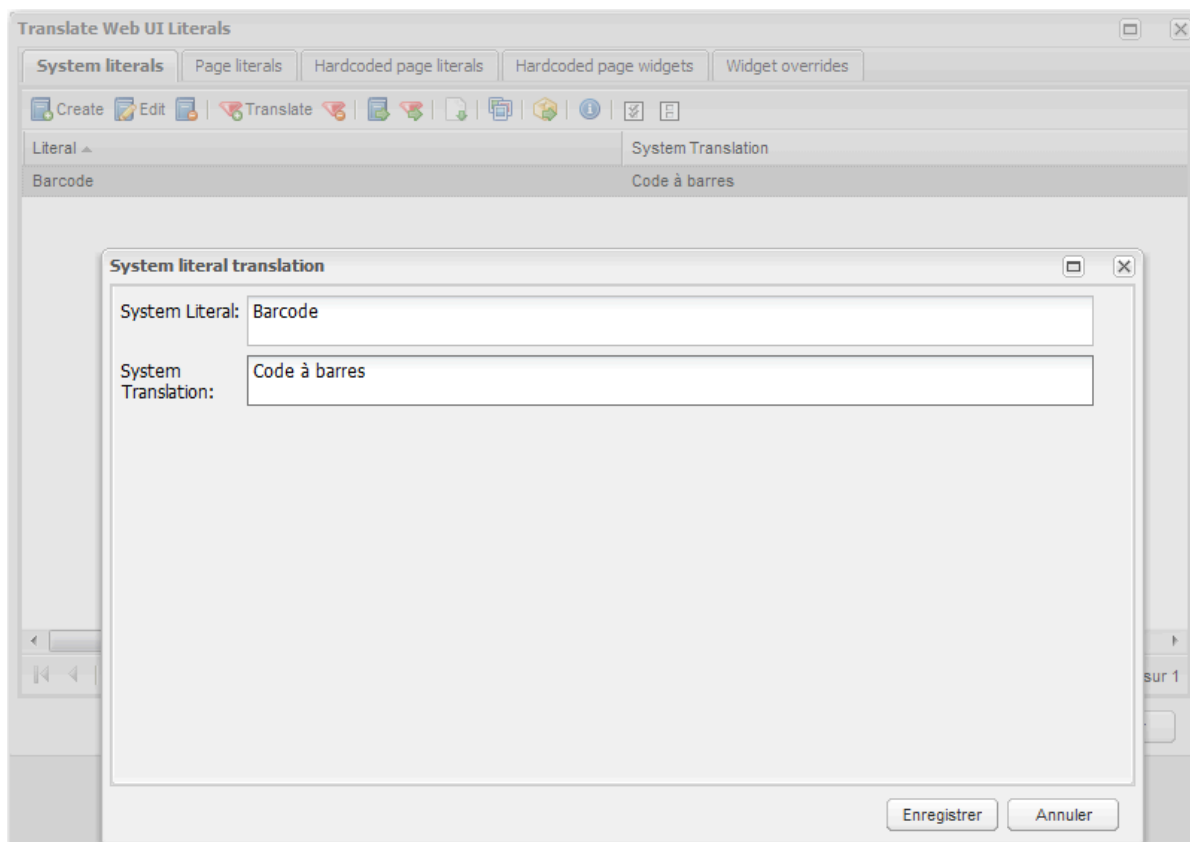
Button	Function
	performing some action, such as saving a list of literals to a file for future translation. You can select a group of literals using the Shift or Control keys.
	Deselect system literals. This option allows you to clear any selections that you have made in the list.

Translating a Literal Throughout the Web UI

To translate a literal for display throughout the Web UI:

1. In the System literals tab, select the literal that you want to translate; for example, barcode.
2. Click the Translate button and enter the new translation in the System Translate field, as displayed in the image below.
3. Click Save

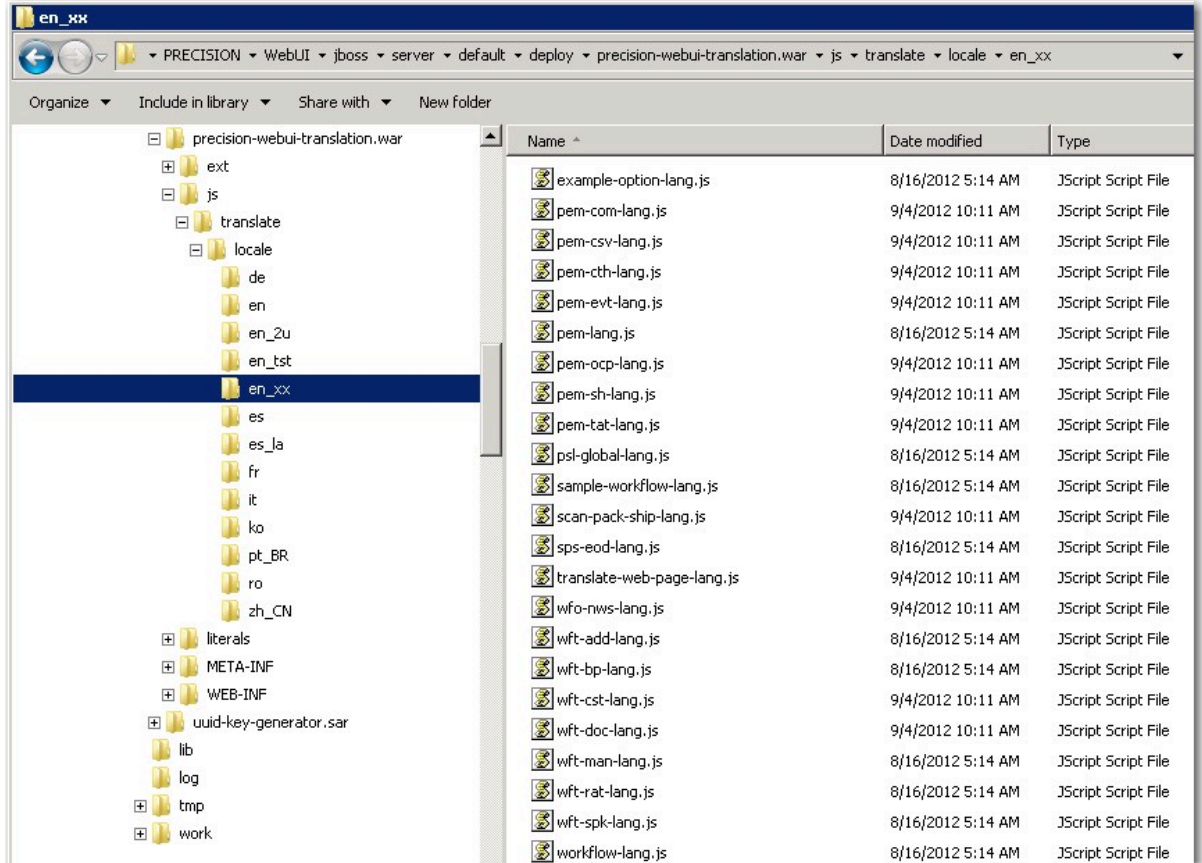
Translating a Literal Using the System Literals Tab



4. To preview the changes, use F5 to refresh the page. This option allows you to review your changes without having to restart the server, thus speeding up the translation validation process.

- As a translation administrator, the literal translations that you see on the screen are taken from the database. For all other users, literal translations are taken from resource files.

Location of Resource Files



To update the translations in the resource files to match the updated database, click the Generate All JavaScript Translation Files icon.

- The JavaScript resource files are cached by the browser. To clear this cache and make the most up-to-date translations visible in the Web UI, access the web browser history and clear the browser cache. In addition, access the ADMIN option and click Clear Translation Literals File.

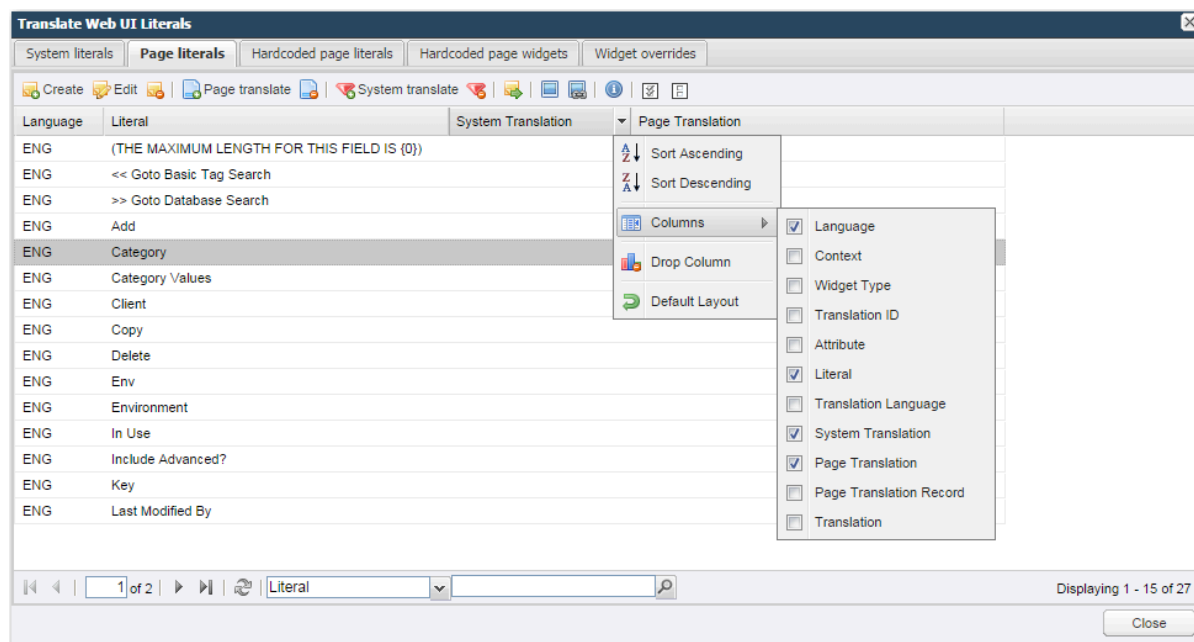
Alternatively, modify the context path within the exploded WAR folder and update the precision.properties file attribute precision.translation.url.context to point to this new context. In addition, access the ADMIN option and click Clear Translation Literals File.

Implementing a Translation on the Current Page Only

Page-level translations can be made using the Page literals tab. This tab displays a list of the system literals that appear in the current page, along with corresponding system translations and page translations.



By default, the Language, Literal, System Translation, and Page Translation columns appear in the header row at the top of the list. You can configure the columns that appear. To do this, click the arrow in any field in the header row, click Columns, and select the fields you want to display. The Context column specifies the scope of the translation. The Widget Type column specifies the level of literal.












Page Literals



You can scroll through the list by clicking the left and right arrows at the bottom of the window. You can search on different criteria using the drop-down menu below the list. This capability allows you to search through all literals, system translations, or page translations. You can also view a list of the literals that have no system translations by choosing No System Translation from the search drop-down menu. There are a number of buttons above the list of page literals, which allow you to carry out different functions.

Page Literals Buttons

Button	Function
 Create	Create page literal. This option allows you to create a page literal for hardcoded text that appears on the page.
 Edit	Edit page literal. Select the relevant literal from the list before choosing this option. This option allows you to update the English version of the literal and leave the translation unchanged. If a page literal for the current system literal does not exist, a new one is created.

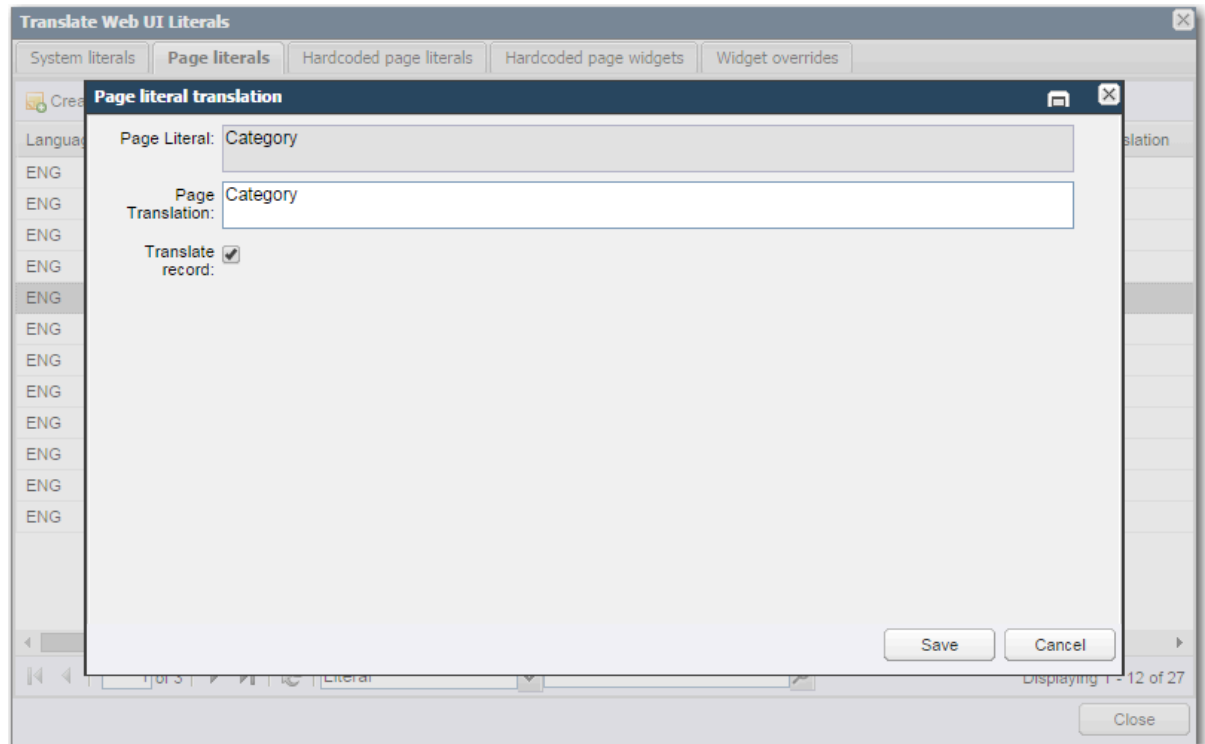
Button	Function
	Delete page literal. Select the relevant literal from the list before choosing this option.
	Create/Edit page literal translation. Select the relevant literal from the list before choosing this option. When users view this page, they see the page translation of the literal rather than the system translation.
	Delete page literal translation. Select the relevant literal from the list before choosing this option.
	Create/Edit system literal translation. This option allows you to create a system-level translation for the selected literal. In the case of editing a literal, select the relevant literal from the list before choosing this option. This translation will appear on all pages in the UI that do not have specific page-level translations.
	Delete system literal translation. Select the relevant literal from the list before choosing this option.
	Upload JavaScript page literals from file. This option allows you to upload a list of page literals for the current web page from a file rather than adding them one by one using the Create page literal button.
	Generate JavaScript Translation File. This option allows you to generate the translation JavaScript file for the current web page, so that non-translation administrator users see the most up-to-date translations for the current Web page.
	Generate JavaScript Dynamic config file.
	Show translation page information. This identifies the primary language that the user language is based on. It also provides useful information for debugging purposes.
	Select page literals. This option allows you to select all the literals in the list. To select the literals before performing some action, such as deleting a list of page literals.
	Deselect page literals. This option allows you to clear any selections that you have made in the list. You may have selected all literals, or selected a group of literals using the Shift or Control keys.

Applying a Literal Translation to the Current Web UI Page Only

To create a translation for display in the current page only:

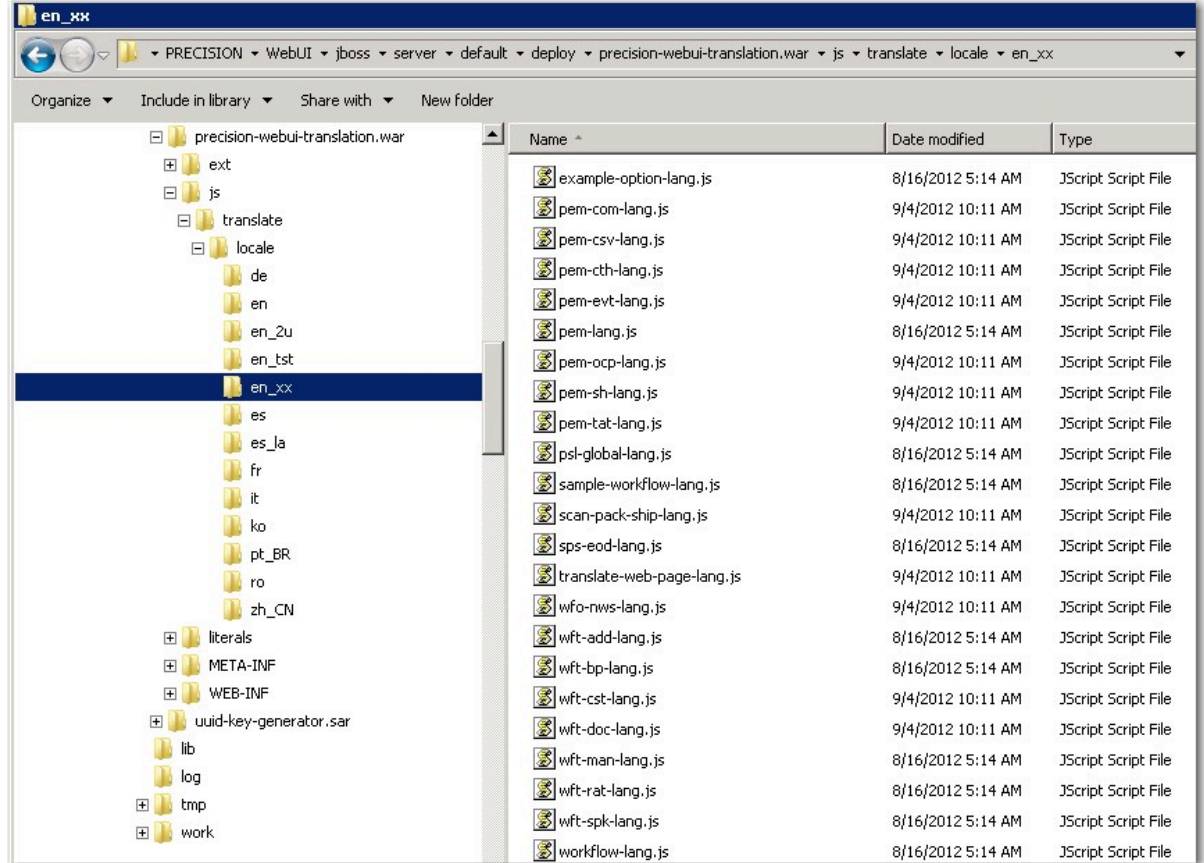
1. In the Page literals tab, select the literal that you want to translate; for example, barcode.
2. Click the Translate button, enter the new translation in the Page Translate field, and select Translate Record.
3. Click Save.

Translating a Page Literal



4. To view the changes, use F5 to refresh the page. This option allows you to review your changes without having to restart the server, thus speeding up the translation validation process.
5. As a translation administrator, the literal translations that you see on the page are taken from the database. For all other users, literal translations are taken from resource files.

Location of Resources Files



To update the translations in the resource files to match the updated database, click the Generate JavaScript Translation File icon.


6. The JavaScript resource files are cached by the browser. To clear this cache and make the most up-to-date translations visible in the Web UI, access the web browser history and clear the browser cache. In addition, access the ADMIN option and click Clear Translation Literals File.

Alternatively, modify the context path within the exploded WAR folder and update the precision.properties file attribute precision.translation.url.context to point to this new context. In addition, access the ADMIN option and click Clear Translation Literals File.

Hardcoded Page Literals Tab

This tab contains a list of literals that appear on the current page. These literals are known as hardcoded page literals. You can use the upload hardcoded page literals option to make these literals available for translation in the page literals tab. This tab is a technical tool that helps developers to generate the literals.

Hardcoded Page Literals Tab

Button	Function
	Upload hardcoded page literals. This option brings literals into the page literals tab, where you can create translations or edit each literal as needed.

Hardcoded Page Widgets Tab and Widget Overrides Tabs

The Hardcoded Page Widgets tab and the Widget Overrides tab contain advanced features that allow you to change the rendering attributes of widgets such as fields and components. These tabs are only to be used with guidance from QAD GTTE, and are beyond the scope of this document.

General Administration

This section contains information on the XML Upload page and the Log Information page. The XML Upload page enables you to import XML content to QAD GTTE. The Log Information page allows you to view or download log files for analysis. This section also describes how to configure some screens for the Maintenance Man functionality.

XML Upload Page

You can use the XML upload page to upload an XML file to the server and import the XML content into the QAD GTTE database, including system value information. This XML must be of the format exported through QAD GTTE. To access the XML upload page, type XML in the menu search. The associated URL is `.../htm/xmlupload.htm`.

Uploading a File

1. On the XML Upload page, to find the file or files you want to upload, click Browse.
2. Select the file you want to upload and click Open.

Note You can also select files by dragging and dropping them into the list. The drag-and-drop functionality is currently available only for browsers Firefox 3.6+ and Chrome.

3. The files you select are displayed in the XML Upload list. To delete files from the list, click Remove or Remove All.
4. To upload the files, click Start Upload.
5. To abort an upload, click Abort or Abort All.

If the upload is successful, the status is changed to Uploaded, as displayed in the image below. However, depending on the size of the file, it may still take some time for the uploaded file content to be imported into the database.

XML Upload Page Successful Upload

XML Upload

Import XML exported from PRECISION.

1. To choose the XML file to upload, click the "Browse" button. Browse...

2. To upload file and import it to database, click "Start Upload".

File Name		Status	Progress
new_values.xml	✓	Uploaded	100 %

✓ Start Upload ✗ Abort ✗ Abort All ✗ Remove ✗ Remove All

Note: An uploaded status indicates the file has been uploaded to the server.
 Importing of the data to database will take additional time which will vary depending on the size of the file.

Log Information Page

The Log Information page provides you with easy access to log files generated by the QAD GTTE solution. The page supports the following use cases:

- A problem is reported to QAD GTTE Support. As part of the troubleshooting process, Support reproduces the problem. To access the resulting log file for review, the support analyst can run the Log Information page.
- A user at a customer site wants to add the log files to a zip file and send them to QAD GTTE Support for analysis. The user runs the Log Information page and downloads all log files

To access the Log Information page, in the menu search, enter the option LI and press Enter. Alternatively, you can access the page through the URL `.../precision/htm/loginfo.htm`.

The page enables you to view or download log files for analysis. To do this:

1. From the Select a Category list, choose the category of log file you want to view or download. The choices are:
 - 4GL LISTENER
 - JBOSS
 - MEMORY
 - SERVICE WRAPPERS
 - ALL

The files are loaded into the View / Download Logs list.

2. To download a zip file of the log files you want, select the files in the list and click Download. You can select all the files by selecting the top check box. You can also download a file by double-clicking it in the list.
3. Open the ZIP archive and review the file

In the example in the image below, the user has selected the logins log for download.

Downloading a Log File

This page allows you to view and download log files generated by the PRECISION solution. The files are categorized by component, but all log files can be listed by selecting the "All" category.

Select a Category:

View / Download logs					
<input type="checkbox"/>	Log File	Path	Last Modified	File Size	Downloadable
<input type="checkbox"/>	server.log	C:\PRECISIONWebUI\jboss\server\...	13-09-2012 07:24:07	218 KB	true
<input checked="" type="checkbox"/>	logins.log	C:\PRECISIONWebUI\jboss\server\...	13-09-2012 07:24:07	135 KB	true
<input type="checkbox"/>	pem.log	C:\PRECISIONWebUI\jboss\server\...	13-09-2012 06:19:38	1 KB	true
<input type="checkbox"/>	compliance.log	C:\PRECISIONWebUI\jboss\server\...	13-09-2012 06:17:18	0 KB	true
<input type="checkbox"/>	sql.log	C:\PRECISIONWebUI\jboss\server\...	13-09-2012 06:17:18	0 KB	true
<input type="checkbox"/>	myGlobalVisibility.log	C:\PRECISIONWebUI\jboss\server\...	13-09-2012 07:23:54	1,554 KB	true
<input type="checkbox"/>	highway.log	C:\PRECISIONWebUI\jboss\server\...	13-09-2012 06:19:00	1 KB	true

Refresh Download

Setting the System Value

By default, the solution tries to locate the `jboss-log4j.xml` file at `...\jboss\server\default\conf` and the `4GLListenerService.cf` file at `...\highway\connectors\Service`. For the system to be able to identify these relative paths, it assumes that `properties.dir` identifies the Web UI root directory and the standard directory structure is used for JBoss and the listener under the Web UI root folder.

A system value can be used to specify which log files and categories to display on the Log Information page and where to find them. This is useful if there is a complex installation with log files from multiple JBoss servers or there is a problem determining the location of the log files from the configuration settings. The system value category is ITRAX and the key is LOG ADMIN: FILES. The format of the system value is:

```
[CATEGORY]=[Log File (wildcards can be used)],[CATEGORY]=[Log File
```

```
(wildcards can be used)]
```

For example:

```
JBOSS=c:\precision\webui\logs\server.log,4GL Listener=
```

```
c:\precision\webui\highway\logs\listener*-business-output.log,
```

Other=c:\precision\logs\aes.log

Note Ensure that the system value with the category ITRAX and the key FILE PATH ALLOW LIST includes the directory E:\apps\PRECISION.

Maintenance Man Functionality

You can configure user permissions so that the user has access to Maintenance Man functionality from a number of pages in the Web UI.

Options with Maintenance Man Functionality

Option	Description
ZS	Shipment Types
PT	Payment Terms
PY	Pack Types
CH	Charge/revenues
PL	Places
NO	Notes
CL	Client
LN	Packing Location

For more information on Maintenance Man functionality, see the [General Maintenance on page 162](#) section of Using Base.

To enable this feature for a particular user and option, ensure that the Allowed access and Add records fields are checked for the option in the relevant permissions record. For information on Permissions, see [Configuring Effective User Roles on page 223](#).

Currencies

The **Currencies** page, menu option CU, provides options that allow you to set up and maintain currencies in the system, as well as configure exchange rates with other currencies.

Note The default currency is defined in the DEFAULT CURRENCY system value in the SYSTEM category. Each shipment is associated with a currency. If the logic that determines the currency to use fails to identify a currency, then it will default to the DEFAULT CURRENCY value.

Creating and Updating Currencies

Before establishing currency exchange rates, the relevant currencies must exist in the system. The Currencies grid contains a list of preconfigured currencies. To add a new currency:

1. On the Currencies page, in the toolbar at the bottom of the grid, click the Create a New Record button.

The Currency [Create] dialog displays.

2. In the dialog, complete the necessary fields, which are described in [Currency Settings on page 499](#).
3. To save the currency, click Create.

The dialog closes and the currency is now accessible in the grid.

Note You can also update existing currencies by selecting one in the grid and clicking the Update this record button.

Currency Settings

The Currencies page stores currencies and allows you to create currencies.

Currency

If not mapped from an ERP system, QAD GTTE includes a list of default currency codes that typically follow the ISO 4217 standard. This standard consists of the ISO 3166 two-character country code, followed by a one-character currency unit; for example, the American dollar is USD. However, it is possible to define any currency code you want.

Description

A description of the currency; for example, US Dollars.

Short description

A short description of the currency.

Exchange rate

The exchange rate associated with the currency. This is the rate used to convert this currency to the local currency.

Note This value can go up to a maximum of 7 decimal places.

Customs exchange rate

The Customs exchange rate of the currency. Some Customs documents require amounts in local currencies to be printed following calculation using a Customs exchange rate.

Note This value can go up to a maximum of 7 decimal places.

EURO conversion rate

The euro exchange rate for the currency. This is no longer used by QAD GTTE.

Note This value can go up to a maximum of 7 decimal places.

Associated country

The country that is associated with the currency.

Note The country must exist in the associated master table.

Abbreviation

The abbreviated name of the currency; for example, USD.

Units

The smaller units that the currency is broken into. For example, the corresponding units for USD is CENTS. CENTS can also apply as units for other currencies. This functionality supports the printing of both dollar and cent amounts on documents.

Edit code for price/cost

This field is not currently in use.

Edit code for total

This field is not currently in use.

Configuring Currency Exchange Rates

After a currency has been added to the system, you can then configure the exchange rates. To set up the exchange rate for a particular currency:

1. On the **Currencies** page, select a currency in the grid.
The suboption icon displays in the first column of the record in the grid.
2. Click the suboption icon and then select Currency Exchange Rates.
The Currency Exchange Rates screen opens. Any existing exchange rate records are listed in this grid.
3. In the toolbar at the bottom of the grid, click the Create a New Record button.
The Currency [Create] dialog displays.
4. In the dialog, complete the necessary fields, which are described in [Currency Exchange Rate Settings on page 500](#).
5. To save the exchange rate settings, click Create.

The dialog closes and the exchange rate is now accessible in the grid.

Note The Default Currency Rate Type is defined in the DEFAULT CURRENCY RATE TYPE system value in the SYSTEM category.

Currency Exchange Rate Settings

A currency exchange rate, which is accessible from the Currency Exchange Rates suboption in the Currencies screen, consists of a number of fields.

Client

This read-only field defaults to the TGL client.

From currency

This read-only field defaults to the currency that you selected on the **Currencies** page.

Exchange rate type

The currency exchange rate type. Exchange rates between currencies are stored using exchange rate types that are defined in option ZR. Rate types are used to allow multiple rates to be stored against any currency pair.

- DASH: Applies to the Operational Analytics Dashboards. Exchange rates with a DASH type are generated daily by a cron job that calls a Java service. These DASH rates are then applied to the charts by Operational Analytics.
- Fixed: Fixed rate. The exchange rate is always calculated according to a fixed rate that is determined by you.
- FWD: Forward rate.
- MEAN: Mean rate.
- SPOT: Spot rate.
- UK-CDS: UK Customs rate.

To currency

The code of the currency that the selected currency is being exchanged to; for example, CAD.

Start date

The date when the exchange rate becomes valid.

Exchange rate

The rate of exchange from base (for example, USD) to currency (for example, CAD).

Customs exchange rate

The Customs rate of exchange from base (for example, USD) to currency (for example, CAD).

EURO conversion rate

The euro exchange rate for the currency. This field is no longer used by QAD GTTE.

Multiply=X Div=

Select this checkbox to multiply the base by the rate to get the currency if the rate is greater than or equal to 1.00. If this box is left blank and the rate is less than 1.00, the system divides the base by the rate to get the currency.

Currency and Exchange Rate Example

The following example presents a shipment with a default currency of USD. The shipment currency is GBP, and charges on the shipment are in EUR.

In option CU, Currencies, the exchange rates are configured as follows:

- USD = 1.00 (The default currency)
- GBP = 1.23 (The rate to convert GBP to the default currency of USD)
- EUR = 1.06 (The rate to convert EUR to the default currency of USD)

Therefore, if a charge of 200 EUR is added to the shipment and is to be printed on a document, QAD GTTE converts EUR to the default currency of USD. This amounts to 106 USD ($100 * 1.06$). USD is then converted to GBP to become 86.17 GBP for the invoice ($106 / 1.23$).

Address Verification Configuration

This section explains how to configure address verification for shipments and partner address changes.

The address verification tool verifies addresses in the Address Verification Overall Status, Partners - Address Changes , and SPS Manifest & Rate workflow tasks, as well as for desktop shipping (DTS). For more information, see the [Address Verification on page 165](#) section in [Using Base on page 45](#).

To automatically verify addresses when creating shipments, or manually perform verification for the named workflow tasks, activate the feature for your workflow or workflows on the Maintain Workflows page (option WF) and configure it on the Configure Address Verification page (option CFGAV). Additionally, the pass threshold for addresses must be configured. See [Activating Address Verification for a Workflow on page 503](#), [Configuring Address Verification for Workflow Tasks on page 511](#), , and [Configuring the Loqate API on page 517](#).

It is recommended to block the SPS Manifest & Rate workflow task if address verification fails. For more information, see [Blocking the SPS Manifest & Rate Workflow Task if Address Verification Fails on page 521](#).

You can also use address verification in DTS using the Loqate API or other plugins. See [Configuring Address Verification for Desktop Shipping on page 514](#).

Activating Address Verification for a Workflow

To perform address verification in the Workflow Portal (option FLOW), you must first activate address verification for the workflow or workflow sets that you are using on the Maintain Workflows (WF) page.

Maintain Workflows Page

Workflow

Workflow: AV-TEST
 Type: S
 Description: Web ALL - test AV steps
 Initial Owner: QTGLUSER
 Initial Status: 00
 Update

Work Flow	Type	Description	Initial Owner
AV-TEST	S	Web ALL - test AV steps	QTGLUSER
DX-PSTD-PW	S	Web Demo-ScanPackShip Webinar	QTGLUSER
MT_SH	S	MITek Export Shipment W-Flow	QTGLUSER
PO-DRAFT	P	Draft Purchase Order	QTGLUSER

Tasks for Workflow AV-TEST

Sequence	Description	Key ID	Option	Task Program...	Categories	Required Status	Success Status	Succ...	Success User	Unsuccess Sta...
5	Address Verification Overall Status	AV_STAT	FLOW	90	Partners, All	NV				
10	Partners - Address Changes	WFTADD50	WFTADD	50	Partners, All					10
20	Partners - Trading Internal	SHSH0200	SHSH02	02	Partners, All					
30	Partners - Transport Customs	SHSH0500	SHSH05	02	Partners, All					
40	Detail - Shipment Header	SH50	SH	50	Detail, All					

Pre & Post Requisite for Workflow Tasks 5 [AV_STAT]

Sequence	Requisite ID	Description	In Use	Pre	Post

Sequence:
 Requisite ID:
 In Use Pre Post
 Check/Fail Action: Warn Error
 Allow Cancel Always Run
 Update

1. In the GTTE search bar, enter the option WF to open the Maintain Workflows page.
2. From the table at the top of the page, select the workflow for which you want to activate address verification. You can use the Workflow Code search field to locate the correct workflow.
3. Navigate to the Tasks for Workflow <x> grid, where x represents the selected workflow.
4. In the Tasks for Workflow <x> grid, check that the tasks in the Address Verification Status and Check Tasks table below are included in the grid. These tasks are essential for the execution of address verification in the selected workflow.

Address Verification Status and Check Tasks

Task	Description
Address Verification Overall Status	Status task. Shows the overall address verification status and icons for the current shipment and all partners that are enabled for address verification.
Inspect Address Verification Results	Check task. Checks the address verification status for all partners that are enabled for address verification and updates the status

Task	Description
	for the Address Verification Overall Status task.
Background Address Verification	Check task. Automatically performs address verification in the background for all partners that are enabled for address verification and updates the address verification status for each partner.


If the tasks are not in the grid, click the Add button to add the tasks to the workflow. Complete the form fields. Refer to the Address Verification Task Fields table below for the recommended values of the fields in the Workflow Task - Update window. In the table, the fields marked with an asterisk (*) are mandatory.


Workflow Task - Update Window for Address Verification Overall Status

Workflow Task - Update

Task sequence number:

Key ID:

Task option: 

Task program type: 

Task description:


Availability: Windows
 Web
 Both

Program Parameters:

Task type: Standard Task
 Secure Task - Before
 Secure Task - After
 Secure Task - Before && After
 Check
 Sub-Flow
 Compliance Status Task


Categories:


Repeatable task
 Warn of repeat


Required status: 

Required status condition: =
 >
 <
 >=
 <=


User confirms success


New status if successful: 


New owner if successful: 

New User if successful: 

Complete if unsuccessful

New status if unsuccessful: 

New owner if unsuccessful: 

New User if unsuccessful: 

Change status only on 1st run
 Break point task
 In forward loop when New

Address Verification Task Fields

Task Field	Value for Address Verification Overall Status	Value for Inspect Address Verification Results	Value for Background Address Verification
Task sequence number* Note Read only	5	560	570
Key ID*	AV_STAT	CK_ADRV	CK_AUTO_ADRV
Task option*	FLOW	WFTCKA	WFTCKB
Task program type*	90	50	50
Task description	Address Verification Overall Status	Inspect Address Verification Results	Background Address Verification
Availability	Web	Web	Web
Program Parameters		SET_TASK=AV_STAT	RECHECK=ALL
Task type	Standard Task	Check	Check
Categories	Partners,All Note Do not add a space after the comma.	Partners,All	All
Repeatable task	Yes	Yes	Yes
Required status	NV		NV
Required status condition	=	=	=
Complete if unsuccessful	Yes	No	No
Change status only on first run	Yes	No	Yes
Break point task	Yes	No	Yes
In forward loop when New	Yes	No	Yes


Task Field	Value for Address Verification Overall Status	Value for Inspect Address Verification Results	Value for Background Address Verification
In forward loop when Update	Yes	No	Yes
Show on Goto menu	Yes	No	Yes
Show on Jump menu	Yes	No	Yes
Menu accelerator CTRL+/ALT+	-	-	-
Show in Task List area	Yes	No	Yes
Lock transaction	Yes	Yes	Yes
VRC Code*	*STANDARD	*STANDARD	*STANDARD

Click Save to save the tasks to the workflow and close the Workflow Task - Update window.

Configuring Pre- and Post-Requisite Tasks

To enable users to see the address verification status in the Workflow portal, configure workflow tasks as follows:

5. In the Tasks for Workflow <x> grid, select the Partners Address Changes task with a single click.

The Pre & Post Requisite for Workflow Tasks <x> panel should open, where x represents the selected task. If it does not open, click the expand icon  located on the bottom-right of the page.

6. In the Pre & Post Requisite for Workflow Tasks <x> panel, click the Add button to open the Workflow Task window.

Workflow Task

Task sequence nu	Task description	Key ID	Task option	Task program ty...	Categories	Require
5	Address Verific...	AV_ZZZZSTAT	FLOW	90	Partners,All	NV
10	Partners - Addr...	WFTADD50	WFTADD	50	Partners,All	
20	Partners - Tradi...	SHSH0200	SHSH02	02	Partners,All	
30	Partners - Trans...	SHSH0500	SHSH05	02	Partners,All	
40	Detail - Shipme...	SH50	SH	50	Detail,All	
50	Detail - Vessels/...	SHSV50	SHSV	50	Detail,All	
60	Detail - Route/R...	WFTRRC50	WFTRRC	50	Detail,All	
70	Detail - Summa...	WFTSDE50	WFTSDE	50	Detail,All	
75	Detail - Assigne...	SHSU50	SHSU	50	Detail,All	
80	Docs - Docume...	WFTDOC50	WFTDOC	50	Docs,All	
90	Docs - Shipmen...	SHST00	SHST	00	Docs,All	
100	Docs - Docume...	WFTDTI50	WFTDTI	50	Docs,All	
110	Packing - Basic ...	WFTBP50	WFTBP	50	Packing,Other,All	

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7. From the drop-down list on the left of the Search... field, select Task description.
8. In the Search... field, enter the description Inspect Address Verification Results and click the search icon.
9. Click the green plus icon to add the Inspect Address Verification Results check task to the Partners - Address Changes task.
10. Click Close.
11. In the Pre & Post Requisite for Workflow Tasks <x> panel, select the Inspect Address Verification Results task and select the In Use and Post checkboxes. This activates the task and designates it as a post-requisite task.
12. Clear the Pre checkbox.
13. Click the Update button.

The address verification status will now be recalculated when the Partners - Address Changes task is closed in the Workflow Portal because Inspect Address Verification Results is set as a post-requisite task.

Setting Inspect Address Verification Results as a Post-Requsite Task for Partners - Address Changes

The screenshot displays the 'Workflow' configuration interface. It is divided into three main sections:

- Workflow Selection:** A table lists various workflows. The selected workflow is 'WEB-ALL'.

Work Flow	Type	Description	Initial Owner
WEB-ALL	S	Workflow (ALL Web UI Tasks)	QTGLUSER
WEB-ALL-K	K	Workflow - Consolidations - K	QTGLUSER
WEB-ALL-L	L	Workflow (ALL Web UI Tasks)	QTGLUSER
WEB-ALL-O	O	Workflow (ALL Web UI Tasks)	QTGLUSER
- Tasks for Workflow WEB-ALL:** A table lists tasks. Task 10, 'Partners - Address Changes', is selected.

Sequence	Description	Key ID	Option	Task Program...	Categories	Required Status	Success Status	Succ...	Success User	Unsuccess Sta...
5	Address Verification Overall Status	AV_STAT	FLOW	90	Partners,All	NV				
10	Partners - Address Changes	WFTADD50	WFTADD	50	Partners,All					10
20	Partners - Trading Internal	SHSH0200	SHSH02	02	Partners,All					
30	Partners - Transport Customs	SHSH0500	SHSH05	02	Partners,All					
40	Detail - Shipment Header	SH50	SH	50	Detail,All					
- Pre & Post Requisite for Workflow Tasks 10 [WFTADD50]:** A table shows the configuration for task 10.

Sequence	Requisite ID	Description	In Use	Pre	Post
10	CK_ADRV	Inspect Address Verification Results	true	false	true

 To the right of this table are configuration options:
 - Sequence: 10
 - Requisite ID: CK_ADRV
 - In Use, Pre, Post
 - CheckFail Action: Warn, Error
 - Allow Cancel, Always Run

- In the Tasks for Workflow <x> grid, select the SPS - Manifest & Rate task with a single click.
- Repeat Steps 6 to 14, but add the Inspect Address Verification Results check task to SPS - Manifest & Rate instead.

Setting Inspect Address Verification Results as a Post-Requisite Task for SPS- Manifest & Rate

The screenshot displays the 'Workflow' configuration interface. The top section shows a list of workflows, with 'WEB-ALL' selected. The right-hand panel shows the configuration for 'WEB-ALL', including its type (S), description, initial owner (QTGLUSER), and initial status (00). Below this, the 'Tasks for Workflow WEB-ALL' section shows a list of tasks, with 'SPS - Manifest & Rate' (Sequence 140) selected. The bottom section, 'Pre & Post Requisite for Workflow Tasks 140 [WFTMAN50]', shows the configuration for the 'Inspect Address Verification Results' task (Sequence 10, Requisite ID CK_ADRV). The task is configured as a post-requisite (Post = true, Pre = false, In Use = true). The 'CheckFail Action' is set to 'Warn', and 'Allow Cancel' and 'Always Run' are checked.

Sequence	Description	Key ID	Option	Task Program...	Categories	Required Status	Success Status	Succ...	Success User	Unsucc Sta...
112	Comp Results	VW_COMP_J	WFTCKV	50						
120	Packing - Standard Packing	WFTSPK50	WFTSPK	50	Packing, Ot...					
130	Packing - Scan>Pack>Ship	SNPKWF50	SNPKWF	50	Packing, Ot...					
140	SPS - Manifest & Rate	WFTMAN50	WFTMAN	50	SPS, All	30				45
150	SPS - Rate Shop	WFTRAT50	WFTRAT	50	SPS, All					

Sequence	Requisite ID	Description	In Use	Pre	Post
10	CK_ADRV	Inspect Address Verification Results	true	false	true

When the pre- and post-requisite tasks are configured, configure address verification for Workflow or desktop shipping. See [Configuring Address Verification for Workflow Tasks on page 511](#) and [Configuring Address Verification for Desktop Shipping on page 514](#).

Configuring Address Verification for Workflow Tasks

This section describes the mandatory and optional settings on the General tab of the Configure Address Verification page. Use this page to configure address verification in the Workflow Portal after the required tasks and checks have been enabled in the Maintain Workflows settings page.

Configure Address Verification Page

Configure Address Verification

General | Loqate | USPS | FedEx | SOA

Enabling

Enable Workflow Address Verification: No

Enable Workflow Address Reverification: Yes No Create Value

Enable Desktop Shipping Address Verification: No

Enable Desktop Shipping Address Reverification: Yes No Create Value

Constraints: from=All;to=All;role=All;type=both

Countries Using Only State Codes: AU,CA,US,IT

Country List: Select Records Create Value

Show Suggestions: Yes No Create Value

Address Verification Plugin:

Address Verification Plugin for Canada: Create Value

Address Verification Plugin for United States: Create Value

Save Reset

1. In the GTTE search bar, search for the option CFGAV to open the Configure Address Verification page.
2. On the General tab, from the Enable Workflow Address Verification drop-down list, choose Optional to turn on address verification in the Workflow Portal. This means that address verification can be switched on or off for the workflow tasks by selecting or clearing the Verify Address checkbox during manual address verification.

Note To disable address verification, choose No.

3. Optionally, enable address re-verification for the Partners - Address Changes and SPS Manifest & Rate Workflow tasks. If this option is enabled, the address is verified again if you click Accept in the pop-up window that suggests an updated address.

If there is no system value saved in the database for address re-verification, a Create Value checkbox displays next to the Yes and No buttons. If you see this checkbox, in the Enable Workflow Address Reverification field, select the Create Value checkbox to create the FLOW ADDRESS ALLOW REVERIFY system value for address re-verification.

If the Create Value checkbox is not visible, there is already a system value in the database and you do not need to take further action.

Optionally, click the Maintain this system value icon



to change the value of the system value for all users or a particular user.

Select the Yes checkbox to turn on re-verification, or select the No checkbox to turn off re-verification.

4. In the Countries Using Only State Code field, enter the countries that use two-character state codes for address verification. Although most countries use three or more characters for their region descriptions, two-character state codes are used for a small number of countries, including Australia, Italy, Canada, and the United States, and these codes are stored separately in the GTTE system. The default value for this field is AU,CA,US,IT.
5. Optionally, in the Country List field, restrict address verification to certain countries.
 1. If the Create Value checkbox is available, select it.
 2. In the Select Records table, click the plus icon and select the checkboxes to add country codes to the list.
 3. To remove a country from the list, click the x icon next to the country code.
6. From the Address Verification Plugin drop-down list, choose Loqate to use Loqate's address verification services.

Note Loqate is the default selection because the address verification tool is optimized for Loqate. Workflow address verification only uses the Loqate API.

1. Optionally, use the Address Verification Plugin for Canada field to set a different address verification plugin specifically for Canada. Select the Create Value checkbox, if it is available, then select a plugin from the drop-down list.
2. Optionally, use the Address Verification Plugin for United States field to set a different address verification plugin specifically for the United States. Select the Create Value checkbox, if it is available, then select a plugin from the drop-down list.

To specify different address verification plugins for countries other than the United States or Canada, you can add more country-specific system values to the form on the System Values page.

Manually add the system values with the following details:

Category: ITRAX

Key: AV: PLUGIN - XX

Value: loqate / fedex_v4 / usps

where XX represents the country code.

7. Optionally, in the Roles Requiring a Verified Address field, choose the party roles for which you want to flag shipment addresses that need verification. For these addresses, the system keeps a record of the verification result, which can be used to control the ability to execute other shipment actions such as rating a shipment.
 1. If the Create Value checkbox is available, select it.
 2. In the Select Records table, click the plus icon and select the checkboxes to add roles to the list.
 3. To remove a role from the list, click the x icon next to the role.
8. In the AV Inspection Check Workflow Task Key ID field, enter the ID of the workflow check task that is used to inspect address verification results and update the address verification result. See the [Check Tasks on page 298](#) section for more information on check tasks. In most cases, you can set this to CK_ADRV.
9. In the AV Inspection Check Workflow Task Key ID, enter the workflow background tasks IDs that are required for address verification. For more information, see [Activating Address Verification for a Workflow on page 503](#). Enter the IDs in the following order:
 - The first entry is the task ID for the Background Address Verification task, which is typically CK_AUTO_ADRV.
 - The second entry is the task ID for the Inspect Address Verification Results task, which is typically CK_ADRV.
 - The third entry is the task ID for the Address Verification Overall Status task, which is typically AV_STAT.

Enter the IDs with commas to separate them—for example, CK_AUTO_ADRV,CK_ADRV,AV_STAT.

10. Click the Save button to save the configuration.

Configuring Address Verification for Desktop Shipping



This section describes the mandatory and optional settings on the General tab of the Configure Address Verification page for desktop shipping (DTS).



Configure Address Verification Page



Configure Address Verification



General | Loqate | USPS | FedEx | SOA



Enabling



Enable Workflow Address Verification: No  

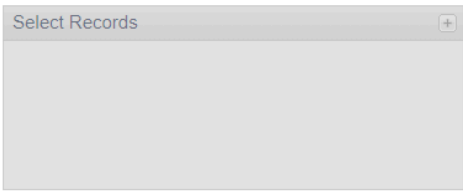


Enable Workflow Address Reverification: Yes No   Create Value



Enable Desktop Shipping Address Verification: No  




Enable Desktop Shipping Address Reverification: Yes No   Create Value




Constraints: from=All;to=All;role=All;type=both  




Countries Using Only State Codes: AU,CA,US,IT  

Country List:    Create Value

Show Suggestions: Yes No   Create Value

Address Verification Plugin:   

Address Verification Plugin for Canada:    Create Value

Address Verification Plugin for United States:    Create Value

Save Reset

1. From the Enable Desktop Shipping Address Verification drop-down list, choose Optional to turn on address verification for DTS, No to turn it off, or Conditional to enable address verification under constraints. To set constraints, see Step 3.
2. Optionally, enable address re-verification for DTS addresses. If this option is enabled, the address is verified again if you click Accept in the pop-up window that suggests an updated address.

If there is no system value saved in the database for address re-verification, a Create Value checkbox displays next to the Yes and No buttons. If you see this checkbox, in the Enable Desktop Shipping Address Reverification field, select the Create Value checkbox to create the DTS ADDRESS ALLOW REVERIFY system value for address re-verification.

If the Create Value checkbox is not visible, there is already a system value in the database and you do not need to take further action. Optionally, click the Maintain this system value icon



to change the value of the system value for all users or a particular user.

Select the Yes checkbox to turn on re-verification, or select the No checkbox to turn off re-verification.

3. Optionally, use the Constraints field to define constraints if you selected conditional address verification in Step 1. Valid constraints include type=domestic, type=international, from=[**Countries**], to=[**Countries**], and role=[**Roles**]. Replace the bold values with an array of values, separated by a comma.

If you are adding multiple constraints, separate the constraints with a semicolon. The default constraints are from=All;to=All;role=All;type=both.

4. In the Countries Using Only State Code field, enter the countries that use two-character state codes for address verification. Although most countries use three or more characters for their region descriptions, two-character state codes are used for a small number of countries, including Australia, Italy, Canada, and the United States, and these codes are stored separately in the GTTE system. The default value for this field is AU,CA,US,IT.
5. Optionally, in the Country List field, restrict address verification to certain countries.
 1. If the Create Value checkbox is available, select it.
 2. In the Select Records table, click the plus icon and select the checkboxes to add country codes to the list.
 3. To remove a country from the list, click the x icon next to the country code.
6. From the Address Verification Plugin drop-down list, choose the Loqate, FedEx or USPS address verification plugin.
 1. Optionally, use the Address Verification Plugin for Canada field to set a different address verification plugin specifically for Canada. Select the Create Value checkbox, if it is available, then select a plugin from the drop-down list.
 2. Optionally, use the Address Verification Plugin for United States field to set a different address verification plugin specifically for the United States. Select the Create Value checkbox, if it is available, then select a plugin from the drop-down list.

To specify different address verification plugins for countries other than the United States or Canada, you can add more country-specific system values to the form on the System Values page.

Manually add the system values with the following details:

Category: ITRAX

Key: AV: PLUGIN - XX

Value: loqate / fedex_v4 / usps

where XX represents the country code.

7. Optionally, in the Roles Requiring a Verified Address field, choose any party roles for which you want to flag shipment addresses that need verification. For these addresses, the system keeps a record of the verification result, which can be used to control the ability to execute other shipment actions such as rating a shipment.
 1. If the Create Value checkbox is available, select it.
 2. In the Select Records table, click the plus icon and select the checkboxes to add roles to the list.
 3. To remove a role from the list, click the x icon next to the role.
8. Click the Save button to save the configuration.

Configuring the Loqate API

On the **Configure Address Verification** screen (menu option CFGAV), for both workflow tasks and DTS, you can adjust the Loqate API and system value configuration on the Loqate tab.

Loqate Tab

Configure Address Verification

General Loqate SOA

UI Config

API Type: Cloud

Address Line Delimiters: ALL=<sp>|JP=<e>|CN=<e>|

Address Line Maximum Size: 35

HTTP Config: ConnectTimeout=60000|ReadTimeout=60000

Key: [Redacted]

AV Pass Threshold: V4 - Verified, Premises

Cloud - URL: https://api.addressy.com/Cleansing/International/Batch/v1.00/json4.ws

Cloud - HTTPS Secure: ClientKeyStoreType=|ClientKeyStoreFilePath=|ClientKeyStoreFilePwd=|CAKeyStoreTy

Cloud - Process: process=verify|certify=off|enhance=off|version=off

Legacy Cloud - URL: https://api.loqate.com

Legacy Cloud - HTTPS Secure: ClientKeyStoreType=|ClientKeyStoreFilePath=|ClientKeyStoreFilePwd=|CAKeyStoreTy

Legacy Cloud - Process: verify=on|certify=off|suggest=off

Save Reset

Note QAD GTTE Technical Services typically configures the Loqate tab. Although it is recommended to adjust the address verification pass threshold and address line maximum size yourself—in the AV Pass Threshold and Address Line Maximum Size fields, respectively—it is recommended to allow QAD GTTE Services to configure the other, more

technical API fields. If the Loqate tab is not configured on your GTTE system yet, contact QAD GTTE Technical Services.

To configure the Loqate API, complete the following steps:

1. In menu option CFGAV, click the Loqate tab.
2. From the API Type dropdown list, select the API type that you want to use for the Loqate plugin. The two options are as follows:
 - Cloud: Use Loqate's RESTful cloud API. This is the recommended option.
 - Legacy Cloud: Use Loqate's simple object access protocol (SOAP) API.
3. In the Address Line Delimiters field, enter the Loqate address line delimiters in the format Country code=delimiter|. For example, to use a space for all countries except Japan and China, and to use a line break character as the delimiter for Japan and China, enter ALL=<sp>|JP=<e>|CN=<e>|
4. In the Address Line Maximum Size field, enter the maximum length of each address line as a positive integer; for example, 40.
5. In the HTTP Config field, enter the connect and read timeout, in seconds, for HTTP and HTTPS connections; for example, ConnectTimeout=60000|ReadTimeout=60000
6. In the Key field, enter the secure key for the Loqate API in the format XX11-XX11-XX11-XX11, where X is a letter and 1 is a number. Obtain your unique key from the Loqate website.
7. From the AV Pass Threshold drop-down list, select the minimum score for an address to pass address verification. The scores are explained in the [Address Verification Score on page 168](#) section in [Using Base on page 45](#).
8. In the Cloud - URL field, enter the following URL for the Loqate cloud API:
https://api.addressy.com/Cleansing/International/Batch/v1.00/json4.ws
9. Optionally, if the cloud API server requires client certificate authentication, or if you are connecting to an untrusted server, in the Cloud - HTTPS Secure field, enter client key and CAKey store parameters in the format ClientKeyStoreType=|ClientKeyStoreFilePath=|ClientKeyStoreFilePwd=|CAKeyStoreType=|CAKeyStoreFilePath=|CAKeyStoreFilePwd=|

The following tables explain each parameter.

Cloud API HTTPS Client Key Parameters

Parameter	Description
ClientKeyStoreType	The certificate store type; for example, pkcs12.

Parameter	Description
ClientKeyStoreFilePath	The path to the certificate store type; for example, C:/path/to/clientStore.p12
ClientKeyStoreFilePwd	The certificate store password.

Cloud API HTTPS CAKey Parameters

Parameter	Description
CAKeyStoreType	The certificate store type; for example, JKS.
CAKeyStoreFilePath	The path to the certificate store type; for example, C:/path/to/myCAStore.jks
CAKeyStoreFilePwd	The certificate store password.

10. In the Cloud - Process field, configure the Loqate cloud API process in the format `process=verify|certify=off|enhance=off|version=off`.
11. In the Legacy Cloud - URL field, enter the following URL for the Loqate legacy cloud API: `https://api.loqate.com`.
12. Optionally, if the legacy API server requires client certificate authentication, or if you are connecting to an untrusted server, in the Legacy Cloud - HTTPS Secure field, enter client key and CAKey store parameters in the format `ClientKeyStoreType=|ClientKeyStoreFilePath=|ClientKeyStoreFilePwd=|CAKeyStoreType=|CAKeyStoreFilePath=|CAKeyStoreFilePwd=|`

For more information on the parameters, see Step 9.

13. In the Legacy Cloud - Process field, configure the Loqate legacy cloud API process in the format `verify=on|certify=off|suggest=off`.
14. To save the Loqate API configuration, click Save.

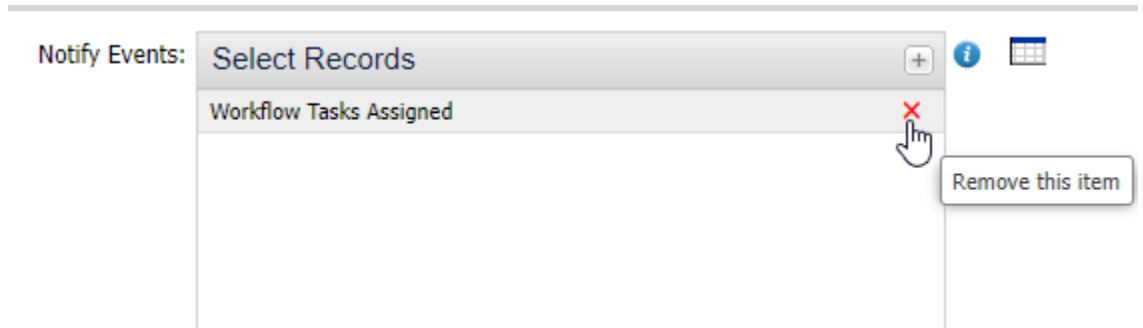
Configuring Shipment Notifications for Address Verification

It is possible to create a shipment using a SOAP request (a `CreateShipment` or `ShipShipment` message). In this case, the background check for address verification automatically runs only if an SOA shipment notification triggers when a workflow is assigned to the shipment. To configure shipment notifications for address verification, first ensure that a Java listener is configured in the `precision.properties` file and running for the `SHIPNOTIFYEVENT` endpoint. You can check if the listener is running by reviewing it in the Java Listeners tab of the Clear Caches screen, menu option ADMIN. Then, on the **Configure Address Verification** page (menu option CFGAV), use the SOA tab.

1. In option CFGAV, click the SOA tab.

2. In the Notify Events panel, select the shipment events that cause notifications. To add an event, click the plus (+) icon, then, in the pop-up dialog, click an event.
 - If you set the value to Workflow Tasks Assigned, a shipment notification occurs when a workflow is assigned to a shipment.
 - If the Notify Events panel is empty, shipment notifications are turned off. To turn off shipment notifications, remove all events from the Notify Events panel with the Remove this item icon.

Remove This Item Icon



3. In the Notify Target field, specify the target endpoint to which the notification is published. In most cases, set the field to SHIPNOTIFYEVENT.
4. In the Notify Transaction Types panel, choose the type of shipments for which notifications apply. The default setting is Shipment (S). To add additional shipment types, click the plus (+) icon. Then, in the pop-up menu, select one or more shipment types.

To remove shipment types, in the pop-up menu, click a shipment that you already selected. Alternatively, close the pop-up menu, then hover over a shipment type in the panel and click the Remove this item icon.

5. In the Event Notification Parameters field, enter the following cURL publication method for notifications:
`SEND_METHOD=HTTP-CURL,URL=http://localhost:8080/highway/http/SubmitMessage,ENDPOINT=SHIPNOTIFYEVENT,WAIT_INTERVAL=1000,SYNCHRONOUS=No,D`

Note Optionally, to adjust the wait interval in seconds, change the value of the WAIT_INTERVAL variable.

6. In the cURL Parameters field, ensure the value is set to `PROG=XTTRANSF,AUTH-TYPE=1,FOLLOW-LOCATION=NO,DEBUG-TRACE=NO`. Do not change the value of this field, because this is an advanced configuration parameter,
7. To turn additional logging for cURL on or off, from the Enable Debug Mode for cURL field, select either No or Yes. The recommended value is No.
8. To save the shipment notification configuration, click Save.

Blocking the SPS Manifest & Rate Workflow Task if Address Verification Fails

You can prevent the SPS Manifest & Rate workflow task from being processed if address verification fails. The system flags the address and displays an error message in the task. This configuration prevents incorrect addresses passing through the system and helps to avoid delayed or returned shipments.

Blocked SPS Manifest & Rate Task

SPS - Manifest & Rate

Route: BEST Delivery Terms: EXW EX-WORKS

Carrier: EX-WORKS

Packing Location: A9901 Chicago Freight Payment Method: Invalid Route

Status: Pending Carrier A/C No.:

Despatch Date: 27/01/2023

Save Processing is not allowed due to Address Verification Overall Status task failure.

Pack No.	Type	Gross Weight	Dimensional Weight	Tracking Number	Length	Width	Height	Freight CI
28583	Box	24.000000	LB 0	LB	24.0000	24.0000	12.0000	IN

Total Packed Weight: 24.000000 LB Total Dimensional Weight: 0 LB Total Volume: 2 CF

1. In the GTTE menu search, enter the menu option WF to open the Maintain Workflows page.
2. Select a workflow from the table at the top of the page. You can use the Workflow Code search field to locate the correct workflow.
3. Navigate to the Tasks for Workflow <x> grid, where x is the selected workflow.
4. Double click the SPS - Manifest & Rate task.
5. In the Workflow Task - Update window, navigate to the Program Parameters field. Enter the following text:
PROCESS_DEPENDS_ON=AV_STAT.

Updating SPS - Manifest & Rate Task

Workflow Task - Update

Workflow code: WEB-ALL

Workflow type: S

Task sequence number: 140

Key ID: WFTMAN50

Task option: WFTMAN

Task program type: 50

Task description: SPS - Manifest & Rate

Availability: Windows
 Web
 Both

Program Parameters: PROCESS_DEPENDS_ON=AV_STAT

Task type: Standard Task
 Secure Task - Before
 Secure Task - After
 Secure Task - Before && After
 Check
 Sub-Flow
 Compliance Status Task

Categories: SPS,All

Repeatable task
 Warn of repeat

Required status: []

Required status condition: =
 >
 <
 >=
 <=
 User confirms success

New status if successful: 30

New owner if successful: []

New User if successful: []

Complete if unsuccessful

New status if unsuccessful: 45

6. Click Save on the bottom-right of the window.

Printers

Printer names and details are listed in the **Printers** page, accessible through menu option DP. You can associate a physical printer with a [locale document on page 532](#) so that, when you sign in to a particular locale and print a particular document, the document prints to that printer.

Creating a Printer

Your label printer's internal network card or external print server must be configured correctly with an IP number, connected to the network, and switched on.

Note Printers must only be maintained under the supervision of GTTE Technical Services.

To add a printer to GTTE, complete the following steps:

1. On the **Printers** page, in the toolbar at the bottom of the page, click the Create a new record button.
2. In the Printer [Create] dialog, complete the fields listed in [Printer Settings on page 524](#).
3. In the *Device file or OS-Command* field, specify a printer by either port or device name:
 - To select a printer by port, enter text in the format `device=<PortName>`.
 - To select a printer by name, enter text in the format `device=<DeviceName>`. Device name is the optimal method of identifying a printer.

To get the port name of the printer to use in the GTTE configuration, set the printer to the default settings in Windows and enter the following text in the LPR command field: `device=,default device info`.

4. Click Create.

Printer Settings

Printer names and details are listed in the **Printers** page, accessible through menu option DP.

Printer name

The name of the printer; for example, QFAX, QDEFAULT, QNOTEPAD, and QI:PCL:PDF.

Description

The description of the printer.

Destination type

The type of destination for the printer name, such as printer or email.

Printer distribution list

The distribution list that is associated with the printer. A printer that is associated with a distribution list has other printers associated with it. GTTE automatically outputs to those printers. See [Creating Printer Distribution Lists on page 530](#).

Device type

The device type or printer for output. When this field is set to a device, GTTE formats the output specific to the type of device such as a PCL printer or MATRIX printer. When the field is set to a printer, GTTE sends output to that printer as defined within the printer master table definition. GTTE currently supports the following three different types of printer output:

- Print to a single printer through network print queues or the Line Printer Daemon protocol (LPR).
- Print to a group of printers within a printer group.
- Send as email, if an email server is available.

Background Printing

If this field is selected, background printing occurs.

Download macros

See [Downloading Forms and Fonts for a Laser Printer on page 528](#).

Background Queue

If a queue name is selected, all the processing associated with printing a document is carried out on the server machine.

Note The LPR command field must be configured to allow the server to send the data to the printer rather than the client machine.

Tray

The tray from which paper is to be selected for printing. Tray descriptions and related PCL codes are:

- Current: 0
- Dflt: 1
- ManInpPaper: 2
- ManInpEnv: 3
- Lwr: 4
- OptSource: 5
- OptEnv: 6
- V7: 7
- V8: 8

- V9: 9
- V10: 10
- V11: 11
- V12: 12
- V13: 13

Symbol Set

The set of printable characters and controls that a printer supports. Different printers have different symbol sets. These sets are supplied with GTTE and are found under Shipment Status type SS.

PCL to Text ratio [Column/X]

A value to convert PCL X co-ordinates into plain text column positions used with fixed position font matrix printers. The value that is specified here is divided into the PCL co-ordinates during conversion. Column conversion calculation is as follows:

Value = ((pcl.co-ordinate + 'PCL Offset [X]') / 'PCL To Text Ratio [Column/X]') + 'Plain Text Offset [X]'.

PCL to Text ratio [Row/Y]

Used to convert PCL Y co-ordinates into plain text row positions used with fixed position font matrix printers. The value that is specified here is divided into the PCL co-ordinate during conversion. Row conversion calculation is as follows:

Value = ((pcl.co-ordinate + 'PCL Offset [Y]') / 'PCL To Text Ratio [Row/Y]') + 'Plain Text Offset [Y]'.

PCL offset [X]

A number to adjust the PCL x-axis offset from the origin.

PCL offset [Y]

A number to adjust the PCL y-axis offset from the origin.

Plain text offset [X]

A number to adjust the plain text x-axis offset from the origin.

Plain text offset [Y]

A number to adjust the plain text y-axis offset from the origin.

Output queue

A filepath for a data definition file (DDF), in the format E:\apps \PRECISION__output\

tool to examine the output of the print program. If the field is blank, a DDF is not created.

DDF outputs are used for debugging purposes only. They provide a trace between data output from a program and data mapped to a macro marker field.

The following special substitution variables can be used within this field. These are replaced with the current transaction values when printing:

- <Shipment> : current shipment number (SHSHIP)
- <Document> : current document reference (DOREF)
- <User> : Current user id (GV-USER).

Output file

A filepath for a PRN file in the format E:\apps\PRECISION__output \<unique>.prn. This field is used when the Merge Engine is used to process the document. The output of the Merge Engine is a file containing PCL commands. The Output file field determines the name of this file. PRN file outputs are final form PCL command files that are interpreted by PCL-compatible laser printers. The PRN file also acts as the basis for email document support through attachments.

The following special substitution variables can be used within this field. These variables are replaced with the current transaction values when printing:

- <Shipment>: current shipment number (SHSHIP)
- <Document>: current document reference (DOREF)
- <User>: Current user id (GV-USER)

Specify <MACROS> at the end of the line following the file name so that the final output file contains the macros and output data. This is useful if you want to archive documents.

Note Macros do not output to the printer unless you also specify DPDOWNLOAD by selecting the Download macros checkbox. After data has been sent to the printer, macros are appended to this output file.

Image output printer

This is the document imaging redirect printer device. It is used if you send the output to an image file.

Output file type

If the output is an image file, this field identifies the file type and can be one of the following:

- Printer control language (PCL).
- PDF; see [Printing Documents to a PDF File on page 529](#).

Device file or OS-Command

The printer port or device name for the printer.

Email

The email address.

Dial-Out Code

The code to dial out from this device to get an external line.

Phone Number

The phone number associated with this device. This value is used to determine whether a dial-out is made to a country or area outside of the device's country or area.

Printer control string

When the printer is used with MATRIX printers, you can enter MATRIX printer escape sequences in this field. These sequences are output at the top of each page of data sent to the MATRIX printer. The ASCII character ESC can be represented by the token <ESC> (5 characters). Refer to the specific MATRIX (Impact) printer manual for more details regarding the escape sequences that a specific printer supports.

For example:

<ESC>C03

on some MATRIX printers will set the page size to 3 inches for address labels.

Printer language

The printer language.

Printer DPI (dots per inch)

The printer resolution in dots per inch.

Print/Preview file type

The printer and preview file type.

Parameters

Additional printer parameters.

Downloading Forms and Fonts for a Laser Printer

If you are printing to a laser printer that does not have a SIMM card—a memory chip with MAC files stored on it—you can download forms and fonts to the printer. The forms are stored in the printer's memory until the printer is turned off.

Important Use of this option results in reduced printer throughput because the printer must interpret the macros each time a document is printed. Only use it when there are problems with the printer losing overlays. For example, if the overlay is missing from a document, then the

macro may have been corrupted during transfer to the machine where the print is being performed. If you use FTP to transfer files, ensure that it is in binary mode.

To automatically download the required macros—forms and logos—each time a document is printed to a particular printer:

1. On the **Printers** page, locate the printer in the grid and double-click it.
2. In the Printer [Update] dialog, select the Download macros checkbox.
3. Click OK.

Printing Documents to a PDF File

To output your documents to a PDF rather than sending them to a printer:

1. On the **Printers** page, locate the printer in the grid and double-click it.
2. In the Printer [Update] dialog, in the Output file type field, select PDF.
3. In the Output file field, add a <.PDF> tag; for example, E:\apps \PRECISION__output\<shipment><document>.prn<.PDF>.
4. Click OK.

If the output file type is PDF, a PRN file is created at the same time as the PDF file. The PDF file is compatible with Adobe Acrobat Reader 4.0 or later.

Printer Distribution Lists

Distribution lists are designed to facilitate documents that are intended for multiple destinations. Documents of shipments can be sent to several printers, fax numbers, or email addresses. The number of copies is dependent on the destination.

A distribution list can be set up against a device, so that any occurrence of that device in a distribution list can represent further entries in the distribution. The device must be marked as a distribution list; relevant targets for the distribution are then associated with it.

Any distributions to printer devices that are marked as printer distribution lists are broken down into their relevant distributions. Therefore, a distribution entry may represent a further number of entries that are created at this point.

The phone number on a printer device that is part of a printer distribution list is a destination phone number, not a source phone number. The source phone number is deemed to be that of the printer distribution header record—the device marked as the printer distribution list.

The device-related information is filled in last. The information is taken directly from the printer records in the database. This information includes the following:

- whether or not the device is a fax, printer, or email.
- whether or not the device is a background device.

- the source phone number, or destination phone number if it is a target distribution rather than a fax device.
- destination email address. This address is always used if this is a target distribution entry.

Note The device destination type determines the data that is filled in relating to destination, such as target fax number or target email address. This differs from the destination type on the other distribution screens, which refers to the field of the partner or contact records from which the fax or email information is taken.

Printer Distribution List Settings

Printer distribution list details are listed in the **Printer Distribution Lists** page, which is a suboption of menu option DP.

Client

Read-only field containing the client associated with the printer distribution list.

Printer group

Read-only field containing the printer group associated with the printer distribution list.

Printer

The printer associated with the printer distribution list.

In Use

This field indicates if the printer distribution list is in use.

Creating Printer Distribution Lists

Ensure that the [Printer distribution list field on page 525](#) is selected for the device in **Printers** to identify the device as a distribution list.

You can set up a distribution list against a device so that any occurrence of that device in a distribution list can represent further entries in the distribution. The device must be marked as a distribution list; relevant targets for the distribution are then associated with it.

To create a distribution list:

1. On the **Printers** page, select the printer in the grid.
In the selected grid row, the suboptions button becomes visible to the left of the Printer name column.
2. Click the suboptions button and click Printer distribution lists.
The Printer distribution lists page opens.
3. On the **Printer distribution lists** page, in the toolbar at the bottom of the page, click the Create a new record button.

4. In the Printer Distribution Lists [Create] dialog, complete the fields listed in [Printer Distribution List Settings on page 530](#).
5. Click Create.

Locales

The locale determines the physical printer that documents are printed to. When you sign in to GTTE, you can select your locale using the Locale field. There can be multiple locales for a client. If you do not select a locale when you sign in, then your locale is based on the Default Locale field assigned to you in the **Users** page (menu option US). With this approach, you can send documents that are sent to the same printer in GTTE to different physical printers.

You can access the locales on the **Locales** page (menu option FNDCL0), which is available from the **Foundation** page (menu option FOUN0). Use this page to set up locales and associate documents and printers with it. When using locales for this purpose, each printer needs to be defined both in GTTE in option DP—for more information, see [Printers on page 524](#)—and in Windows.

Creating a Locale

To add a locale to GTTE, complete the following steps:

1. On the **Locales** page, in the toolbar at the bottom of the page, click the Create Record button.
2. In the Create Locales dialog, complete the fields listed in [Locale Settings on page 532](#).
3. Click Save.

The dialog closes and the locale is now accessible in the grid.

Locale Settings

The **Locales** page stores locales and allows you to create locales and attach documents to a locale. The **Locales** page is available from the **Foundation** page (menu option FOUN0). The grid on the page displays details about each of the locales in the system.

Locale

A unique name for the locale.

Description

A description of the locale.

Language


The language used by the printers in the locale. This field is only applicable when the application includes multiple-language support.

Locale Documents

The **Locale Documents** window, which is accessible from the Locale Documents suboption in the **Locales** page, allows you to view the documents and printers associated with a locale.

Attaching Documents to a Locale

To add a document to a locale, complete the following steps:

1. On the **Locales** page, in the grid, click the Locale Documents  icon for the locale that you want to add a document to.
2. In the **Locale Documents** window that opens, click the Create Record button.
3. In the Create Locale Documents dialog, complete the fields listed in [Locale Document Settings on page 533](#).
4. Click Save.

The dialog closes and the document is now attached to the locale.

Locale Document Settings

The **Locale Documents** suboption in the **Locales** page lists the documents attached to a locale and allows you to attach documents to a locale. The grid on the page displays details about each of the locale documents.

Locale

A unique name for the locale.

Document Type

The document type. The combination of the document type and document ID uniquely identify the document.

Document

The document ID. The combination of the document type and document ID uniquely identify the document.

Image ID

If the document to be printed is associated with a scanned image from an external system, this field contains the image ID.

Printer

The ID of the printer to print the document to.

Continuation Page Printer


The printer to print pages after the first page of the document to, if it differs from the value in the Printer field.

Number of Copies

The number of copies to be printed. To print more than one copy, the USE LOCALE COPIES system value must be set to YES.

Associating a Document With Multiple Locales

The Locales page (menu option FNDCLO) allows you to associate a document with multiple locales.

1. On the **Locales** page, on the lower right of the page, click the blue suboption icon  .
2. In the Associate a Document With Multiple Locales window, from the first Document Type lookup, select the document type of the document you want to associate with the locales.
3. From the first Document lookup, select a document to associate with the locales.
4. From the second Document Type lookup, select a document type to serve as the blueprint for the document's locales configuration.
5. From the second Document lookup, select a document to serve as the blueprint for the document's locales configuration.
6. To associate the document in the first Document lookup with the locales from the blueprint, click Associate.

Note Blueprint documents serve as a template for the new locale document. For example, if the new document is a label, then the blueprint document should also be a label. This is because the printer that is set for the new locale document is copied from the blueprint locale document. Furthermore, the new locale document is only created in the locales where the blueprint document exists. This is useful where a letter size document is only to be added to locales based in the US, and a different A4 document is required in other region locales.

Web UI Workflow Tasks

Note More information will be added to this table in future publications of this online help.

Web UI Workflow Tasks

Task Option	Name	Description/Parameters	Applicable Transaction Level
BBSCLS	Close Shipment – Process Action – Black Box Service	Use this task to close a shipment in the GTTE database.	S
BBSDEL	Delete Shipment – Process Action – Black Box Service	Use this task to delete a shipment in the GTTE database.	S
BBSVRT	Print Shipment – Process Action – Black Box Service	<p>To print the specific documents, the action segment of the message must pass in action parameters.</p> <p>The Name node is set to DOCUMENT. This setting specifies that the parameter represents the document to be printed.</p> <p>The Value node contains the identifier of the document as a comma-separated list containing the following items:</p> <ol style="list-style-type: none"> 1. The document type. The possible values are listed in option DO. 2. The document reference. The possible values are listed in option DO. 3. The number of copies that you want to print. 4. The printer that you are printing the document to. The 	S, L

Task Option	Name	Description/Parameters	Applicable Transaction Level
		<p>possible values are listed in option DP.</p> <ol style="list-style-type: none"> 5. The specific pack number that you are printing the document for. This parameter applies if you print the document for a specific pack, only. 6. The document image. 7. The action. The possible values are PRT (print), which is the default value, and PRV (preview). <p>Example:</p> <pre><Parameter> <Name>DOCUMENT</Name> <Value>01,INV2E,1</Value> </Parameter></pre> <p>This example specifies that the document to be printed is the INV2E document, of type 01, and the number of copies to be printed is 1.</p>	
BBSRAS	Route Assign Shipment – Process Action – Black Box Service	This task enables the routing assignment to be run against the shipment in order to set the carrier and service.	S
BBSRRS	ReRate Store for Shipment – Process Action – Black Box Service	To enable you to rate or re-rate a shipment, this task returns the charges for that shipment and stores the charges. You might use this task in a case where weights are changed on a shipment after shipping.	S
BBSRRT	ReRate Shipment – Process Action –	To enable you to rate or re-rate a shipment, this task returns the charges for that shipment, but does not store the charges. You	S

Task Option	Name	Description/Parameters	Applicable Transaction Level
	Black Box Service	might use this task in a case where weights are changed on a shipment after shipping.	
BBSRTN	Return Shipment – Process Action – Black Box Service	Use this task to enable an existing shipment to have its inbound shipment created as a mirror of the outbound leg. The inbound shipment is created in a different shipment transaction type, but with the same shipment reference.	S
BBSRTV	Rate/ Validate Shipment – Process Action – Black Box Service	Use this task to validate that the shipment can be rated according to the current characteristics of the shipment.	S
BBSRUL	Rules Workflow Task – Process Action – Black Box Service	Use this task to enable the standard GTTE rulebook to be run against the shipment.	S
BBSSCS	Shop Current Service – Process Action – Black Box Service	Use this task to return the shopping result for the service that is currently set on the shipment. You might use this task in a case where weights are changed on a shipment after shipping.	S
BBSSHP	Ship – Process Action – Black Box Service	Use this task to generate packing numbers and print labels.	S
BBSSOP	Shop – Process Action – Black Box Service	Use this task to return shopping results for a shipment.	S

Task Option	Name	Description/Parameters	Applicable Transaction Level
BBSWFT	Workflow Task – Process Action – Black Box Service	This task enables you to call a Windows UI task from the Web UI. To run a workflow task, the action segment of the message must also pass in action parameters. The possible parameters for the workflow task are as follows: TASK-ID=<WinUITaskId>, where <WinUITaskId> is the workflow task key ID of the Windows UI task that you want to run.	S
CLOSGR	Close Load - Process Action		L
CSTSH	Customs Transmissions – by shipment		S
FLOW	Compliance – Overall Status	For this task, set Task Key ID to CK_STAT. This task is a special case that displays the overall compliance status and is read-only. Ensure that you set the required status for this task to NV. This tells the Web UI to mark this task as read-only.	S
GR	Loads		L
OPENSH	Re-open Shipment		S, L
RRULES	Rules - Workflow Process Action - Black Box Action		S, L
SH	Detail - Shipment Header		S

Task Option	Name	Description/Parameters	Applicable Transaction Level
SHNOTE	Notes – Procedure		S
SHSH02	Partners – Trading Internal		S
SHSH04	References and other details		S
SHSH05	Partners – Transport Customs		S
SHSH07	Route, Booking and Container		S
SHSI	Items	The Items task enables you to add products that are associated with your shipment.	S
SHSO	Charges – Costs and revenues		S
SHST	Texts		S
SHSU	Assigned Rules		S
SHSV	Vessels / legs		S
SHVRF	Virtual fields		
SNPKWF	Scan>Pack>Ship Workflow Task		S
WFDIR	Workflow – External link		S
WFITEM	Workflow – [Maintenance] Items List Task		S

Task Option	Name	Description/Parameters	Applicable Transaction Level
WFODEL	Workflow - Delete Load Option		L
WFONWL	Workflow - Create Load Option		L
WFTADD	Workflow – Address Task	The Address task enables you to review or set the address for the current shipment.	S
WFTBP	Workflow – Basic Packing Task		S
WFTCKR	Workflow – Compliance Checking (Web)	The checks to run and the task to update with the compliance result. Example: CHECKS=EBC,MN_P R-Q;SET_TASK=CK_STAT	S
WFTCKV	Workflow – Compliance Results (Web)		S
WFTCST	Workflow – Consolidate Shipments Task	This task applies to consolidation workflows only.	S
WFTDOC	Workflow – Documents Task (old)	The Documents task enables you to print and email shipment documents and to associate new documents with the shipment. This version of the task uses the old UI.	S, L
WFTSDC	Workflow – Documents Task (new)	The Documents task enables you to print and email shipment documents and to associate new documents with the shipment. This version of the task uses the new UI.	

Task Option	Name	Description/Parameters	Applicable Transaction Level
WFTDTI	Workflow – Document Text IDs		S
WFTIIU	Workflow – Items Task		S
WFTLOA	Workflow - Update Load Shipments		L
WFTMAN	Workflow – Manifest Task	The Manifest task enables you to review and edit key details of the shipment, and to add the shipment to the EOD Manifest. For more information, refer to the Transportation Execution Shipment Workflow on page 1554 .	S
WFTRAT	Workflow – Rate Shop Task	The Rate Shop task is a results screen, displaying the available carrier services for the shipment. The services available for the shipment depend on how the Routing Guide is set up. You can select the service you want to use and apply it to the shipment. To view carrier services that failed to rate for the shipment, click the Invalid Rates tab.	S
WFTRGP	Debug Routing Guide		
WFTNO2	Workflow – Note Task		S
WFTNO3	Workflow – Note Task	The note to display on the screen.	S
WFTNO4	Workflow – Note Task	See WFTNO2	S
WFTNOT	Workflow – Note Task	See WFTNO2	S

Task Option	Name	Description/Parameters	Applicable Transaction Level
WFTRRC	Route, References and Container	The Routes, References and Containers task enables you to review and add shipping details for the current shipment. These details include dates, locations, references, and information on any vessels or containers linked to the shipment.	S
WFTSDE	Workflow – Shipment Details (Summary) Task		S
WFTSPK	Workflow – Standard Packing Task		S
WFTSSO	Charges - Costs and revenues		S
WFURL	Workflow – External link		S

Inquiry System Values

Inquiry System Values

Category	Key	Description
ITRAX	INQ CREATED BY FIELD DISABLED	<p>This system value controls the Created By field on the Shipment Inquiry search page.</p> <p>Possible values:</p> <ul style="list-style-type: none"> • yes, true, or on – The Created By field on the Shipment Inquiry search page is disabled and the user cannot edit the field content. • no, false, or off – The Created By field on the Shipment Inquiry search page is enabled and the user can edit the field content. <p>Default value: no</p>
ITRAX	INQ DEFAULT CREATED BY VALUE	<p>This system value controls the default value of the Created By field on the Shipment Inquiry page.</p> <p>Possible values:</p> <ul style="list-style-type: none"> • *CURRENT – Displays the current user • <USERNAME> – The username that you want to appear in the Created By field <p>Default value: blank</p>
ITRAX	INQUIRY SEARCH TYPES	<p>This system value specifies what type of transactions you can search.</p> <p>Possible values: A comma-separated list of transaction types. Each entry consists of two values in the <TRANSACTION_TYPE_LETTER>,<TRANSACTION_TY</p>

Category	Key	Description
		<p>Default value: S,Regular Shipments</p> <p>Example: S,Shipments,V,Voided,X,Consolidated Shipments</p>
ITRAX	INQ:YOUR GROUPS ONLY MANDATORY	<p>This system value specifies if a user is only allowed to perform an inquiry on the groups they belong to - Your Groups Only.</p> <p>Possible values:</p> <ul style="list-style-type: none"> • yes, true, or on – The Search Only Your Groups field is selected, indicating that the search is based on transactions that are associated with user groups that the user belongs to. • no, false, or off – The Search Only Your Groups field is not selected <p>Default value: no</p>
ITRAX	INQ SEARCH FIELDS	<p>This system value allows you to specify the search criteria available in the Select Criteria drop-down list. Specify a comma-separated list of values, each representing an item in the drop-down list for this field.</p> <p>Possible values:</p> <p>reference,description,client,consignor,customer,consignee,haulier,shippingOfficer,deliverFrom,deliverTo,hawbNumber,wbNumber,otherReference,customsReference,forwardersReference,additionalReference,DefinedField5,userDefinedField10,invoiceNumber,bookingNumber,billOfLading,route,transportMode,countryFrom,countryTo,placeOfLoading,placeOfDestination,loadReference,shipmentStatus,aesStatus,office,despatchDate,arrivalDate,packingListNumber,mPoNumber,product,trackingNumber,rfidTag,packType,upiNumber,codTrackingNumber,containerNumber,batchNumber,serialNumber,salesOrg1,salesOrg2,salesOrg3,salesOrg4</p> <p>Default value: The complete list of possible values listed above.</p>

Category	Key	Description
		<p>Corresponding values in the Select a criteria field:</p> <p>Reference, Description, Client, Consignor, Customer, Consignee, Carrier, Haulier, Shipping Officer, Deliver From, Deliver To, HAWB No, MAWB No, Other Reference, Customs Reference, Forwarders Reference, Additional Reference, User Defined Field5, User Defined Field 10, Invoice Number, Booking Number, Bill of Lading No, Route, Mode of Transport, Country From, Country To, Place of Loading, Place of Destination, Load Reference, Shipment Type, Status, AES Status, Office, Despatch Date, Arrival Date, Packing Location, Compliance Status, Order Number, PO Number, Order Number (item), PO Number (item), Product, Tracking Number, RFID Tag, Pack Type, UPI, Pack Number, COD Tracking Number, Container Number, Batch Number, Lot Number, Serial Number, Sales Organisation 1, Sales Organisation 2, Sales Organisation 3, Sales Organisation 4</p>
ITRAX	GENERIC - ALLOW SQL DEBUG	<p>This system value determines whether a view last SQL query icon displays below the grid in the Shipments panel.</p> <p>Possible values:</p> <ul style="list-style-type: none"> • true – The view last SQL query icon displays below the grid in the Shipments panel.

Category	Key	Description
		<ul style="list-style-type: none"> • false – The view last SQL query icon does not display below the grid in the Shipments panel. <p>Default value: false</p>
ITRAX	[CARRIER_CODE]: TRACKING SITE	<p>Configure this system value on a carrier basis to specify the link in the Tracking Number column of the grid in the Packages tab of the Shipment Line Details panel.</p> <p>Possible values: URL of the carrier's shipment tracking Web page.</p> <p>Default value: blank</p>
ITRAX	INQ DOCUMENTS PRINTED ONLY	<p>The Documents tab of the Shipment Line Details panel displays documents related to the transaction. Depending on the configuration of this system value and INQ DOCUMENTS HIDDEN DOCS, all documents related to the transaction or a subset of these documents display in the Documents tab.</p> <p>Possible values:</p> <ul style="list-style-type: none"> • true – The Documents tab of the Shipment Line Details panel excludes printed documents. • false – The Documents tab of the Shipment Line Details panel does not exclude printed documents. <p>Default value: false</p>
ITRAX	INQ DOCUMENTS HIDDEN DOCS	<p>The Documents tab of the Shipment Line Details panel displays documents related to the transaction. Depending on the configuration of this system value and INQ DOCUMENTS HIDDEN DOCS, all documents</p>

Category	Key	Description
		<p>related to the transaction or a subset of these documents display in the Documents tab.</p> <p>Possible values: A comma-separated list of document names that you want to exclude from the Documents tab. These document names must correspond with document names listed in the Document field of entries in the DO option.</p> <p>Default value: blank</p> <p>Example: INV1E,INV1S</p>
ITRAX	TEMP-xxxx:001	<p>When a user names and saves a search template, the system creates a system value; it uses the NQTMP- prefix to identify Inquiry templates followed by the template name, a colon, and a sequential number.</p> <p>If you want to make a template available to other users or client, then you can copy the system value and update the user and client fields of the new system value.</p> <p>Example: NQTMP-REF:001 is the system value related to a template with the name REF.</p>
ITRAX	INQ DYNAMIC GRID FIELDS	<p>A comma-separated list of additional columns that display in the Inquiry results grid.</p> <p>Example: userDefinedField3,userDefinedField4,taxCode,...,flag4,ban</p>
ITRAX	REPORT: MAX EXPORT SIZE	<p>Specify the maximum number of rows that it is possible to export to Excel from the Inquiry search results grid.</p> <p>Example: 100000</p>
ITRAX	INQ RECALL AND TRACK ENABLED	<p>This system value controls the presence of the Recall button on page 150 in the Actions column</p>

CategoryKey	Description
	of the Shipments Panel grid on the Inquiry on page 141 screen.

List of Dynamic Fields

This section describes the predefined dynamic fields that are available to add to the **Workflow Portal** and the **Inquiry** screen. For more information, see [Adding Dynamic Fields to the Workflow Portal on page 284](#) and [Adding Dynamic Fields to the Inquiry Screen on page 463](#).

actualArrivalDate

actualArrivalTime

actualCostsComplete

actualLetterOfCreditNumber

activity

aesOption

aesStatus

aesValidationResult

alsoNotify

bankDate

billOfExchange

billOfExchangeDate

billOfLadingNumber

billOfLadingType

blBagCopie

blBagOriginal

blCopie

blDate

blOriginal

blShipperCopie

blShipperOriginal

bookingNumber
boeReferQuestion
calculateDuty
calculateRefund
calculateUsingCert
capNumber
carrier
certOfInsuranceNumber
certOfOriginNumber
certifiedOnBoardDate
checkNo
claimsPayableParty
client
closeDate
closeTime
codPaymentMethod
coLoadedWith
commissionGroup
companyNumber
complianceStatus
consolidateForFreight
consolidation
consignee
consigneeExciseNumber
consignor

consignorExciseNumber
consignorsBank
contact
containerised
countOfClosedDespatche
countOfCommoditie
countOfContainer
countOfDespatche
countOfItem
countryOfDestination
countryOfDespatch
countryOfOrigin
copiedFromConsignor
copiedFromDespatchNumber
corporateCustomer
costValue
creditInsuranceAgent
creditReleaseDate
creditReleaseTime
creditReleaseUser
creditStatus
createdByUser
crowflyDistance
currency

custom
customer
customsEntryPort
customsExchangeRate
customsRef
declarant
deliverFrom
deliverTo
deliveryTerm
deliveryTermsText
departmentCode
departDate
departTime
despatchDate
despatchNumber
despatchTime
description
distance
distanceBand
distanceUom
documentContact
documentSet
dropNumber
dutyPaymentMethod
earlyDeliveryAllowed

ecuExchangeRate
ediStatus
endLoadingDate
endLoadingTime
entryNumberPrefix
eslPeriod
eslPrinted
eslYear
etaDate
etaTime
eur1Number
exchangeRate
exchangeRateType
expectedReceiptQuantity
expiryDate
exportRefundClaimReference
exportTradersRef
extraDate
extraDate2
extraDetailText
extraField4
flag
flag4
flag5

flag6
financial
finalDestination
fobValue
foreignAgent
foreignTradeZone
forwardersRef
forwardingAgent
freightStatus
goodsDepartureDate
grossWeight
group3
group4
haulier
houseAirWaybill
importPermitNumber
inUseFlagYOrBlank
inUseInConsolidation
inspectionBy
inspectionType
insuranceAgent
insuranceValue
insuredParty
insuredPartyType
insuredUnderCondition

internationalCarrier
intrastatPeriod
intrastatPrinted
intrastatYear
invoiceConsolidationNo
invoiceDate
invoiceDate2
invoiceNumber
invoiceNumber2
invoicePrefix
invoiceYear
journeyTime
journeyTimeUom
language
lastModifiedDate
lastModifiedTime
lastModifiedUser
lastModifiedWorkstation
lateDeliveryAllowed
letterOfCreditNo
load
loadConsignor
loadNoDropSequence
loadSpace

loadSpaceUom
loadingDate/
loadingTime
lockCalculation
masterAirWaybill
mostRecentlyUsedBy
multiplyExchangeRate
natureOfTransaction
netNetWeight
netWeight
notify
numberOfCollection
numberOfDeliverie
office
operatingCurrency
orderDate
orderNumber
origin
otherReference
ownerGroup
packingLocation
partiesRelated
paymentMethod
paymentTerm
placeBLDated

placeOfDelivery
placeOfLoading
policyNumber
ppIm
precisionDefinedField1
precisionDefinedField2
precisionDefinedField3
precisionDefinedField4
precisionDefinedField5
prepaidCollectOther
priceIncludesTax
principal
priority1999
protectedField
protectAsPerClosed
receivingInbondCarrier
receivingItClass
receivingItDate
receivingItNumber
receivingItPort
reference
reference2
reference3
referQuestionsToFrgtfwd

remitOffice
reqDeliveryEndDate
reqDeliveryEndTime
reqDeliveryStartDate
reqDeliveryStartTime
responsible
returnType
removeFromAesProcessing
route
routingEcWc
salesAgent1
salesAgent2
salesAgent3
salesAgent4
serviceContractNumber
settlingAgent
shipQuantity
shipmentBank
shipmentCategory
shipmentCategory2
shipmentSource
shipmentType
shippedAsDespatches
status
status2

statusCharge
stateOfOrigin
taxCode
totalLineValue
totalNoOfInner
totalNoOfOuter
totalNoOfPack
totalValue
transactionDate
transactionType
transportMode
typeOfMovement
ultimateConsignee
uniqueConsignmentReference
uniqueReference
upId
useAndOrDestination
userConsolidatingShipment
userDefined11
userDefined12
userDefined13
userDefined14
userDefined7
userDefined8

userDefined9

userDefinedField1

userDefinedField3

userDefinedField4

userDefinedField5

userDefinedField6

volume

volumeUom

weightUom

workflowCode

workflowIsInUse

workGroup