Tokairo DMS Interface

Contents

1 Tokairo DMS Interface

This document details the integration between CTMS and the Tokairo Document management system.

Once C-TMS has orders, it interfaces a list of the main attributes of those orders over to the document management system. Effectively, that interface is a pre-advice where the customer expects to get delivery and pod paperwork once the deliveries have been made. The interface includes the customer reference. This creates an "index" in the document manager system - so far with no linked documents.

As paperwork is received, it is scanned as an image into the document management system (looks like a photocopier). The document manager software allows image templates to be pre-set and on those image template where the reference is printed. As the documents are scanned and an electronic image created, the logic matches the template and using OCR finds the reference on the paperwork. The image is then linked to / indexed to the data record for the order by matching the reference from the interface to the reference OCR read from the paperwork.

The document management system then sends a simple interface to C-TMS for the order where there is a POD and all that happens is the debrief POD flag is set.

Once there is a POD flag, C-TMS has a show POD button. This is greyed out until the POD flag is set. The button generates a web show document URL into the document manager software and displays all the scanned images for that reference.

1.1 Process

1.1.1 Outbound CSV Extract
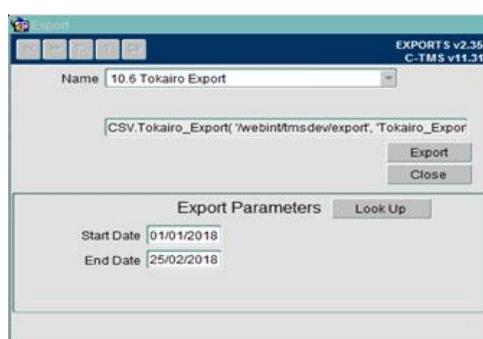
The Export to the document management system can be created as a process to run at a specific time each day. The export will generate a CSV file including the following information, customer, carrier, depot and orders references for all orders updated in the last 24 hours.

The export can be automated using the EDI Maintenance screen and the following parameters:

Parameter Name	Parameter Description	Value
Process Name	Flow Identifier	RETRIEVAL_DAILY
Filename Format	Naming convention of the files being sent in	RET_Export_
Customer	N/A	
Cost Centre Code	CTMS Cost Centre associated with the flow	N/A

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Parameter Name	Parameter Description	Value
Location (Optional)	Location ID for the flow, this is not mandatory	N/A
Direction	Type of flow	Outbound
Flow Type	Flow format	EXPORT

The file is generated and stored in a folder on the C-TMS server. The location of the folder is stored in the parameter TOK_OUTBOUND_PATH

Parameter Name	Parameter Description	Value
Delivery Folder	Folder into which the files will be delivered	Test :- /webint/xxxtst/interface/TOK/OUT
		Live :- /webint/xxxprd/interface/TOK/OUT
Archive Folder	Folder into which successful files are placed	Test :-/webint/xxxtst/interface/TOK/OUT/archive
		Live :- /webint/xxxprd/interface/TOK/OUT/archive
Failures Folder	Folder into which failed files are placed	Test :- n/a
		Live :- n/a
Acknowledgment Folder	Folder into which acknowledgment files are placed	Test :- n/a
		Live :- n/a

The export is expected to run once a day and can be run as an export process in the EDI Maintenance screen. Running the extract pre-advises the document system of the orders , using an order reference as an index. The file may be sent across more regularly than once a day depending upon the offset between order creation and order delivery.

Parameter Name	Parameter Description	Value
Frequency Type	Once daily or regular intervals	Specific Time
All Days	Days on which the export runs Box	checked
Process Time	Time of day report will run	15:00
Flow Start Date/Time	Date and time that flow should be started	Test :- ASAP
		Live :- ASAP

Title	Name	Value
Export Name	EXPORT	CSV.Tokairo_Daily

1.2 Document View

Within the Debrief screen the View POD button may be enabled to allow users to view the POD file, this will link directly to the scan of the POD document for the order selected, held within the document system.

In the debrief screen, the View POD button is used to view the POD report in the document system. Selecting the button will build a url for a WEB SHOW Document command, based on the oms reference of the order. The system will only attempt to build the URL if the POD flag against the order has been set to Y. If the POD has not been set, the following message will be displayed.
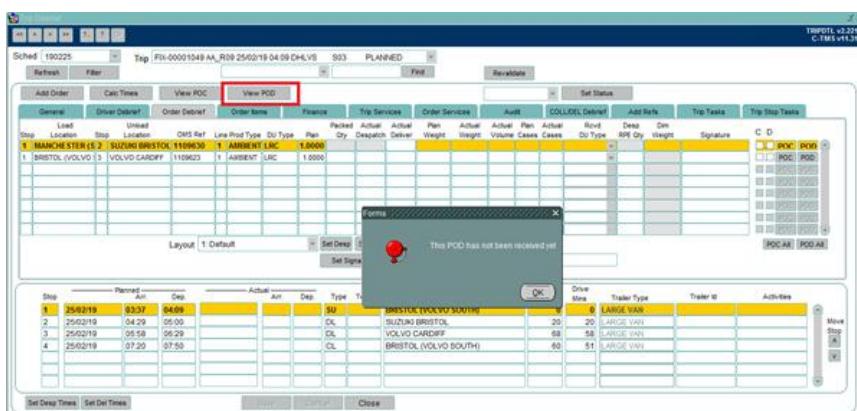
If the POD flag has been set to Y, the system will use the following system parameters to build the WEB SHOW document command

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TOK_CNAME	SYSTEM	NONE	&cname=CN-POD	Defines the Tokairo Customer Name.
TOK_CUSTOMERS	SYSTEM	NONE	OPENFIELD	A comma-delimited list of customers to interface with Toka
TOK_FIELD	SYSTEM	NONE	&fid=OMSID&SrchRef=	Defines the Tokairo field name.
TOK_OUTBOUND_ARCHIVE	SYSTEM	NONE	/webint/tms.dev/interface/TOK/OUT/a	Filepath for Tokairo Daily Extract archive
TOK_OUTBOUND_PATH	SYSTEM	NONE	/webint/tms.dev/interface/TOK/OUT	Filepath for Tokairo Daily Extract
TOK_POD_AVAIL	SYSTEM	NONE	Y	Is Tokairo being used to view POD documents - Y or N.
TOK_SRCH_PAGE	SYSTEM	NONE	/Tok_search.asp?WCI=query	Defines the Tokairo search page.
TOK_URL_PREFIX	SYSTEM	NONE	http://etdi.exel.com	Defines the Tokairo URL prefix.
TOK_VIRDIR	SYSTEM	NONE	/tokwebsearch	Defines the Tokairo virtual directory.

1.3 Further Configuration

The following System Parameters affect this functionality:

Parameter	Description	Level
TOK_CNAME	Defines the Tokairo Customer Name.	CUSTOMER
TOK_CUSTOMERS	A comma-delimited list of customers to interface with Tokairo.	SYSTEM
TOK_FIELD	Defines the Tokairo field name.	CUSTOMER
TOK_OUTBOUND_ARCHIVE	Filepath for Tokairo Daily Extract archive	SYSTEM
TOK_OUTBOUND_PATH	Filepath for Tokairo Daily Extract	SYSTEM
TOK_POD_AVAIL	Is Tokairo being used to view POD documents - Y or N.	SYSTEM
TOK_SRCH_PAGE	Defines the Tokairo search page.	SYSTEM
TOK_URL_PREFIX	Defines the Tokairo URL prefix.	SYSTEM
TOK_VIRDIR	Defines the Tokairo virtual directory.	CUSTOMER

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