

TRA/X v6.0#A03 Release Notes

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Introduction

This document contains information on the changes between TRA/X v6.0#A02(initial release) and TRA/X v6.0#A03.

It does not include information on changes to the interfaces such as, PeopleSoft, Oracle ERP, SAP etc.

It does not include information on new Small Parcel System Carrier Certifications/Approvals.

Note:-

This patch contains a change to the Compliance engine that could cause conflicts with interfaces or any customised calling of the compliance engine. See note in Compliance section for further information.

Application Enhancements

General

Mailing Label

The mailing label (MAIL_LABEL) can now print labels per package. It allows eight lines of address (with contact name). It can also print references, such as Buyers Reference or Shipment Number, and the print of these are controlled via a system value

Category	Key	Default	Information
SPS	MAIL:SHIP REFERENCES		This is a comma separated list(maximum two) of codes related to shipment header from the list contained in the following KB http://www.precisionsoftware.com/kbmt.asp?ID=200310020&uidPrg=KnowledgeBase

It requires the macros from SPS #A09 are available for label format changes.

Standard Interface Screens

The literals on these screens can now be changed using the standard Translation functionality.

Charge Maintenance (CH)

The landed cost allocate method defaults to None rather than Gross Weight.

Charge Table Maintenance - Axis

The format of the label on axis has been increased so full label is shown regardless of number of breaks and whether Fixed Values are displayed.

The Unit Type field has been enabled when Packs, Inners or Outers is used as a basis for the axis.

Shipment Packing

The Open Pack and Transfer Pack buttons are disabled for shipments that have been rated.

Charge Table Upload - Packs

Allow for charge tables with rates per pack type rather than weight.

Charge Calculation

Cater for pack types as axis breaks.

Workflow

The following changes have been made to the Workflow module within TRA/X.

First Automatic task not executing

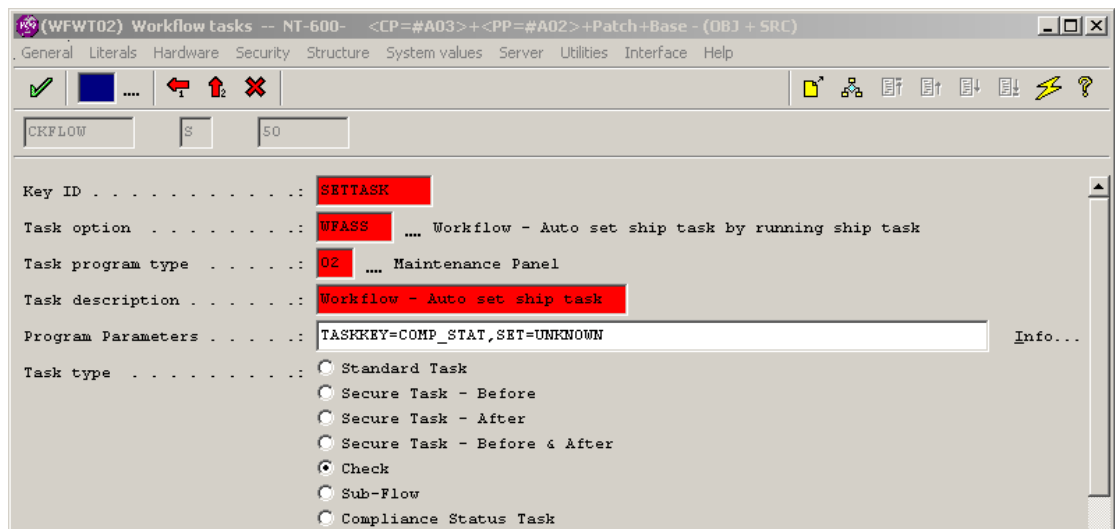
There was an issue with Workflows that contained tasks that were to be executed when a transaction was created. Some users came across an intermittent problem with the task not running. This has been corrected.

Tasks - Unknown Status

A task can now have an “unknown” status. This status will be represented by a “?” on the Workflow screen and can be used to represent a task that is running in the background during which the status is pending.



Setting the status to pending can be achieved by running the task setting program “xtwfts2s.p” (Option WFASS) or “xtwftl2l.p” (Option WFALL) and specifying the “SET” program parameter to “UNKNOWN”.



When a task is pending it is not considered to be successful.

Tasks - Automatic Refresh

It is now possible to configure a task such that the status displayed on the Workflow screen will be refreshed automatically.

This is useful when a task is being run in the background during which the task status has been set to pending. On completion the background process will stamp the task as completed either successfully or unsuccessfully. If the task is configured to

automatically refresh and is still displayed on the Workflow screen then the new task status will be displayed automatically.

To do this the task should be configured with the program parameter “REFRESH” set equal to “YES”. An optional parameter “REFRESH_STATUS” can also be used which conditions the refresh to only occur when the task has a particular status. This can be set to “PASS”, “FAIL”, “UNKNOWN” or “ALL”. If omitted “ALL” is assumed by default.

Key ID	COMP_STAT
Task option	FLOW Workflow
Task program type	90 Menu
Task description	Compliance Status
Program Parameters	REFRESH=YES

The frequency at which Workflow checks for an update in status is definable using the “TIMER INTERVAL” system value.

Category	Key	Default	Information
WF-HISTORY	TIMER INTERVAL	10	Interval in seconds between refresh of tasks identified as in need of a possible refresh.

Tasks – Ghosted/Hidden control

It is now possible to configure a task such that when it is displayed a “load” program can be called which will return whether the task should be ghosted or not displayed at all.

This allows for dynamic tasks, i.e. tasks that can be disabled or hidden depending on attributes of the shipment or load. For example when the compliance task is running in the background it is desirable to disable the “View Compliance Results” task. A plug-in program can be written to test for this condition and associated with the task. Whenever the task is displayed the plug-in program can be called. The display value returned from this program will determine if the task is disabled (ghosted) or hidden.

To do this the task should be configured with the program parameter “LOAD_PROGRAM” set equal to the program that contains the business logic to decide for the given shipment or load the task should be available, ghosted or hidden.

Key ID	VIEW_COMP
Task option	SHCKVM Compliance Checks
Task program type	CL Category list panel for selected object
Task description	View Compliance Results
Program Parameters	REFRESH=YES,LOAD_PROGRAM=xtckispe.p

```

/*
 * "LOAD_PROGRAM" Parameters ...
 */
def input  parameter pr-shcono like xmshdr0.shcono no-undo.
def input  parameter pr-shship like xmshdr0.shship no-undo.
def input  parameter pr-shdesp like xmshdr0.shdesp no-undo.

```

```
def output parameter pr-view1 as char no-undo.  
def output parameter pr-view2 as char no-undo. /* Not used. */
```

The parameter “pr-view1” can be set to “GHOSTED”, “HIDDEN” or “”.

Note: Performance should be a high consideration when writing such a load program as it will be called each time the task it is associated with is displayed in Workflow.

Compliance

The following changes have been made to the Compliance module.

[TECHNICAL NOTE: COMPLIANCE ENGINE

The number of parameters passed to the engine has been increased. As the engine is integrated with the standard interfaces including PeopleSoft(formely JDE) and may have been integrated into customer specific interfaces you should ensure that there are no conflicts. #A09 is the earliest release of the PeopleSoft Interface that will support this change.

END NOTE]

AS/400 – Compliance Error

There was a problem with running Compliance against AS/400 Database platforms with v6.0#A02 release. The problem manifested itself when running compliance more than once for the same transaction. When it was run an error would be reported on the screen. This has been rectified in this release.

DPL – Define Roles to be checked

The roles to be tested within a compliance DPL check can now be specified on the Workflow task. Previously if a compliance check was configured to run the “DPL” check it would check all roles associated with the transaction type. It is now possible to identify only those roles that can possibly change when a task is run and have a compliance check specifically for when that task is run which will only perform a DPL check on the roles that may have changed (i.e. a subset of the roles associated with the transaction type).

To do this the compliance check now takes a new “ROLES” program parameter which can be used to specify the roles to check.

Key ID	RUN_CR_CHG
Task option	SHCOMP Compliance check
Task program type	02 Maintenance Panel
Task description	Compliance check (CHARGES)
Program Parameters	checks=DPL;TXDP,fchecks=,roles=04;28,recheck=yes,message=no,stop=no, Info...

DPL - Warning Thresholds

The warning threshold can now be defined using a system value. Previously the warning threshold was hard coded to be half the actual fail threshold. It is now possible to explicitly define the warning thresholds using the “DPL_RUN_ISMATCH_WARN” and “DPL_RUN_NAME_ISMATCH_WARN” system values.

Category	Key	Default	Information
COMPLIANCE	DPL_RUN_ISMATCH_WARN	Half the fail threshold	If the score value for an address DPL search is greater than the percentage value specified with this system value and less than the “DPL_RUN_ISMATCH” value then the match is consider to be a warning.

COMPLIANCE	DPL_RUN_NAME_ISMATCH_WARN	Half the fail threshold	If the score value for a name DPL search is greater than the percentage value specified with this system value and less than the "DPL_RUN_NAME_ISMATCH" value then the match is consider to be a warning.
------------	---------------------------	-------------------------	---

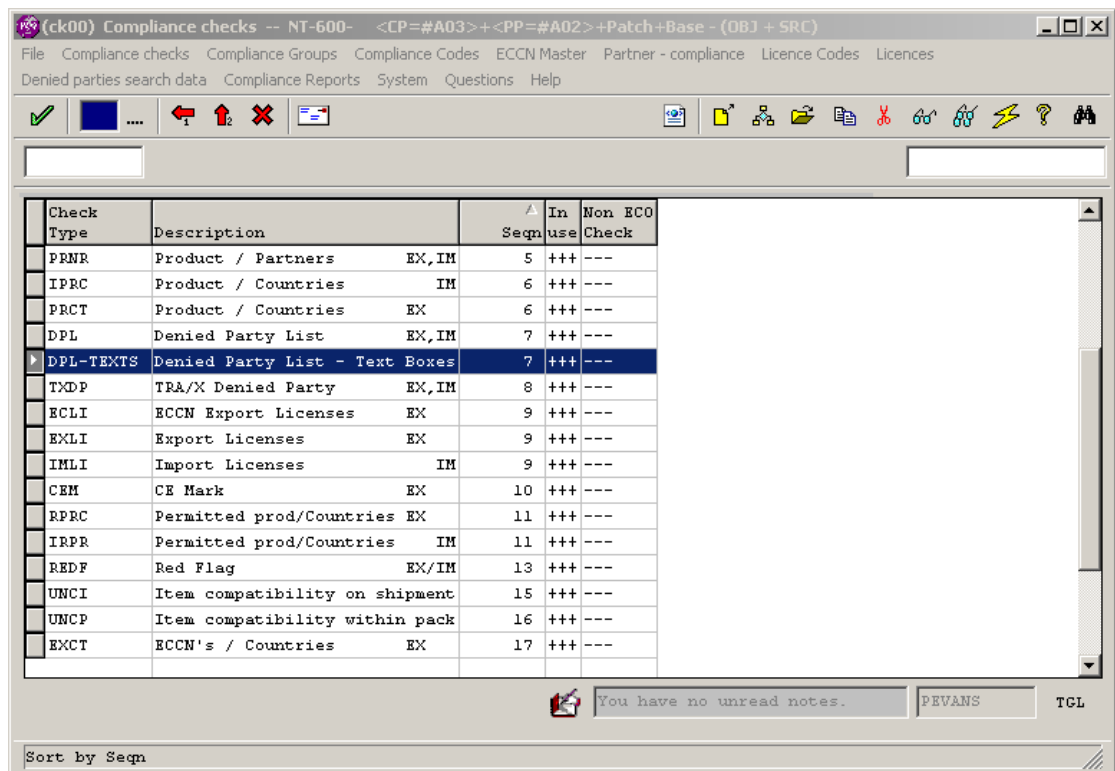
DPL – Check Text Boxes

A denied party check can now be performed on data in text boxes. Text boxes may be used to hold name and address data that is to be printed on a document. This information can now be checked against the DPL list.

The data integrity check has been extended so that a new data check, "DPL-TEXTS", which tests text boxes for DPL matches, is now available. This check should be added to the system value list of data integrity checks.

Category	Key	Default	Information
COMPLIANCE	DATA-INTEGRITY CHECKS	DATA-INTEG	The check "DPL-TEXTS" should be added to the list of data integrity checks.

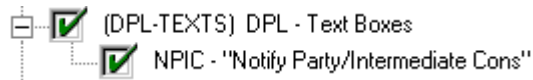
A new "DPL-TEXTS" compliance check record should be created using option "CK".



To define which texts boxes are to be tested add compliance check detail records to this compliance check category. For example if we wanted to check a test box "NPIC", a compliance check detail record should be created using an element code "NPIC". The program "xtdpltxt.p" should be specified.

An option “ROLE” parameter can be specified. This allows the system to link the text box data back to a TRA/X partner. If running version 6.02 of TRA/X or higher this will allow the user to save any manual passes or fails for this text box.

The compliance result will now include the “DPL-TEXTS” category under which the texts tested will be listed.



DPL – Pier Locations & Virtual Roles

Denied party checking can be performed on pier locations and additional virtual roles. (Specific to Freight Forwarding product but framework can be used to include additional partner ids in the base product.)

DPL – Cached Result

DPL results can be determined from previous cached results. Each time a partner is DPL tested the result is also stored against the partner in TRA/X. When testing the partner again on another shipment this information can be used rather than performing a DPL search.

The cached result is only valid for a given version of the DPL data. Once new DPL data is uploaded a DPL search will automatically be performed.

Saved manually passed or failed results are not cached.

Category	Key	Default	Information
COMPLIANCE	USE_CACHED_DPL_RESULTS		Use to define a list of DPL statuses that can be used with caching, e.g. "PA,PW,FA". By default caching is disabled.

Important Fields	Version 5.0	Version 6.0+
Cached Version Stamp: The partner record is stamped with a version number comprising of the DPL version identifier (xmckco0.ckvrid) and the partner record id (xmhref0.nrupid). The cached value can only be used if the version stamp of the cached result matches the current version stamp.	xmhref0.nrpdir	xmhref0.nrcver
Cached Run Number: The run number is a unique number that identifies what compliance check should be used as the cached compliance result.	xmhref0.nrurl	xmhref0.nrrunn

Results – Text Format

The compliance result text has been modified as follows:

- Pass information is provided for the DPL, EBC and IEBC checks.
- The result for the DPL, EBC and IEBC checks includes what was tested along with certain test parameters which describe what parameters were set when the test was performed.
- Each denied party listed in the result is now categorised as a warning or pass.

```

TESTED NAME AND ADDRESS:
=====
    osama bin laden

TEST RESULT:
=====
    Test: Does the above name/address match any parties in the denied party
    lists.
    Score: 100%
    Conclusion: The also notify (osama bin laden) has a override
    name/address/name&address which matches a denied party entry. This has caused
    the compliance check to fail.
    Tip: See result details below for additional information on matches found.

RESULT DETAILS: *** BY NAME ***
=====
Subset of
    BIN LADEN, Osama (OFAC)
    Osama Bin Laden (UNC)
    [There is one more occurrence of this name but the address may be
    different.]
End of Subset Section [Current action is: FAIL]

(100.0% [FAIL])
    BIN LADEN, Osama (OFAC)

(90.5% [FAIL])
    BIN LADIN, Osama (OFAC)

(90.5% [FAIL])
    BIN LADIN, Osama bin Muhammad bin Awad (OFAC)

TEST PARAMETERS:
=====
    Name Threshold: 90%
    Address Threshold: 80%
    Common Words:
    System Values:
DPL_UPDATE_COMMON=INTERNATIONAL,PUBLIC,SHIPPING,Street,avenue,ave,rue,suite,LIM
ITED,CO,COMPANY,LTD,Road,INC,TRADING,SA,AB,BV,GMBH
    ACTION ON DPL SUBSET=FAIL

```

```

DPL_RUN_NAME_CHECK=BXA,OFAC,ENTITY,FTO,DEBARRED,JPC,ETC,UNVERIFIED,MP,CBW,GPC,U
KPC

FULL_SOUNDEX_CHECK=
FULL_METAPHONE_CHECK=
DPL_RUN_C/O_CHECK=Yes
DPL_RUN_ISMATCH=80.00
DPL_RUN_ISMATCH_WARN=65.00
DPL_RUN_NAME_ISMATCH=90.00
DPL_RUN_NAME_ISMATCH_WARN=75.00
DPL_ALGORITHM=Soundex
DPL_DEBUG_MODE=No
COUNTRY_MANDATORY=NO
DPL_MINIMAL_WORD_LENGTH=1
DPL_SCORE_DECIMAL_PLACES=1

```

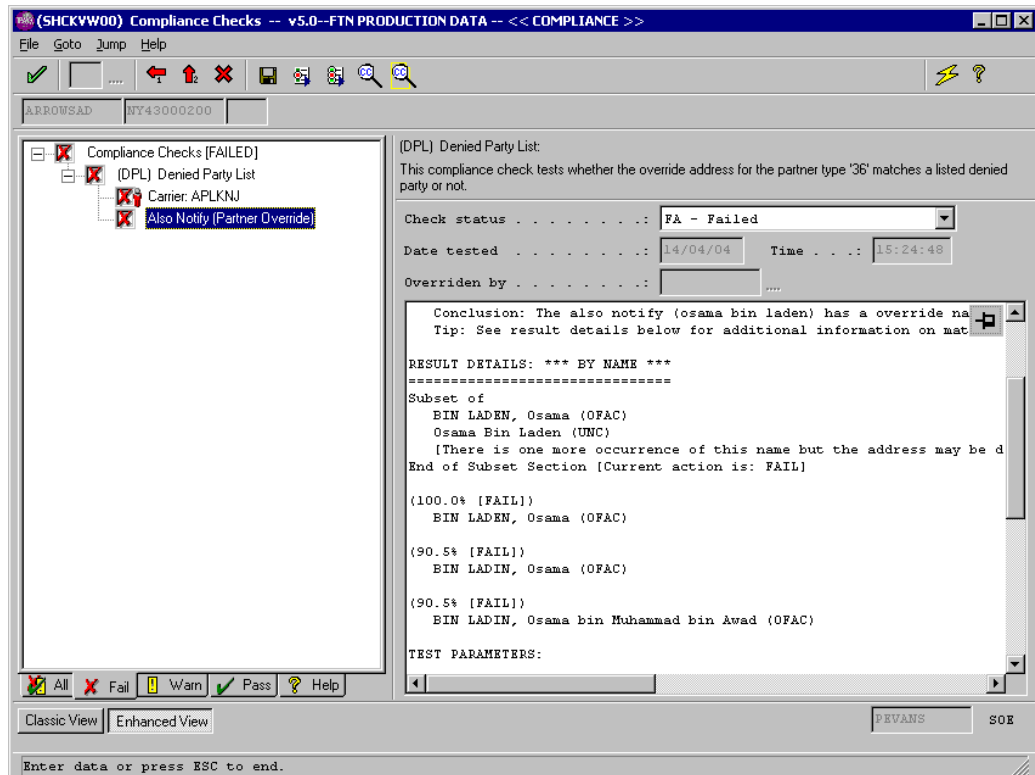
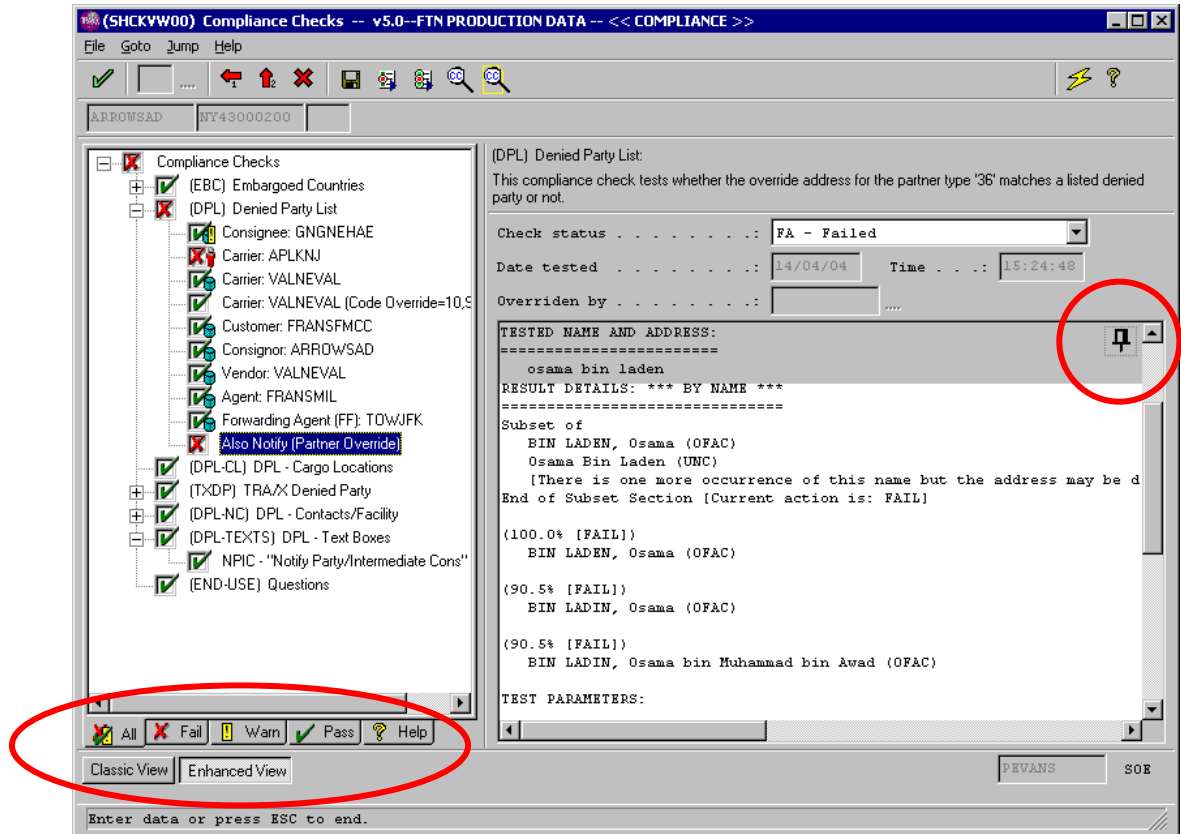
Results – Tree View

The compliance results screen has been modified as follows:

- (a) New icons have been introduced to represent saved manually passed/failed results as well as cached passed/failed with warnings/failed results. A help legend is also available with a description for each possible icon.



- (b) The compliance check tree window is now a tabbed area. The tabs allow the user to view only those checks that have failed, passed with warnings or passed without warnings as well as the default all checks regardless of their status.
- (c) The compliance check tree information can now be presented in an enhanced view. This view replaces the role code with the role description for the DPL type checks. Other codes are replaced with more informative descriptions for the EBC, IEBC, DPL-TEXTS check categories.
- (d) A scroll pin button is available when viewing DPL results. This button can be toggled to lock/unlock the scrolling of the tested name and address section of the result allowing the user compare the tested value with the matches without having to scroll up and down.



Category	Key	Default	Information
COMPLIANCE	RESULT DISPLAY MODE	OLD	Used to indicate the preferred view. This should be set to "NEW" in order for the "Enhanced View" button to be selected by default.

DPL – Manual Pass/Fail Screen

Changes to look of manually pass/fail screen.

(DPL) Manual Party Match

Tested Name/Address Associated Partner

Fedex Freight East
4103 Collection Center Dr
Chicago, IL 60693
United States
CHICAGO, 60693
United States (US)

Results

Check Type	Score	From List	Name
ADDRESS	49.4	BIS	TAL INDUSTRIES, INC
ADDRESS	47.1	BIS	SMITH, WAYNE P.
ADDRESS	47.1	BIS	STAND, JUNIOR
ADDRESS	AKA	BIS	STAND, KEN
ADDRESS	AKA	BIS	STAND, KURT ALAN
ADDRESS	47.1	BIS	SUMMIT MARKETING INC
ADDRESS	47.1	BIS	JACKSON, ALAN DAVID
ADDRESS	43.5	BIS	MALSON, DONALD
ADDRESS	43.1	BIS	PRAND, PAUL

Selected Details:

TAL INDUSTRIES, INC
901 CORPORATE CENTER DRIVE, SUITE 207, CA, 91754, MONTEREY PARK
MONTEREY PARK
United States of America

Embargoed Countries – Blank Countries

System can be configured so that a blank country of origin or destination does not cause embargoed country check to fail.

Category	Key	Default	Information
COMPLIANCE	BLANK COUNRTY ALLOWED	NO	When set to yes the EBC check will pass if the country of destination is blank. In the case of IEBC, the check will pass if the country of origin is blank.

DPL – Blank Countries

System can be configured so that party with no country code associated with it can still undergo a denied party check.

Category	Key	Default	Information
COMPLIANCE	COUNTRY MANDATORY	NO	Used by the DPL matching program. If set to "YES" then parties must be associated with a country in order for a check to be performed. If set to "NO" then the country is not required.

[TRA/X 6.02 Only]

DPL - Contact Information

Denied party checking can be performed on contact information.

DPL – Manually Passing/Failing

Manually passing/failing of DPL results has been extended to override information.

Category	Key	Default	Information
COMPLIANCE	MAN OVERRIDE DFLT PARTNER		If an override cannot be associated with a partner then the manual override information will be stored against the partner code entered in this system value.

Small Parcel System (SPS)

This module is constantly being updated to provide support for additional carriers and services. This document does not include information on these developments and you should contact PSL for details on currently supported carriers.

Carrier Label Information Screen

- The third party address is consistent with other address screens in TRA/X
- It is possible to configure the system to run compliance from within the screen if the customer or consignee addresses are changed.

Category	Key	Default	Information
SPS	RATING SCREEN CMPL CHECKS	*NONE	*ALL or Comma Separated Lists of Categories or *NONE

If the system value does not exist the default is not to carry out the check.

Store Calculated Charges

There is an option to allow the charges calculated not to be stored against the transaction. It is controlled via a system value.

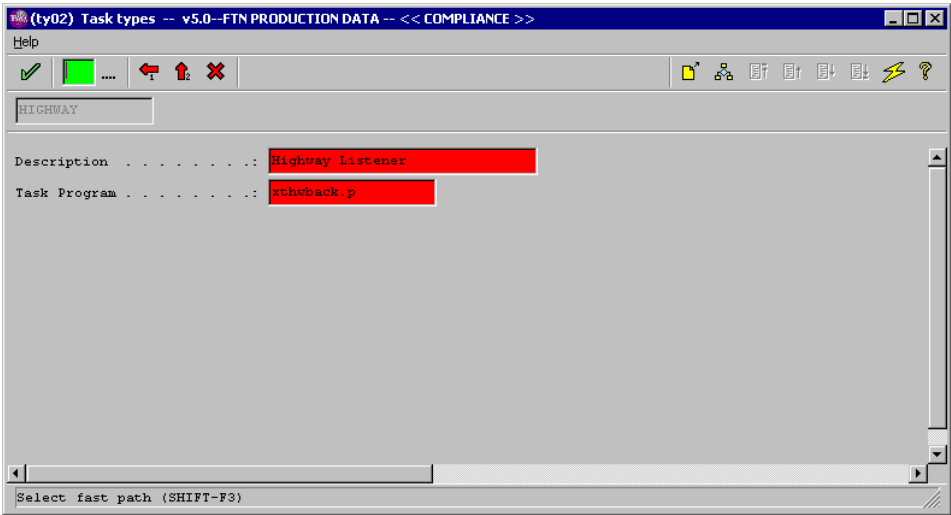
Category	Key	Default	Information
SPS	[GLOBAL-CARRIER]: DO NOT STORE CHARGES	Yes	Values Yes or No

Highway

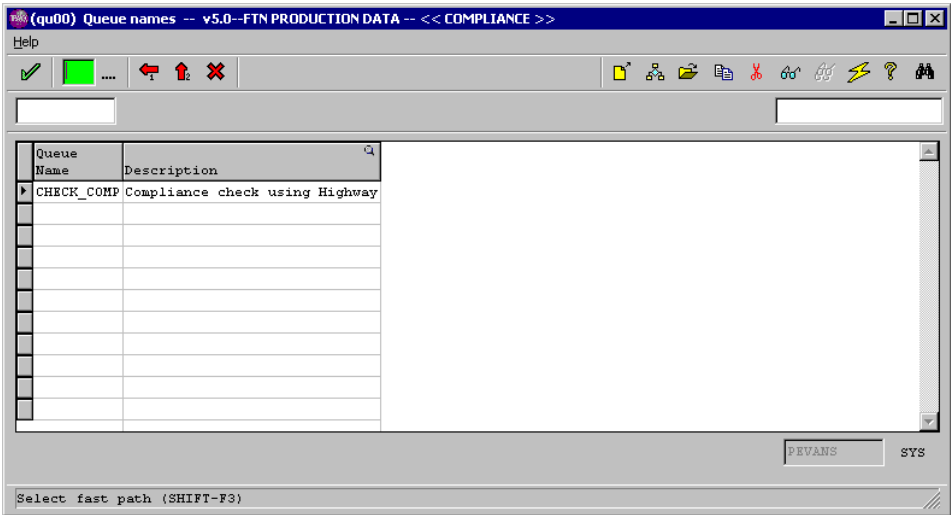
The following Highway related changes have been made to TRA/X:

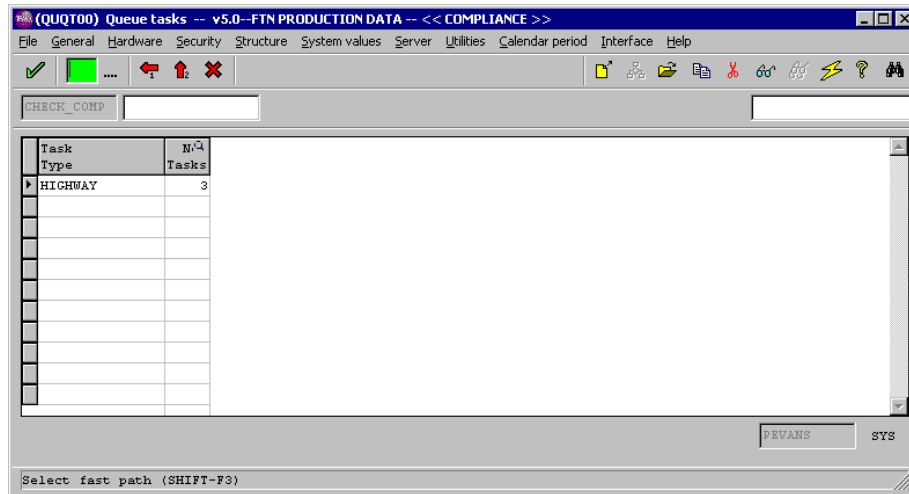
- 1. It is now possible to have a Highway listener run as a background process.

To do this, add a new “Highway Listener” task using option “TY”.

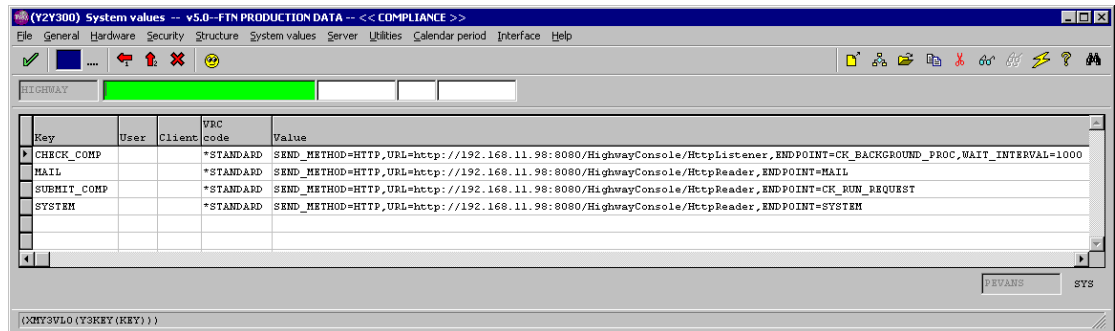


Add a queue using option “QU” and associate the “HIGHWAY” task to it.





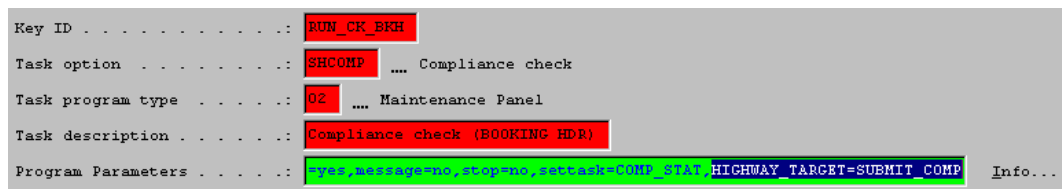
The queue name uses maps to a Highway target. Therefore is the above example a Highway target “CHECK_COMP” should be configured under the system value category “HIGHWAY”.



A “SYSTEM” Highway target should also be setup so that the listener can respond to “monitor” messages from Highway.

- It is possible to have the compliance task run in the background. The client compliance task can be configured to add a message to a Highway endpoint for background processing by a Highway listener.

To do this the compliance check task should have a “HIGHWAY_TARGET” program property added that point to a Highway target defined under the “HIGHWAY” system value category.



- Highway can be used to e-mail users with compliance notification messages.

Category	Key	Default	Information
EMAIL	AUTOMATIC E-MAIL METHOD		HIGHWAY,TARGET=MAIL,MESSAGE_ID=TRAX_MAIL