EDI Maintenance

Aptean Ltd
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1 EDI Maintenance

The EDI interface screen is accessed from the Interface menu.

1.1 General Functionality

The EDI interface screen allows users to control the following activities on the system

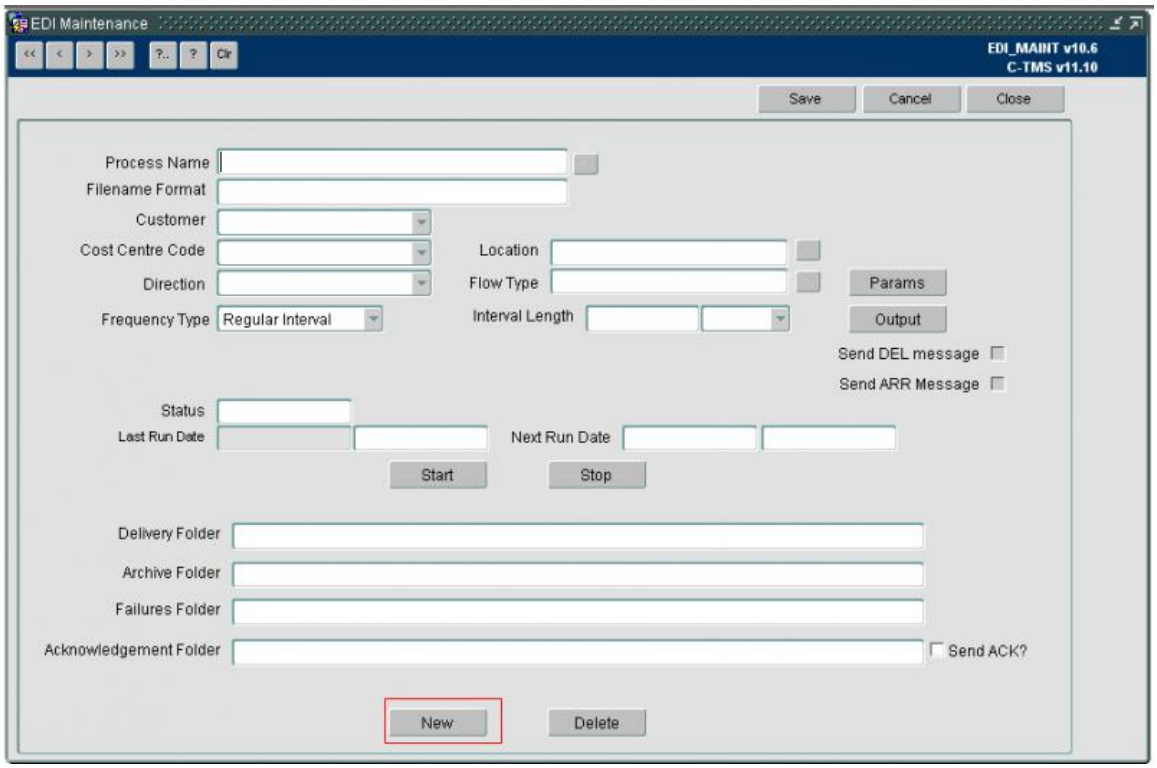
- Outbound Flows
- Inbound Flows
- Database Jobs
- Database Processes
- Report and Extract generation
- ORS Report generation

Controllable settings include setting the time, frequency, type of process, outbound file names and folders, outbound emails, data parameters and ftp settings.

The following buttons are available:

- **New** Button - Clears any data currently in any of the fields to allow the user to enter a new process flow.
- **Delete** Button - Deletes the Process flow.
- **Params** Button - A number of Parameters / Triggers Can be entered. These control various rules about the business that are out of scope of the Standard xml schemer. These are normally set by by your implementation team in the first instance.
- **Output** Button - This screen is for Outbound flows only and contains Destination IP Address and security usernames and passwords.

To create a new EDI process, select the **New** button on the screen.



The following Information may be entered when creating a new EDI process

Field	Description
Process Name	This should indicate the nature of the job so it may be identified in the screen. Required.
Filename Format	This indicates how any files created or required by the process are names, for outbound files, the system will add the system date and time to ensure a unique filename is always generated. Required.

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Field	Description
Customer	Enter the Customer required using the Drop Down List. Optional.
Cost Centre Code	The cost centre code may be used when the process is checking parameter values and may be matched to orders or trips to identify if the process should be running. Required.
Location	The location may be used to specify selection of data from a particular location code. A lookup is provided.
Direction	The direction is defined as outbound or inbound. This will indicate if the process in bringing data into C-TMS or sending data out of C-TMS. Required.
Flow Type	This indicates the type of process, there are several different options discussed later. Required.
Frequency Type	Frequency type indicates how often the process is run, are regular interval or specific time. Required.
Process Time	Only available if selecting *Frequency Type* of *Specific Time*. The time at which the process is to run.
(Day Selection)	Only available if selecting *Frequency Type* of *Specific Time*. Check *All Days*, or check the days on which you want the process to run.
Interval Length	Only available if selecting *Frequency Type* of *Regular Interval*. Interval length indicates the regular interval. Enter the number , and then the unit (*Seconds, Minutes, Hours, Days, Monthly*). Required.
Interval Length	Interval length indicates the regular interval. Required.
Send DEL Message	If this box is checked then this can create an ARR message when the actual arrive times are fully entered
Send ARR Message	If this box is checked then this can create a DEL message when the order to deliver quantities are fully entered
Delivery Folder	When the file has been created this is the directory that the file will sit in until it has been picked up
Archive Folder	When the file has been picked up by the relevant source successfully the file gets moved to this directory
Failures folder	The directory of any files that failed to upload
Acknowledgment Folder	The directory for an acknowledgment message to sent to
Send ACK?	The box is checked if the Acknowledgment of an inbound flow is requested. The Acknowledgment will then been sent to folder to be picked up by the relevant source

The screen also displays the following information about the flow:

Field	Description
Process Time	This option is only visible if the Frequency Type has been set to ?Specific Time?. The user can simply enter the time that the flow should be run. Also the checkboxes can be flagged for the required days of the week
Status	This is not an editable field and tells the user if the Flow is running or has been stopped
Last Run Date	This tells the user the Date and time the process last ran
Next Run Date	This is the date and time the flow is due to run next
Start / **Stop** Buttons	Stops and starts the process flow. Please note that only the user that started the process can stop it

The flow types available to select are listed below:

- EXPORT - Run an Export process.
- FORD_EDI_IN - bespoke EDI process
- MILE_XML
- MILK_ROUND - generation of milk rounds
- ORD_COLL_XML
- ORD_OR3
- ORD_XML
- ORD_XML_OUT
- ORS - run an ORS report
- PLUTO_ACTUALS
- POD_XML
- PROCESS - trigger a process
- PULSE_ORDERS - bespoke EDI process
- REPORT - run a report

- SCN
- SESSION_XML - import sessions
- STS_XML
- TRACK_IMPORT
- TRIP_ORD_XML
- TRIP_XML
- UNISON_FLAT - Legacy WMS flat-file import process

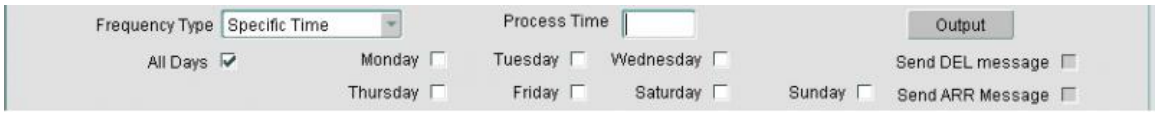
For running specific extracts and processes, PROCESS should be used.

For automatically running reports, use the REPORTS type.

For automatically running extracts, use the REPORTS type.

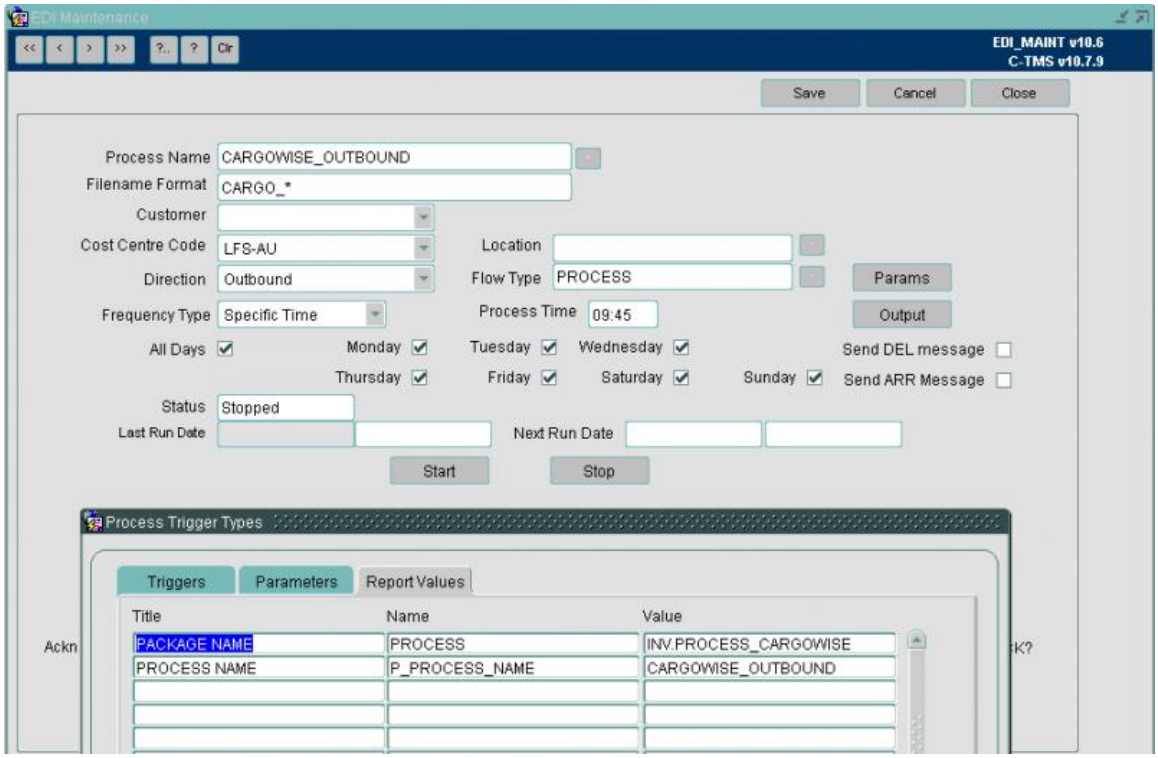
For automatically running exports created through ORS, use the ORS type.

If a frequency type of Specific time is selected, the following information is displayed on screen. Users are required to specify a process time and the days of the week the job will run.



1.1.1 Parameters

In addition to the EDI header, users may be required to specify additional outputs and job parameters. There are several job parameters which will control how jobs are run and the data they process. If a parameter is required for a job, users will be informed by the developer to set up the parameter and the value they should set it to.



1.1.2 Output

Output applied to a process may be different, depending upon the type of process. If a PROCESS type is selected, users are able to define FTP information. If a REPORT type is selected, users may define email addresses for report output.

Users will always be instructed how to set up the jobs but may use the screen to control when the job runs.

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1.2 Examples

1.2.1 Creating an Inbound Order EDI Flow

- Enter the Process Name e.g. INB_ORDERS
- Enter the Filename Format e.g. INB_ORD
- Enter the Customer from the list available
- Enter the Cost Centre from the list available
- Enter "Inbound" from the Direction field
- Click on the button next to the Flow Type field to populate a list of values and select ORD_XML
- Enter the required Frequency type and interval length. For example, a set Regular Interval could be chosen and an interval length of 15 minutes.
- Enter a Delivery folder directory path
- Enter an Archive Folder directory path
- Enter a Failures Folder directory path

When everything is set-up click the **Start** Button to run the process.

1.2.2 Creating an Outbound EDI Flow

- Enter the Process Name e.g. OUT_TRIPS
- Enter the Filename Format e.g. OUT_TRP
- Enter the Customer from the list available
- Enter the Cost Centre from the list available
- Enter "Outbound" from the Direction field
- Click on the button next to the Flow Type field to populate a list of values and select TRIP_XML
- Enter the required Frequency type and interval length. In the example screenshot below, Regular Interval has been chosen and an interval length of 15 minutes
- Enter a Delivery folder directory path
- Enter an Archive Folder directory path
- Enter a Failures Folder directory Path

You may also click the Output button - this shows a screen that allows you to enter the access details to allow C-TMS permission to FTP a file to another system.

- Destination IP - The IP Address of recipient Server
- FTP Port - The Port Number of recipient server
- FTP Username - Login ID for recipient server
- FTP Password - Password for above login ID
- FTP Directory - Delivery Directory for recipient server

Note: An Outbound file can be collected from the Aptean Server or delivered by FTP.

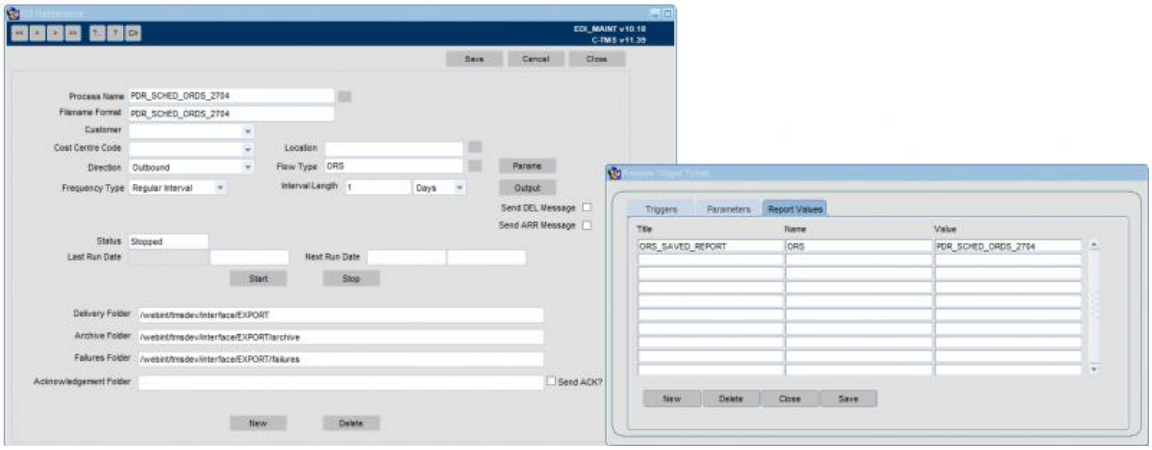
1.2.3 Creating Scheduled Reports/Extracts

This section demonstrates how to set up an EDI process in order to schedule ORS reports and extracts.

1.2.3.1 ORS Reports Scheduling

The extract suite option can be used to extract data into a CSV file format. These extracts are in a predefined format and the data can be controlled by the use of selection criteria which can be entered when the extract runs, the columns of data extracted can be selected or excluded by the user to control the actual data values extracted. These reports can be created by users and saved as reports, which can then be run on demand or scheduled and emailed.

Any report saved may be scheduled as EDI outbound messages, where parameters may be entered and the output configured. The below screens show an ORS report being configured for running every 1 day:



Field	Description	Value
Process Name	This should indicate the nature of the job so it may be identified in the screen. Required.	A unique identifier for the report, e.g. OPS_REPORT1
Filename Format	This indicates how any files created or required by the process are names, for outbound files, the system will add the system date and time to ensure a unique filename is always generated. Required.	rep1
Customer	Enter the Customer required using the Drop Down List. Optional.	Optional
Cost Centre Code	The cost centre code may be used when the process is checking parameter values and may be matched to orders or trips to identify if the process should be running. Required.	Optional
Location	The location may be used to specify selection of data from a particular location code. A lookup is provided.	N/A
Direction	The direction is defined as outbound or inbound. This will indicate if the process in bringing data into C-TMS or sending data out of C-TMS. Required.	Outbound
Flow Type	This indicates the type of process, there are several different options discussed later. Required.	*ORS*
Frequency Type	Frequency type indicates how often the process is run, are regular interval or specific time. Required.	As required
Process Time	Only available if selecting *Frequency Type* of *Specific Time*. The time at which the process is to run.	As required
(Day Selection)	Only available if selecting *Frequency Type* of *Specific Time*. Check *All Days*, or check the days on which you want the process to run.	As required
Interval Length	Only available if selecting *Frequency Type* of *Regular Interval*. Interval length indicates the regular interval. Enter the number , and then the unit (*Seconds, Minutes, Hours, Days, Monthly*). Required.	As required
Send DEL Message	If this box is checked then this can create an ARR message when the actual arrive times are fully entered	Unchecked
Send ARR Message	If this box is checked then this can create a DEL message when the order to deliver quantities are fully entered	Unchecked

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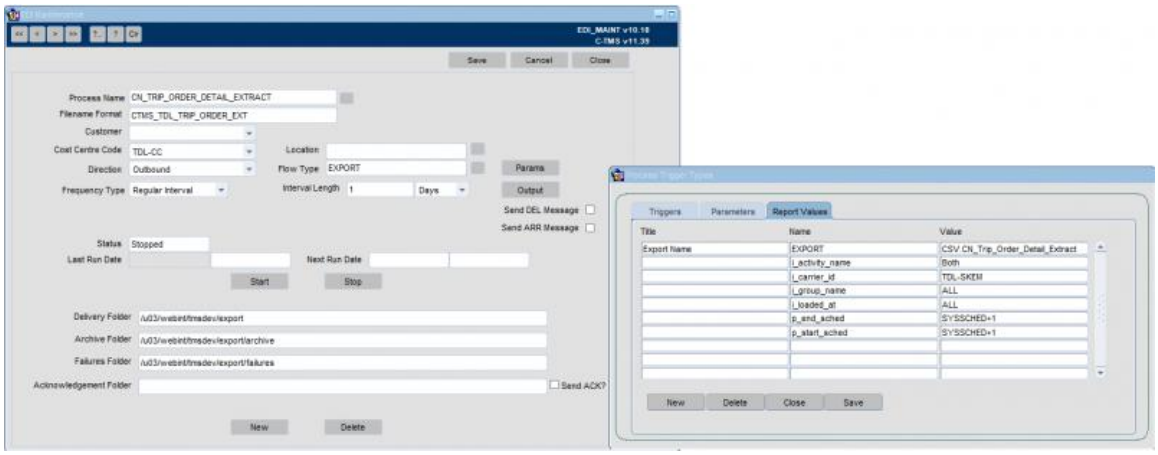
Field	Description	Value
Delivery Folder	When the file has been created this is the directory that the file will sit in until it has been picked up	A server-side folder for the extracted files. Provided by your implementation team. Usually `/webint/(client-database)/export`.
Archive Folder	When the file has been picked up by the relevant source successfully the file gets moved to this directory	A server-side folder for the extracted files. Provided by your implementation team. Usually `/webint/(client-database)/export`.
Failures folder	The directory of any files that failed to upload	A server-side folder for the extracted files. Provided by your implementation team. Usually `/webint/(client-database)/export`.
Acknowledgment Folder	The directory for an acknowledgment message to sent to	N/A
Send ACK?	The box is checked if the Acknowledgment of an inbound flow is requested. The Acknowledgment will then been sent to folder to be picked up by the relevant source	Unchecked

Report Values must then be entered for the process through the **Params** button:

Title	Name	Value
ORS_SAVED_REPORT	ORS	Your saved report name
audit_process	audit_process	Optional - whether the report production is audited for diagnostic purposes for the Aptean support team. Omit unless asked to apply by your Aptean support team.

You may then specify an email for the report using the **Output** button, specifying the destination email in the *E-Mail* column. You may specify multiple destinations.

1.2.3.2 Extracts Scheduling



Field	Description	Value
Process Name	This should indicate the nature of the job so it may be identified in the screen. Required.	A unique identifier for the extract, e.g. *DAILY_EXTRACTS*
Filename Format	This indicates how any files created or required by the process are names, for outbound files, the system will add the system date and time to ensure a unique filename is always generated. Required.	A unique name for the extract.
Customer	Enter the Customer required using the Drop Down List. Optional.	As required
Cost Centre Code	The cost centre code may be used when the process is checking parameter values and may be matched to orders or trips to identify if the process should be running. Required.	As required
Direction	The direction is defined as outbound or inbound. This will indicate if the process in bringing data into C-TMS or sending data	Outbound

Field	Description	Value
	out of C-TMS. Required.	
Flow Type	This indicates the type of process, there are several different options discussed later. Required.	*EXPORT*
Frequency Type	Frequency type indicates how often the process is run, are regular interval or specific time. Required.	As required
Process Time	Only available if selecting *Frequency Type* of *Specific Time*. The time at which the process is to run.	As required
(Day Selection)	Only available if selecting *Frequency Type* of *Specific Time*. Check *All Days*, or check the days on which you want the process to run.	As required
Interval Length	Only available if selecting *Frequency Type* of *Regular Interval*. Interval length indicates the regular interval. Enter the number , and then the unit (*Seconds, Minutes, Hours, Days, Monthly*). Required.	As required
Send DEL Message	If this box is checked then this can create an ARR message when the actual arrive times are fully entered	Unchecked
Send ARR Message	If this box is checked then this can create a DEL message when the order to deliver quantities are fully entered	Unchecked
Delivery Folder	When the file has been created this is the directory that the file will sit in until it has been picked up	A server-side folder for the extracted files. Provided by your implementation team. Usually `/webint/(client-database)/export`.
Archive Folder	When the file has been picked up by the relevant source successfully the file gets moved to this directory	A server-side folder for the extracted files. Provided by your implementation team. Usually `/webint/(client-database)/export`.
Failures folder	The directory of any files that failed to upload	A server-side folder for the extracted files. Provided by your implementation team. Usually `/webint/(client-database)/export`.
Acknowledgment Folder	The directory for an acknowledgment message to sent to	N/A
Send ACK?	The box is checked if the Acknowledgment of an inbound flow is requested. The Acknowledgment will then been sent to folder to be picked up by the relevant source	Unchecked

Report Values must then be entered for the process through the **Params** button:

Title	Name	Value
Export Name	EXPORT	The name of the export required.
An optional parameter id, for ease of identification	the unique parameter name for the export	The value for this parameter

Note that many of these parameter names and packages can be seen in the Extracts Details section.

You may then specify an email for the report using the **Output** button, specifying the destination email in the *E-Mail* column. You may specify multiple destinations.

1.2.3.3 Reports Scheduling

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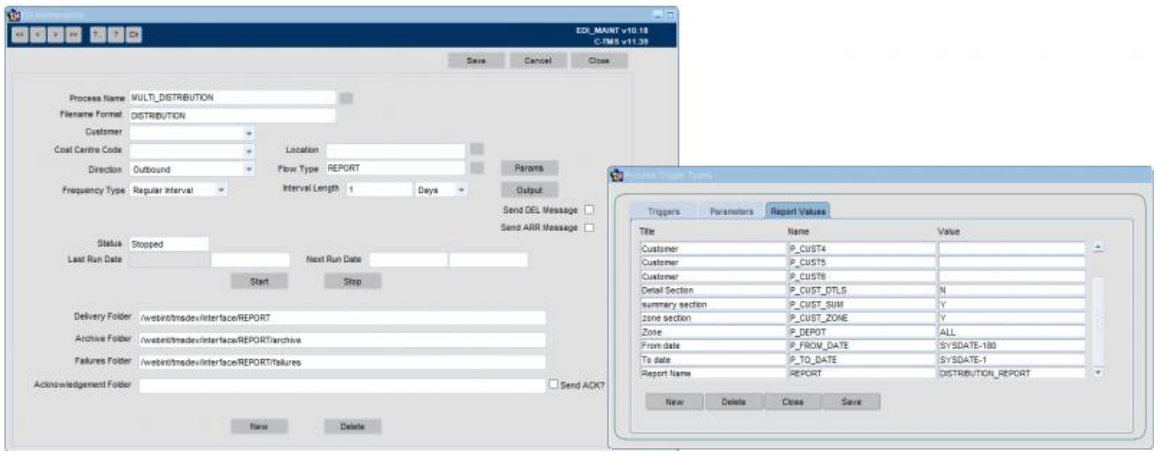

Field	Description	Value
Process Name	This should indicate the nature of the job so it may be identified in the screen. Required.	A unique identifier for the report
Filename Format	This indicates how any files created or required by the process are names, for outbound files, the system will add the system date and time to ensure a unique filename is always generated. Required.	A unique name for the report.
Customer	Enter the Customer required using the Drop Down List. Optional.	As required
Cost Centre Code	The cost centre code may be used when the process is checking parameter values and may be matched to orders or trips to identify if the process should be running. Required.	As required
Direction	The direction is defined as outbound or inbound. This will indicate if the process in bringing data into C-TMS or sending data out of C-TMS. Required.	Outbound
Flow Type	This indicates the type of process, there are several different options discussed later. Required.	*REPORT*
Frequency Type	Frequency type indicates how often the process is run, are regular interval or specific time. Required.	As required
Process Time	Only available if selecting *Frequency Type* of *Specific Time*. The time at which the process is to run.	As required
(Day Selection)	Only available if selecting *Frequency Type* of *Specific Time*. Check *All Days*, or check the days on which you want the process to run.	As required
Interval Length	Only available if selecting *Frequency Type* of *Regular Interval*. Interval length indicates the regular interval. Enter the number , and then the unit (*Seconds, Minutes, Hours, Days, Monthly*). Required.	As required
Send DEL Message	If this box is checked then this can create an ARR message when the actual arrive times are fully entered	Unchecked
Send ARR Message	If this box is checked then this can create a DEL message when the order to deliver quantities are fully entered	Unchecked
Delivery Folder	When the file has been created this is the directory that the file will sit in until it has been picked up	A server-side folder for the extracted files. Provided by your implementation team. Usually `/webint/(client-database)/export`.

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Field	Description	Value
Archive Folder	When the file has been picked up by the relevant source successfully the file gets moved to this directory	A server-side folder for the extracted files. Provided by your implementation team. Usually `/webint/(client-database)/export`.
Failures folder	The directory of any files that failed to upload	A server-side folder for the extracted files. Provided by your implementation team. Usually `/webint/(client-database)/export`.
Acknowledgment Folder	The directory for an acknowledgment message to sent to	N/A
Send ACK?	The box is checked if the Acknowledgment of an inbound flow is requested. The Acknowledgment will then been sent to folder to be picked up by the relevant source	Unchecked

Report Values must then be entered for the process through the **Params** button:

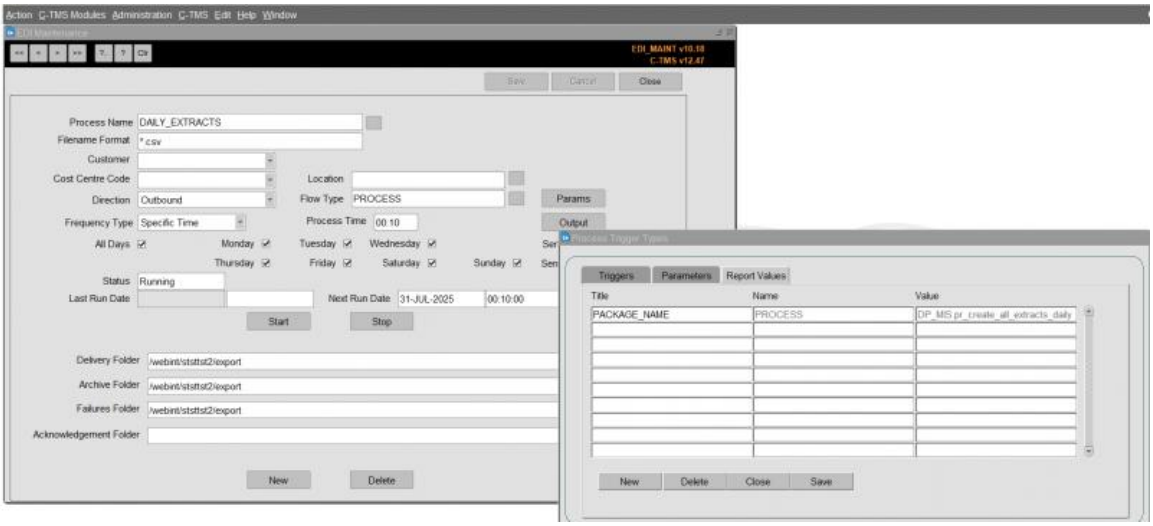
Title	Name	Value
Report Name	REPORT	The name of the report required.
An optional parameter id, for ease of identification	The unique parameter name for the export	The value for this parameter

Note that many of these parameter names and packages can be seen in the Reports Details section. The reports name can be found in the System Configuration screen and are listed in the Reports List.

You may then specify an email for the report using the **Output** button, specifying the destination email in the *E-Mail* column. You may specify multiple destinations.

1.2.3.4 MIS/BI Extracts Scheduling

The MIS/BI processes are configured by your implementation team - see BI Data Extract Guide for more information on this process. The process is then scheduled to run daily at a specific time.



Field	Description	Value
Process Name	This should indicate the nature of the job so it may be identified in the screen. Required.	A unique identifier for the extracts, e.g. *DAILY_EXTRACTS*
Filename Format	This indicates how any files created or required by the process are names, for outbound files, the system will add the system date and time to ensure a unique filename is always generated. Required.	**.csv*
Customer	Enter the Customer required using the Drop Down List. Optional.	N/A
Cost Centre Code	The cost centre code may be used when the process is checking parameter values	N/A

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Field	Description	Value
	and may be matched to orders or trips to identify if the process should be running. Required.	
Direction	The direction is defined as outbound or inbound. This will indicate if the process in bringing data into C-TMS or sending data out of C-TMS. Required.	Outbound
Flow Type	This indicates the type of process, there are several different options discussed later. Required.	*PROCESS*
Frequency Type	Frequency type indicates how often the process is run, are regular interval or specific time. Required.	*Specific Time*
Process Time	Only available if selecting *Frequency Type* of *Specific Time*. The time at which the process is to run.	e.g. 00:10
(Day Selection)	Only available if selecting *Frequency Type* of *Specific Time*. Check *All Days*, or check the days on which you want the process to run.	*All Days*
Interval Length	Only available if selecting *Frequency Type* of *Regular Interval*. Interval length indicates the regular interval. Enter the number , and then the unit (*Seconds, Minutes, Hours, Days, Monthly*). Required.	N/A
Send DEL Message	If this box is checked then this can create an ARR message when the actual arrive times are fully entered	Unchecked
Send ARR Message	If this box is checked then this can create a DEL message when the order to deliver quantities are fully entered	Unchecked
Delivery Folder	When the file has been created this is the directory that the file will sit in until it has been picked up	A server-side folder for the extracted files. Provided by your implementation team. Usually `/webint/(client-database)/export`.
Archive Folder	When the file has been picked up by the relevant source successfully the file gets moved to this directory	A server-side folder for the extracted files. Provided by your implementation team. Usually `/webint/(client-database)/export`.
Failures folder	The directory of any files that failed to upload	A server-side folder for the extracted files. Provided by your implementation team. Usually `/webint/(client-database)/export`.
Acknowledgment Folder	The directory for an acknowledgment message to sent to	N/A
Send ACK?	The box is checked if the Acknowledgment of an inbound flow is requested. The Acknowledgment will then been sent to folder to be picked up by the relevant source	Unchecked

Report Values must then be entered for the process through the **Params** button:

Title	Name	Value
PACKAGE_NAME	PROCESS	DP_MIS.pr_create_all_extracts_daily

1.2.4 Creating Processes

In general, creating specific EDI processes follows the same procedure as the above. The MIS/BI Reporting extract process is an example of a process.

There are many processes, mostly for a very specific reason or bespoke processes. A list of processes follows. Note that this list if evolving and may not be complete:

Process	Notes

Process	Notes
ACC.GENERATE_WAREHOUSE_CHARGES	
ASSET.REMOVE_DELETED_ASSETS	
DP_3PL_SCHED.DEPOT_SWEEP	The Depot Sweep process, used in conjunction with the fixed drop scheduling engine
DP_BMW_EDI_IN.PROCESS_FILES	
DP_BMW_EDI_OUT.SEND_CLAIMS	
DP_BNL_EDI_IN.P_PROCESS_FILES	
DP_BNL_EDI_OUT.P_PROCESS_PLAN	
DP_BWSC.PROCESS_FILES	
DP_CSV4.TOKAIRO_CUST_EXPORT	
DP_CSV6.TIMI_EXTRACT	A bespoke tracking extract.
DP_CSV_DUN.STORE_PVA	
DP_CSV_POD.P_PROCESS_CSV_POD	
DP_DRIVER_SCHEDULING.ADD_SCANNED_ORDERS_TO_TRIP	
DP_EPOD_WEBSERVICE.epod_locked_job	A helper process for any locked jobs, used in conjunction with Calidus ePOD .
DP_EPOD_WEB_SERVICE.get_vehicle_info	A helper process, used in conjunction with Calidus ePOD .
DP_EXPORT_EVENTS.PROCESS_XML_OUTBOUND_API	
DP_FINANCE.D365_EXPORT	
DP_FINANCE.D365_EXTRACT	
DP_FIXED_IMPORT.P_PROCESS_FILES	
DP_IMP.P_PROCESS_CIPD	
DP_INT_XML_CARPOD.PROCESS_CARPOD_IN	A process for importing Carrier POD files.
DP_LFE_POD.PROCESS_FILES	
DP_LOGINEXT.PROCESS_OUTBOUND	A process for exporting trips and orders to 3rd party carriers using the LogiNext system.
DP_LOGIX_NHSBT.OUTBOUND_PROCESS	
DP_MIS.PR_CREATE_ALL_EXTRACTS	An MIS/BI extract process
DP_MIS.PR_CREATE_ALL_EXTRACTS_DAILY	An MIS/BI extract process
DP_MIS.PR_CREATE_ALL_EXTRACTS_DATES	An MIS/BI extract process
DP_NOKIA_LOC_PLAT.FIND_SIMILAR_SUBURBS	A help process for Nokia Maps extracts
DP_PAR_API.READ_PARAGON_IN	A Paragon API process
DP_PAR_API_STP.P_UNSCHEDULE	A Paragon API process
DP_PAR_API_STP.get_paragon	A Paragon API process
DP_PAR_API_STP.get_paragon_route	A Paragon API process
DP_PAR_API_STP.process_paragon	A Paragon API process
DP_REPORTS.DAY_BEFORE_MSG	A Reports process
DP_REPORTS.PROCESS_CLICK_OUTBOUND	A Reports process
DP_REPORTS.P_PROCESS_ORD_CONF	A Reports process
DP_REPORTS.P_PROCESS_PRE_DEL	A Reports process
DP_REPORTS.P_PROCESS_URGENT	A Reports process
DP_REPORTS.P_RUN_DAILY_STORE_ASN_REPORT	A Reports process
DP_REPORTS.P_RUN_STORE_REPORT	A Reports process
DP_REPORTS.SEND_CALLBACK_EMAIL	A Reports process
DP_REPORTS.SEND_DEL_EMAIL	A Reports process
DP_REPORTS.SEND_NON_CONFORM_EMAIL	A Reports process
DP_REPORTS.p_run_manifest_report	A Reports process
DP_RICO.RECEIVE_REPORT_STATUS	
DP_SCHEDULING_NHSBT.p_nhsbt_schedule	A bespoke scheduling process, used with the NHS scheduling engine.
DP_SHIPMENT.CLOSE_SHIPMENTS	
DP_SHIPMENT.RUN_CONSOLIDATION	
DP_TESLA_EDI_IN.IMPORT_ORDERS	A bespoke import process

Process	Notes
DP_TOMTOM.GET_GEOFENCE	Part of the WEBFLEET interface
DP_TOMTOM.GET_MESSAGES	Part of the WEBFLEET interface
DP_TOMTOM.SEND_ORDERS	Part of the WEBFLEET interface
DP_TOMTOM.resend_stop(2029828,'A','911GT2')	Part of the WEBFLEET interface - a helper/support process.
DP_TOY_EDI_IN.P_PROCESS_FILES	A bespoke import process
FIXED.Gen_Fixed_Schedule	Part of the Fixed Schedule process
GEO.PROCESS_NEW_LOCATIONS	
HKP.Delete_interface_records('HUK')	
INT_XML_MIC.PROCESS_XML_OUTBOUND_MIC	The Microlise scanning interface
INT_XML_OUT2.PROCESS_XML_DESP_CONF	The Microlise scanning interface
INT_XML_OUT2.PROCESS_XML_MANIFEST	The Microlise scanning interface
INV.GENERATE_ALL_INVOICES	Invoice generation
INV.PROCESS_CARGOWISE	Bespoke Invoice Generation
ORS.UPDATE_ORDER_STATS	
ORS.UPDATE_ORDER_STATS_all	
TRIP.BUF_DEL_INVALID	Bespoke process
TRM.P_AUTO_COMPLETE	
TRM.fn_load_trunks	
int_msg.process_msg_header_int_file	
int_msg.process_pod_int_file	
int_xml_in.process_lift_update	
int_xml_in.process_on_hold	
process_xml_outbound_LOTS_ORDC	

Each process can be scheduled through this EDI screen.

In most cases, they also use parameters to determine the functionality of the process itself.

A list of applicable parameters is shown here: EDI Process Parameters.

Further to this, Report Values may need to be set for each process, to determine which data is being affected by the process..

A list of applicable report values is shown here: EDI Process Report Values.