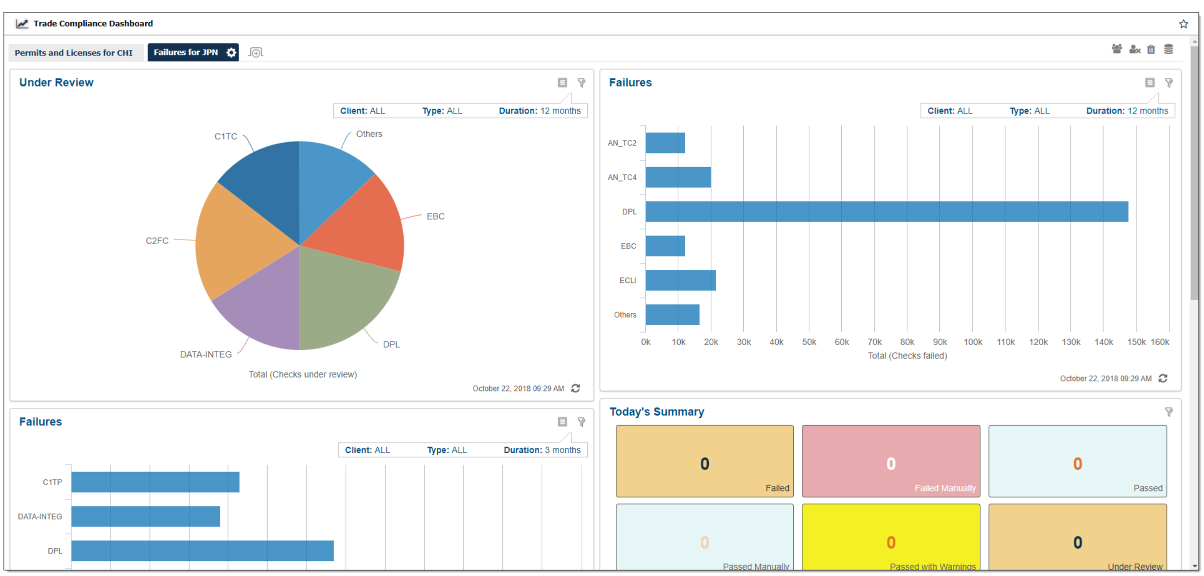
Operational Analytics

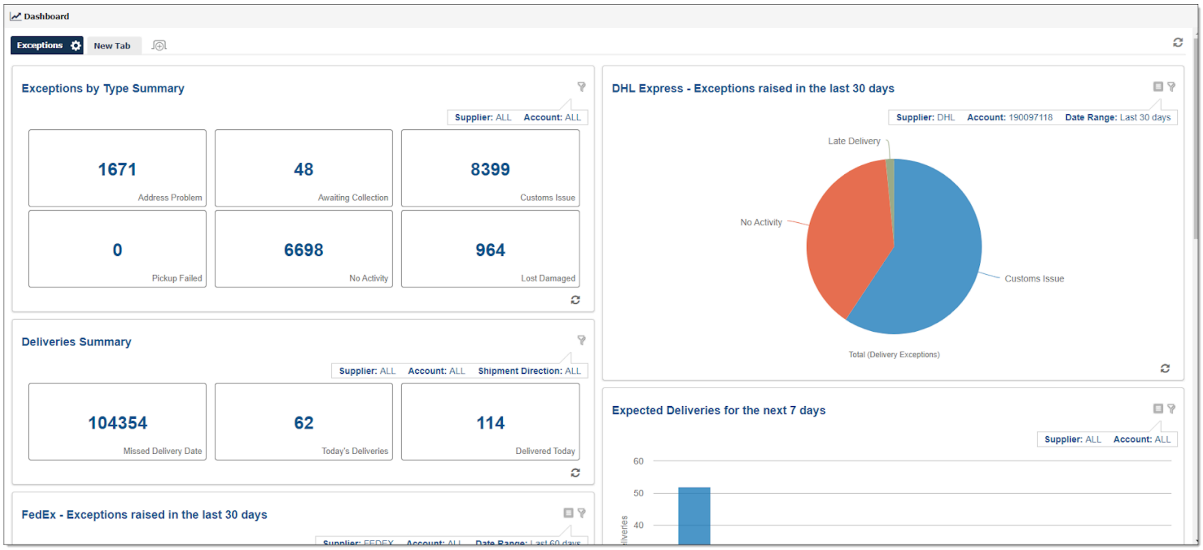
The Operational Analytics Dashboards provide a snapshot view of current compliance activity and shipping analytics. This customizable view consists of a series of bar charts, line charts, and grids that can easily be added, rearranged, or removed according to company needs. Visual items, such as grids and charts, offer a quick, simple format for you to check performance in one location. In addition, these charts can have drill-down capability, enabling you to view a more detailed breakdown of the information by clicking chart data.

Transportation Execution Dashboard

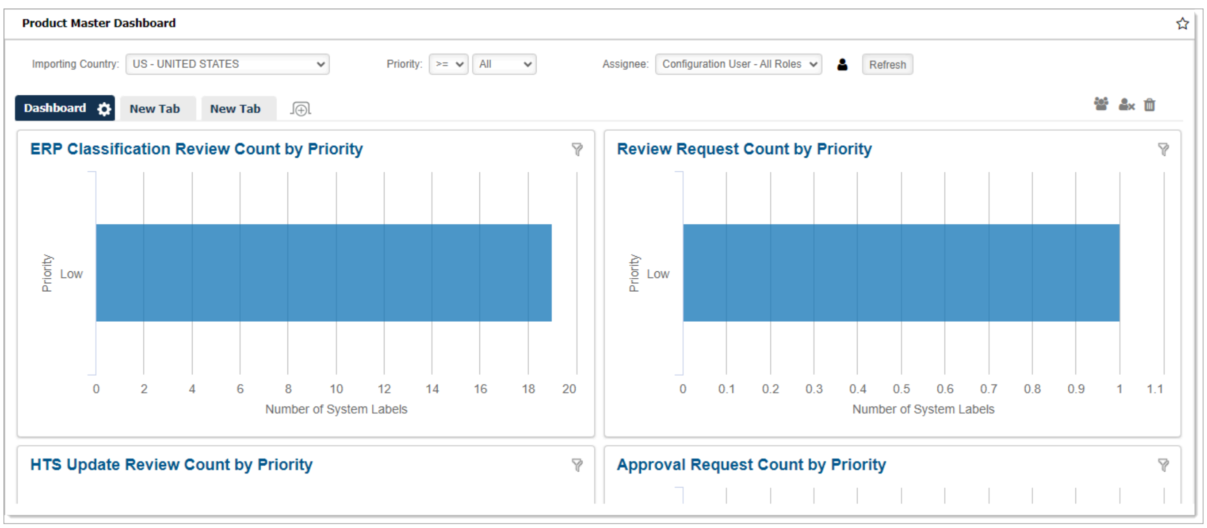
Trade Compliance Dashboard



Delivery Exception Management Dashboard



Product Master Dashboard



Using The Dashboards

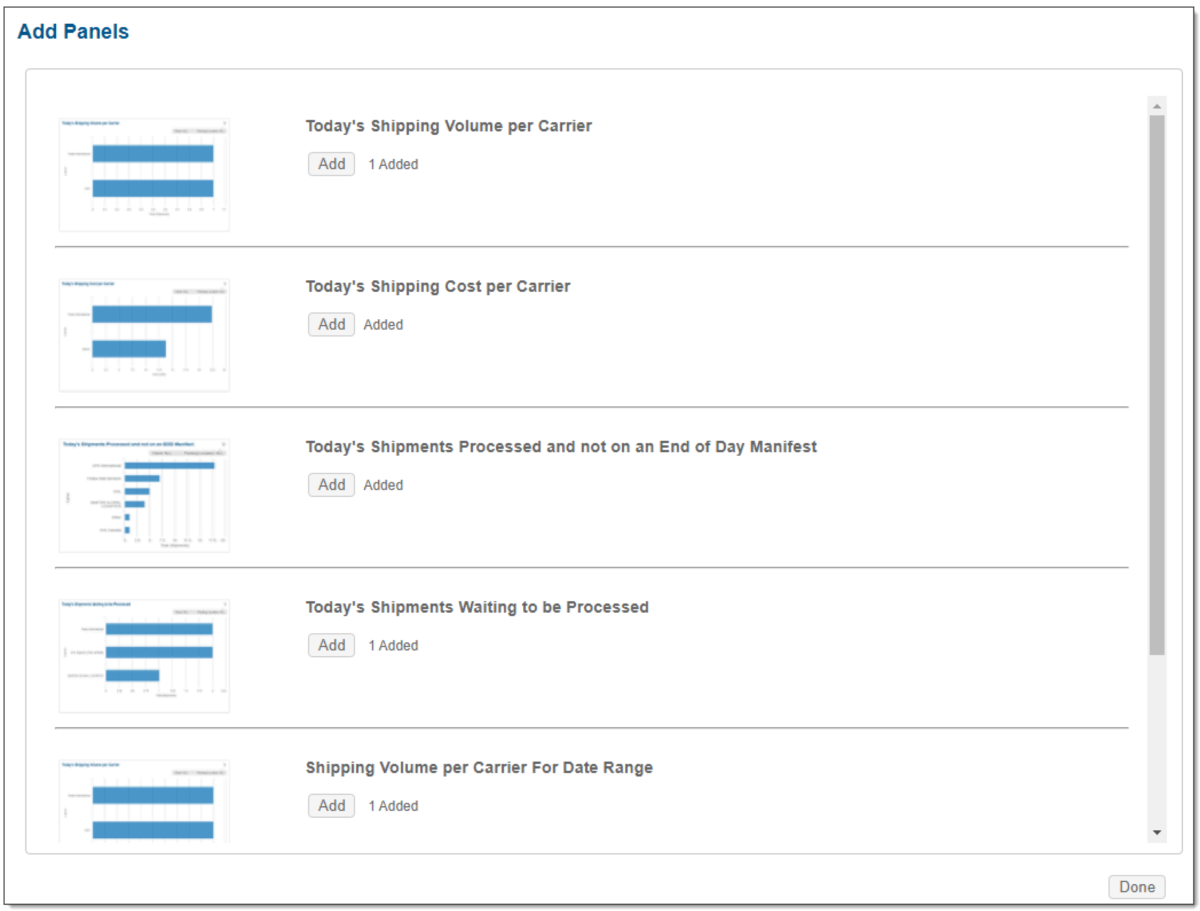
This section describes how to get started using the Operational Analytics Dashboards, and the features that are available to you, the user. It also describes the charts available for each dashboard.

General Concepts

Adding Charts

When you access a dashboard page for the first time, or if the dashboard is empty at any point, you are prompted to add chart panels in an Add Panels pop-up window.

Add Panels Window



If it is not your first time accessing a dashboard and you would like to add a chart, click the gear icon to the left of the tab title and then click Add Panels.

You can add multiple instances of the same chart to a dashboard. Click the Add button again in the Add Panels pop-up window.

To save your chart panel selection, click Done. When at least two charts are added, you can use the drag and drop functionality to rearrange them on the dashboard.

Tabs

The dashboards can be divided into tabs using the tab buttons at the top of the page. Tabs are especially useful in cases where there are a lot of panels that you may want to organize; for example, you can establish a tab for each client.

By default, the first tab displays the name of the dashboard that you are currently on.

Tab Buttons, Trade Compliance Dashboard

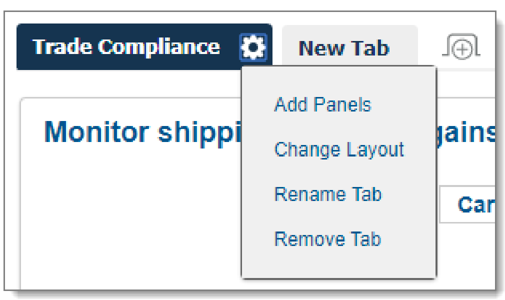
Adding a Tab

To add a tab to a dashboard, click the add button. When you click this button, the Add Panels pop-up window is displayed.

Tab Settings

You can configure the tabs by clicking the gear icon. This opens a drop-down menu.

Tab Settings, Drop-down Menu



- **Add Panels.** Select this option to add chart panels to the current tab. This opens the Add Panels pop-up window.
- **Change Layout.** By default, the dashboard displays two panels on each row that you can drag and drop to rearrange. To change the number of panels on each row, click Change Layout and enter the desired column number in this field.

Note This only changes the layout of the selected tab.

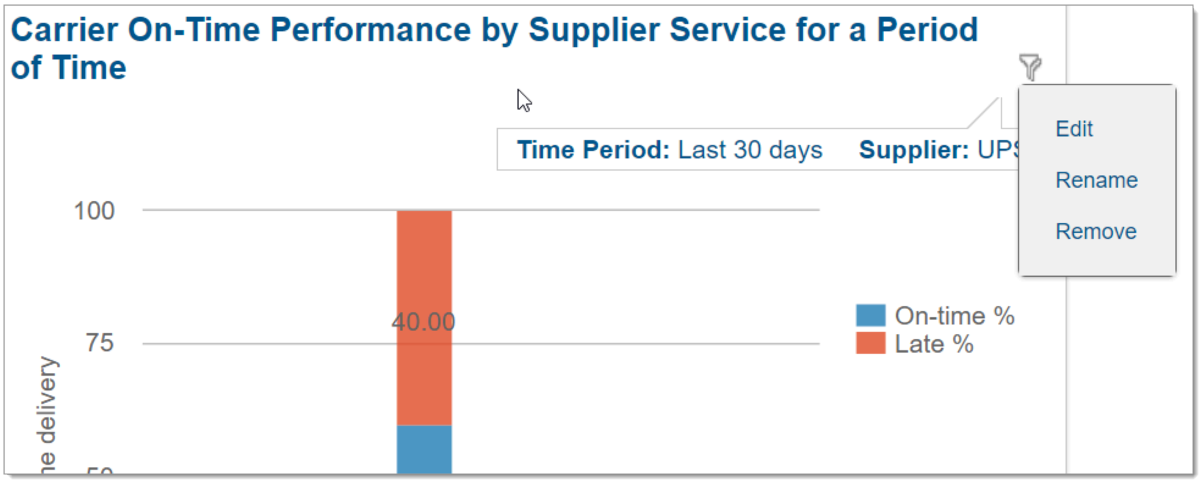
- **Rename Tab.**Select this option to update the name of the current tab. Type the new name in the field provided and press Enter.

- **Remove Tab.** This option is only available when there is more than one tab on the dashboard. If there is only one tab, you cannot remove it.

Chart Settings and Filters

To view additional settings, click the settings icon. This opens a drop-down menu.

Settings Drop-down Menu



- **Edit.** This option enables you to filter the data to be displayed in a chart.
- **Rename.** Each chart option has a default title that you can modify. This only changes the name of the selected chart. It does not affect the title of the chart options in the Add Panels pop-up window.
- **Remove.** Click this option to remove a chart panel from the dashboard.

Common Transportation Execution Filters

Filter Name	Description
Client	View data associated with a specific client. If this filter is set to show All, the chart will display all the clients that you have access to.
Packing Location	Filter by the logical area from where users ship their shipments. If this filter is set to ALL, the chart displays all the locations for a specific client. In the case of all clients, all packing locations that the user has access to are shown.
Carriers	Specify the number of carriers to display in the chart.
Display	Choose to display data for either shipments or packages.

Filter Name	Description
Currency	Select from this drop-down list to view data for a specific currency. These currencies are configurable by your administrator.
Date Range	View data within a specified date range.
Carrier	Select from this drop-down list to view data associated with a specific carrier.
Services	Specify the number of carrier services displayed in the chart.
Min and Max Packages	Select the minimum and maximum package quantities contracted with a carrier.
Scheme	Your administrator can establish a color scheme for bar and pie charts in the Dashboard Configurator. Select a color scheme using this drop-down list.
Duration	Similar to the Date Range filter, the Duration field allows you to filter the results based on the time at which the activity occurred: • Today • 1 month • 3 months • 6 months • 9 months • 12 months
Type	Specify the type of data that you would like to view activity for; transactions, requests, or data scrubs.
Chart Type	You can choose different types of charts in which to display the operational analytics data: • Bar • Pie

Inquiry

Some charts have an Inquiry button that you can click to view the data on which the chart is based.

Drill-Down

If a chart offers drill-down capabilities, it means that you can access a more detailed level of the information presented. For example, on the Trade Compliance Dashboard, you can view the details of today's data scrub results beyond the total number of parties that were screened. In this case, drilling down directs you to the Compliance History (CKHIST) page, where you can view a breakdown of each data scrub.

If drill-down capabilities are enabled, click a particular section of the bar or chart to view the data in more detail.

Cache

The Operational Analytics dashboards may aggregate a high volume of compliance and shipping activity each day. To prevent this from having a negative impact on performance, chart and configuration data is stored for a period of time in the system memory, or cache. When you, the user, access the dashboards, the system can then quickly load the data from the cache.

By default, the cache is automatically refreshed every 30 minutes, but this can be configured by your administrator. For more information, see Cache on page 1889. Alternatively, you can refresh the cache manually using one of the options below.

Refresh Chart Data

To refresh the data for a specific chart, click the refresh icon at the bottom right of the chart. The date and time of the most recent manual or automatic cache refresh is displayed to the left of this icon.

Refresh Configuration Cache

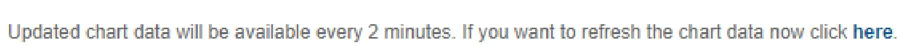
Changes that you make in the Web UI may not be immediately reflected in the chart filters. For example, the Description field on a client record was updated, but the Client filter on a dashboard chart still displays the old description. In this case, you need to refresh the configuration cache.

To ensure that the chart filters display only the most up-to-date information, click the Refresh Configuration Cache icon at the top right of the page.

Refresh All Dashboard Data

To refresh all data in either the Transportation Execution Dashboard or Trade Compliance Dashboard, click the link at the bottom of the page.

Refresh Cache Link



This action updates the cache for all tabs in the selected dashboard.

Note This link may be temporarily hidden if you have refreshed the cache recently. This feature can be disabled, enabled, and configured by your administrator.

By default, the operational analytics data automatically refreshes every 30 minutes for both dashboards. You can change the default duration between cache refreshes in the Dashboard Configurator (CFGDB).

Transportation Execution Dashboard

Overview

The Transportation Execution Dashboard displays real-time transaction and shipping analytics for the current day or a date range. You can filter data based on certain criteria, such as client, date range, or packing location.

To open the Transportation Execution Dashboard, access the ANTE option. Alternatively, on the top menu, choose one of the following from role-based menu bar:

- Customer Service Manager
- Supply Chain Manager
- Transportation Analyst
- Warehouse Manager

In the top menu, a chart icon appears to the right of the user group. Click Transportation Execution Dashboard from the drop-down menu that appears when you hover over the icon.

Menu Link to Dashboard

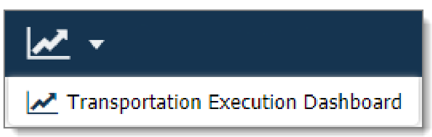


Chart Options

The available chart options are listed in the table below:

Available Charts and Configuration Options

Chart Name	Description	Drill-Down Available	Filters	Possible to Add Multiple Instances
Today's Shipping Volume By Carrier	The number of packages or shipments made today by carrier. By default, this chart displays shipments. The despatch date is today's date.	Yes	• Client • Packing Location • Display • Carriers • Scheme	Yes
Today's Shipping	The total cost of packages or shipments made	Yes	• Client	Yes

Chart Name	Description	Drill-Down Available	Filters	Possible to Add Multiple Instances
Costs By Carrier	today by carrier. The default currency is defined in the Dashboard Configurator (CFGDB).		• Packing Location • Currency • Carriers • Scheme • Chart Type	
Today's Shipments Manifested and Not on a Carrier Pickup	The number of packages or shipments that have not been communicated to the carrier.	No	• Client • Packing Location • Display • Carriers • Scheme • Chart Type	Yes
Today’s Transactions Not Yet Manifested	The number of packages or shipments by carrier that have not been processed.	Yes	• Client • Packing Location • Display • Carriers • Scheme • Chart Type	Yes
Shipping Volume By Carrier For a Date Range	The number of packages or shipments by carrier made in a specified date range.	Yes	• Client • Packing Location • Date From/ To • Display • Carriers • Scheme • Chart Type	Yes
Shipping Costs By	The total cost of shipping packages	Yes	• Client	Yes

Chart Name	Description	Drill-Down Available	Filters	Possible to Add Multiple Instances
Carrier For a Date Range	or shipments by carrier made for a specified date range.		• Packing Location • Date From/ To • Currency • Carriers • Scheme	
Today's Shipping Volume By Carrier Service	The number of packages or shipments made today by each carrier service. The despatch date is today's date.	Yes	• Client • Packing Location • Carrier • Display • Services • Scheme • Chart Type	Yes
Today's Shipping Costs By Carrier Service	The total cost of shipping packages or shipments made today by each carrier service. The despatch date is today's date and the default currency is defined in the Dashboard Configurator (CFGDB).	Yes	• Client • Packing Location • Carrier • Currency • Services • Scheme • Chart Type	Yes
Shipping Volume By Carrier Service for a Date Range	The number of packages or shipments by carrier service in a specified date range.	Yes	• Client • Packing Location • Carrier • Date From/ To • Display	Yes

Chart Name	Description	Drill-Down Available	Filters	Possible to Add Multiple Instances
			• Services • Scheme • Chart Type	
Shipping Costs By Carrier Service for a Date Range	The total cost of shipping packages or shipments by each carrier service in a specified date range. The default currency is defined in the Dashboard Configurator (CFGDB).	Yes	• Client • Packing Location • Carrier • Date From/To • Currency • Services • Scheme • Chart Type	Yes
Monitor Shipping Volumes Against Carrier Agreement	The quantity of packages that is shipped inside a specified date range, compared against the minimum and maximum number of packages agreed with the carrier. The gray bar indicates the number of packages. The red segments signify the danger zone for packages that are either less than the contracted minimum or over the contracted maximum.	No	• Client • Packing Location • Carrier • Date From/To • Min/Max Packages	Yes
Monitor Today's Shipping Volumes	The quantity of packages that is shipped today, compared against	No	• Client • Packing Location	Yes

Chart Name	Description	Drill-Down Available	Filters	Possible to Add Multiple Instances
Against Carrier Agreement	the minimum and maximum number of packages agreed with the carrier. The gray bar indicates the number of packages. The red segments signify the danger zone for packages that are either less than the contracted minimum or over the contracted maximum.		• Carrier • Date From/ To • Min/Max Packages	

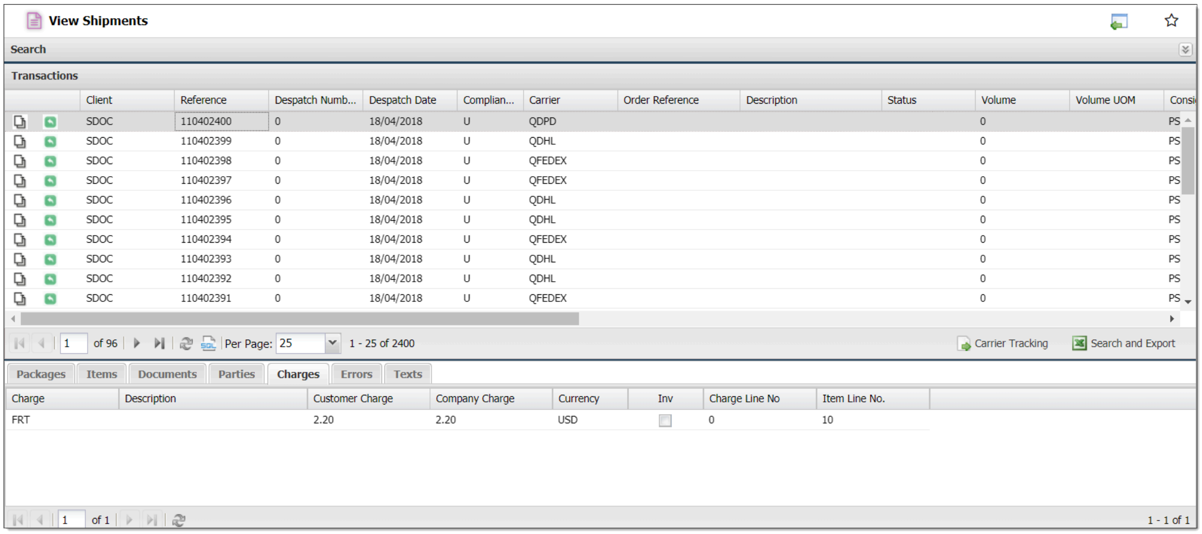
Note The cost charts for a date range provide estimated amounts. This is because the system does not contain historical currency data associated with carrier shipping costs. Therefore, it makes calculations based on the exchange rate closest to today's date.

Inquiry Drill Down

To view the exact volume or cost total associated with a carrier, hover over any bar or pie segment in a chart. Click a bar or segment to see a detailed breakdown of the data it represents on the Inquiry page. Alternatively, access the REPORT option.

Each panel also has an Inquiry button. Click this button to open the Inquiry page and see a detailed breakdown of shipments relating to all carriers in that particular panel. The Inquiry page is read only, which means that you cannot perform any operations on a transaction.

Inquiry Page



Search Panel

Click the down arrow  icon at the top right of the page to expand the search panel.

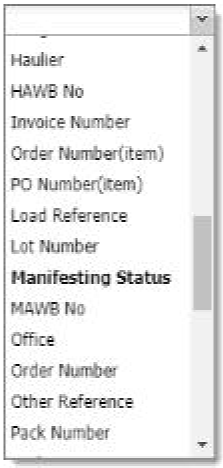
Inquiry Search Panel

The large box in this section displays the search criteria that is currently in place. This was brought over from the filters that were applied to the bar chart on the Transportation Execution Dashboard.

You can use the Search Criteria drop-down list to refine the results based on commonly used search criteria.

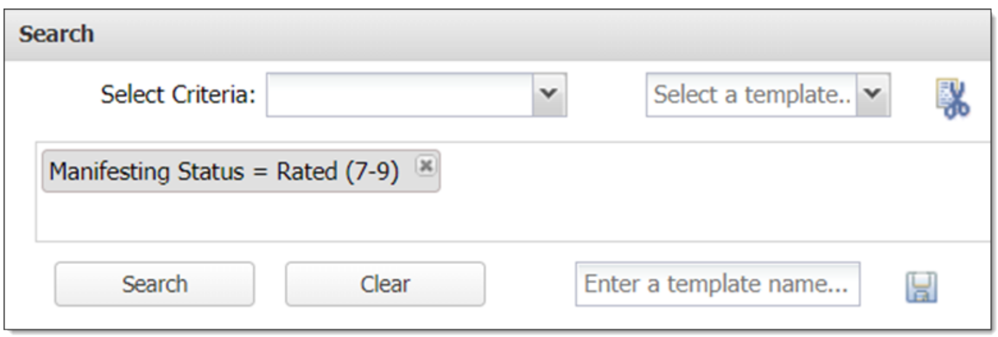
Selected criteria display in bold text in the drop-down list of criteria to indicate that these fields are already listed in the search criteria area.

Search Criteria Area, Selected Criterion



Inside this criteria box, you will see a Manifesting Status criterion with status codes applied.

Manifesting Status as Search Criterion



The following table summarizes the meaning of each status code.

Manifesting Status Code Descriptions

Code	Description
Blank	Pending
5	Beginning of the rating process.
6	Interim. Rarely used by QAD GTTE customers, but allows for an interim service to be used to get the shipment from desk to mailroom for later service completion.
7	Rated (shipped)
9	Posted (after the close of the shipment)

For more details on the Inquiry page and the Search Panel, see Inquiry on page 141.

To return to the Transportation Execution Dashboard, click the Back button in the top right corner.

Trade Compliance Dashboard

Overview

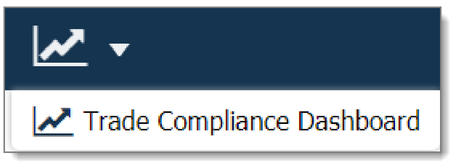
The Trade Compliance Dashboard provides operational information about recent compliance processing activity. This data is illustrated in a series of panels that contain bar charts, pie charts, line charts, and tables.

To open the Trade Compliance Dashboard, choose one of the following user roles from the role-based menu:

- Export Compliance Officer
- Export Compliance Manager

In the top menu, a chart icon appears to the right of the user group. Click Trade Compliance Dashboard from the drop-down menu that appears when you hover over the icon.

Menu Link to Trade Compliance Dashboard



Alternatively, access the ANTC option.

Chart Options

Available Charts and Configuration Options

Chart Name	Description	Drill-down Available	Filters	Possible to add multiple instances
Screening Throughput	This chart displays the number of compliance checks that were performed in the past seven days. This data is divided into check type, check total, and the date on which they occurred.	No	Client	No
Denied Party Screening	This chart displays Denied Party List (DPL) failure metrics from the last seven days. This chart is useful when you want to review the number of false	No	• Client • Type	No

Chart Name	Description	Drill-down Available	Filters	Possible to add multiple instances
	positives that the system identifies.			
Expiring Licenses and Permits	The chart displays the license and permit records that are close to expiring. You can specify a date range. By default, the range is set to thirty days.	No	• Expiry Days • Type • Client	No
Today's Total Summary	This chart displays totals based on compliance screening activity relating to transactions, requests, and data scrubs performed in the system today.	Yes	• Type • Status 1 - 6	Yes
Failures	This chart displays compliance runs that have an overall status of System Failed (FA).	Yes	• Client • Type • Duration • Chart Type • Scheme	Yes
Under Review	This chart displays compliance runs that have an overall status of Under Review (FR).	Yes	• Client • Type • Duration • Chart Type • Scheme	Yes
Consumed Quantity Licenses and Permits	This chart identifies Permits or Licenses where the remaining quantity is low. You can specify the quantity for comparison using the Remaining Quantity filter.	No	• Remaining Quantity • Type • Client	Yes
Consumed Value Licenses and Permits	This identifies Permits or Licenses where the remaining value is low. You can specify the value	No	• Remaining Quantity • Type	Yes

Chart Name	Description	Drill-down Available	Filters	Possible to add multiple instances
	for comparison using the Remaining Value filter.		• Client	
Payments	This bar chart shows the purchase order (PO) payment totals. The chart displays the number of purchase orders with lines that are over or under the received payment.	Yes	• Client • Scheme	No
Reconciliation	This bar chart shows the daily reconciliations, with drill-down functionality that provides a filtered list of the relevant purchase orders (POs). The chart shows the number of POs with lines that are over or under the received payment.	Yes	• Client • Scheme	No

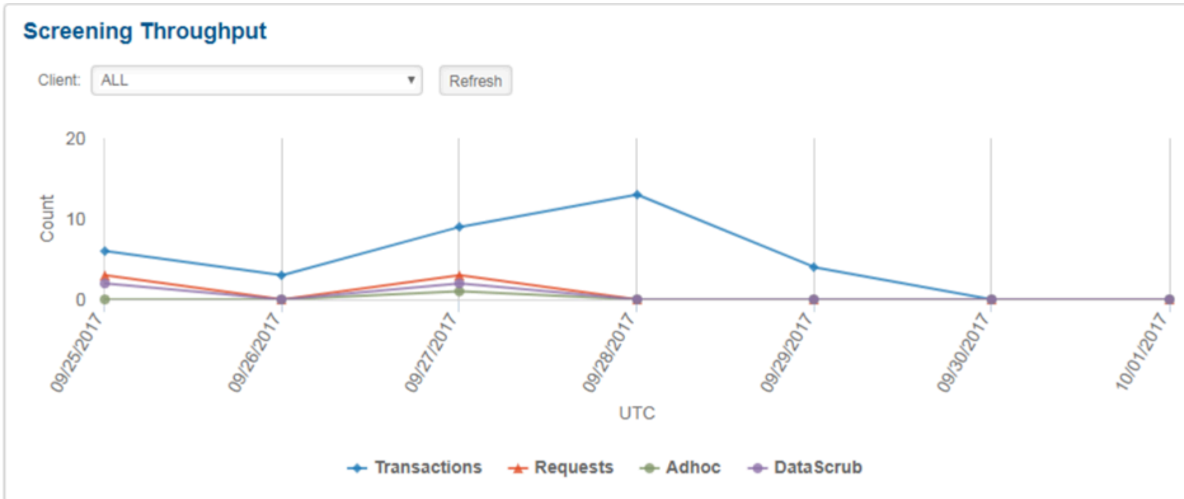
Note You may not see results for all compliance types, depending on how the administrator has configured your system.

Screening Throughput

This chart shows information in a series of data points connected by color-coded lines. Each line represents a screening type:

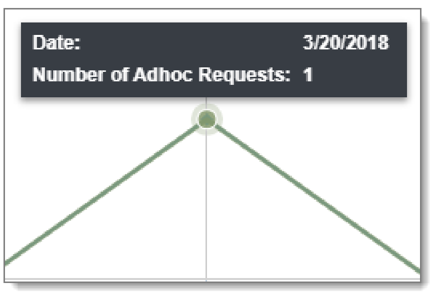
- Transactions
- Requests
- Ad hoc
- Data scrub

Screening Throughput



To view the total number of compliance screenings for a specific date and screening type, hover over the corresponding data point on the chart.

Hover Over Data Point for More Information



To zoom in on a particular area of the chart, click and drag the cursor across the area. To return to normal view, click the Reset Zoom button. You can select and deselect the check types that are displayed in the line chart by clicking the labels below the table to toggle them on and off.

Denied Party Screening

The Denied Party Screening table is divided into two sections: a general DPL overview on the left, and a breakdown of false positives on the right.

Denied Party Screening

Denied Party Screening

Client: ALL

					False Positives Breakdown		
Date	Screened	Failed	False Positives	% False Positives	Transactions	Requests	Data Scrub
03/20/2018	2	0	0	0.00%	0	0	0
03/21/2018	3	0	0	0.00%	0	0	0

- *Screened.* The total number of compliance runs performed on the specified date.
- *Failed.* The total number of manual DPL failures.
- *False Positives.* The total number of DPL checks that failed a compliance check and were then manually passed by a user.
- *% Failed.* The total of false positives as a percentage of the total screened.
- *Transactions.* The total number of compliance runs for transactions that have a false positive DPL failure. Multiple runs for the same transaction are only counted once.
- *Requests.* The total number of compliance runs for requests that have a false positive DPL failure. Multiple runs for the same request are only counted once.
- *Data Scrub.* The total number of false positive DPL failures that occurred in a data scrub. If the same denied party was screened in more than one Data Scrub upload, each occurrence of the false positive is counted here.

Note AdHoc compliance checks are excluded from the Denied Party Screening chart data.

Expiring Licenses and Permits

Expiring Licenses and Permits

Expiring Licenses and Permits

Expiry Days: 30 **Type:** ALL **Client:** ALL

Type	License Code	Expiry Date	Country	Consignee	Data Client
License	EX_DEC	20/04/2018	US		TGL
License	LICENSE AB3	25/04/2018	BR		TGL
Permit	DECLAN	28/04/2018			TGL

You can filter this table by:

- *Expiry Days.* The number of days from the current date. Any licenses or permits due to expire within this number of days will be shown in the table.
- *Type.* You can select to view only licenses or permits.
- *Client.* Use this drop-down list to view only the licenses associated with a particular client.

The Expiring Licenses and Permits grid displays the following data:

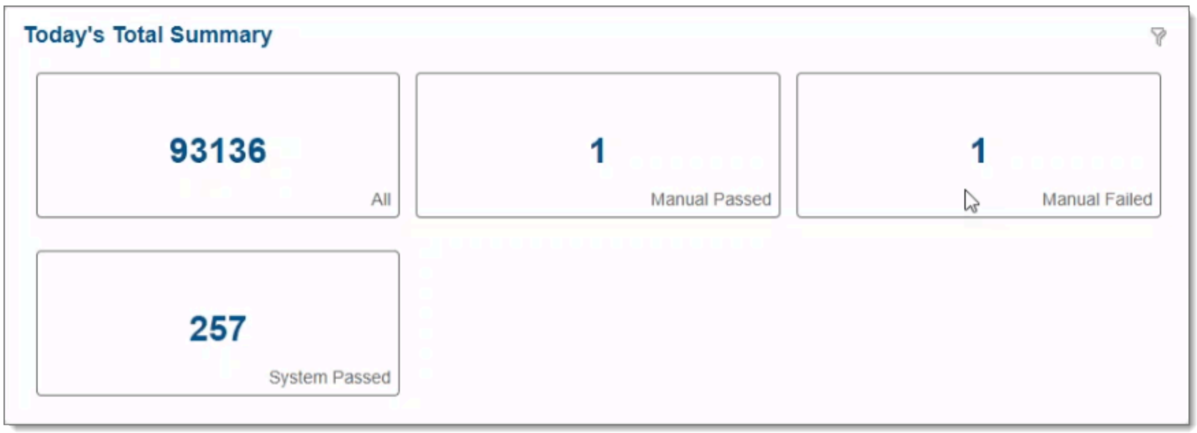
- *Type.* This column indicates whether a permit or a license is due to expire.
- *License Code.* The code that is supplied by the licensing agency.
- *Expiry Date.* This is the expiry date of the license or permit.

- *Country.* The country that issued the license.
- *Consignee.* The consignee that the license is issued against.
- *Data Client.* The client associated with the license or permit.

Today's Total Summary

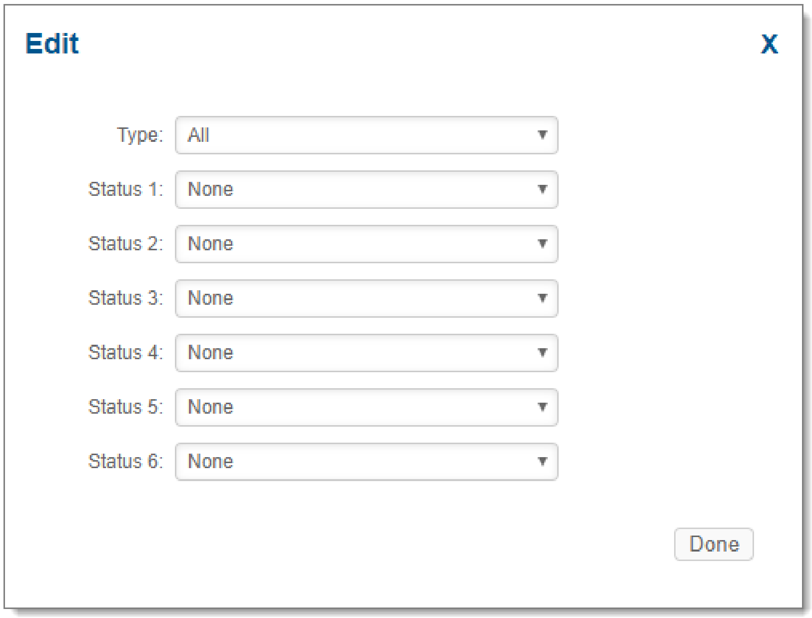
The Today’s Total Summary chart consists of up to six tiles that display totals based on today’s compliance screening activity. You can view totals relating to transactions, requests, and data scrubs performed in the system today.

Today’s Total Summary



Note When you first add this chart, or if you have not assigned statuses to the tiles yet, the chart will display a prompt asking you to do so. If you do not assign any statuses, this chart will remain empty.

Click the settings icon and then click Edit. In this pop-up window, you can select the data type to display and assign statuses to the tiles. By default, the Type field is set to All. This means the chart will display today’s totals for transactions, requests, and data scrubs.



Tile Descriptions in the Today’s Total Summary Chart

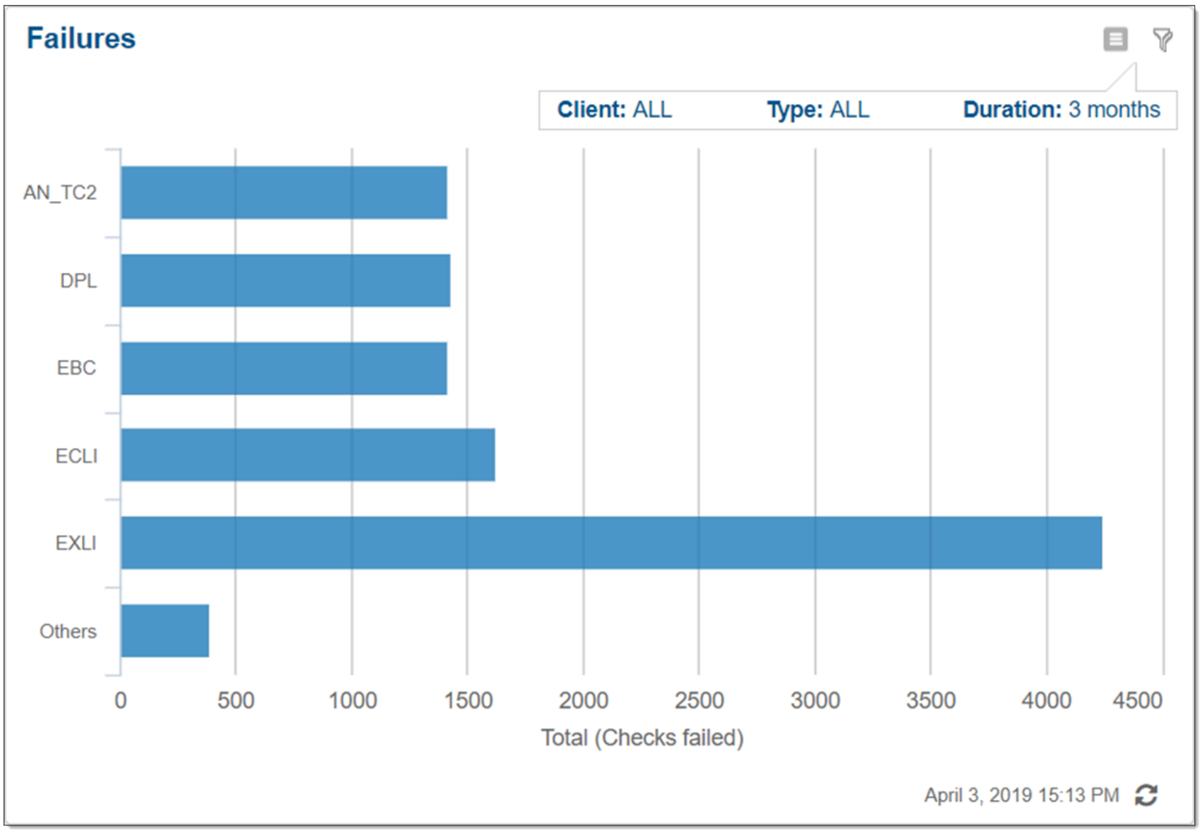
Tile	Description
Confirmed Fail (FM)	The total number of data scrubs, requests, and/or transactions on QAD GTTE today that received a compliance status of Failed by a user with relevant permissions.
Manual Pass (PM)	The total number of data scrubs, requests, and/or transactions on QAD GTTE today that failed a compliance check, and were then passed manually by a user with the relevant permissions.
System Fail (FA)	The total number of data scrubs, requests, and/or transactions on QAD GTTE today that automatically failed a compliance check.
System Pass (PA)	The total number of data scrubs, requests, and/or transactions on QAD GTTE today that automatically passed a compliance check.
Under Review (FR)	The total number of data scrubs, requests, and/or transactions on QAD GTTE today that were manually set to Under Review by a user with the relevant permissions.
All	The total number of data scrubs, requests, and/or transactions on QAD GTTE today that received a compliance status of Confirmed Fail, Manual Pass, System Fail, System Pass, and Under Review.

You can change the background color and text color of these tiles through the Trade Compliance Dashboard tab of the Dashboard Configurator (CFGDB).

Failures

This chart displays compliance runs that have an overall status of System Failed (FA). Using the filters, you can limit the data based on client, duration, and run type. To view the exact number of system failures for a specific client, hover over the corresponding bar on the chart.

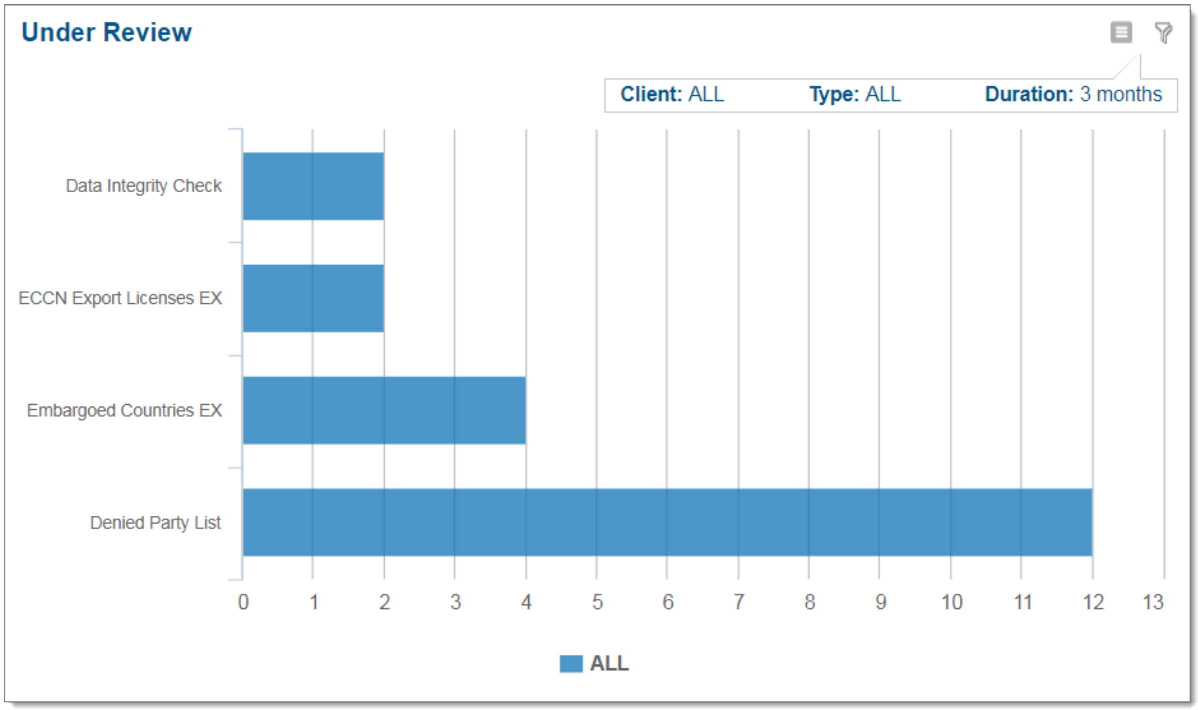
System Failure Panel



Under Review

This chart displays compliance runs that have an overall status of Under Review (FR). Using the filters, you can limit the data based on client, duration, and run type. To view the exact number of compliance runs with a status of under review for a specific client, hover over the corresponding bar on the chart.

Under Review



Consumed Quantity Licenses and Permits

This grid displays the remaining quantities of permits and licenses that are low or below a threshold.

To specify a quantity for comparison, click the settings icon and then click Edit. Enter a quantity in the Remaining Quantity field. In this pop-up window, you can also filter the grid data based on Type - License or Permit - and Client. The grid can be added to the dashboard multiple times with different filter criteria.

Consumed Quantity Licenses and Permits Chart

Consumed Quantity Licenses and Permits

Type: ALL **Client:** ALL **Remaining Quantity:** 1000

Type	License Code	Product	Classification	Licensed Quantity	Remaining Quantity	UoM	Expiry Date	Client
License	R9A_L2	A1000000	EU/	50.000000	44.00	EA	2019/06/30	TGL
License	LIC_01_US	A99-87110	US/	150.000000	150.00	EA	2019/12/19	TGL
License	LIC_01_US	B1000002	US/	250.000000	250.00	EA	2019/12/19	TGL
License	LIC_01_US	B2000006	US/	300.000000	300.00	EA	2019/12/19	TGL
License	LIO	LIO	US/0A001	100.000000	100.00	D	2018/11/30	TGL
License	LIO	LIO	US/0A001	10.000000	10.00	CM2	2018/11/30	TGL
License	LIO	LIO	SG/0A001	100.000000	100.00	CM2	2018/11/30	TGL
License	LIO	LIO	SG/0A001	100.000000	100.00	EA	2018/11/30	TGL
License	LIO	LIO	SG/0A001	100.000000	95.00	EA	2018/11/30	TGL
Permit	LIO PERMIT	A1000000	HTS/0101901090	50.000000	50.00	cm2	2018/11/30	TGL
Permit	LIO PERMIT	A2000001	HTS/0101100010	50.000000	50.00	cm2	2018/11/30	TGL
License	LIO_R9A	A1000000	EU/	50.000000	50.00	EA	2019/06/30	TGL
License	LIC_01_EU		EU/0B001.b.14.a	250.000000	250.00	EA	2019/07/19	TGL
License	LIC_01_EU	A201004	EU/	500.000000	500.00	KG	2019/07/19	TGL
License	LIC_01_EU	A5000001	EU/	400.000000	400.00	KG	2019/07/19	TGL

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November 26, 2018 14:02 PM

Consumed Value Licenses and Permits

This grid displays the remaining values of permits and licenses that are low or below a threshold.

To specify a value for comparison, click the settings icon and then click Edit. Enter a quantity in the Remaining Value field. In this pop-up window, you can also filter the grid data based on Type - License or Permit - and Client. The grid can be added to the dashboard multiple times with different filter criteria.

Consumed Value Licenses and Permits Chart

Consumed Value Licenses and Permits

Type: ALL **Client:** ALL **Remaining Value:** 1000

Type	License Code	Product	Classification	Licensed Value	Remaining Value	Currency	Expiry Date	Client
Permit	R9A_PERMIT	A1000000		30.00	30.00	EUR	2020/07/25	TGL
License	R9A_L2	A1000000	EU/	100.00	80.10	USD	2019/06/30	TGL
License	LIC_01_US	A1000000	US/1A004.b	1000.00	1000.00	USD	2019/12/19	TGL
License	LIC_01_US	B2000006	US/	1000.00	1000.00	USD	2019/12/19	TGL
License	LIO	LIO	US/0A001	10.00	10.00	USD	2018/11/30	TGL
License	LIO	LIO	US/0A001	10.00	10.00	USD	2018/11/30	TGL
License	LIO	LIO	SG/0A001	100.00	99.00	USD	2018/11/30	TGL
License	LIO	LIO	SG/0A001	100.00	99.00	USD	2018/11/30	TGL
Permit	LIO PERMIT	A1000000	HTS/0101901090	100.00	100.00	EUR	2018/11/30	TGL
Permit	LIO PERMIT	A2000001	HTS/0101100010	50.00	50.00	EUR	2018/11/30	TGL
License	LIO_R9A	A1000000	EU/	100.00	100.00	USD	2019/06/30	TGL
License	LICENCE NOV23RD	A4000001	US/	500.00	500.00	USD	2018/11/30	TGL
License	LICENCE NOV23RD	A4000003	US/	350.00	350.00	USD	2018/11/30	TGL
Permit	SELENIUM_XG1	A1000000		1.00	1.00	USD	2040/12/31	TGL
License	LIC_01_EU	A201004	EU/	700.00	700.00	EUR	2019/07/19	TGL

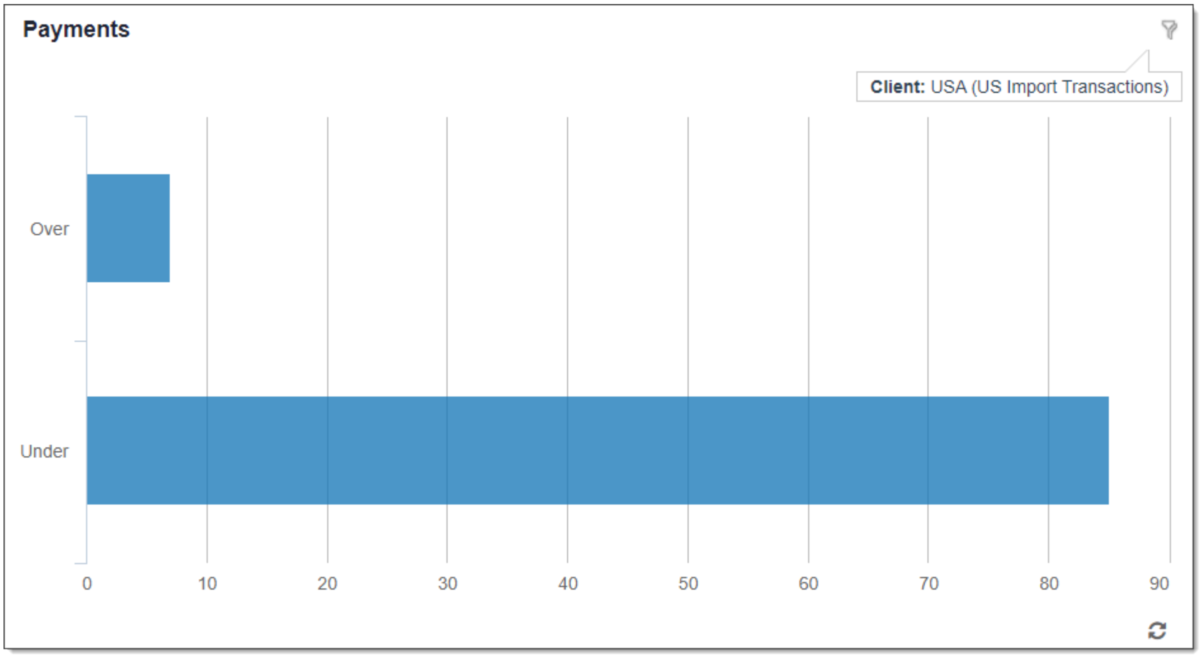
1 2 > >>

November 26, 2018 14:02 PM

Payments

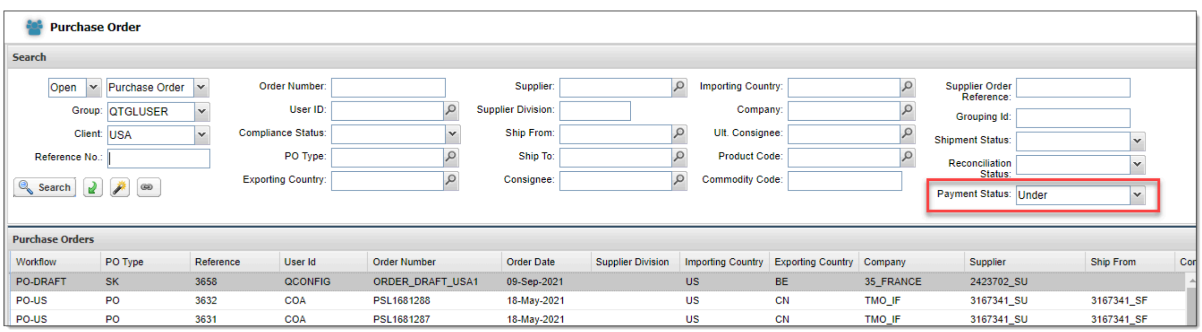
This bar chart shows the purchase order (PO) payment totals. The chart displays the number of purchase orders with lines that are over or under the received payment.

Payments Chart



Click on the Over or Under bar to drill-down to the Purchase Order page. The Purchase Order page is filtered by Over or Under Payment Status.

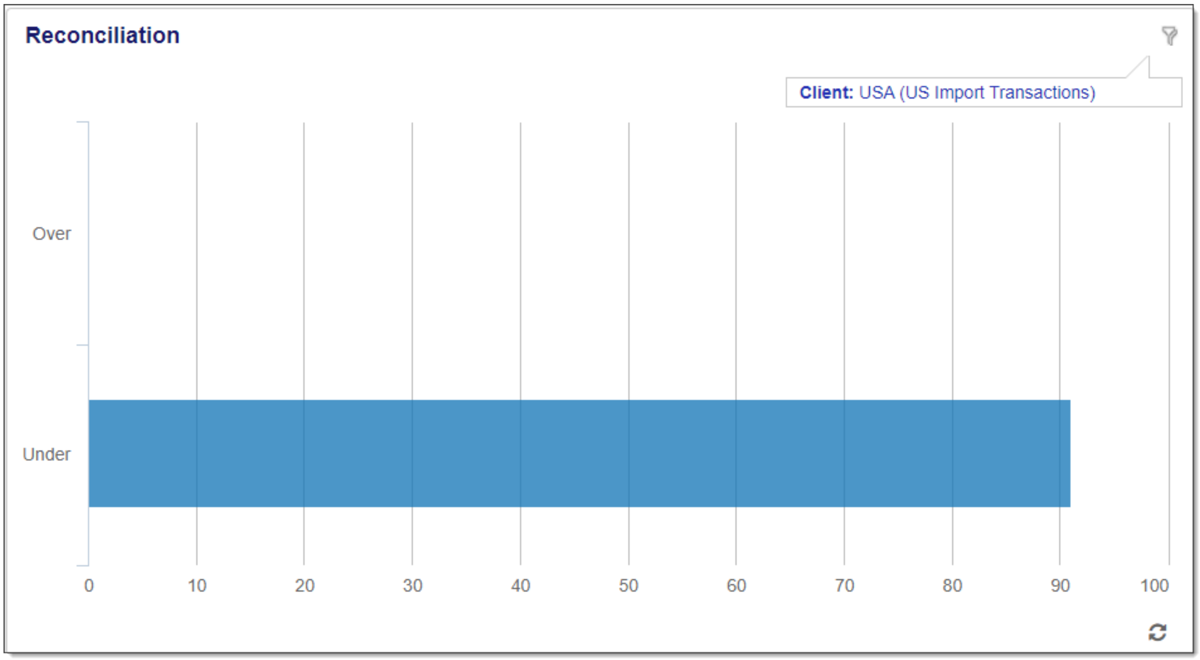
Purchase Order page filtered by Payment Status



Reconciliation

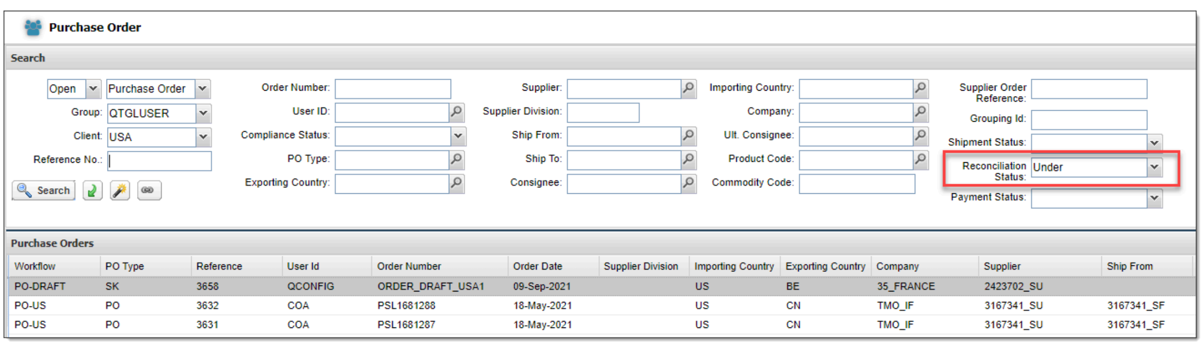
This bar chart shows the daily reconciliations, with drill-down functionality that provides a filtered list of the relevant purchase orders (POs). The chart shows the number of POs with lines that are over or under the received payment.

Reconciliation Chart



Click on the Over or Under bar to drill-down to the Purchase Order page. The Purchase Order page is filtered by Over or Under Reconciliation Status.

Purchase Order page filtered by Reconciliation Status



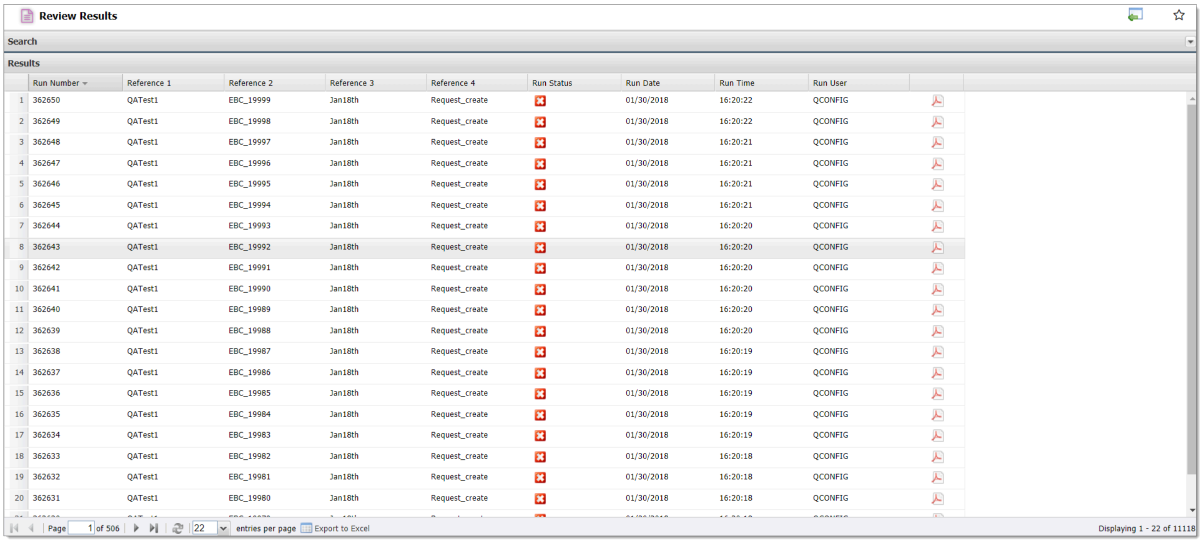
Inquiry Drill-Down

Overview

Drill-down functionality is available on the Failures, Today's Total Summary and Under Review charts. To access it, click the count total in a tile, or click a bar or pie segment of interest. This will open the Compliance History search page, with the relevant search criteria populated from the bar, segment, or tile. For example, the drill-down data from a Today's Total Summary tile will have today's date in the Run Date field of the search criteria panel.

Alternatively, access the CKHIST option. This opens a list of all failed transactions and requests.

Compliance History



	Run Number	Reference 1	Reference 2	Reference 3	Reference 4	Run Status	Run Date	Run Time	Run User
1	362650	QATest1	EBC_19999	Jan18th	Request_create		01/30/2018	16:20:22	QCONFIG
2	362649	QATest1	EBC_19998	Jan18th	Request_create		01/30/2018	16:20:22	QCONFIG
3	362648	QATest1	EBC_19997	Jan18th	Request_create		01/30/2018	16:20:21	QCONFIG
4	362647	QATest1	EBC_19996	Jan18th	Request_create		01/30/2018	16:20:21	QCONFIG
5	362646	QATest1	EBC_19995	Jan18th	Request_create		01/30/2018	16:20:21	QCONFIG
6	362645	QATest1	EBC_19994	Jan18th	Request_create		01/30/2018	16:20:21	QCONFIG
7	362644	QATest1	EBC_19993	Jan18th	Request_create		01/30/2018	16:20:20	QCONFIG
8	362643	QATest1	EBC_19992	Jan18th	Request_create		01/30/2018	16:20:20	QCONFIG
9	362642	QATest1	EBC_19991	Jan18th	Request_create		01/30/2018	16:20:20	QCONFIG
10	362641	QATest1	EBC_19990	Jan18th	Request_create		01/30/2018	16:20:20	QCONFIG
11	362640	QATest1	EBC_19989	Jan18th	Request_create		01/30/2018	16:20:20	QCONFIG
12	362639	QATest1	EBC_19988	Jan18th	Request_create		01/30/2018	16:20:20	QCONFIG
13	362638	QATest1	EBC_19987	Jan18th	Request_create		01/30/2018	16:20:19	QCONFIG
14	362637	QATest1	EBC_19986	Jan18th	Request_create		01/30/2018	16:20:19	QCONFIG
15	362636	QATest1	EBC_19985	Jan18th	Request_create		01/30/2018	16:20:19	QCONFIG
16	362635	QATest1	EBC_19984	Jan18th	Request_create		01/30/2018	16:20:19	QCONFIG
17	362634	QATest1	EBC_19983	Jan18th	Request_create		01/30/2018	16:20:19	QCONFIG
18	362633	QATest1	EBC_19982	Jan18th	Request_create		01/30/2018	16:20:18	QCONFIG
19	362632	QATest1	EBC_19981	Jan18th	Request_create		01/30/2018	16:20:18	QCONFIG
20	362631	QATest1	EBC_19980	Jan18th	Request_create		01/30/2018	16:20:18	QCONFIG

Compliance History Search Panel

The Search panel is collapsed by default. To expand it, click the arrow icon at the top right of the page.

For more details on compliance, see Trade Compliance on page 962.

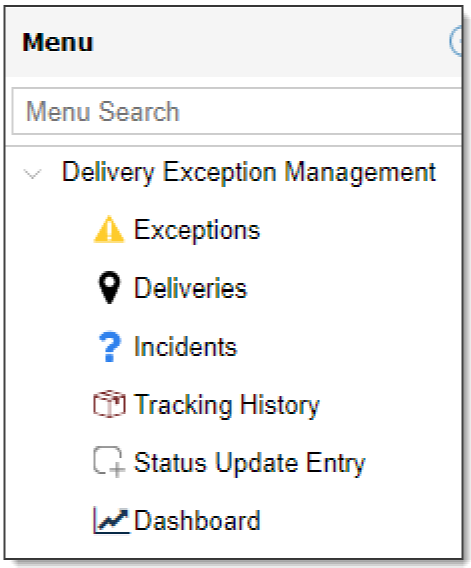
Delivery Exception Management Dashboard

Overview

The Delivery Exception Management Dashboard provides information about recent delivery activity. This data is illustrated in a series of panels that contain bar charts, line charts, and tables.

To open the Delivery Exception Management Dashboard, select Dashboards from the Delivery Exception Management menu.

DEM Menu



The charts are divided into two categories, shown as the Operations and Performance tabs on the dashboard.

Chart Options

The available chart options are listed in the table below:

Available Charts and Configuration Options

Chart Name	Description	Filters	Possible to Add Multiple Instances
Delivery Exceptions Raised for a Period of Time	Users can view Exceptions for a set number of days. This number is configurable. It can be set to 30, 60, or 90 days. This information is presented on a pie chart.	• Supplier • Supplier Account • Date Range	Yes

Chart Name	Description	Filters	Possible to Add Multiple Instances
Exceptions and Incidents Summary	This panel shows a summary of current exceptions and incidents. Each tile represents the number of open exceptions, open incidents, and incidents that require review. In the Edit window you can select the exception types to include in the data. Administrators can select what suppliers are available to users in User Views.	• Supplier • Supplier Account • Exception Type	Yes
Exceptions by Type Summary	Each tile in this panel represents an exception type and the number of open incidents associated with it. Users can choose to display up to six different exception types.	• Supplier • Supplier Account	Yes
Deliveries Summary	This panel shows a summary of current delivery information. Each tile represents a delivery status: • In Flight • Today's Deliveries • Missed Delivery Date • Delivered Today • Pending Delivery • Delay Expected	• Supplier • Supplier Account • Shipment Direction	Yes
Top 10 Countries	This chart displays the ten most shipped to	• Supplier	Yes

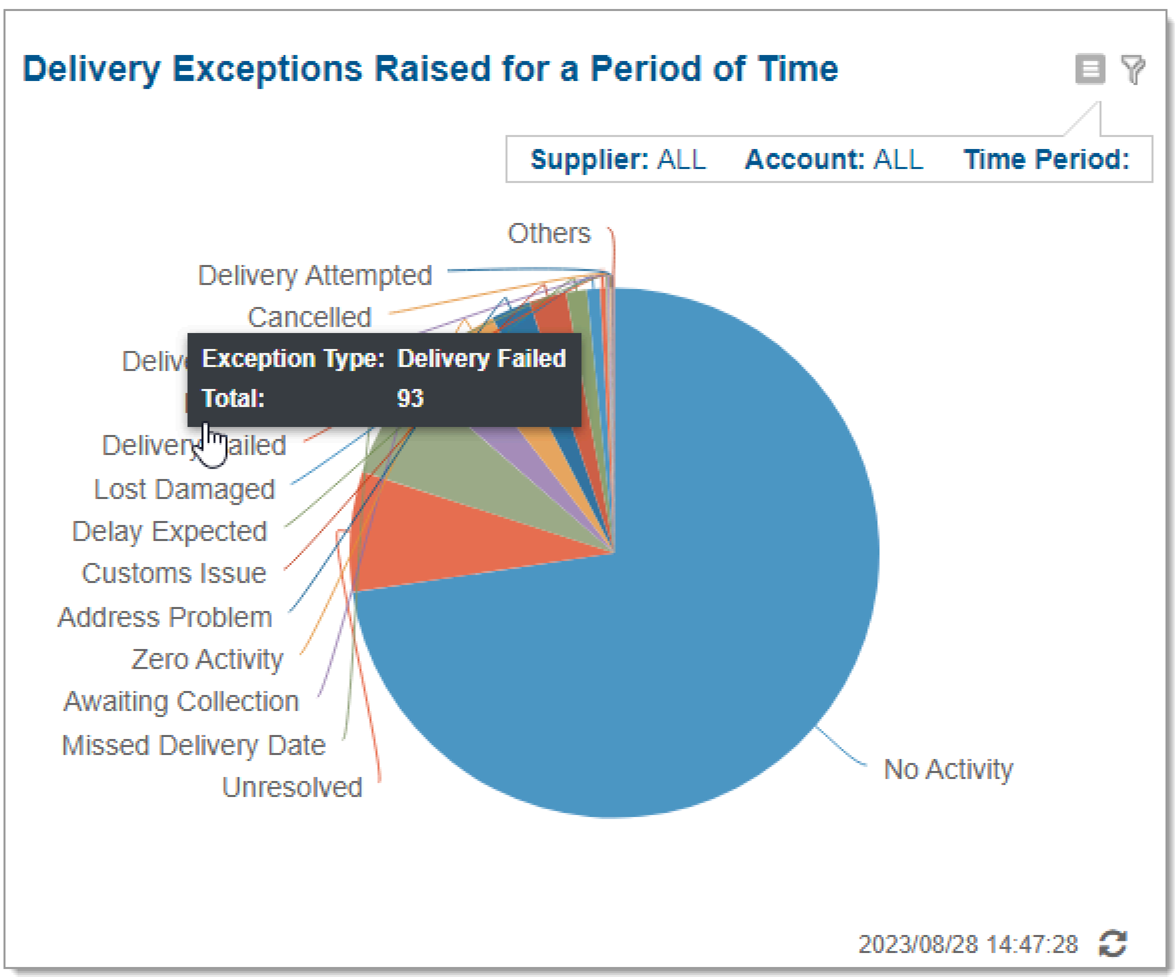
Chart Name	Description	Filters	Possible to Add Multiple Instances
Shipped To for a Period of Time	countries for a specified date range. The top ten countries are listed along the vertical bar, while the horizontal bar displays the number of deliveries. You can specify 30, 60, or 90 days as the date range.	• Supplier Account • Date Range	
Expected Deliveries for the Next 7 Days	This chart shows the number of deliveries that are expected over the next seven days. The dates are displayed along the horizontal axis, and the vertical bar shows the number of deliveries. Hovering over each bar in the chart displays the exact number of expected deliveries.	• Supplier • Supplier Account	Yes
Late Deliveries by Number of Days for a Period of Time	This chart shows the number of late deliveries and how many days they are late. The number of days is shown on the horizontal axis, and the number of deliveries is displayed on the vertical bar.	• Supplier • Supplier Account • Date Range	Yes
Carrier On-Time Performance by Supplier for a Period of Time	This chart details the percentage of deliveries that a carrier has delivered on time or late over a period of time.	• Time Period • Origin Country • Destination Country • Supplier	Yes
Carrier On-Time	This chart details the percentage of deliveries	• Time Period	Yes

Chart Name	Description	Filters	Possible to Add Multiple Instances
Performance by Supplier Service for a Period of Time	that a carrier has delivered on time or late for each carrier service during a specified time period by service.	• Origin Country • Destination Country • Supplier • Service	

Delivery Exceptions Raised for a Period of Time

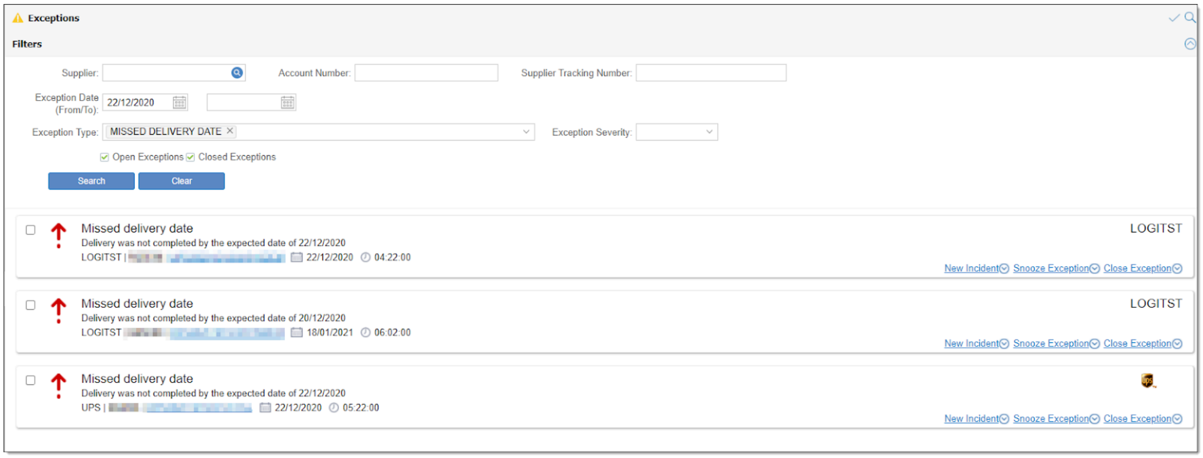
You can view Delivery Exceptions for a set number of days. This number is configurable. It can be set to 30, 60, or 90 days. This information is presented on a pie chart.

Delivery Exceptions Raised for a Period of Time



You can view more information about exceptions raised by clicking a pie chart segment. This opens the Exceptions page, filtered by the specified supplier, supplier account, date rage and the selected Exception Type.

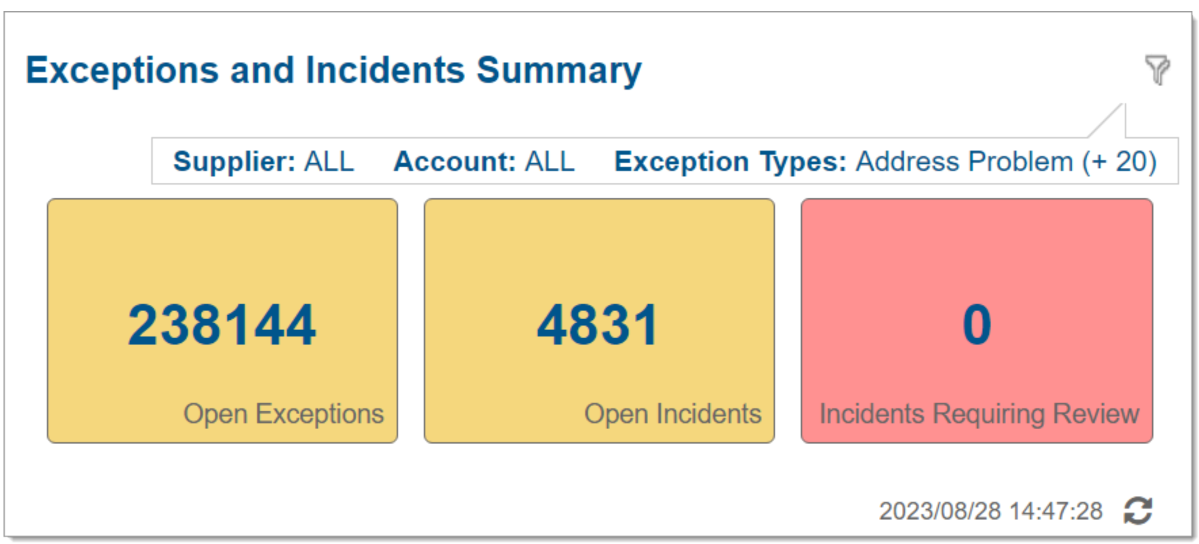
Exceptions filtered by Dashboard



Exceptions and Incidents Summary

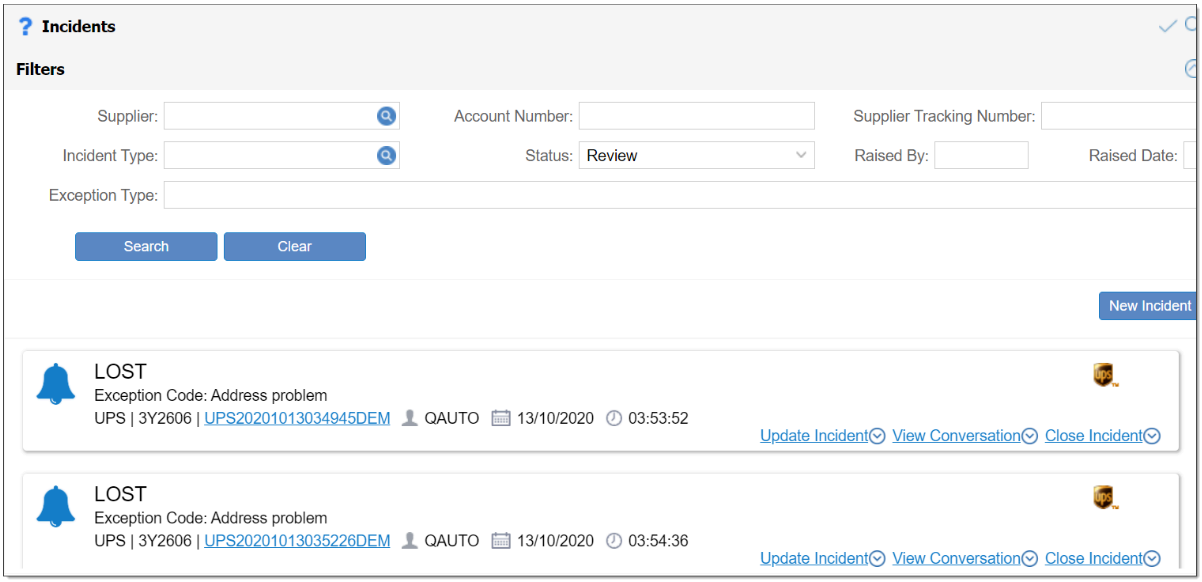
This panel shows a summary of current exceptions and incidents. Each tile represents the number of open exceptions, open incidents, and incidents that require review. In the Edit window, you can select the exception types to include in the data. It can be filtered by Supplier, Supplier Account, and Shipment Direction. Administrators can select what suppliers are available to users in User Views. For more information, see *Administration*

Exceptions and Incidents Summary



You can view more information about exceptions or incidents raised by clicking a tile. This opens the relevant page, filtered by the Exception or Incident type selected.

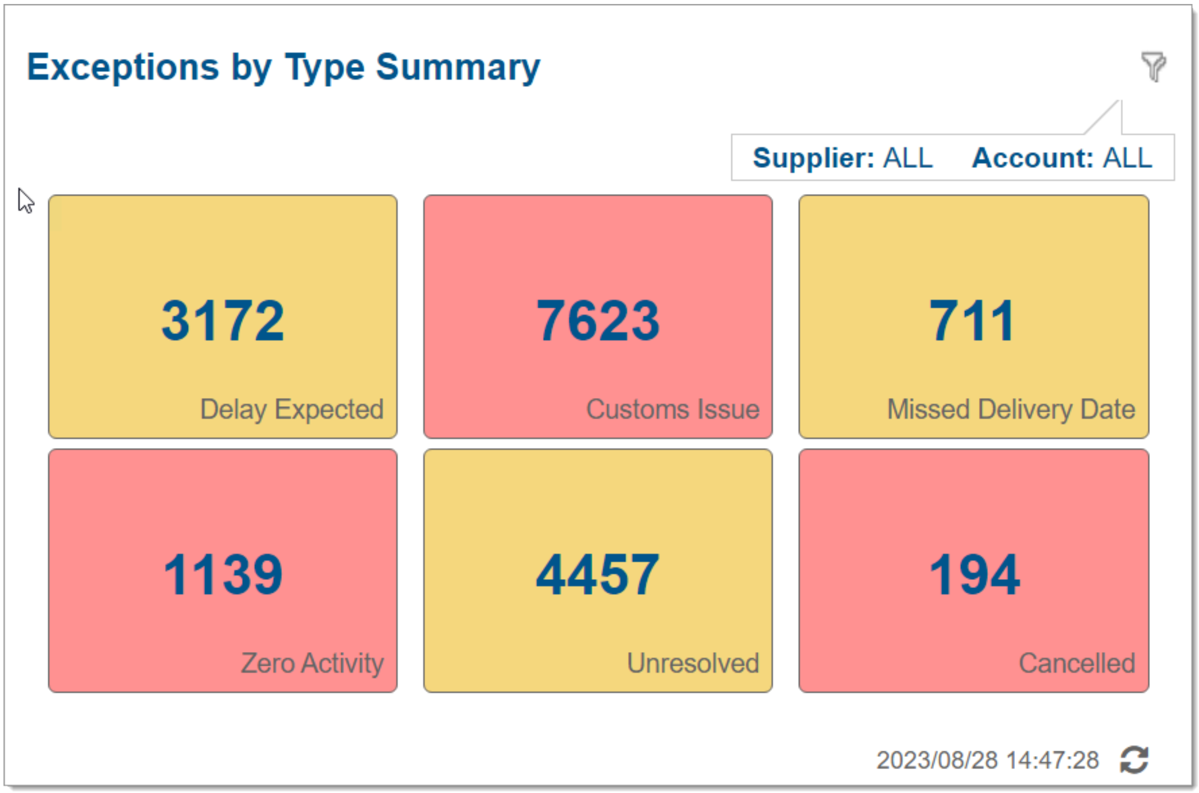
Incidents page filtered by Incidents Requiring Review



Exceptions by Type Summary

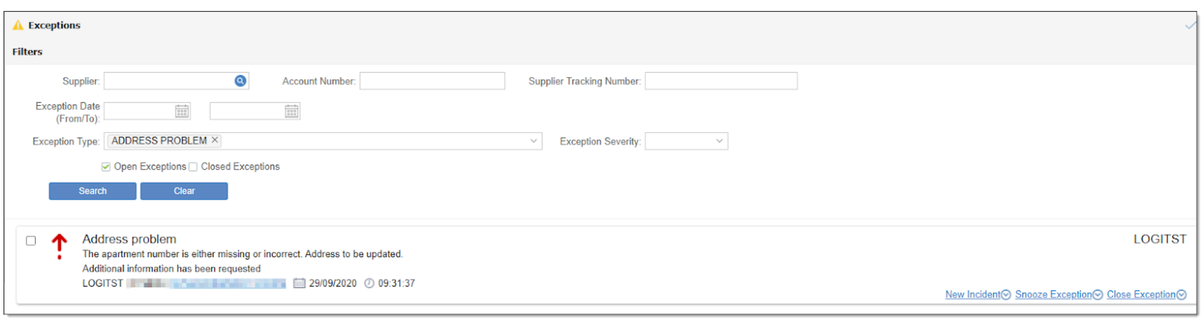
Each tile in this panel represents an exception type and the number of open exceptions associated with it. You can choose to display up to six different exception types, and the data can be filtered by supplier, and supplier account.

Exceptions by Type Summary



You can view more information about exceptions raised by clicking a tile. This opens the Exceptions page, filtered by the Exception type selected.

Exceptions page filtered be Exception Type



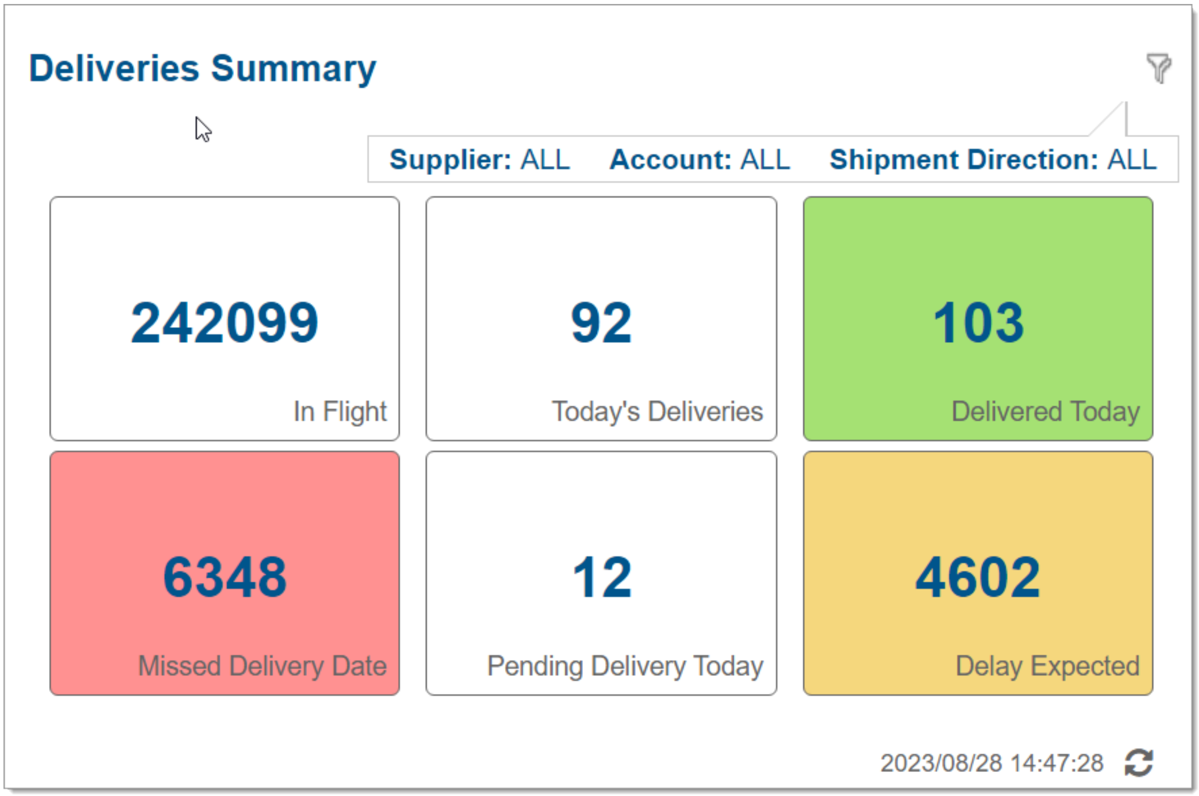
Deliveries Summary

This panel shows a summary of current delivery information. It can be filtered by supplier, supplier account, and shipment direction. Each tile represents a delivery status:

- In Flight
- Today's Deliveries
- Missed Delivery Date

- Delivered Today
- Pending Delivery Today
- Delay Expected

Deliveries Summary



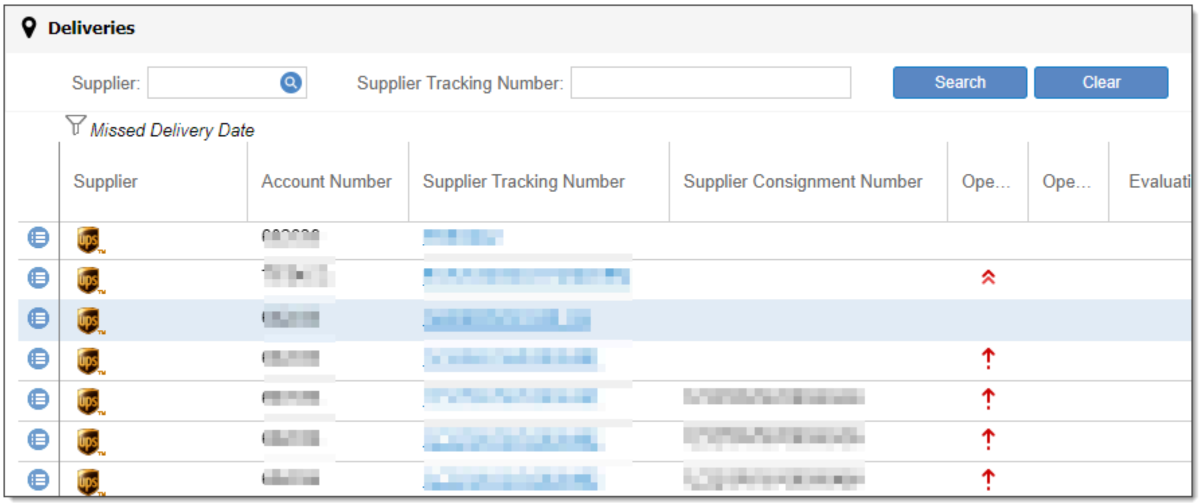
Delivery Status Description

Delivery Status Name	Description
In Flight	The delivery process has begun and the shipment is on its way.
Today's Deliveries	All deliveries with a target delivery date of today. The date used for this information is the Current Comparison ETA date.
Missed Delivery Date	Deliveries that have missed their target delivery date and have not yet been delivered.
Delivered Today	Shipments that were successfully delivered today.
Pending Delivery	Deliveries that are expected today but are still pending. The date used for this information is the Current Comparison ETA date.

Delivery Status Name	Description
Delay Expected	Deliveries that are expected to be late. This includes deliveries that have a Delay Expected exception raised and deliveries that the current estimated delivery date is later than the original shipper promised date.

You can view more information about deliveries by clicking a tile. This opens the Deliveries page, filtered by the delivery status selected.

Deliveries page filtered by Missed Delivery Date



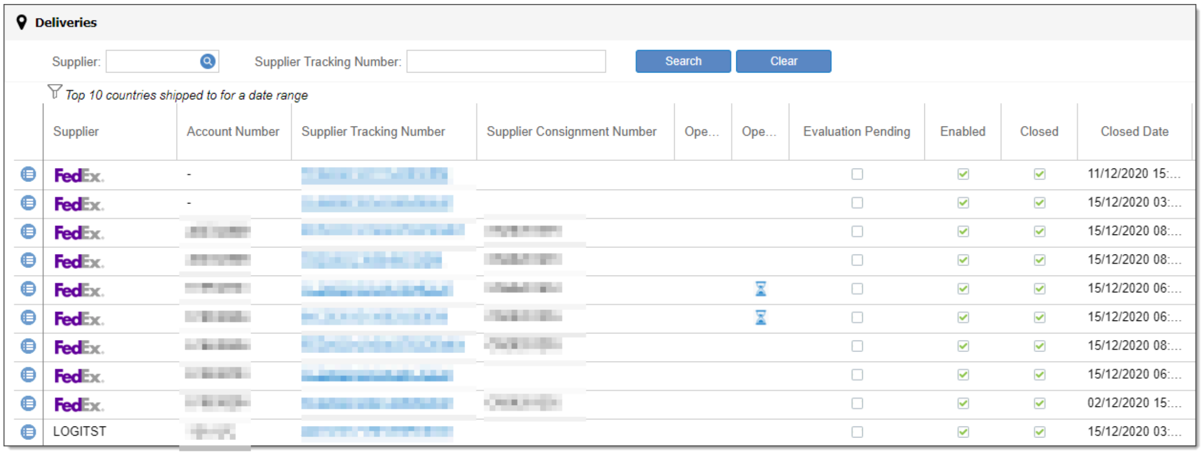
Top 10 Countries Shipped To for a Period of Time

This chart displays the ten most shipped to countries for a specified date range. The top ten countries are listed along the vertical bar, while the horizontal bar displays the number of deliveries. It can be filtered by supplier, supplier account, and date range. You can specify 30, 60, or 90 days as the date range.

Top 10 Countries Shipped To for a Period of Time

You can view more information about deliveries by clicking a bar. This opens the Deliveries page, filtered by the country of the selected bar.

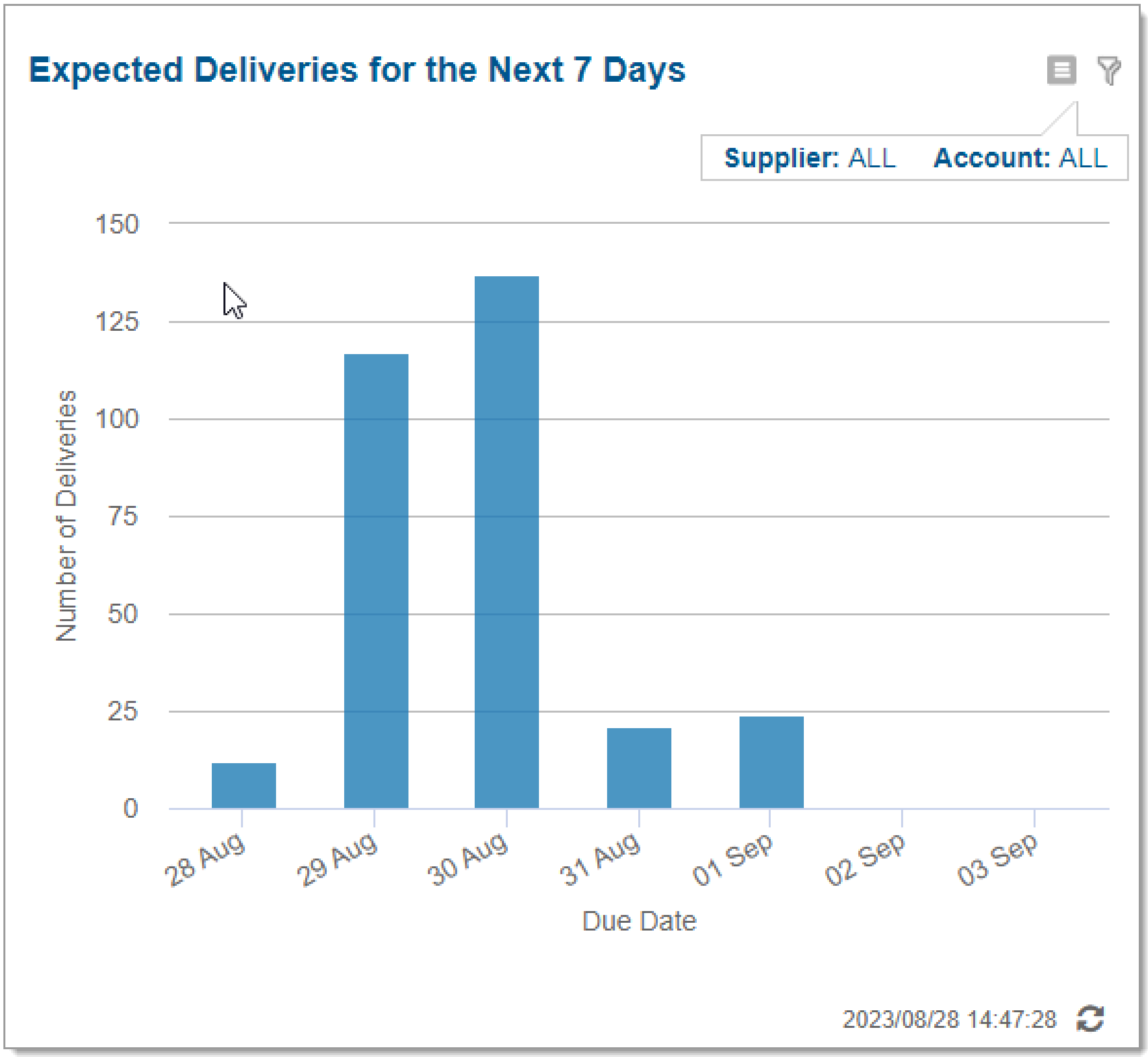
Deliveries page filtered by Top 10 countries shipped for a date range



Expected Deliveries for the Next 7 Days

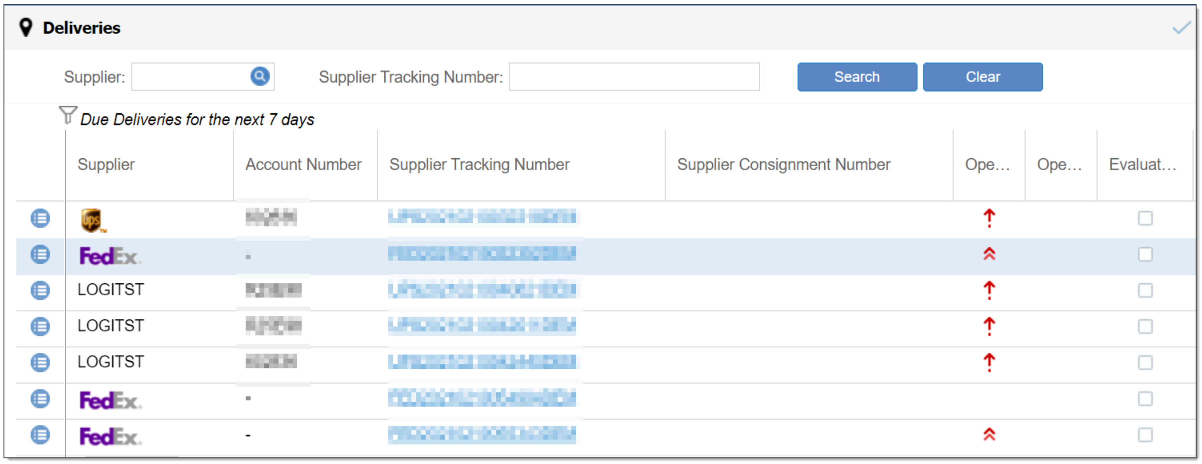
This chart shows the number of deliveries that are expected over the next seven days. The date used for this chart is the Current Comparison ETA date. The dates are displayed along the horizontal axis, and the vertical bar shows the number of deliveries. Hovering over each bar in the chart displays the exact number of expected deliveries. This chart can be filtered by supplier, supplier account, and exception type.

Expected Deliveries for the Next 7 Days



To view expected deliveries for a specific date in more detail, click on the bar related to the date to drill-down to the Deliveries page.

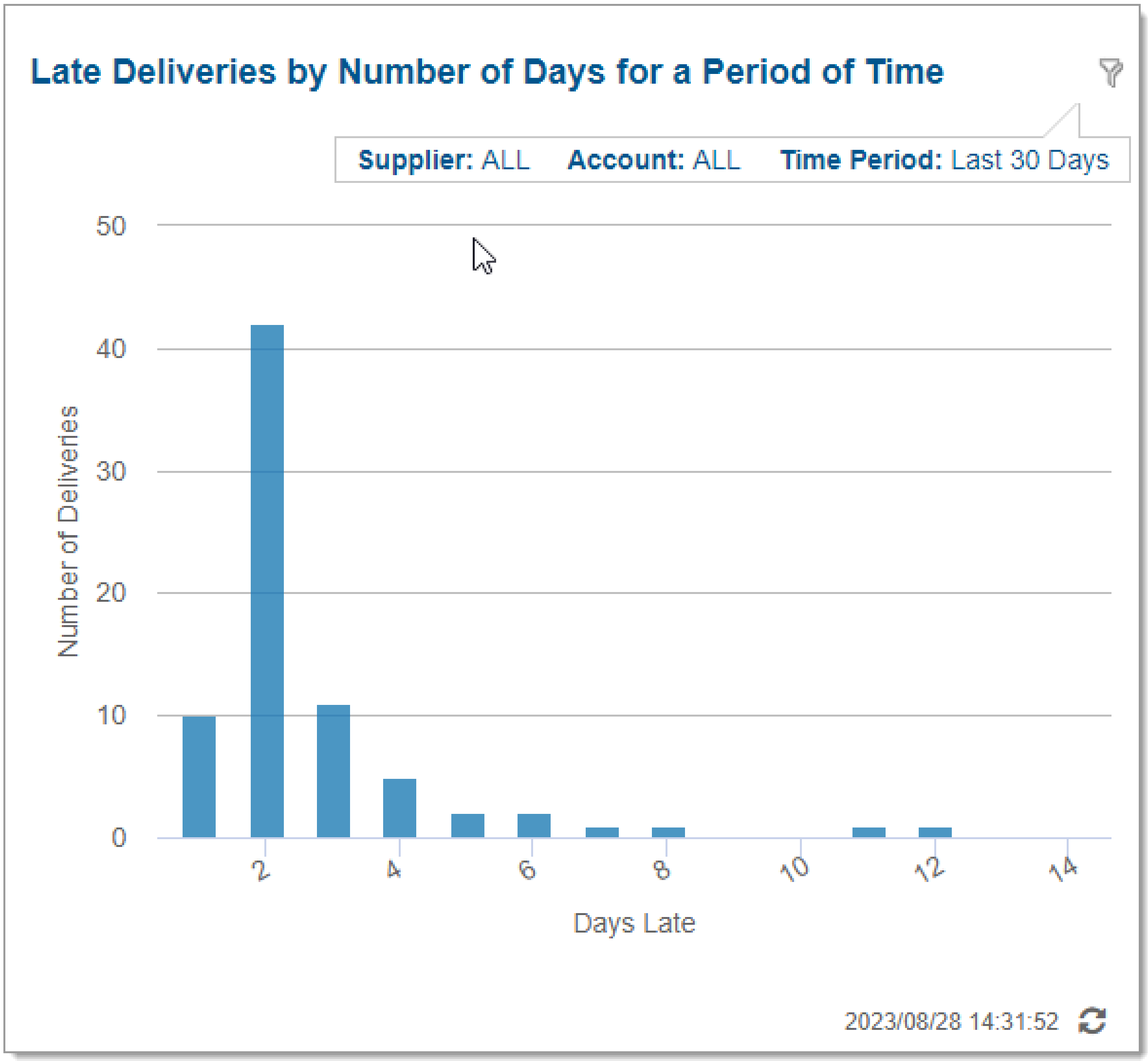
Deliveries page filtered by Expected Deliveries for the next 7 days



Late Deliveries by Number of Days for a Period of Time

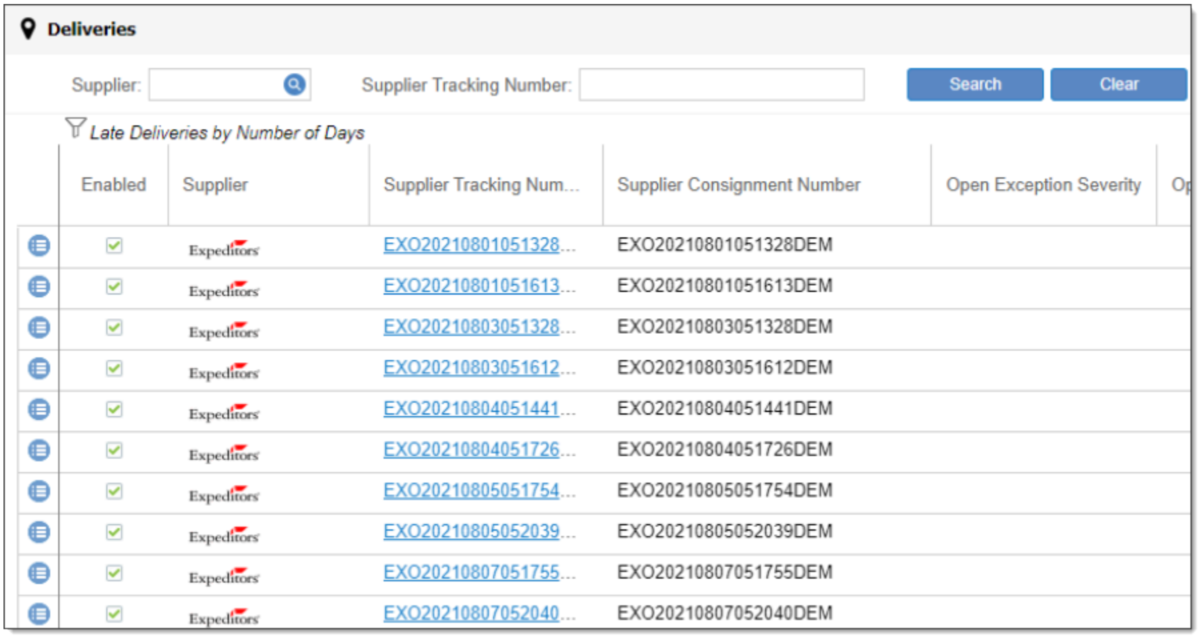
This chart shows the number of late deliveries and how many days they are late. The number of days is shown on the horizontal axis, and the number of deliveries is displayed on the vertical bar. This chart can be filtered by supplier, supplier account, and by date range.

Late Deliveries by Number of Days for a Period of Time



To view Late Deliveries in more detail, click on the bar related to the date to drill-down to the Deliveries page.

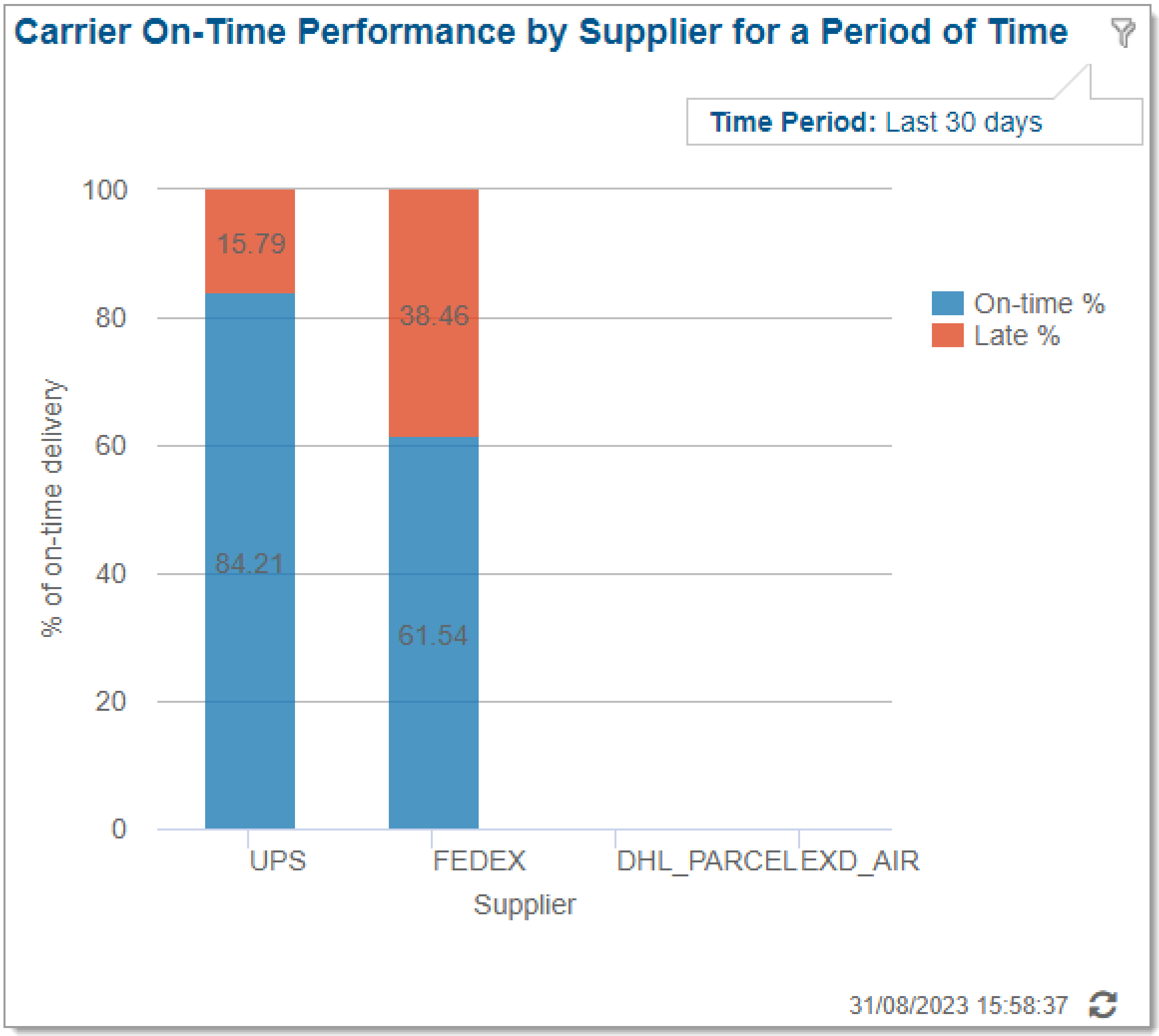
Deliveries filtered by Late Deliveries by Number of Days



Carrier On-Time Performance by Supplier for a Period of Time

This chart details the percentage of deliveries that a carrier has delivered on time or late over a period of time. Hover over a segment of one of the bars to see more details, and click the segment to view the underlying data in the Deliveries page.

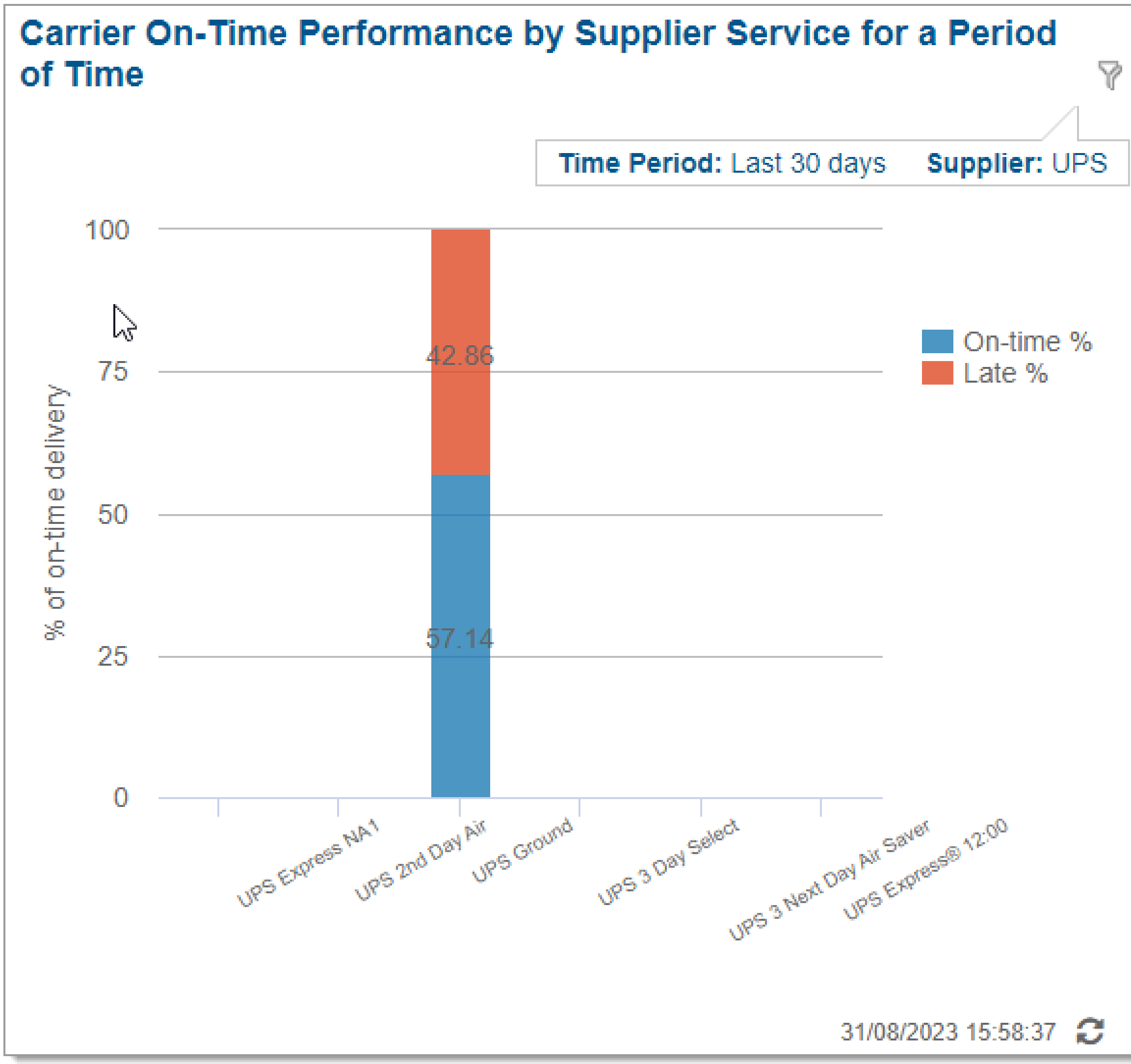
Carrier On-Time Performance by Supplier for a Period of Time



Carrier On-Time Performance by Supplier Service for a Period of Time

This chart details the percentage of deliveries that a carrier has delivered on time or late over a period of time by service. Hover over a segment of one of the bars to see more details, and click the segment to view the underlying data in the Deliveries page.

Carrier On-Time Performance by Supplier Service for a Period of Time

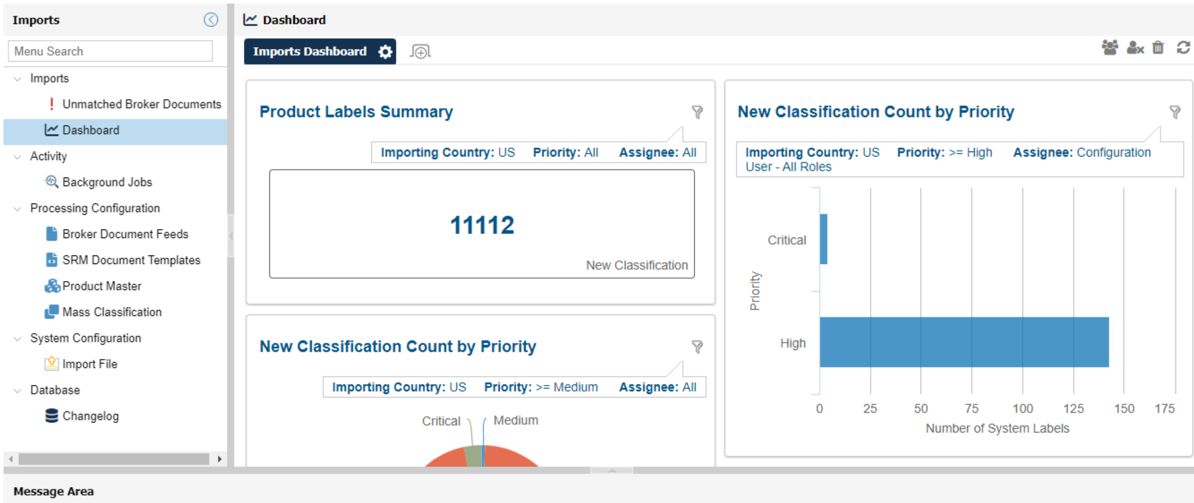


Imports Dashboard

Use the Imports Dashboard to analyze product classification statuses, classification approval requests, and broker entry discrepancies.

The Imports Dashboard can be accessed in three ways:

- Access menu option IMPDH in the GTTE search bar.
- Select the Jump to Dashboard icon in the PCMA or PCMR window.
- Open the Imports Portal (menu option IMP) and, from the sidebar, click Dashboard.



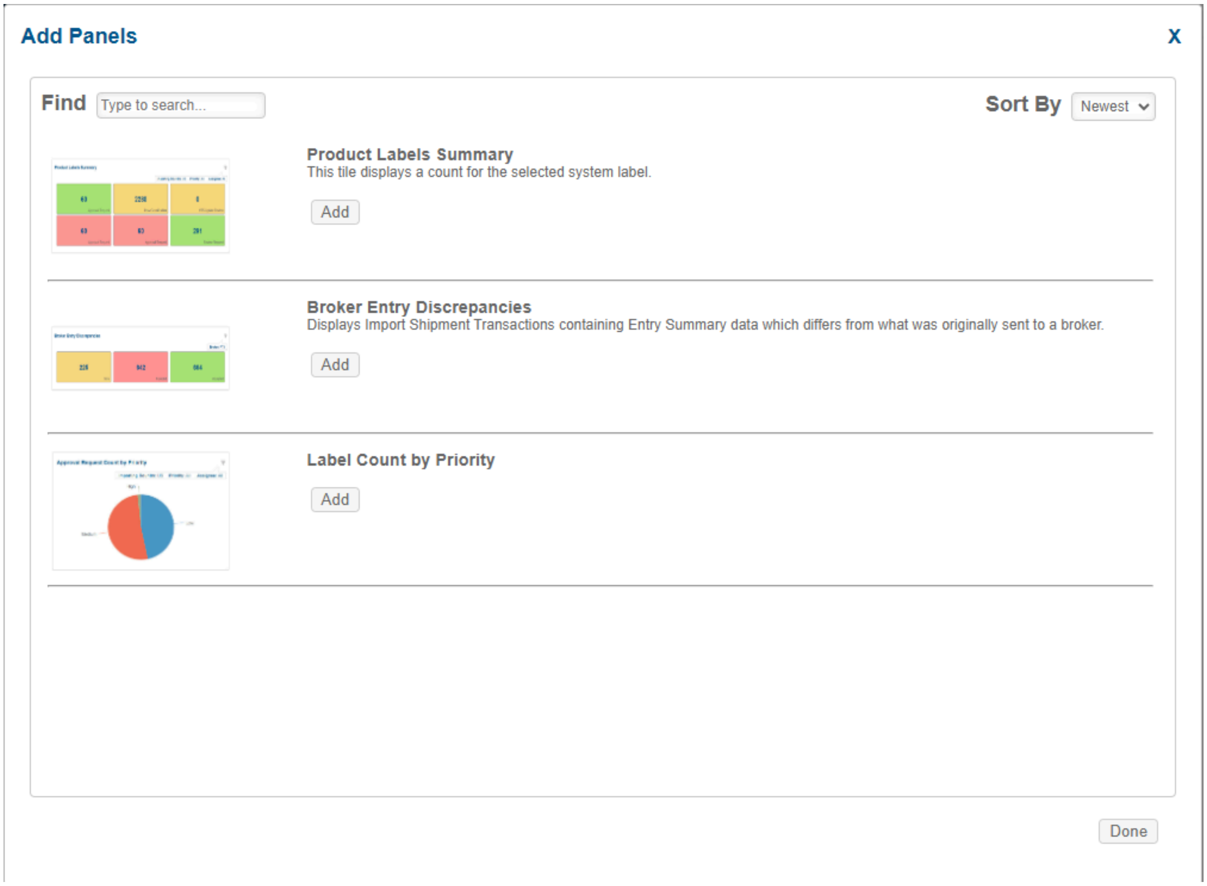
Tabs

You can divide the Imports Dashboard into tabs, which are displayed horizontally along the top of the page. Use tabs to organize panels into logical groups. For example, you can configure one tab to display panels filtered for US data, and another tab for EU data.

For more information on adding and removing tabs, refer to General Concepts on page 1840.

Panels

When you open the Imports Dashboard for the first time, the Add Panels window is displayed.



To add the first panels to the dashboard, click the Add button for one or more of the following panels, then click Done:

Product Labels Summary

Displays tiles that contain counts of newly classified products and products with pending approval or review requests.

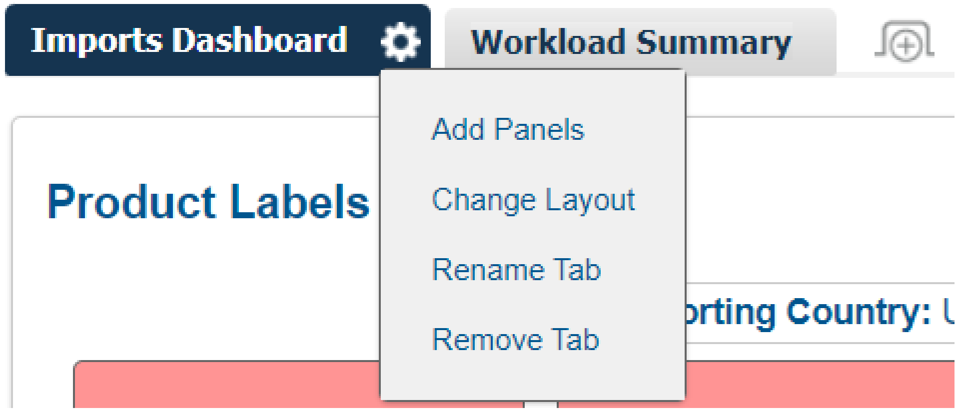
Label Count by Priority

Displays bar or pie charts that contain counts of newly classified products and products with pending approval or review requests.

Broker Entry Discrepancies

Displays tiles that contain counts of import shipment transactions where the entry summary data provided by a broker differs from the data in QAD GTTE. The status of broker transactions is also shown.

To add a panel to the selected tab, click the cog icon on the tab and select Add Panels.



To open a grid containing data filtered using the same criteria that was used to create the tile or chart's summary count, click a tile or chart in the panel.

The Add Panels window is also displayed if you add a new tab to the dashboard by clicking the New Tab button.

Editing the Panel Settings

After you add a panel to the Imports Dashboard, to edit the panel settings, complete the following steps:

1. In the top right corner of the panel, click the Settings icon.
2. To edit the content of the panel, from the dropdown menu, click Edit.
3. In the Edit window, in the Label Type fields, select the label types from the dropdown lists.
4. To change the color of the label types, click the Color buttons and select the color from the dropdown list. The Color setting is not available for all panels.
5. From the Importing Country dropdown list, select the importing country.
6. From the Priority dropdown list, select the priority of data that you want to view in the panel for labels that are assigned the following priorities:
    - <= displays labels prioritized as lower than or equal to low, medium, high, or critical.
    - = displays labels prioritized as either low, medium, high, or critical.
    - >= displays labels prioritized as higher than or equal to low, medium, high, or critical.
7. From the Assignee dropdown list, select the panel's assigned users. To assign the field to the user that is currently signed in, click the User icon.
8. To apply the settings, click Done.

Note For more information on panel settings, see General Concepts on page 1840.

Default Imports Dashboard

After you configure your Imports Dashboard, you can optionally set it as the default Imports Dashboard for other users.

To set the current Imports Dashboard as the default dashboard, click the Save this dashboard as default for other users icon .

After you set a default Imports Dashboard, when another user opens the dashboard for the first time, the Add Panels window is not displayed, and they see the default dashboard. Other users can still change the default dashboard to suit their needs.

If changes have been made to the dashboard, but you want to restore it to the default settings, click the Reset this dashboard to default icon .

To remove all panels and settings applied to the dashboard, click the Reset this dashboard to blank icon .

Drill Down

To view a detailed breakdown of the data that is represented on the Imports Dashboard, you can drill down by clicking various elements in the panels.

In the case of the Label Tile panel, clicking the total number opens a page that corresponds to the selected label:

- The Approval Request label type opens the **Approval Requests** page.
- The New Classification label type opens the **New Classification** page.
- The ERP Classification Review label type opens the **ERP Classification Review** page.
- The Review Request label type opens the **Review Requests** page.
- The HTS Update Review label type opens the **Product Labels - Review** page.

To drill down from the Label Count by Priority Panel panel, click the bar or pie segment of interest. This opens the corresponding page, as explained above, with the addition of a Priority filter. For example, if the label type is Review Request and you click the bar or pie segment labeled Critical, the Review Requests page opens with the Priority filter configured to >= Critical.

Note Your administrator can configure settings for the Imports Dashboard.

OA Administration

This section describes how to configure the Operational Analytics Dashboards functionality in QAD GTTE.

The dashboards provide your company with a snapshot view of current compliance activity and shipping analytics. As an administrator, you need to integrate with Logi Analytics to enable this functionality.

You can configure the appearance and refine the data to meet your company's needs. It is also possible to configure the cache and currency exchange settings. This ensures that the dashboards show only the most relevant information.

- Dashboard Configurator on page 1887
- Dashboard Templates on page 1894
- Currency Exchange Rates on page 1896

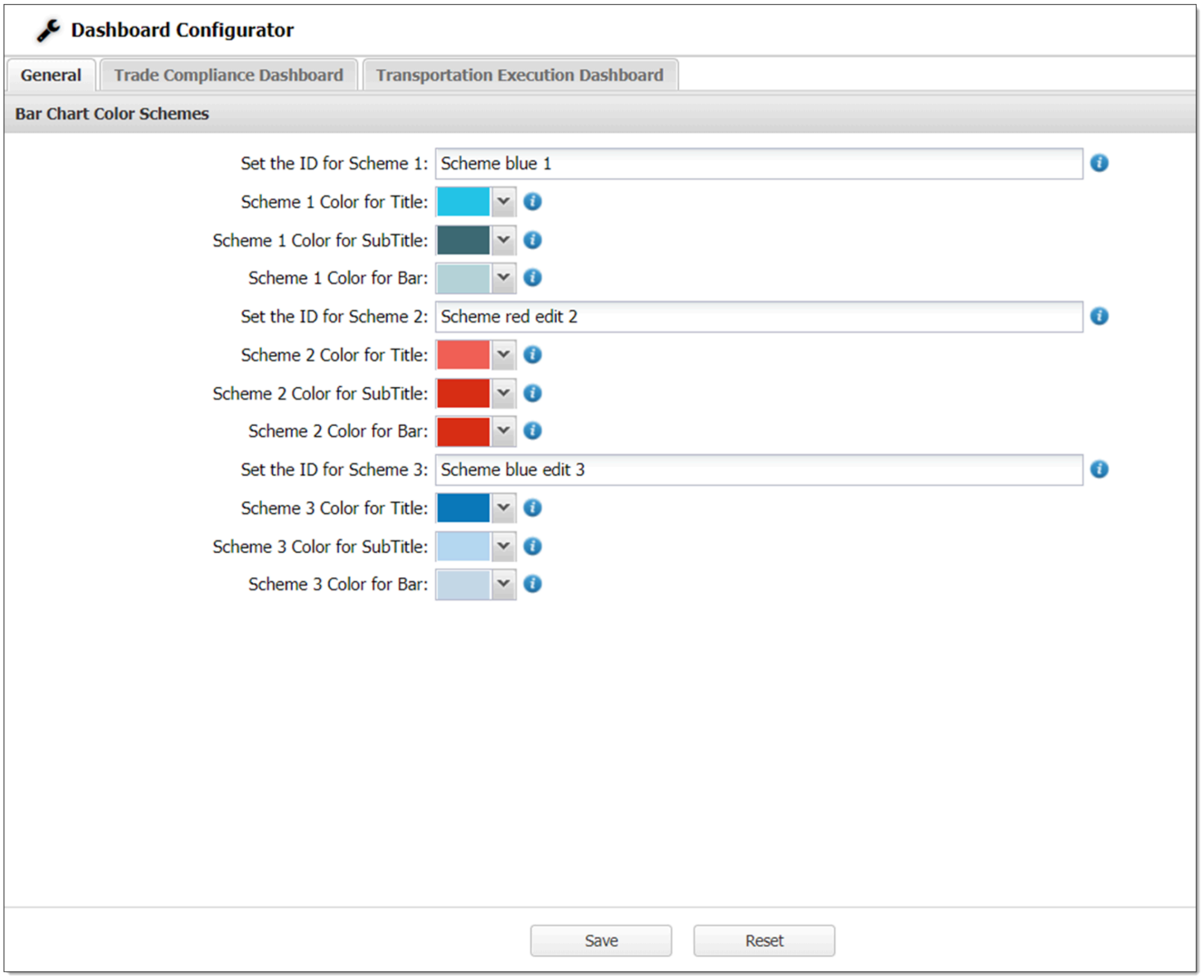
Dashboard Configurator

Overview

You can configure some elements of the dashboards, such as caching, colors, and currencies, in the Dashboard Configurator.

To access the Dashboard Configurator, use the Ctrl+M keys and enter the CFGDB option.

Dashboard Configurator, General Tab



The Dashboard Configurator is divided into three tabs:

- General
- Trade Compliance Dashboard
- Transportation Execution Dashboard

Dashboard Configurator, General Tab Enabled

To save any changes that you make in the Configurator, click the Save button at the bottom of the page. To revert to the settings you had before clicking save, click the Reset button.

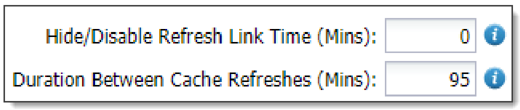
Cache

For performance reasons, the data in the Trade Compliance Dashboard and the Transportation Execution Dashboard is cached. By default, the cache for both dashboards is set to refresh automatically every 30 minutes. You can change the default duration between cache refreshes in the Dashboard Configurator.

You can also hide the link that enables users to manually refresh the cache for a specified amount of time.

Select the tab for the relevant dashboard and locate the two cache fields.

Cache Configuration



Cache Configuration Fields and Associated System Values

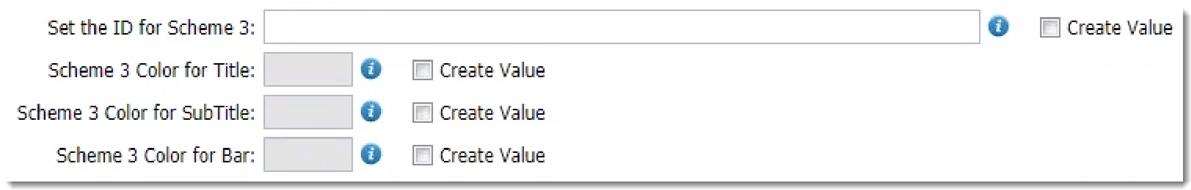
Field	Category	Key	Description
Hide/Disable Refresh Link Time (Mins)	DASHBOARDS	Trade Compliance Dashboard = TC REFRESH HIDE Transportation Execution Dashboard = TES REFRESH HIDE	The Refresh Cache link on the dashboard is hidden for this number of minutes after a user clicks it. The default duration is one minute if this system value is not defined.
Duration Between Cache Refreshed (Mins)	DASHBOARDS	Trade Compliance Dashboard = TC CACHE REFRESH TIME Transportation Execution Dashboard = TES CACHE REFRESH TIME	The cache refreshes automatically at intervals. Define the duration of these intervals using this field. The default is 30 minutes.

General Tab

Bar Chart Color Schemes

The Bar Chart Color Scheme section allows you to create and configure chart color schemes. You can apply these color schemes to charts in both the Transportation Execution Dashboard and the Trade Compliance Dashboard.

Bar Chart Color Scheme



Select the Create Value check box beside the Set the ID field to create a system value. You can then enter an ID for the color scheme.

Select the Create Value check box beside the corresponding title, subtitle, and bar color fields. You can then click the down arrow to open the color picker for each field.

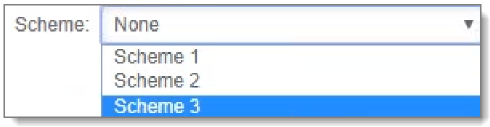
Click Save.

In the dashboards, when you open the Edit pop-up window for a panel, you can apply a bar chart color scheme using the Scheme drop-down list.

Bar Chart Color Scheme Description and Associated System Values

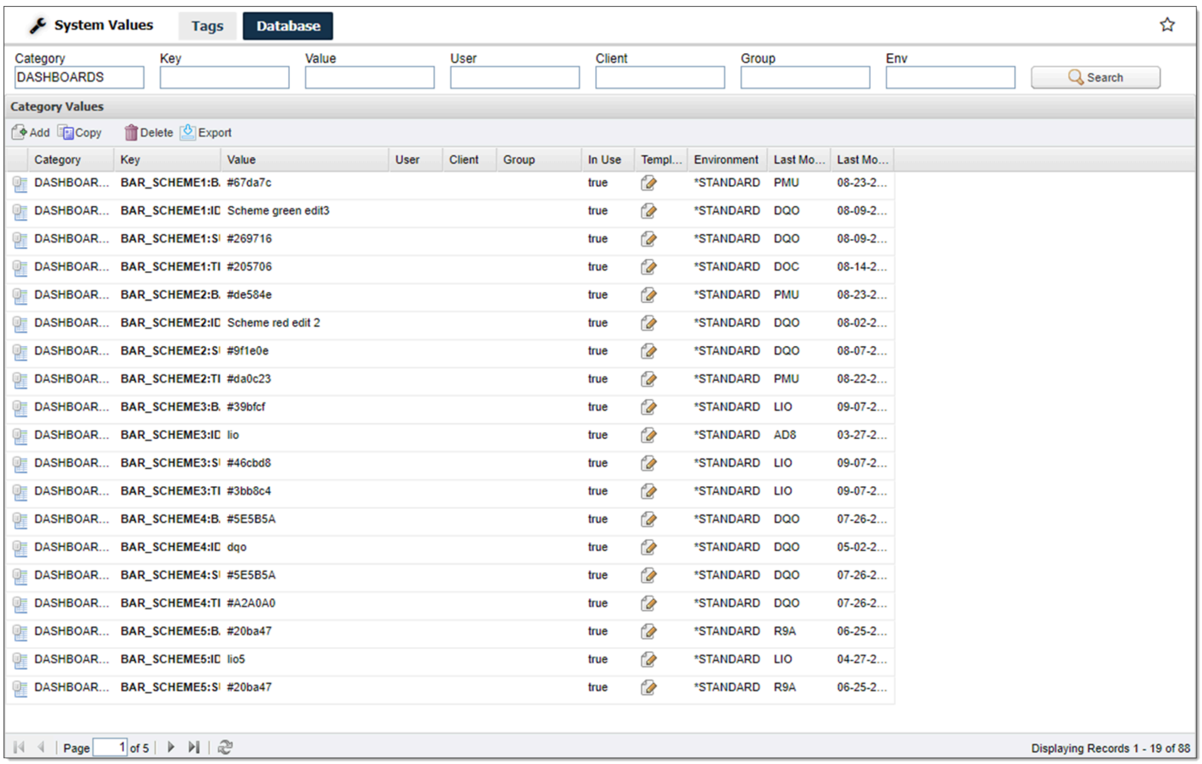
Field Name	Category	Key	Description
Bar Chart Color Scheme	DASHBOARDS	• BAR_SCHEME1:ID • BAR_SCHEME1:TITLE • BAR_SCHEME1:SUBTITLE • BAR_SCHEME1:BAR • BAR_SCHEME2:ID • BAR_SCHEME2:TITLE • BAR_SCHEME2:SUBTITLE • BAR_SCHEME2:BAR • BAR_SCHEME3:ID • BAR_SCHEME3:TITLE • BAR_SCHEME3:SUBTITLE • BAR_SCHEME3:BAR	Configure the title, subtitle, and bar color for charts. This system value is only defined at a global level.

Edit Pop-up Window, Scheme Drop-down List



By default, the maximum number of configurable color schemes in the Dashboard Configurator is three. To create additional color schemes, access the System Values page, option Y3. In the Category field, type DASHBOARDS. The key is BAR*.

Color Schemes, System Values Page



Note This is advanced functionality that is appropriate for advanced users, only.

Note You must enter hex values for the bar color fields on the Y3 page.

Trade Compliance Dashboard

The Trade Compliance Dashboard tab contains configuration options that are unique to this dashboard.

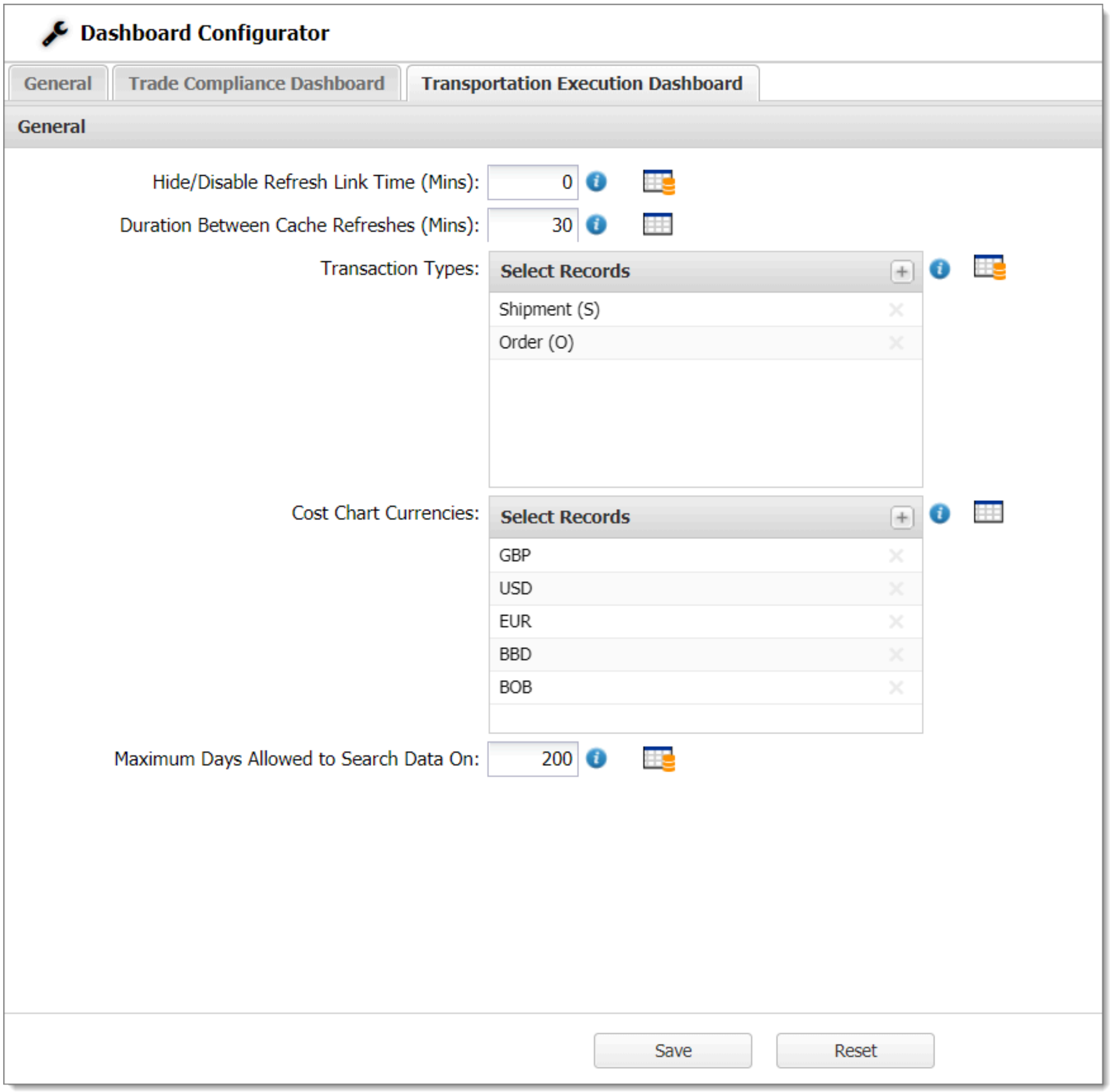
Trade Compliance Dashboard Configuration Fields and Associated System Values

Field Name	Category	Key	Description
Trade Compliance Types	DASHBOARDS	TRADE COMPLIANCE TYPES	Determine the compliance types that appear on the Trade Compliance Dashboard using this field.
Tile Colors	DASHBOARDS	• TRANSACTION TILE COLOR • TRANSACTION TILE TEXT COLOR • TRANSACTION TILE COUNTER COLOR • REQUEST TILE COLOR • REQUEST TILE TEXT COLOR • REQUEST TILE COUNTER COLOR • DATASCRUB TILE COLOR • DATASCRUB TILE TEXT COLOR • DATASCRUB TILE COUNTER COLOR • ADHOC TILE COLOR • ADHOC TILE TEXT COLOR • ADHOC TILE COUNTER COLOR	Set the background and text colors for the Today's Total Summary tiles on the Trade Compliance Dashboard.

Transportation Execution Dashboard

The Transportation Execution Dashboard tab contains configuration options that are unique to this dashboard.

Dashboard Configurator, Transportation Execution Dashboard Tab



Cache Configuration Fields and Associated System Values

Field Name	Category	Key	Description
Transaction Types	DASHBOARDS	TRANSACTION TYPES	Specify the transaction types that are available on the Transportation Execution Dashboard charts using a comma-separated list of values. The default value is ‘S’.

Field Name	Category	Key	Description
			Data lookup: Transaction Types (Z9) Table name: XTZ9TP0
Cost Chart Currencies	DASHBOARDS	COST CURRENCIES	Configure the currencies displayed in the following charts: • Shipping Costs by Carrier for a Date Range • Today's Shipping Cost by Carrier • Shipping Volume by Carrier Service for a date range • Today's Shipping Costs by Carrier Service If this system value is blank, then the dashboard uses the default currency set for a user. Data lookup: Currencies (CU) Table name: XMCURR0
Maximum Days Allowed to Search Data On	DASHBOARDS	MAX NUMBER OF DAYS ALLOWED	Set the number of days of data that can be searched on the charts that have Date Range fields as filter criteria.
Bar Chart Color Scheme	DASHBOARDS	• BAR_SCHEME1:ID • BAR_SCHEME2:ID • BAR_SCHEME3:ID	Configure the title, subtitle, and bar color for charts. This system value is only defined at a global level.

Note The carriers displayed in the charts are transaction (L3) clients.

Dashboard Templates

Overview

You can add, remove, and rearrange the order of the chart panels on each dashboard. This data, along with filters, is stored in XML files, which in turn are used to maintain the layout of the dashboards.

Customize Dashboard Templates

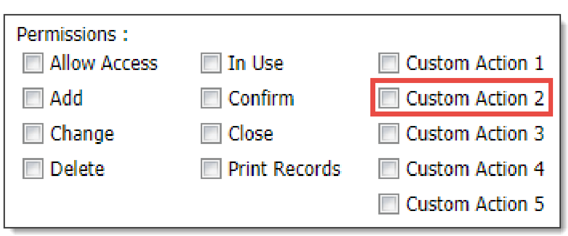
It is possible to establish a default dashboard template for all users to match your company business processes. Users who land on the dashboards for the first time then have a predefined set of charts and filters, instead of empty dashboards.

The dashboards have a set of icons at the top right of the page that enable you to customize your own or multiple users' dashboard templates.

Dashboard Template Icons

Icon	Description
	Save this dashboard as the default for other users. This button can be enabled on the Configure Permissions page, option ACCESS, using the Custom Action 2 checkbox as shown in the image below.
	Reset this dashboard to default. Click this icon to reset the dashboard back to its default charts, layout, and filter settings.
	Reset this dashboard to blank. Click this icon to remove all panels from the dashboard and leave it blank.
	Refresh this dashboard. Click this icon to refresh all charts in the dashboard.
	Refresh configuration cache. Changes that you make in the Web UI may not be immediately reflected in the chart filters. For example, the Description field on a client record was updated, but the Client filter on a dashboard chart still displays the old description. In this case, you need to refresh the configuration cache. To ensure that the chart filters display only the most up-to-date information, click the Refresh Configuration Cache icon at the top right of the page.

Enable The Save This Dashboard as Default Icon in Option ACCESS



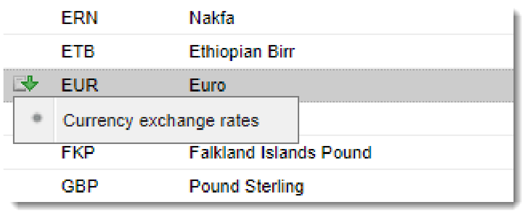
Currency Exchange Rates

Overview

The Dashboard Configurator allows you to choose the currencies that are available in the Transport Execution Dashboard charts.

The exchange rates for these currencies can be found in the Currencies screen. Access the CU option, click a currency and then click the sub-options icon that appears. Choose Currency Exchange Rates.

Access Currency Exchange Rates



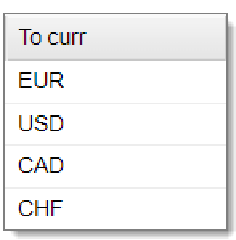
To generate a DASH exchange rate for the dashboard, the logic first looks for the HIST exchange rate type. If it does not exist, it will then look for another type of exchange rate type, such as MEAN or SPOT. These types are used only when there is no HIST type defined in a system value. These alternative types can be specified in the system value below:

Specify HIST Type System Value

Category	Key
CURRENCY	TRANSACTION RATE

If there are multiple currencies in the To Currency column of the Currency Exchange Rates table, a DASH rate is created for each currency.

Multiple currencies in the To Currency column



There are two methods of generating DASH entries:

- Cron Job
- Manually

Cron Job

Note This method is only available to QAD Services, and can be configured on request.

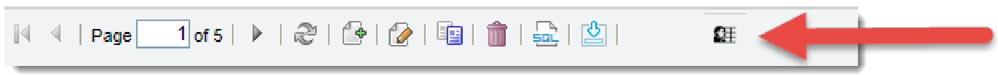
The cron job calls a Java service to generate DASH exchange rates daily, or in specified intervals through the precision.properties file. The following displays the default value for this cron job, which happens at 3 AM every day; however, you can set this to a custom value:

precision.analytics.exchangerate.generation=0 0 3 * * *

Manually

You can click Dashboard Exchange Rates at the bottom of the Currencies screen to generate DASH data.

Currency Toolbar: DASH Generation



Note If multiple users try to run the Java service at the same time, the service only runs once. Any other requests are discarded until the first request is complete.