

Release Notes

CyberTrax2™

Version: 2.37.0

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Prepared for
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CyberTrax2™ Release Notes

1. Introduction

This document notes the major new features and changes in this release of CyberTrax2. It also documents known problems and workarounds.

2. About This Release

CyberTrax2 Release 2.37.0 includes additional tools to create more reports, additional features for operations, new KPIs for flashlight, introduce Inventory portal, additional features for ASN portal, admin, accounting, and bug fixes on ASN portal, accounting and client application.

3. Projects

3.1 Report

- **Mantis IDs:** 0004543: *If user has been deleted, remove him from recipients lists in scheduled reports*
Description of Change: System automatically removes disabled and archived users from receiving dashboard reports. If user is the last recipient then disable all options (“D” dashboard, “E” e-mail) for him.
- **Mantis IDs:** 0004547: *[Report] Inventory Dashboard Report*
Description of Change: Ability to set up an inventory dashboard report with “impending/past due” conditions for supplier due date (PO), Cargo Due Date (ASN), and Call off Requested ship date (call off).
- **Mantis IDs:** 0004549: *[Main report] Add more dates (every date in the system) to date filters*
Description of Change: Add all dates to be available as date filters on Main report.
- **Mantis IDs:** 0004627: *Distance value from Loadplan --> CT2*
Description of Change: Add “Distance” value from Loadplan to CyberTrax as well as output field for Main report.
- **Mantis IDs:** 0004629: *[Main report] Add "3PL" as filter to the main report.*
Description of Change: Add “3PL” as filter to Main report with default value:
 - *Internal UI: Exclude records transmitted to 3PL (not CyberTrax)*
 - *Client UI: Include records transmitted to 3PL for all clients.*
- **Mantis IDs:** 0004647: *[Main report] Add "Open/Paid" status of Sales Invoice as filter to reporting*
Description of Change: Add “Open/Paid” status as filter to Main report and Search Invoices Report.
- **Mantis IDs:** 0004701: *[Main report] ASN - pending approval*
Description of Change: Ability to schedule a report for ASN Pending Approval. This is a condition on ASN filter tab from Main report.

- **Mantis IDs:** 0004702: *[PO Main report] Ability to send updated report for supplier due date has been changed daily/wkly/..etc with comment*
Description of Change: Ability to schedule a report to send an update daily/weekly/monthly/etc for supplier due date that has been updated. This can allow user to schedule a report to be sent to all planners that need to be notified about this.
- **Mantis IDs:** 0004707: *[Main report] Tweak/Correction of Container # Output*
Description of Change: Ability to schedule a report for ASN Pending Approval. This is a condition on ASN filter tab from Main report.

3.2 Operation

- **Mantis IDs:** 0004677: *Loss Approval Update*
Description of Change: Update Loss Approval feature. When some loss is approved, user can leave a comment in ICom tab about this action. Keep “Loss Authorized” checkmark visible when record is closed. Indicate authorized loss in shipment with “This shipment has authorized loss” label.
- **Mantis IDs:** 0004661: *[EDI to TMS] Add to the system LOG, info about Est charges created by the system.*
Description of Change: Add info about Est charges created by the system to the system log with amounts taken from Loadplans as well as percentage of splitting charges.

3.3 Client Application

- **Mantis IDs:** 0004594: *[Watchlist] Tweaks / Watch List On Screen Notifications*
Description of Change: Tweaks Watch List on Screen Notifications as following:
 1. Instead of CT #, show the Nickname in the ‘notification panel’
 2. Each line in the notification panel should have a hyperlink to the CT or ASN (CT if CT was flagged, ASN if ASN was flagged)
 3. “Newly updated” watchlist records should be populated at the top of the Watchlist.
- **Mantis IDs:** 0004465: *(Ops) Change warning message for deleted CTs.*
Description of Change: Change warning message for deleted CTs from "Error loading shipment: Your company has no shipment CT#XXXXX." to something like "The CT#XXXXX is deleted"

3.4 Flashlight

- **Mantis IDs:** 0004602: *LeadTime: Supplier On Time Performance*
Description of Change: Implement Lead Time KPI: Supplier On time performance.
- **Mantis IDs:** 0004631: *CPU KPI: Cost Per Mile*
Description of Change: Implement Cost per Unit KPI: Cost per Mile.
- **Mantis IDs:** 0004632: *Volumes KPI: Total Miles*
Description of Change: Implement Volumes KPI: Total Miles.
- **Mantis IDs:** 0004636: *Lane Optimization: Miles per Load*
Description of Change: Implement Lane Optimization: Miles per Load. This KPI uses distance data from received Load Plans.
- **Mantis IDs:** 0004652: *Volumes KPI: Gross lbs*
Description of Change: Implement Volumes KPI: Gross lbs.

3.5 POEM, Inventory, and Call off

- **Mantis IDs:** 0004437: *Inventory and Call Off: Ability to upload PO automatically*
Description of Change: Provide ability for user to email information in excel spreadsheet to system email address. System receives the file and validates the file to upload automatically. If the file has incorrect format or missing information or etc or successfully uploaded, system will notify users by sending them an email with report about update result.
- **Mantis IDs:** 0004457: *Add Inventory Shipper Role*
Description of Change: Provide a checkbox to enable inventory shipper role on a shipper profile to have ability to create and update inventory records.
- **Mantis IDs:** 0004458: *Add "Call Off" rights as option of Planner User*
Description of Change: Provide a setting for planner's ability to approve ASNs and create call offs for inventory planner only.
- **Mantis IDs:** 0004459: *Inventory and Call Off panel*
Description of Change: Ability to enable inventory portal for shipper and planner by functionality in portal and user account. Inventory and call off panel for inventory shipper and inventory planner provide functionalities below:

Shipper:
 1. Create/update inventory quantity on inventory tab
 2. Update inventory form, the level counter is always started with "0"

3. Validate upon updating inventory for quantity and total PO quantity at current level
4. Ability to sort all date columns
5. Ability to create ASN from purchase order tab, inventory tab, and call off tab
6. Auto-fill PO issued by value in ASN creation from PO/Inventory/call off tab
7. Set a visibility rule for inventory shipper by supplier
8. Ability to download to excel
9. Allow user to manage his columns for purchase order, inventory, and call off view list
10. Display traffic lights all tabs for impending, pending, at risk and past due status
11. Ability to use search feature on all tabs

Planner:

1. Ability to edit/view inventory for call off feature
2. Ability to cancel call off
3. Set a visibility rule for inventory planner by PO issued by
4. Ability to download to excel
5. Allow user to manage his columns for purchase order, inventory, and call off view list
6. Display traffic lights all tabs for impending, pending, at risk and past due status
7. Ability to use search feature on all tabs

- **Mantis IDs:** 0004460: *ASN "Traffic light" filters*

Description of Change: Counters of critical indicators that show traffic light status of purchase order, inventory, call-off and ASN records based on their specific date in comparison with current date for statuses impending, at risk, and past due:

- PO supplier (origin) Due date
- Inventory (destination) Due date
- Call off Request Ship date
- ASN Cargo Due Date (on approved tab)
- Also Hold and Approved For Pick Up on Date (Impending status on approved tab)

Note: Add "All" button to show unfiltered list of records

- **Mantis IDs:** 0004585: *Inventory and Call Off: Admin part of Upload PO feature*

Description of Change: Create a facility for admin user to upload PO list per portal. Currently the format of excel spreadsheet file to upload is hardcoded.

- **Mantis IDs:** 0004586: *Inventory and Call Off: Supplier Event Validation*

Description of Change: Create admin configuration "Event Management" per portal for supplier event validation to configure statuses to validate (in days), logic and process of validation, e-mail notifications, and log and display the validation. Add a feature when user review the supplier event validation to confirm the due date with yes or no option and the opportunity is provided for user to enter comment when user selects "No" with a revised date selected. This would be recorded in the record and become a permanent part of the record for any report purposes if needed.

- **Mantis IDs:** 0004587: *Inventory and Call Off: Dashboards for PO Statuses*

Description of Change: Create dashboards for PO statuses: Pending, Impending, At Risk, and Past Due.

- **Mantis IDs:** 0004676: *Inventory and Call Off panel: updates and fixes*

Description of Change: Add and rename label description for fields. Add more validation for quantity and PO open quantity as well as call of quantity. Display "Supplier Due Date" for all Inventory tabs. Add "Create ASN" button to Inventory tab. Mark closed call offs and make button "show closed call offs". Show all traffic lights and counters for opened call offs only. When creating ASNs for full of the inventory quantity, make inventory quantity equal zero and close it. If some ASN is canceled, all quantities are rolled back.

- **Mantis IDs:** 0004648: *Inventory and Call Off: Origin Due Date request confirmation*
Description of Change: Provide ability for user to confirm origin due date or new supplier due date information with ability to add comment.
- **Mantis IDs:** 0004653: *Inventory and Call Off: use specific list of output fields for "Download to Excel" feature*
Description of Change: Provide dynamic generation of the list of output fields for "Download to Excel" feature.
- **Mantis IDs:** 0004655: *Inventory and Call Off: move Approved ASN to Delivered tab automatically*
Description of Change: Ability to set approved ASN to delivered tab automatically and use date of approval as date of delivery. This functionality can be set on the admin > Portal.
- **Mantis IDs:** 0004673: *Combine ASN "Traffic light" filters with other filters on panel*
Description of Change: Ability to filter records on inventory tabs with using traffic lights and other filters combined.
- **Mantis IDs:** 0004675: *Display Inventory and Call Off information in ASN record*
Description of Change: Display information as read-only text when ASN is created. Inventory history is displayed on ASN view window. Display total PO quantity, current PO quantity, inventory PO quantity when creating ASN.
- **Mantis IDs:** 0004683: *Inventory and Call Off Communication Tab*
Description of Change: Add Com tab to all related tabs. Recipients are the same as in ASN excluding Jaguar users. PO/Inventory/CallOff tabs have common list of messages based on PO. Copy all Inventory-related e-mails to ASN when ASN is created. Inventory and ASN Com tabs are independent of each other.
- **Mantis IDs:** 0004686: *Inventory and Call Off: Hide "zero" quantity Inventory records*
Description of Change: Hide "0" quantity inventory records so that it makes the system show only "existing" inventory under "inventory" tab to see what is available.
- **Mantis IDs:** 0004690: *Inventory and Call Off: P.O. Notifications change requests*
Description of Change: Change format of content of email and information for PO Notifications.
- **Mantis IDs:** 0004694: *Inventory and Call Off: Update notification for approved ASN*
Description of Change: Update notification for approved ASN message content.
- **Mantis IDs:** 0004703: *Ability to create an ASN from multiple PO*
Description of Change: Ability to create an ASN from multiple PO. They should have the same destination, PO issued by and mode of transportation.
- **Mantis IDs:** 0004705: *Inventory and Call Off: Close POs with "0" Qty.*
Description of Change: Close POs with "0" quantity. Make "Create ASN" button disabled for close Pos. Show the POs in gray with "Italic" font, Make filters: show opened, show closed, and show all.

- **Mantis IDs:** 0004711: *Inventory and Call Off: if auto-approved ASN requires Final Traffic approval leave it on New tab until FT approval*

Description of Change: Leave shipment on new tab in pending status and wait for final approval by planner with rights to take final approval. Once shipment has been approved with final approval, shipment becomes delivered if this setting has been turned on for this particular portal.

3.6 ASN

- **Mantis IDs:** 0004545: *[ASN 2.0] Add Impending and Past Due filters for ASN Cargo Due Date*

Description of Change: Implement this in ASN shipment list to filter the ASNs by “impending/past” Cargo Due date. Provide ability to set and keep filter criteria per user.

- **Mantis IDs:** 0004546: *[ASN 2.0] Add Impending and Past Due filters for Inventory Dates*

Description of Change: Implement filter for purchase order list by “impending/past” supplier due date. Implement filter for call off records by “impending/past” request ship date. Provide ability to set and keep filter criteria per user.

- **Mantis IDs:** 0004633: *[ASN 2.0] (changes) Remove auto fill supplier ready date, make DIMS mandatory*

Description of Change: Remove auto fill of supplier ready date. This date must be entered by the supplier. Ability to set per portal to make DIMS mandated field.

- **Mantis IDs:** 0004666: *[ASN 2.0] Final approval for MLB shipments*

Description of Change: Implemented “Final Traffic approval” option for every MOT in POIB for Shipper and Planner, instead of hardcoded Air Approval option.

3.7 Admin

- **Mantis IDs:** 0004658: *Admin>Address book> add "Email" field*

Description of Change: Implement a new field “E-mail” for admin > address book.

3.8 Accounting

- **Mantis IDs:** 0004622: *[Data2Logistics] Replacement of symbols upon file creation*

Description of Change: Implement script to run to replace dash (-) symbol to 1 format and implement validation to use 1 format for each new address created to prevent different dash format.

- **Mantis IDs:** 0004668: *EDI to D2L: Provide 10 digits validation for Total Weight in L3 segment of EDI*

Description of Change: Implement validation to total weight must be less than 10 digits.

- **Mantis IDs:** 0004680: *EDI to D2L: "Fail" status for exceptions in transmitting*
Description of Change: Implement a new "Fail" status for invoices that are not transmitted because of exception. Update "Rejected invoices" report to include invoices with "Fail" status as well. Rename status to "Fail and Rejected"
- **Mantis IDs:** 0004682: *Stop/Disable: Transmitting CR to D2L for all bill to parties*
Description of Change: Disable the transmission of credit notes.
- **Mantis IDs:** 0004706: *Change: Prepare/Run script for Elizabeth Arden client users. (remove EA USA DOMESTIC)*
Description of Change: Remove EA USA DOMESTIC from the groups: ELIZABETH ARDEN, EA USA INTL & DOM, and EA DOM & DOM PORTAL

4. Bugs Fixes and Changes

4.1 Operation

- **Mantis IDs:** 0004656: *[EDI to TMS] Save only latest TMS Load Charges in shipment*
Description of Change: Each time when CyberTrax receives a Loadplan in XML file from Descartes TMS, the system adds two charges (CC= 1597 and 1598) to related shipment. This leads to duplicate amounts on Est Tab. This issue has been improved by updating the charges in shipment with new data from latest received Loadplan. Please note that in group case, re-distributed charges are needed for all grouped CTs and old records need to be handled.
- **Mantis IDs:** 0004665: *[EDI to TMS] CT2 makes wrong est charges lines when it distributes TMS Charges.*
Description of Change: Improving distributes TMS charges. CT2 made wrong est charges lines when it distributed TMS charges. Now it makes correct "est" charges lines when it distributes TMS charges.

4.2 ASN

- **Mantis IDs:** 0004542: *[ASN 2.0] Com tab: search recipients emails are not working*
Description of Change: Fixing bug on list of users to be searchable as well as to be alphabetically sorting.
- **Mantis IDs:** 0004621: *Authorization date from ASN portal is not displaying in Cybertrax history window*
Description of Change: Fixing bug on approved shipments that should have authorized status and authorized date recorded in history.
- **Mantis IDs:** 0004625: *Bug: Default setting for all shippers for the new POIB added should be fixed to the right setting*
Description of Change: Fixing bug on the default setting of new PO issued by added to ASN portal to existing shipper users from auto approved to the correct setting from admin setting.

- **Mantis IDs:** 0004660: *[ASN 20] bug: deleting of lines in Dims table doesn't work*
Description of Change: Fixing bug on deleting line(s) in Dims table and saving CT to be automatically updated removing line(s). No longer need to refresh the browser page in order to see the updated line(s).
- **Mantis IDs:** 0004691: *Inventory and Call-Off (bug): Can't save newly created Portal*
Description of Change: Fixing bug on creating and saving a new portal. It was not allowing user to save a newly created portal. Now it is working properly.

4.3 Accounting

- **Mantis IDs:** 0004681: *(bug) "CWT KG" unit uses Volume value as default Quantity if create Sales Invoice in grouped CT*
Description of Change: Fixing bug on "CWT KG" unit to use correct value as default quantity if create sale invoice in group.
- **Mantis IDs:** 0004699: *[GM Split] Problem on the reporting of Handling Fee Statement*
Description of Change: Fixing bug on consolidated internal invoices to restore gross margin split. This report issue is related to GMS process on Sep 29th. All consolidated invoices dated on Sep 29th have the same problem with no detailed info.

4.4 Client Application

- **Mantis IDs:** 0004674: *Client App Log on window looks weird in IE*
Description of Change: Fixing bug on look and feel on client application log on window to look properly.

5. Known Bugs and Limitations (none)

6. Testing

All items have undergone and passed Quality Assurance, Systems Integration, and User Acceptance testing. Please refer to below for list of testers.

Mantis	QA	SIT	UAT	Category
4543	Roma	n/a	Tira	Report
4547	Roma	n/a	Tira	Report
4627	Roma	n/a	Tira	Report
4629	Roma	n/a	Tira	Report
4647	Roma	n/a	Tira	Report
4701	Roma	n/a	Tira	Report
4702	Roma	n/a	Tira	Report
4707	Roma	n/a	Tira	Report
4749	Roma	n/a	Tira	Report
4656	Roma	n/a	Tira	Ops
5661	Roma	n/a	Tira	Ops
4665	Roma	n/a	Tira	Ops
4677	Roma	n/a	Tira	Ops
4465	Roma	n/a	Tira	Client App
4594	Roma	n/a	Tira	Client App
4602	Roma	n/a	Tira	Flashlight
4631	Roma	n/a	Tira	Flashlight
4632	Roma	n/a	Tira	Flashlight
4636	Roma	n/a	Tira	Flashlight
4652	Roma	n/a	Tira	Flashlight
4392	Roma	n/a	Tira	Inventory
4437	Roma	n/a	Tira	Inventory
4457	Roma	n/a	Tira	Inventory
4458	Roma	n/a	Tira	Inventory
4459	Roma	n/a	Tira	Inventory
4460	Roma	n/a	Tira	Inventory
4585	Roma	n/a	Tira	Inventory
4586	Roma	n/a	Tira	Inventory
4587	Roma	n/a	Tira	Inventory
4648	Roma	n/a	Tira	Inventory

Mantis	QA	SIT	UAT	Category
4653	Roma	n/a	Tira	Inventory
4655	Roma	n/a	Tira	Inventory
4673	Roma	n/a	Tira	Inventory
4683	Roma	n/a	Tira	Inventory
4675	Roma	n/a	Tira	Inventory
4676	Roma	n/a	Tira	Inventory
4686	Roma	n/a	Tira	Inventory
4690	Roma	n/a	Tira	Inventory
4694	Roma	n/a	Tira	Inventory
4703	Roma	n/a	Tira	Inventory
4705	Roma	n/a	Tira	Inventory
4711	Roma	n/a	Tira	Inventory
4545	Roma	n/a	Tira	ASN
4546	Roma	n/a	Tira	ASN
4633	Roma	n/a	Tira	ASN
4666	Roma	n/a	Tira	ASN
4542	Roma	n/a	Tira	ASN
4621	Roma	n/a	Tira	ASN
4625	Roma	n/a	Tira	ASN
4660	Roma	n/a	Tira	ASN
4691	Roma	n/a	Tira	ASN
4658	Roma	n/a	Tira	Admin
4622	Roma	n/a	Tira	Accounting
4668	Roma	n/a	Tira	Accounting
4680	Roma	n/a	Tira	Accounting
4681	Roma	n/a	Tira	Accounting
4682	Roma	n/a	Tira	Accounting
4699	Roma	n/a	Tira	Accounting
4706	Roma	n/a	Tira	Accounting
4674	Roma	n/a	Tira	Client App

Revision History

Version	Date	Summary of Changes	Author	Revision Marks (Yes/No)
0.1	10/28/2014	Initial revision.	Montira Earley	N