



User Guide
Operational Analytics

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Operational Analytics User Guide

Change Summary

The following table summarizes significant differences between this document and previous versions.

Date/Version	Description	Reference
September 2021/19	Added Payments and Reconciliation charts to the Trade Compliance Chart Options table.	page 19
	Added sections on Payments and Reconciliation.	page 25-27
	Added Late Deliveries by Number of Days for a date range chart to Delivery Exception Management Chart Options table.	page 30
	Added section on Late Deliveries by Number of Days for a date range chart to Delivery Exception Management.	page 37-38
March 2021/18	Added information about the new Delivery Exception Management Dashboard.	page 3, page 5
	Added a chapter on Delivery Exception Management Dashboard.	page 27
April 2019/17.3	Added a section on the Tabs functionality.	page 5
	Updated the Cache section to describe the new cache refresh buttons.	page 7, page 8
	Added new charts to the Transportation Execution Chart Options: <ul style="list-style-type: none"> ● Today's Shipping Volume By Carrier Service ● Today's Shipping Costs By Carrier Service ● Shipping Volume By Carrier Service for a Date Range ● Shipping Costs By Carrier Service for a Date Range ● Monitor Shipping Volumes Against Carrier Agreement ● Monitor Today's Shipping Volumes Against Carrier Agreement 	page 12, page 13
	Added new charts to the Trade Compliance Chart Options: <ul style="list-style-type: none"> ● Today's Total Summary ● Failures ● Under Review ● Consumed Quantity Licenses and Permit ● Consumed Value Licenses and Permits Removed the Held and Today's Summary charts.	page 17, page 18, page 22, page 23, page 24, page 25
September 2018/17.2	Initial version	--

Chapter 1

Operational Analytics Introduction

This section provides a brief introduction to Operational Analytics.

Overview

Describes the functionality of the Operational Analytics dashboards.



Overview

The dashboards provide a snapshot view of current compliance activity and shipping analytics. This customizable view consists of a series of bar charts, line charts, pie charts, tile panels, and grids which can easily be added, rearranged, or removed according to company needs. Visual items, such as grids and charts, offer a quick, simple format for users 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.

Fig. 1.1
Transportation Execution Dashboard

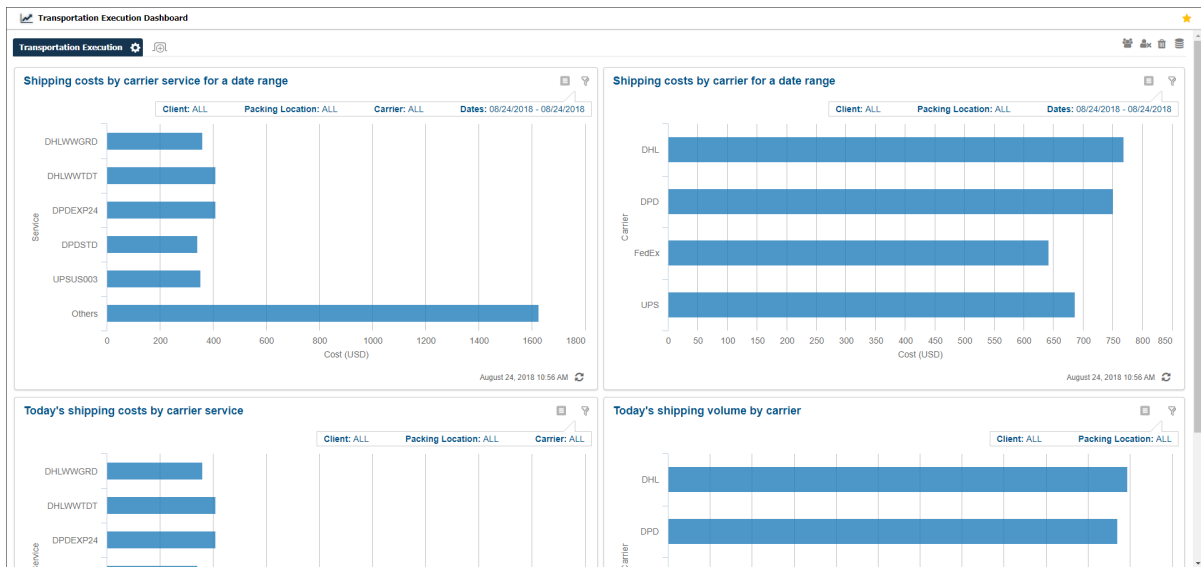


Fig. 1.2
Trade Compliance Dashboard

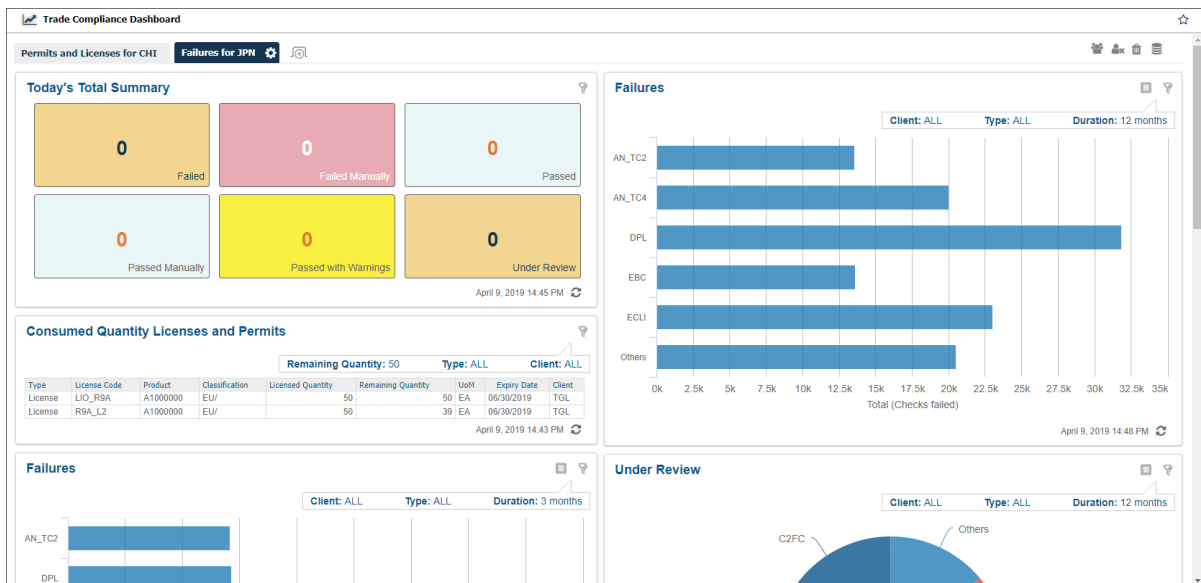
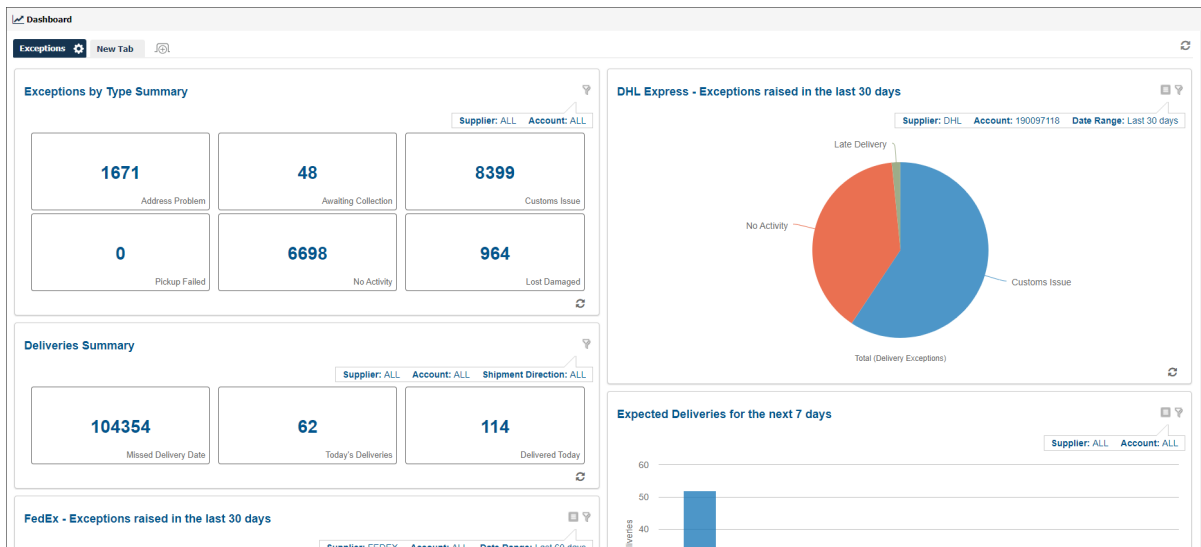


Fig. 1.3
Delivery Exception Management Dashboard



Chapter 2

General Concepts

This section describes the interface elements that a user typically works with when using the dashboards.

Adding Charts

Describes how to add and arrange charts on the dashboards.

Tabs

Describes how to organise the dashboards using the tabs feature.

Chart Settings and Filters

Describes how to access the chart settings and apply data filters.

Drill-Down

Describes how some charts offer a more detailed level of the information presented in the charts.

Cache

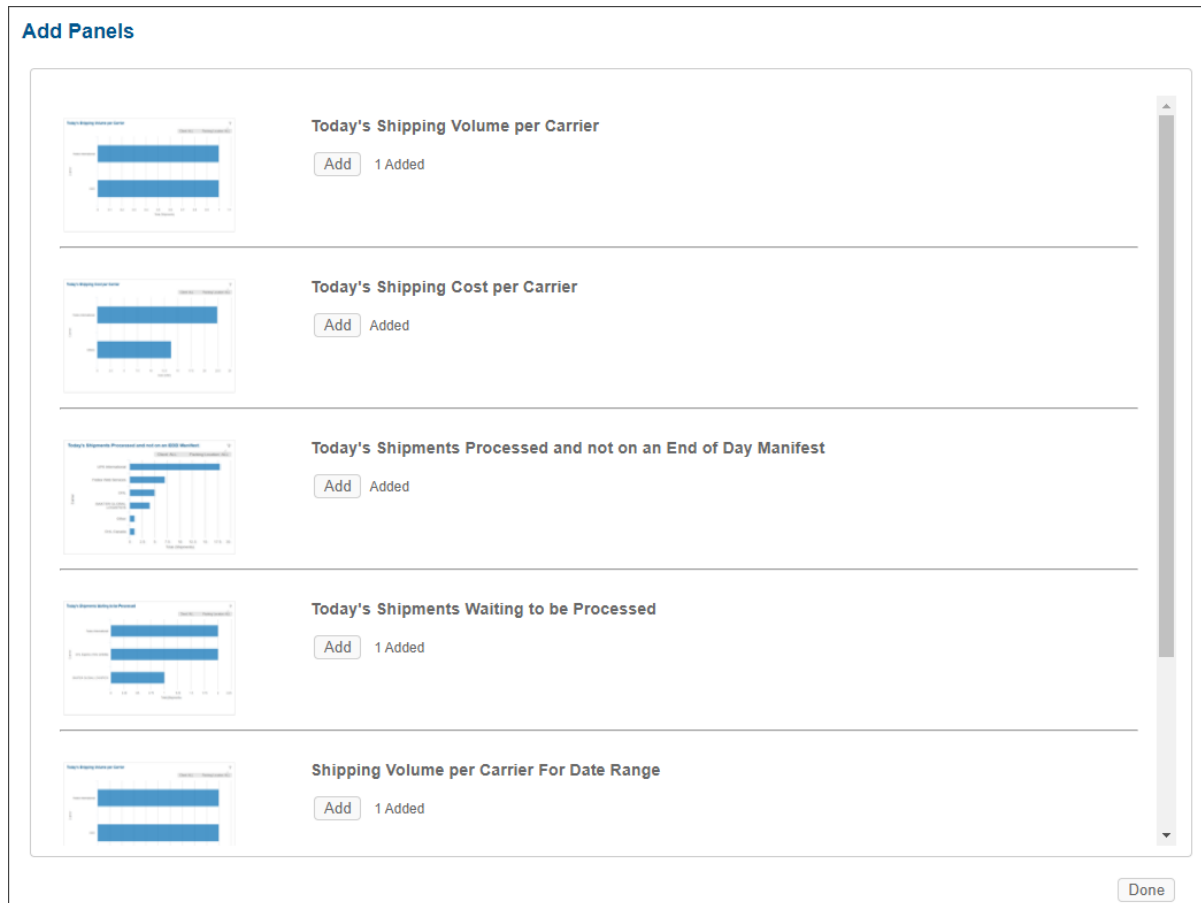
Describes how to clear the dashboard cache.




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.

Fig. 2.1
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 inside the selected tab at the top of the dashboard to open the pop-up window. To add a chart, click the Add button.

The Transportation Execution and Delivery Exception Management Dashboards enable you to add multiple instances of the same chart. Click the Add button again in the Add Panels pop-up window.

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

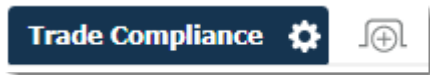
Tabs

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 organise; 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.

Fig. 2.2

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


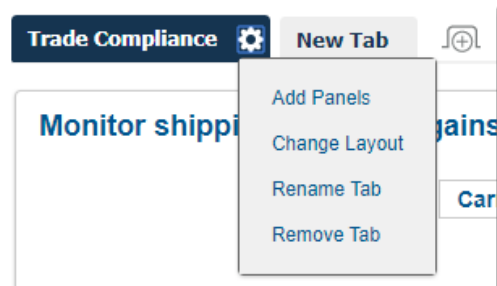
You can configure the tabs by clicking the gear  icon. This opens a drop-down menu.

Fig. 2.3

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.

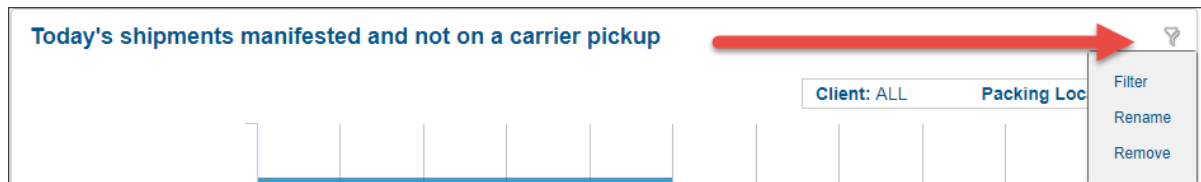
Remove Tab. This option is only available when there is more than one tab on the dashboard. If there is only one tab, you cannot remove it.

Chart Settings and Filters

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

Fig. 2.4

Settings Drop-down Menu



Filter. 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 that particular 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.

Table 2.1

Chart Filter Descriptions

Filter Name	Description
Client	View data associated with a specific client. If this filter is set to show All, this means that 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, this means that the chart displays all the locations for a specific client. Or, 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.
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	<p>Similar to the Date Range filter, the Duration field allows you to filter the results based on the time at which the activity occurred:</p> <ul style="list-style-type: none"> • 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	<p>You can choose different types of charts in which to display the operational analytics data:</p> <ul style="list-style-type: none"> • Bar • Pie

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 Chapter 2 of the *Operational Analytics Administration Guide*. 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.

Fig. 2.5

Refresh Cache Link

Updated chart data will be available every 2 minutes. If you want to refresh the chart data now click [here](#).

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).



Chapter 3

Transportation Execution Dashboard

This section describes how to use the Transportation Execution Dashboard.

Overview

Explains the purpose of the Transportation Execution Dashboard.

Charts Options

Provides a list and descriptions of the available Transportation Execution charts.

Inquiry Drill-Down

Describes how to access a more detailed breakdown of the chart data on the Inquiry page.



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.

Fig. 3.1

Menu Link to Transportation Execution Dashboard

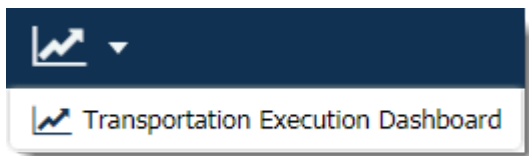


Chart Options

The available chart options are listed in the table below:

Table 3.1

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 despatched today by carrier. By default, this chart displays shipments. The despatch date is today's date.	Yes	<ul style="list-style-type: none"> • Client • Packing Location • Display • Carriers • Scheme • Chart Type 	Yes
Today's Shipping Costs By Carrier	The total cost of packages or shipments despatched today by carrier. The default currency is defined in the Dashboard Configurator (CFGDB).	Yes	<ul style="list-style-type: none"> • Client • Packing Location • Currency • Carriers • Scheme • Chart Type 	Yes

Shipping Costs By Carrier Service for a Date Range	The total cost of shipping packages or shipments by each carrier service within a specified date range. The default currency is defined in the Dashboard Configurator (CFGDB).	Yes	<ul style="list-style-type: none"> • 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 despatched within a specified date range, compared against the minimum and maximum number of packages agreed with the carrier. The grey 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	<ul style="list-style-type: none"> • Client • Packing Location • Carrier • Date From/To • Min/Max Packages 	Yes
Monitor Today's Shipping Volumes Against Carrier Agreement	The quantity of packages that is shipped today, compared against the minimum and maximum number of packages agreed with the carrier. The grey 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	<ul style="list-style-type: none"> • Client • Packing Location • Carrier • Date From/To • Min/Max Packages 	Yes

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 to see a detailed breakdown of the data it represents on the Inquiry page. Alternatively, access the REPORT option.


Each chart 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 chart. The Inquiry page is read only, which means that you cannot perform any operations on a transaction.

Fig. 3.2
Inquiry Page

Client	Reference	Despatch Num...	Despatch Date	Complian...	Carrier	Order Reference	Description	Status	Volume	Volume UOM	Consi
SDOC	110402400	0	18/04/2018	U	QDPD				0		PS
SDOC	110402399	0	18/04/2018	U	QDHL				0		PS
SDOC	110402398	0	18/04/2018	U	QFEDEX				0		PS
SDOC	110402397	0	18/04/2018	U	QFEDEX				0		PS
SDOC	110402396	0	18/04/2018	U	QDHL				0		PS
SDOC	110402395	0	18/04/2018	U	QDHL				0		PS
SDOC	110402394	0	18/04/2018	U	QFEDEX				0		PS
SDOC	110402393	0	18/04/2018	U	QDHL				0		PS
SDOC	110402392	0	18/04/2018	U	QDHL				0		PS
SDOC	110402391	0	18/04/2018	U	QFEDEX				0		PS

Charge	Description	Customer Charge	Company Charge	Currency	Inv	Charge Line No	Item Line No.
FRT		2.20	2.20	USD	<input type="checkbox"/>	0	10

Search Panel


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

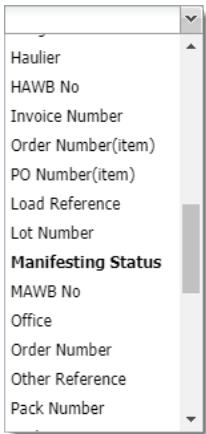
Fig. 3.3
Inquiry Search Panel

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.

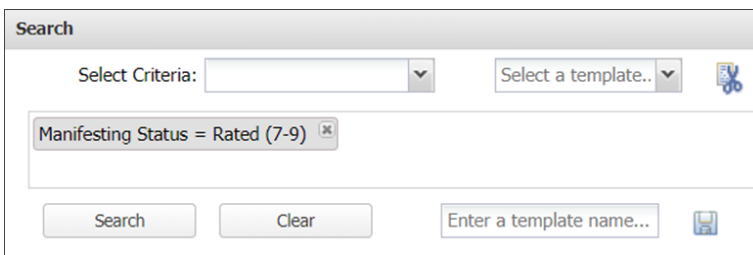
Selected criteria display in bold text in the drop-down list of criteria to indicate that these fields are already listed in the search criteria area.

Fig. 3.4
Search Criteria Area, Selected Criterion



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

Fig. 3.5
Manifesting Status as Search Criterion



You can choose to view shipments that have a manifesting status of Rated (7-9), or Not Rated (Blank, 1-6).


The following table summarizes the meaning of each status code.

Table 3.2
Manifesting Status Code Descriptions

Code	Description
Blank	Pending
5	Beginning of the rating process.
6	Interim. Rarely used by QAD Precision 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 the Inquiry chapter of the *Base User Guide*.

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

Chapter 4

Trade Compliance Dashboard

This section describes how to use the Trade Compliance Dashboard.

Overview

Explains the purpose of the Transportation Execution Dashboard.

Chart Options

Provides a description of the available Trade Compliance charts.

Inquiry Drill-Down

Describes how to access a more detailed breakdown of the Trade Compliance chart data on the Inquiry page



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, line charts, and tables.

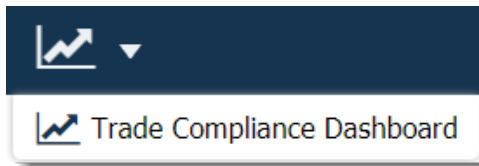
To open the Transportation Execution Dashboard, choose one of the following user roles from the role-based menu:

- 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.

Fig. 4.1

Menu Link to Trade Compliance Dashboard



Alternatively, access the ANTC option.

Chart Options

Table 4.1

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	<ul style="list-style-type: none"> • 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 positives that the system identifies.	No	<ul style="list-style-type: none"> • Client • Type 	No
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	<ul style="list-style-type: none"> • Expiry Days • Type • Client 	No



Today's Total Summary	This panel displays information on the compliance screening performed today. It can show up to six tiles with each tile containing a count of compliance runs at a particular status.	Yes	<ul style="list-style-type: none"> Type Status 1 - 6 	Yes
Failures	This chart displays compliance runs that have an overall status of System Failed (FA).	Yes	<ul style="list-style-type: none"> Client Type Duration Chart Type Scheme 	Yes
Under Review	This chart displays compliance runs that have an overall status of Under Review (FR).	Yes	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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 for comparison using the Remaining Value filter.	No	<ul style="list-style-type: none"> Remaining Value Type Client 	Yes
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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Client Scheme 	No

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

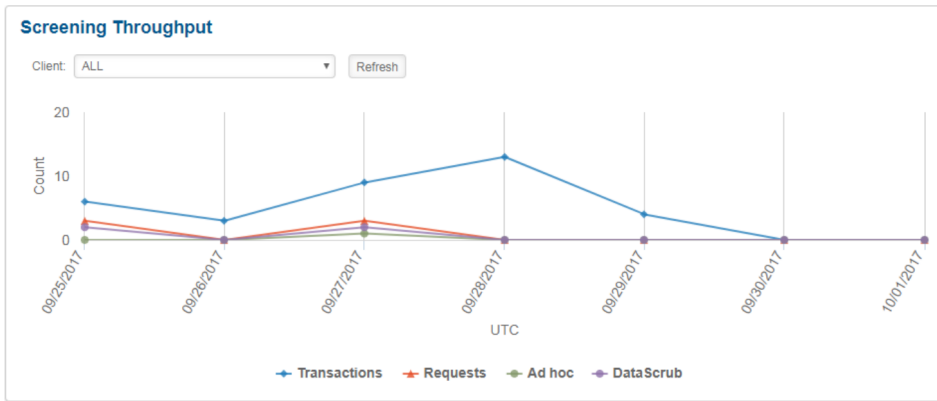
Screening Throughput Chart

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

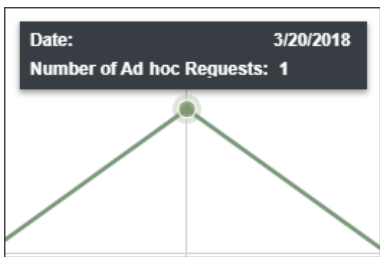


Fig. 4.2
Screening Throughput Chart



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

Fig. 4.3
Roll 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 Chart

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.

Fig. 4.4
Denied Party Screening Chart

Denied Party Screening						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 Ad hoc compliance checks are excluded from the Denied Party Screening chart data.

Expiring Licenses and Permits Chart

Fig. 4.5

Expiring Licenses and Permits Chart

Expiring Licenses and Permits					
		Expiry Days: 99	Type: ALL	Client: ALL	
Type	License Code	Expiry Date	Country	Consignee	Data Client
License	GE2958	06/01/2019	CA		TGL
License	LIO_R9A	06/30/2019	IE		TGL
License	R9A_L2	06/30/2019	IE		TGL

You can filter this grid 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.

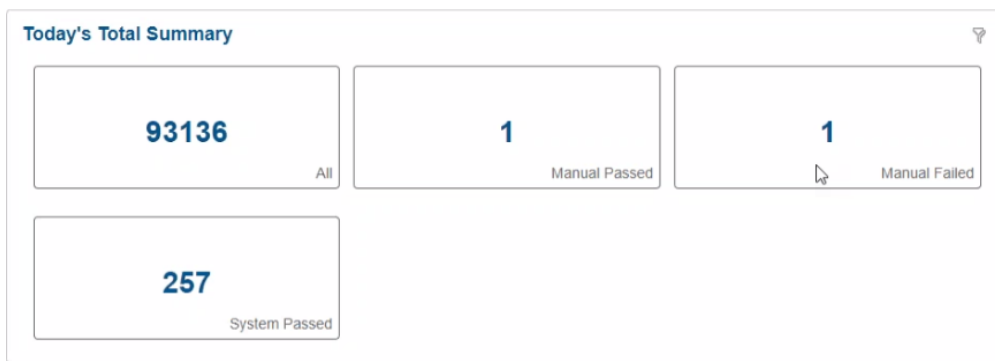
Data Client. The client associated with the license or permit.

Today's Total Summary Chart

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.

Fig. 4.6

Today's Total Summary Chart



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.

Fig. 4.7

Today's Total Summary Chart, Select Statuses to Display

Edit [X]

Type: All

Status 1: None

Status 2: None

Status 3: None

Status 4: None

Status 5: None

Status 6: None

Done

Table 4.2

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 Precision 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 Precision 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 Precision today that automatically failed a compliance check.
System Pass (PA)	The total number of data scrubs, requests, and or transactions on QAD Precision today that automatically passed a compliance check.
Under Review (FR)	The total number of data scrubs, requests, and/or transactions on QAD Precision 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 Precision today that received a compliance status of Confirmed Fail, Manual Pass, System Fail, System Pass, and Under Review.

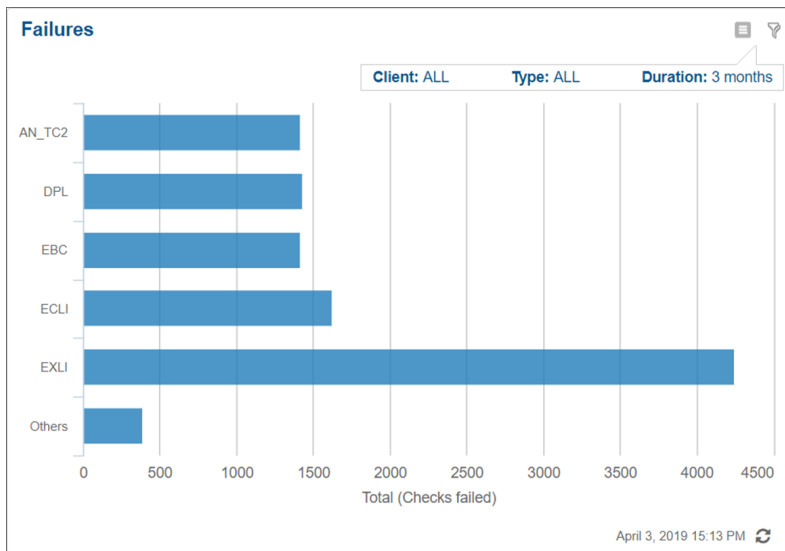
You can change the background color and text color of these tiles through the Trade Compliance Dashboard tab of the Dashboard Configurator (CFGDB).

Failures Chart

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 or pie segment on the chart.

Fig. 4.8

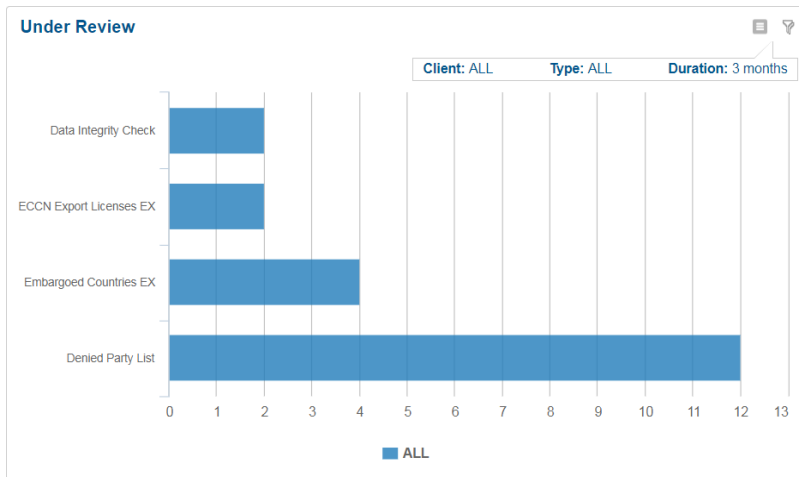
Failures Chart



Under Review Chart

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 system failures for a specific client, hover over the corresponding bar or pie segment on the chart.

Fig. 4.9
Under Review Chart



Consumed Quantity Licenses and Permits Chart

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.

Fig. 4.10
Consumed Quantity Licenses and Permits Chart

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

1 2 > >>

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Consumed Value Licenses and Permits Chart

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.

Fig. 4.11
Consumed Value Licenses and Permits Chart

Consumed Value Licenses and Permits								
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

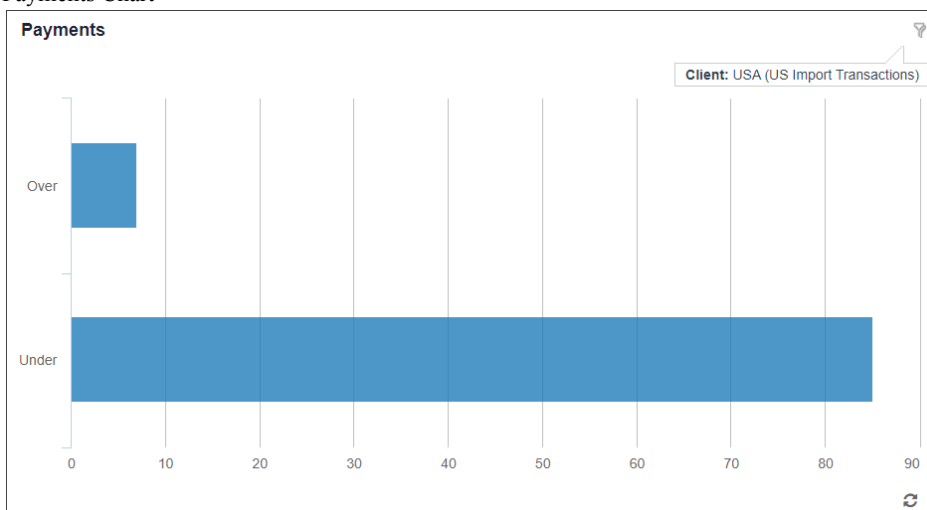
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Payments

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.

Fig. 4.12
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.

Fig. 4.13
Purchase Order page filtered by Payment Status

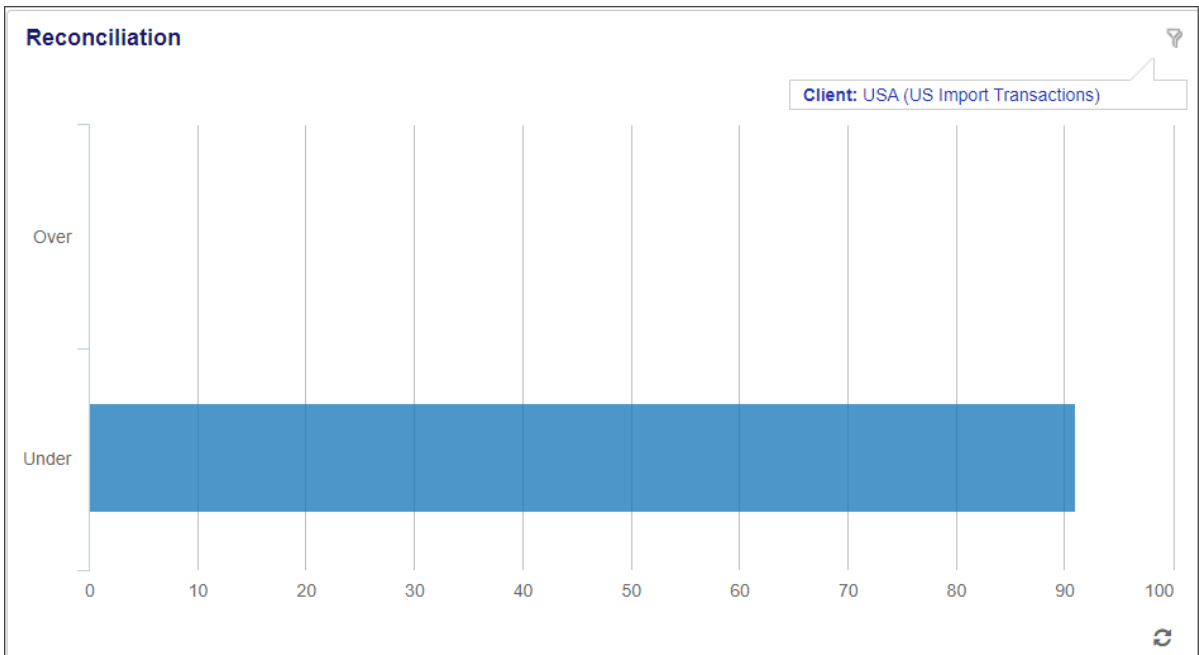
The screenshot shows the 'Purchase Order' interface. At the top, there is a search section with various filters including 'Open', 'Purchase Order', 'Group: QTGLUSER', 'Client: USA', and 'Reference No.'. Below the search filters is a table titled 'Purchase Orders' with columns: Workflow, PO Type, Reference, User Id, Order Number, Order Date, Supplier Division, Importing Country, Exporting Country, Company, Supplier, and Ship From. The table contains three rows of data. The 'Payment Status' dropdown menu is highlighted with a red box and is set to 'Under'.

Workflow	PO Type	Reference	User Id	Order Number	Order Date	Supplier Division	Importing Country	Exporting Country	Company	Supplier	Ship From
PO-DRAFT	SK	3658	QCONFIG	ORDER_DRAFT_USA1	09-Sep-2021		US	BE	35_FRANCE	2423702_SU	
PO-US	PO	3632	COA	PSL1681288	18-May-2021		US	CN	TMO_IF	3167341_SU	3167341_SF
PO-US	PO	3631	COA	PSL1681287	18-May-2021		US	CN	TMO_IF	3167341_SU	3167341_SF

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.

Fig. 4.14
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.



Fig. 4.15
Purchase Order page filtered by Reconciliation Status

The screenshot shows the 'Purchase Order' search interface. The search panel includes various filters such as Group, Client, Reference No., Order Number, Supplier, Importing Country, Supplier Order Reference, User ID, Supplier Division, Company, Grouping Id, Compliance Status, Ship From, Ult. Consignee, Shipment Status, PO Type, Ship To, Product Code, Exporting Country, Consignee, Commodity Code, and Payment Status. The 'Reconciliation Status' dropdown is highlighted with a red box and set to 'Under'.

Workflow	PO Type	Reference	User Id	Order Number	Order Date	Supplier Division	Importing Country	Exporting Country	Company	Supplier	Ship From
PO-DRAFT	SK	3658	QCONFIG	ORDER_DRAFT_USA1	09-Sep-2021		US	BE	35_FRANCE	2423702_SU	
PO-US	PO	3632	COA	PSL1681288	18-May-2021		US	CN	TMO_IF	3167341_SU	3167341_SF
PO-US	PO	3631	COA	PSL1681287	18-May-2021		US	CN	TMO_IF	3167341_SU	3167341_SF

Inquiry Drill-Down

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.

Fig. 4.12
Compliance History

The screenshot shows the 'Review Results' page with a table of compliance history results. The table has columns for Run Number, Reference 1, Reference 2, Reference 3, Reference 4, Run Status, Run Date, Run Time, and Run User. The Run Status column shows 'Request_create' with a red 'X' icon.

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 the *Trade Compliance User Guide*.



Delivery Exception Management Dashboard

This section describes how to use the Delivery Exception Management Dashboard.

Overview

Explains the purpose of the Delivery Exception Management Dashboard.

Chart Options

Provides a description of the available Delivery Exception Management charts.

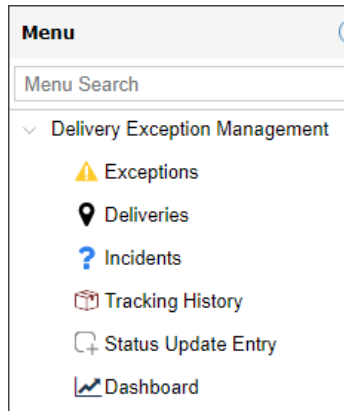


Overview

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.

Fig. 5.1

DEM Menu



Alternatively, access the DEMDH option.

Chart Options

Table 5.1

Available Charts and Configuration Options

Chart Name	Description	Filters	Possible to add multiple instances
Deliveries exceptions raised for a date range	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.	<ul style="list-style-type: none"> • Supplier • Supplier Account • Date Range 	Yes
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.	<ul style="list-style-type: none"> • Supplier • Supplier Account • Exception Types 	Yes
Exceptions by Type Summary	Each tile in this panel represents an exception type and the number of open incidents	<ul style="list-style-type: none"> • Supplier • Supplier Account 	Yes

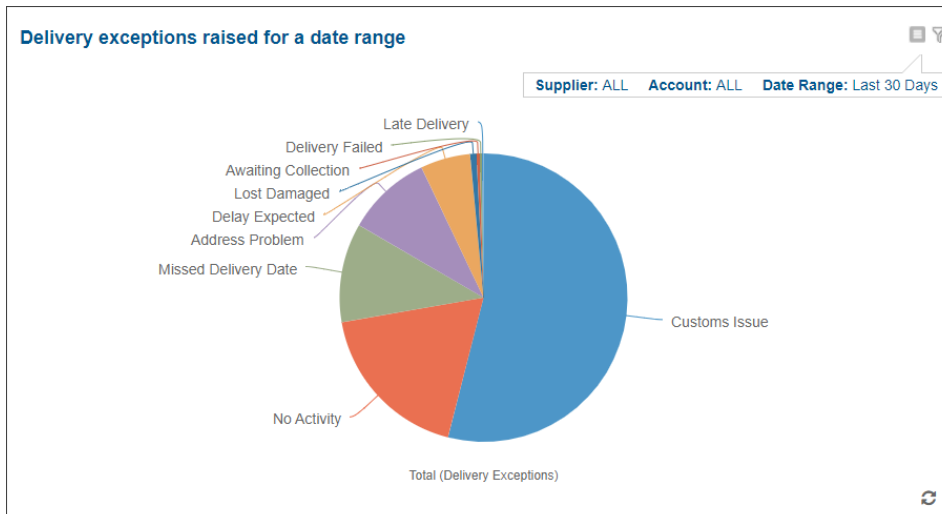
	associated with it. Users can choose to display up to six different exception types.		
Deliveries Summary	This panel shows a summary of current delivery information. Each tile represents a delivery status: <ul style="list-style-type: none"> • In Flight. • Today's Deliveries. • Missed Delivery Date • Delivered Today • Pending Delivery • Delay Expected 	<ul style="list-style-type: none"> • Supplier • Supplier Account • Shipment Direction 	Yes
Top 10 countries shipped for a date range	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. You can specify 30, 60, or 90 days as the date range.	<ul style="list-style-type: none"> • Supplier • Supplier Account • Date Range 	Yes
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.	<ul style="list-style-type: none"> • Supplier • Supplier Account 	Yes
Late Deliveries by Number of Days for a date range	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.	<ul style="list-style-type: none"> • Supplier • Supplier Account • Date Range 	Yes

Note The date used to create charts is the Current Comparison ETA Date. This is the system-calculated ETA Date that is used by DEM when checking for an expected and possibly updated ETA Date. This is taken from the Supplier Current ETA date where available. If the Supplier Current ETA Date field is not completed, then the value is taken from the Original Comparison ETA Date.

Delivery exceptions raised for a date range

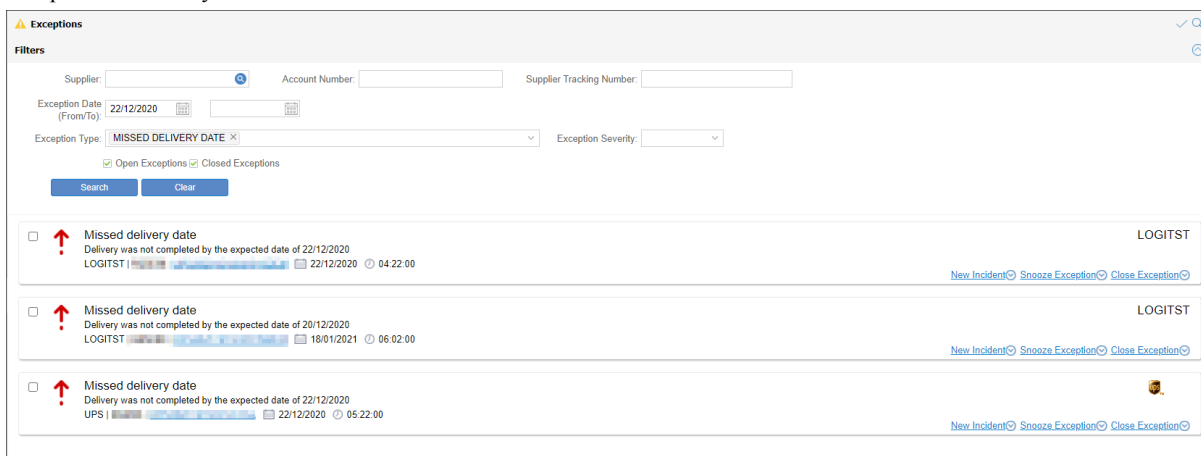
Users can view Delivery Exceptions for a set number of days. This number is configurable. It can be set to 30, 60, or 90 days. This information is presented on a pie chart.

Fig. 5.2
Delivery exception raised for a date range



Users 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 range and the selected Exception Type.

Fig. 5.3
Exceptions filtered by Dashboard



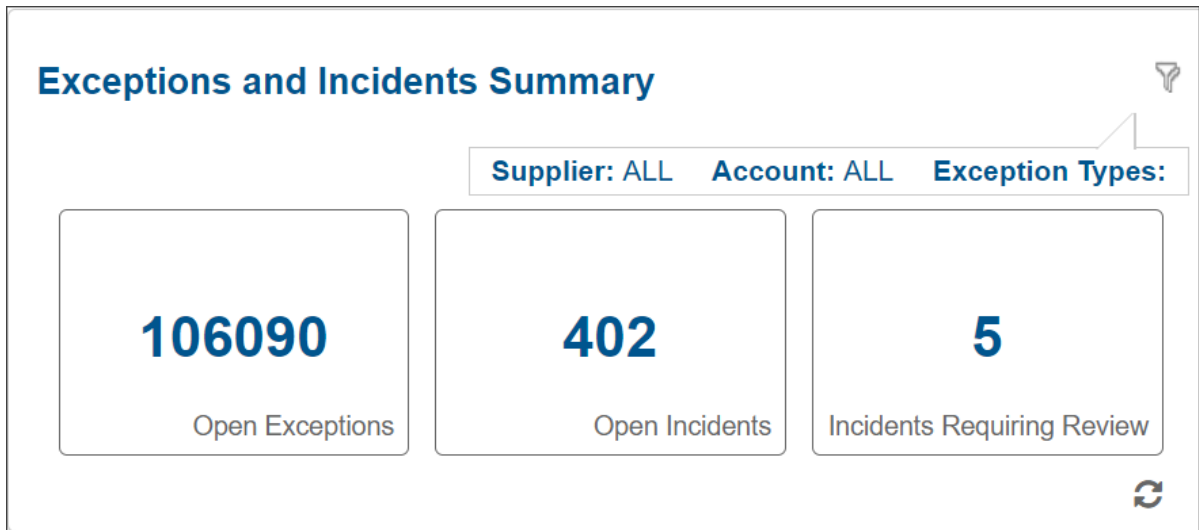
Exceptions and Incidents Summary

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 *Delivery Exception Management Administration Guide*.



Fig. 5.4

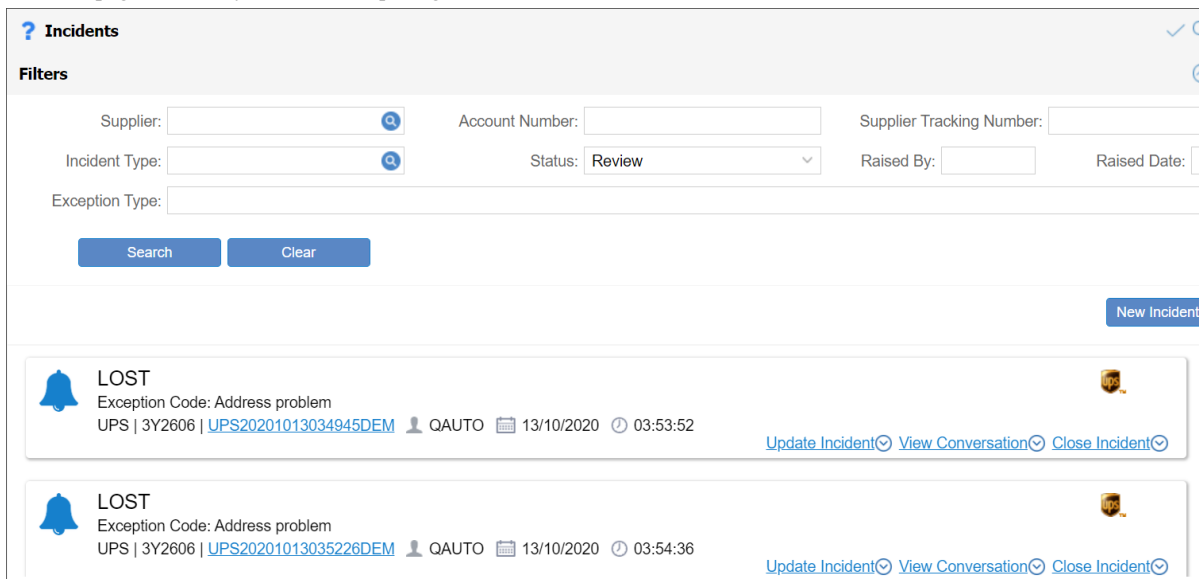
Exceptions and Incidents Summary dashboard



Users 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.

Fig. 5.5

Incidents page filtered by Incidents Requiring Review

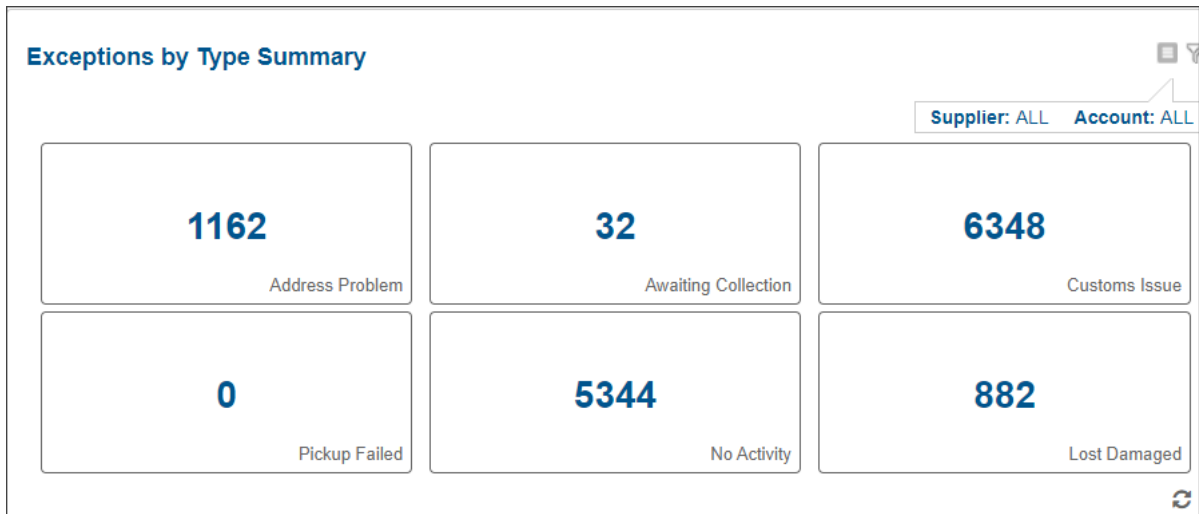


Exceptions by Type Summary

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.

Fig. 5.6

Exceptions by Type Summary



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

Fig. 5.7

Exceptions page filtered by Exception Type

Exceptions

Filters

Supplier: Account Number: Supplier Tracking Number:

Exception Date (From/To):

Exception Type: Exception Severity:

Open Exceptions Closed Exceptions

Address problem
 The apartment number is either missing or incorrect. Address to be updated.
 Additional information has been requested
 LOGTST 29/09/2020 09:31:37

[New Incident](#) [Snooze Exception](#) [Close Exception](#)

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

Fig. 5.8
Deliveries Summary Dashboard

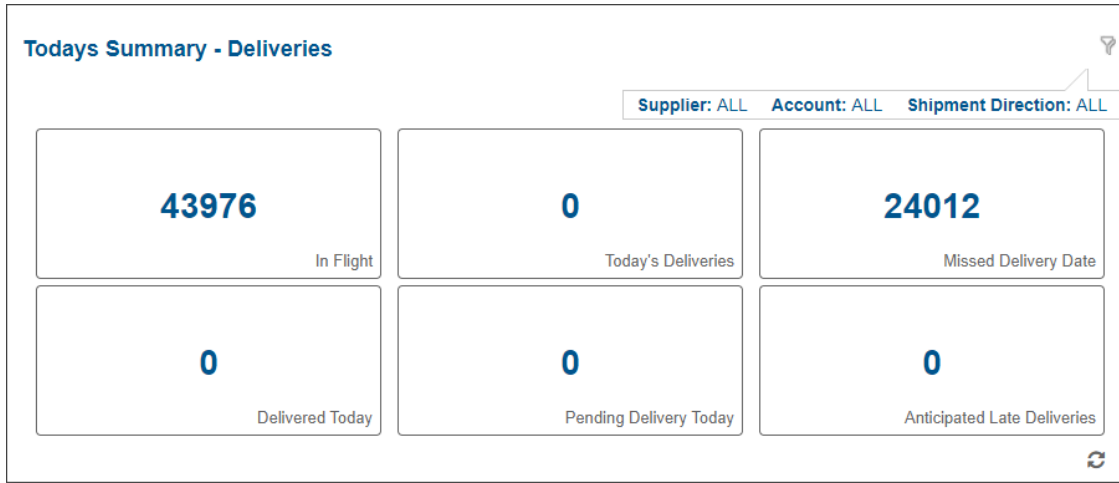


Table 5.2
Delivery Status Descriptions

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.
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.

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

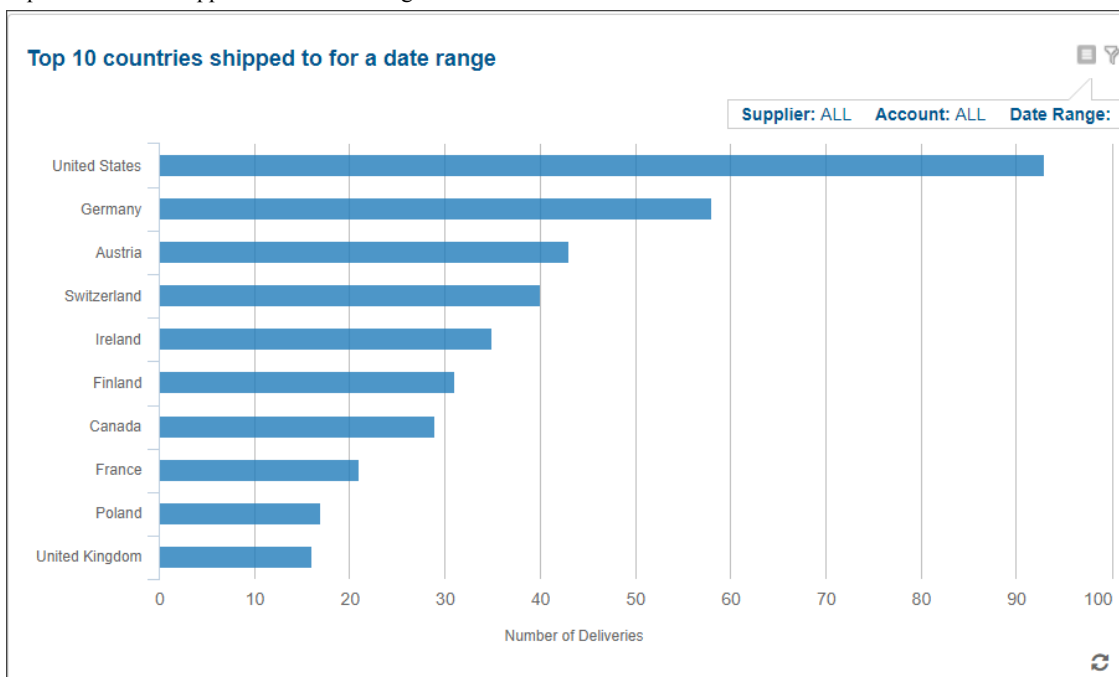
Fig. 5.9
Deliveries page filtered by Missed Delivery Date

Deliveries							
Supplier: <input type="text"/>		Supplier Tracking Number: <input type="text"/>		Search	Clear		
Missed Delivery Date							
	Supplier	Account Number	Supplier Tracking Number	Supplier Consignment Number	Ope...	Ope...	Evaluati
	UPS	000000	123456789				
	UPS	000000	123456789				
	UPS	000000	123456789				
	UPS	000000	123456789			↑	
	UPS	000000	123456789			↑	
	UPS	000000	123456789			↑	
	UPS	000000	123456789			↑	

Top 10 countries shipped for a date range

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.

Fig. 5.10
Top 10 countries shipped to for a date range



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

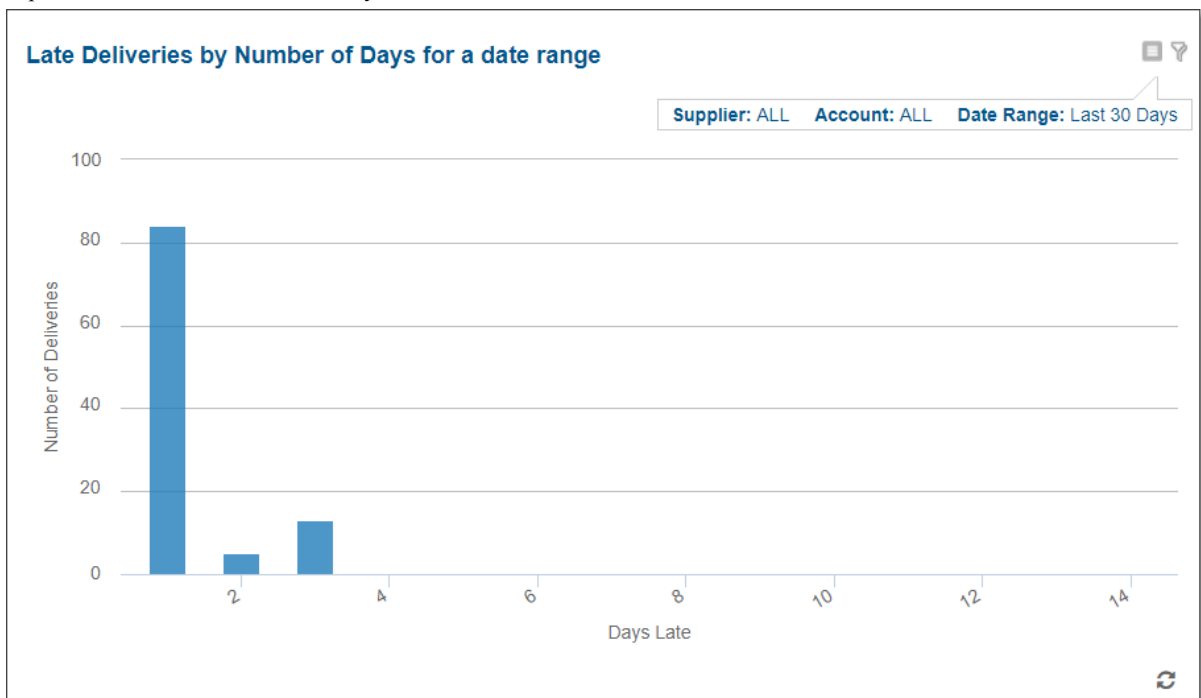
Fig. 5.13
Deliveries filtered by Expected Deliveries for the next 7 days

Deliveries							
Supplier: <input type="text"/>		Supplier Tracking Number: <input type="text"/>		Search	Clear		
Due Deliveries for the next 7 days							
	Supplier	Account Number	Supplier Tracking Number	Supplier Consignment Number	Op...	Op...	Evaluat...
			LIFR00000000000000000000				<input type="checkbox"/>
	FedEx	-	FE00000000000000000000				<input type="checkbox"/>
	LOGITST		LIFR00000000000000000000				<input type="checkbox"/>
	LOGITST		LIFR00000000000000000000				<input type="checkbox"/>
	LOGITST		LIFR00000000000000000000				<input type="checkbox"/>
	FedEx	-	FE00000000000000000000				<input type="checkbox"/>
	FedEx	-	FE00000000000000000000				<input type="checkbox"/>

Late Deliveries by Number of Days for a date range

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.

Fig. 5.14
Expected Deliveries for the Next 7 days



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

Fig. 5.15

Deliveries filtered by Late Deliveries by Number of Days

Deliveries							
Supplier:		<input type="text"/>	Supplier Tracking Number:		<input type="text"/>	<input type="button" value="Search"/>	<input type="button" value="Clear"/>
Late Deliveries by Number of Days							
	Enabled	Supplier	Supplier Tracking Num...	Supplier Consignment Number	Open Exception Severity	Op	
	<input checked="" type="checkbox"/>	Expeditors	EXO20210801051328...	EXO20210801051328DEM			
	<input checked="" type="checkbox"/>	Expeditors	EXO20210801051613...	EXO20210801051613DEM			
	<input checked="" type="checkbox"/>	Expeditors	EXO20210803051328...	EXO20210803051328DEM			
	<input checked="" type="checkbox"/>	Expeditors	EXO20210803051612...	EXO20210803051612DEM			
	<input checked="" type="checkbox"/>	Expeditors	EXO20210804051441...	EXO20210804051441DEM			
	<input checked="" type="checkbox"/>	Expeditors	EXO20210804051726...	EXO20210804051726DEM			
	<input checked="" type="checkbox"/>	Expeditors	EXO20210805051754...	EXO20210805051754DEM			
	<input checked="" type="checkbox"/>	Expeditors	EXO20210805052039...	EXO20210805052039DEM			
	<input checked="" type="checkbox"/>	Expeditors	EXO20210807051755...	EXO20210807051755DEM			
	<input checked="" type="checkbox"/>	Expeditors	EXO20210807052040...	EXO20210807052040DEM			