

Release Notes

CyberTrax2™

Version: 2.31.0

October 2013

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 2.31.0 includes some new classes of Key Performance Indicator project (KPI phase 3) with new changes to user interface, logics, admin functionality to enable certain classes of KPIs to client users, and bug fixes on KPIs, new functionalities of ASN portals, estimation module for sales and costs and validation on Internal application with some changes to sale invoices, arrival notice, and accounting module as well as bug fixes on Internal and Client application.

3. Projects

3.1 KPI phase III

- **Mantis IDs:** 3988, 3993, 3997,4051,4060, 4066, 4071, 4072, 4074, 4076, 4083, 4085,4090, 4091,4102,4109, 4119, 4125, 4126,4128, 4133,4134, 4138, 4141, 4142, 4147,4152, 4154, 4155, 4157, 4192, 4197, 4198, 4199, 4203, 4208, 4209, 4210, 4211, 4212, 4213, 4214, 4222, 4223, 4253, 4254, 4255, 4287, 4288, 4289, 4290, 4291, 4293, 4294, 4297, 4304, 4305, 4315, and 4318

Description of Change: Mainly focusing on KPIs to evaluate performance of a particular activity and present state of the business and its key activities that are associated with the selection of performance indicators. Offers more classes and types of KPIs, changes look and feel for chart, graph, and drilldown to make more user friendly.

- New class: Lane optimization with drilldown with download to excel functionality
 - Shipment per lane for all MOTs
- New class: Equipment Utilization with drilldown with download to excel functionality
 - Kgs per shipment for all MOTs
 - Lbs per shipment for all MOTs
 - Pallets per shipment for all MOTs
 - CBMs per shipment for Ocean LCL only
 - Chargeable weight kgs per shipment for Air only
- Counters/Volumes with drill down and download to excel functionality
 - CT count for all MOTs
 - Total spend for all MOTs
 - Gross Kg for all MOTs
 - Containers/TEU count for Ocean FCL only
 - CBM count for Ocean LCL only
 - Chargeable Weight count for Air only

- Dates/Lead Times with drill down and download to excel functionality:
 - Departed to Arrived for Air and Ocean only
 - On Time performance for all MOTs
 - Approved to Cargo Due for all MOTs
- Cost per Unit with drill down and download to excel functionality:
 - Cost per kg version 2 available for all MOTs
 - Cost per lb version 2 available for all MOTs
 - Cost per CBM for Ocean LCL only
 - Cost per TEU for Ocean FCL only
 - Cost per chargeable weight for Air only
- Cost related: Add Duty and VAT switch
- Apply logic of cost distribution in sales invoices to KPI value and KPI drilldown result
- New version of drilldown for download to excel with drag and drop feature
- KPI admin version 2 with multi-editor with added double click feature for "edit" function
- Change colors for gauges
- Layout and graphics change
- Changes: Display graph on the Top Right panel when using weekly, monthly, quarterly and yearly control
- Change: Logic for KPI Earliest Date
- Change: KPI Menu version 2 (User Interface and functionality)
- Change: Split MOT Ocean options into FCL and LCL modes
- Change: Main menu for client company and mode of transportation parameters are set to propagate to all KPIs
- Change: Remove the decimal points and use only whole numbers for weights in lb and kg on the top right and left panels
- Change: Adjust width of the top right graph chart
- Change: System should apply immediately after user changes the setting for gauge tolerance
- Change: Rounding number to 3 decimal places for the cost per unit KPIs
- Change: Precision logic for Lead Times KPI to show only one digit after dot
- Change: Exclude logic for shipments to calculate value on KPI with association shipment criteria to display in particular week, month, quarterly, and yearly.
- Change: Inclusion logic based on CC number for cost per unit
- Change: Logic and labels for the bottom panel depending on values of weekly, monthly, quarterly, or yearly selector
- Change: Inclusion and association logic from groups to CTs and drilldown
- Change: Logic for cost of case when shipment is closed but no invoices
- Display average value graph for bottom chart
- Import data and charts for EA DOM Truck moves year 2011 from TMS to CT2 in order to display KPI value for year 2011

- Change: Formula to calculate cost per unit value for TMS shipments

- Association logic framework for all KPIs for particular week to use actual arrival date for Air and Ocean and use actual delivery date for all truck modes
- Exclusion logic framework for all KPIs such as canceled, deleted, and rejected shipments
- Needle movers feature
- Add additional field options for drilldowns (plus, loose, etc)
- Add more global filters with clear buttons: SKU, Shipper, Consignee, PO Issued by, etc
- Display list of active filters and value on KPI as well as on pdf download
- Separate thousands value by comma
- List of field options for groups for drilldown selected output

3.2 Estimation module for cost related KPI

- **Mantis IDs:** 4050, 4062, 4078, 4149, 4150, 4178, 4207, 4233

Description of Change: Mainly focusing on creating a way of entering “Estimated” sales and cost of a shipment(s) into a system before actual sale and cost are known. Data collection from this module will be used in various reports especially on cost related on KPIs. This module is located on “Est” tab of a CT profile.

- Create Estimation of sales and cost
- TMS charges should populate value from “Estimation” tab automatically
- Add Client Company to Bill To Party link admin control
- Add Bill To Party parameter to Descartes TMS properties
- Change in logic for population of Est Tab from TMS
- Sale Invoices version 2
- Arrival Notices pdf version 2: populate value from estimation tab
- Create and execute a script that will run to populate Est Tab and Est database table for historical data

3.3 Accounting

- **Mantis IDs:** 0004188: *(Search Invoices) add new output fields to result of searching of Sales Invoices*

Description of Change: Add “Special View” options to reports that will add “Charge Code Group” or “Charge Code Number” to output. Ability to include/exclude specific CC required.

- **Mantis IDs:** 0004202: *Add Est Tab to CT Viewer*

Description of Change: Display Estimation Tab on CT viewer for read only when shipment is closed.

- **Mantis IDs:** 0004205: *Re-factor Exchange Logic system wide*

Description of Change: Apply the same exchange logic globally in the system.

- **Mantis IDs:** 0004230: *Sales Distribution project*

Description of Change: Accommodate distribution of sales amounts across the CT records in the group

- **Mantis IDs:** 0004243: *(Sales Distribution) Core logic and changes to Sales Invoices*

Description of Change: Apply new logic to associate sales charges with individual CTs within a group. Info will be stored in database in a different way to accommodate that as a result charges will be posted against individual CTs and each CT will have its own gross margin and profit and loss report. All new logic is used for both sales invoices and credit notes.

- **Mantis IDs:** 0004250: *(Sales Distribution) Apply logic of cost distribution in Sales Invoices to KPI*

Description of Change: Apply logic of cost distribution in Sales Invoices to KPI

3.4 Operation

- **Mantis IDs:** 0003949: *Enable Show to Client functionality for Financial doc from Invoices/credit note*

Description of Change: Enable sale invoices/credit note functionality to show to Client and to be display on financial section of the first section on document center tab of client application.

- **Mantis IDs:** 0004118: *Additional Validation for Actual Delivery Date*

Description of Change: System should not allow user to set/save “Actual Delivery Date” without “Estimated Delivery Date” being defined. This validation is applied for all modes of transportation and “estimated date” should be automatically filled when user enters “Actual date.”

- **Mantis IDs:** 0004120: *Validation for Origin and Destination country and related*

Description of Change: At the moment “Actual Departure” is set and ready to be saved, system should require origin and destination country fields to be set. In case of grouped CTs, system should validate for all CTs to enter origin and destination countries and process “Group save” in order to copy the value to all records in the group.

- **Mantis IDs:** 0004143: *Validation to ensure that containers are assigned before actual departure*

Description of Change: Actual Departure date cannot be assigned if there are unassigned containers for ocean and truck-ocean modes of transportation

- **Mantis IDs:** 0004175: *update new branding for the pdf files that are generated from CT2*

Description of Change: New branding of Jaguar and CyberTrax are introduced to CT2. System updates all the PDFs that contain the old Jaguar logo with the new Jaguar logo as well as the old CyberTrax logo with the new CyberTrax logo.

- **Mantis IDs:** 0004191: *Set and update Origin and Destination Countries automatically*

Description of Change: To automatically pre-fill Origin and Destination country when user sets shipper/consignee. This allows user to update automatically as well when shipper or consignee has been changed.

- **Mantis IDs:** 0004206: *Commodity and Container related validations*

Description of Change: Add validations for the session when user sets Actual Departure date to ensure that commodities are assigned to containers and all containers of the CT records have assigned commodities to them before actual departure date is set except for ocean LCL MOT that system allow commodities without containers assigned. Error message will specify container's numbers that have no assignments. There are validations upon deleting commodity line to prevent removing all commodity lines after actual departure date is set.

- **Mantis IDs:** 0004232: *Container validations and related*

Description of Change: Add validations if actual departure date is set and user is trying to add container(s) or add CTs with unassigned container(s) to Master then to present dialog warning that adding new container(s) or adding CT with unassigned container(s) will clear Actual departure date set value. If you proceed you need to assign at least one commodity to a new container first and then set this date again. If user clicks OK then: add container(s) or CTs with containers and clear actual departure date.

- **Mantis IDs:** 0004263: *(CT Editor/Viewer) Add control to show all CTs in GRP*

Description of Change: Add control/label to CT editor and viewer to show all CTs in GRP by clicking on the link of number of shipments in the GRP. On clicking, it will produce a pop-up with a list of CTs in the group.

- **Mantis IDs:** 0004269: *Replace confirm pop-ups with "status line"*

Description of Change: Replace confirmation pop-up with "status line" messages on the top of the screen to avoid many clicks of confirmation. The pop-up will disappear once user takes any next action on the system.

3.5 Ops: Report

- **Mantis IDs:** 0004021: *(Main Report) Accounting fields should be visible for Account Users only*

Description of Change: There are 2 types of “Main” report. One with accounting fields that is only available for super account users and management users to access. The other one is a common “Main” report that has no accounting fields for other user roles.

- **Mantis IDs:** 0004137: *[Ops Repts] remove inactive users from any scheduled reports (dropdown menu and current recipient lists)*

Description of Change: Remove inactive users list from the dropdown menu of all users/recipients list from any scheduled reports.

- **Mantis IDs:** 0004244: *(CT Records Rep) Option to report per ASN portal*

Description of Change: Add option to generate report for shipment records that were created from date to date for ASN 2 portal.

- **Mantis IDs:** 0004319: *(Ops:Reps) InTransit/Main, add option for Delivery Locations*

Description of Change: Add “Import delivery location” filter for Main and In Transit reports as well as rename label for delivery location to “Export delivery location”.

3.6 Client Application

- **Mantis IDs:** 0004130: *speed up loading of the Client homepage*

Description of Change: Improve speed of loading the Client homepage by loading Watch List widget in a separated thread to allow user to navigate to menu quicker

- **Mantis IDs:** 0004171: *[CT &ASN] update new branding & content for the pdf attached files that goes out when new accts are created and all pdfs in CTs*

Description of Change: Update the user guide PDF documents: Client, Shipper, and Planner user guides for new content and new Jaguar logo.

3.7 ASN 2.0

- **Mantis IDs:** 0003968: *[ASN 20 ph3] SOW 1A Download to Excel. Enable to select specific TAB (status) for output*

Description of Change: Provide option to select specific tab (status) for printing to include status New, Approved, Hold and exclude status Reject, Delivered, and Archived by default. Change title label from “Shipment List on Web Portal” to “ASN Portal download” and remove the Jaguar logo to reduce file size.

- **Mantis IDs:** 0004170: *[ASN 20 ph3] ASN record can be delivered before it was approve*

Description of Change: Change hours of shipments Hold with Approved on date status to be available on Internal and TMS from 72 hours to 24 hours before approved on date.

- **Mantis IDs:** 0004324: *Expedite label on ASN I view window*

Description of Change: Add label “Expedited” on view shipment window for expedited shipments

- **Mantis IDs:** 0004328: *Modify the contents of Dispatch Confirmation to include BOL and Pick-up Instructions*

Description of Change: Modify the contents of Dispatch confirmation to include BOL and indicate Shipper’s Ref, Carrier Ref, and Freight info in red font as well as the pickup instruction from the ASN pick up instructions field in red font.

4. Bugs Fixes and Changes

4.1 ASN 2.0

- **Mantis IDs:** 0004225: *Bug: xls download from CT list does not include all tabs (Client app, Planner role)*

Description of Change: Fixing bug on output to display all tabs result except “ Archived” tab for download to excel

- **Mantis IDs:** 0004239: *[ASN 20 ph3] Counters on tabs aren't updated properly*

Description of Change: Fixing bug on counters on tabs to calculate properly.

- **Mantis IDs:** 0004307: *[ASN 20] bug: can't set "E0. Client Company:" on "EA Shipper" tab in User Profile*

Description of Change: Fixing bug for user to be able to set E0. Client Company on EA Shipper tab in user profile.

- **Mantis IDs:** 0004316: *[ASN 20] bug: Sorting doesn't work for "status" column.*

Description of Change: Fixing bug on ASN2.0 for sorting feature on “status” column.

4.2 Accounting

- **Mantis IDs:** 0003955: *[P&L] BUG: Archived "Bill To" still available when issuing invoice.*

Description of Change: Fixing bug on archive feature for "Bill To" to disable archived bill to parties list when issuing invoices.

- **Mantis IDs:** 0004162: *[P&L] BUG: Wrong GMS calculations for CT#421641*

Description of Change: Fixing bug by adding some validations to prevent wrong GMS calculation.

Additional validations:

- Do not allow user to edit PIs for "Closed" CTs.
- Calculate properly P&L for CTs that contain PI with "Table Of Charges has identical lines" status.
- Do not allow user to add "Closed" CTs to "Master."

4.3 Accounting Report

- **Mantis IDs:** 0004037: *(*Billing Required Report) Bug: Shows incorrect losses for some CTs.*

Description of Change: Fixing bug on Billing Required Report to show correct losses once users re-open and close shipments. After that GM split should be run with correct value.

- **Mantis IDs:** 0004317: *(* Scheduled Reports) "Profit/Loss for Multiple CTs" does not save "Vendors" and "Sales Persons" filters*

Description of Change: Fixing bug on "Vendor" and "Sales Persons" filters for saved filters for "Profit/Loss for Multiple CTs"

4.4 Operation

- **Mantis IDs:** 0004005: *(Ops) Some Client Companies do not appear in the Create Shipment tab*

Description of Change: Fixing bug on some of client companies that are listed in admin but do not appear in client company drop-down list when user tries to create new shipment from create CT section.

- **Mantis IDs:** 0004156: *(Ops) Add validation + find all records which use archived "CDG Paris, France" airport*

Description of Change: Fixing bug on any/all CDG records to use the non-archived CDG airport. Creating a validation of 3-letter code of airport code to be unique.

- **Mantis IDs:** 0004166: *(Ops) bug: Master has disappeared from CT2*

Description of Change: This case can occur only when master was deleted from CT2.

- **Mantis IDs:** 0004216: *(Files Tab) bug: trying to upload document on the group with numerous CTs generates exception*

Description of Change: Fixing bug on exception error while uploading document on the group with many CT records in the group.

- **Mantis IDs:** 0004231: *(Masters) bug: Get an exception when adding grouped shipments to Ocean Master*

Description of Change: Fixing bug on an exception error while trying to add grouped shipment to Ocean Master.

- **Mantis IDs:** 0004264: *(Ops) bug: Recycle Bin (Deleted shipments) doesn't contain deleted CTs(empty).*

Description of Change: Fixing bug for the recycle bin to contain deleted shipments. Adding paging and increasing rows of number for list of deleted CTs.

- **Mantis IDs:** 0004266: *[Air Status EDI] bug: system sends FSR messages for deleted CTs*

Description of Change: Implement to have validation to prevent sending FSR for deleted and closed shipments

4.5 Client Application

- **Mantis IDs:** 0004195: *bug: Comment has disappeared from com tab*

Description of Change: Fixing bug of random disappeared comment on com tab on the Client application.

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
4062, 4178, 4207, 4233	Roma	Alex	Marc, Tira	TMS
4188	Andrei	Alex	Marc, Tira	Search Invoices Report
4149, 4230, 4243, 4250	Roma	Alex	Marc, Tira	Sales Invoices
4050, 4202	Roma	Alex	Marc, Tira	Est Module
4205	Roma	Alex	Marc, Tira	Acc:Misc
4037	Roma	Andrei	Marc, Tira	Acc:Rep
3955	Andrei	Alex	Tira	Acc:Misc
4118, 4120, 4143, 4206, 4232	Roma	Alex	Marc, Tira	Ops: validation
4191, 4263	Roma	Alex	Marc	Ops: Misc
4005, 4231	Roma	Alex	Tira	Ops: Misc
4269	Roma	Tira	Marc	Ops: Misc
4166, 4216	Andrei	Alex	Tira	Ops: Misc
4156	Andrei	Alex	Marc, Tira	Ops: Misc
4266	Andrei	Tira	Tira	Ops: Misc
4244, 4319	Roma	Tira	Marc	Ops: Rep
4021, 4317	Andrei	Tira	Marc	Ops: Rep
4137, 4264	Roma	Tira	Tira	Ops: Rep
4090, 4091, 4192	Roma	Alex	Marc, Tira	KPI:ph3
4051, 4133	Roma	Alex	Marc, Tira	KPI:ph3
4071, 4074, 4078, 4147, 4102, 4138, 4152	Roma	Alex	Marc, Tira	KPI:ph3
3993, 4085	Roma	Alex	Marc, Tira	KPI:ph3
4126	Roma	Alex	Marc, Tira	KPI:ph3
3988, 4076	Roma	Alex	Marc, Tira	KPI:ph3
4141, 4142, 4119, 4134, 4109, 4197	Roma	Alex	Marc, Tira	KPI:ph3
4072, 4102, 4203	Roma	Alex	Marc, Tira	KPI:ph3
4208, 4209, 4210, 4211, 4212, 4213, 4214	Roma	Alex	Marc	KPI:ph3
4222, 4223, 4253, 4254, 4255	Roma	Alex	Marc	KPI:ph4
4287, 4288, 4389, 4290, 4293, 4294, 4297	Roma	Alex	Marc	KPI:ph5
4154, 4155	Roma	Alex	Marc, Tira	KPI:ph3
4125, 4304, 4305, 4315, 4318	Roma	Alex	Marc	KPI:ph3
4066	Roma	Alex	Marc, Tira	KPI:ph3
4157	Roma	Alex	Marc, Tira	KPI:ph3
4128	Roma	Alex	Marc	KPI:ph3
3997, 4083	Roma	Alex	Marc	KPI:ph3
4199	Roma	Alex	Marc	KPI:ph3

4198	Roma	Alex	Marc	KPI:ph3
4225	Andrei	Alex	Marc, Tira	ASN 20 ph3
3968, 4170, 4239	Andrei	Tira	Marc, Tira	ASN 20 ph3
4160	Roma, Andrei	Andrei	Marc, Tira	ASN 20 ph3
4324	Roma	Marc	Marc	ASN 20 ph3
4328	Roma	Andrei	Marc, Tira	ASN 20 ph3
4316	Roma	Alex	Tira	ASN 20 ph3
4307	Andrei	Tira	Tira	ASN 20 ph3
4175	Tira, Andrei	Tira	Marc, Tira	Ops: Pdfs
4150	Roma	Alex	Marc, Tira	Ops:Pdf
4170, 4171	Andrei	Tira	Tira	Client App
4130	Roma	Tira	Marc	Client App
3949	Roma	Tira	Marc, Tira	Ops: Misc /Client App
4195	Roma	Tira	Tira	Client App
4162	Roma	Alex	Marc, Tira	Acc:Misc

Revision History

Version	Date	Summary of Changes	Author	Revision Marks (Yes/No)
0.1	10/10/2013	Initial revision.	Montira Earley	N