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Improve your Operation with Advanced Layouts

A Closer Look at Use Cases and Configuration Possibilities

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Program Agenda

- 1 ➤ What is an Advanced Layout?
- 2 ➤ Configuration Options and Examples
- 3 ➤ Real World Use Cases, Exel

What is an Advanced Layout?

- Advanced Layouts are multi-paneled views allowing you to create custom views of your data.
- When viewing a completed advanced layout, you can run actions on the tables
- A user can drag-and-drop data from one table/pane to another
- Can define contextual master/detail relationships
- Can add one or more Advanced Layouts to the users menu
- Configured based on well constructed Saved Queries and Screen Sets
- Users can quickly review statuses, assess data and perform actions within the confines of a single screen with minimal clicks.

Program Agenda

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- 2 Configuration Options and Examples
- 3 Real World Use Cases, Exel

Configuration Options and Examples

- Configuration and Administration > User Configuration > Advanced Layout
- Create a new one or select an existing record to copy
- Assign ID and configure panes/tables
- The Layout pane is where you define how your advanced layout is structured. The interface is that of a tree. You may expand or collapse nodes on the tree as well as add or delete them.
- We'll examine a few examples

Configuration Options and Examples

Example

Tables

Dispatch Board

UNPLANNED_ORDERS | **PLANNED_ORDERS** | Locations

ID	Order Release ID	Indicator	Order Base ID	Early Pickup Date	Late Pickup Date
CHAYES.CH_110509_1	CH_110509_1	<input type="radio"/>			
CHAYES.CH_110609_1	CH_110609_1	<input type="radio"/>			
CHAYES.CH_111109_1	CH_111109_1	<input type="radio"/>			

Total Found 5

NEW_TL_SHIPMENTS | TENDERED_TL_SHIPMENTS | EXECUTED_TL_SHIPMENTS | TROUBLE_TL_SHIPMENTS

ID	Shipment ID	Bill of Lading	Indicator	Source City	Destination Location ID	D	C
CHAYES.01002	01002	UPS-000048	<input type="radio"/>	CLEVELAND	NEW YORK	N	^
CHAYES.01007	01007	-000039	<input type="radio"/>	CHICAGO	SAN ANTONIO	S	^
CHAYES.0801TEST	0801TEST		<input type="radio"/>	SEATTLE	MIAMI	M	^
CHAYES.0802-1	0802-1		<input type="radio"/>	ATLANTA	PHL	P	^
CHAYES.0806	0806		<input type="radio"/>	ATLANTA	LAX	L	^
CHAYES.100	100	YELLOW-000022	<input type="radio"/>	ATLANTA	MIAMI	M	^
CHAYES.1104_1	1104_1	CAH_DRAY_1-0...	<input type="radio"/>	MEMPHIS	CLEVELAND	C	^
CHAYES.1104_2	1104_2	CAH_DRAY_1-0...	<input type="radio"/>	MEMPHIS	CLEVELAND	C	^
CHAYES.12987	12987	SEA-NY-000123	<input type="radio"/>	COLUMBUS	NEW YORK	N	^

Total Found 50

Equipment | Shipment Ship Units

ID	Equipment ID	Indicator	Tag1	Tag2
CHAYES.48-RED-9876	48-RED-9876	<input type="radio"/>	123	123
CHAYES.48-BLUE-9876	48-BLUE-9876	<input type="radio"/>		

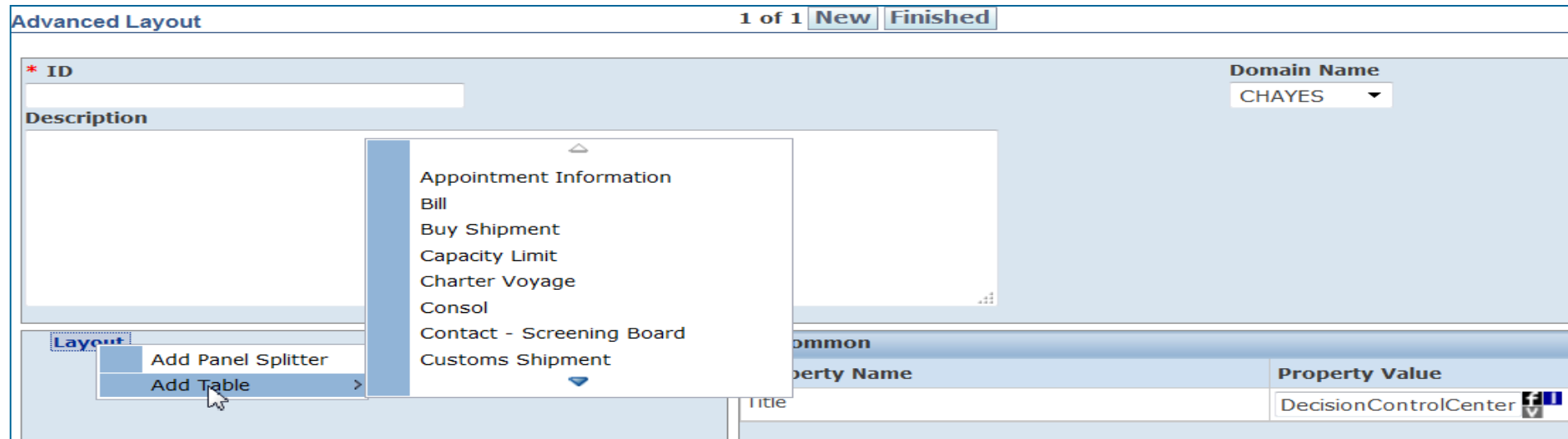
Total Found 2

Panel Splitters

Configuring Advanced Layouts

Creating a Layout

- Assign ID, Description and Title
- Right click on the word Layout, you may choose to:
 - Add Panel Splitter
 - Add Table



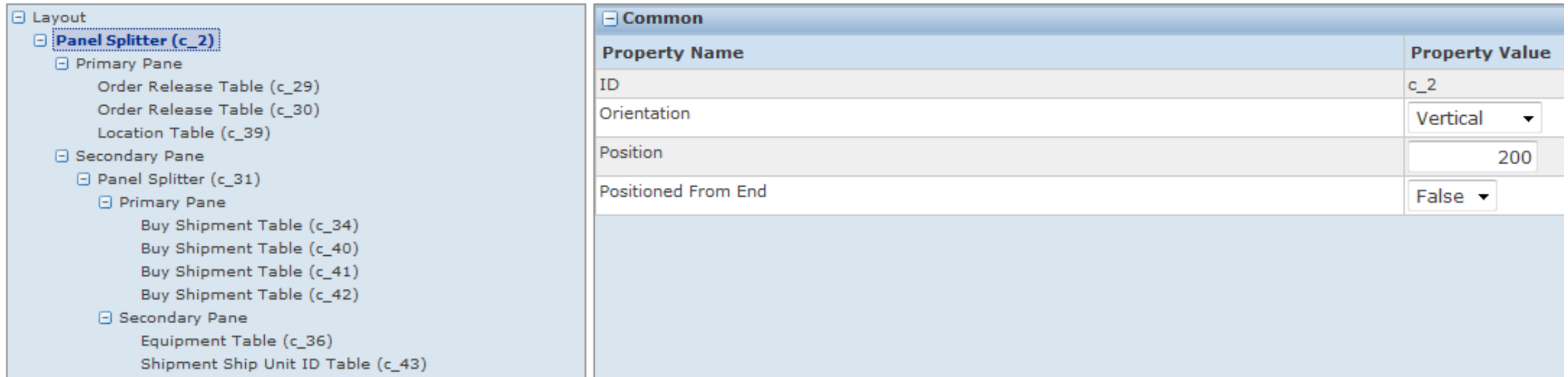
Configuration Options and Examples

Adding a Panel Splitter

- Adding a panel splitter creates several sub-options on the layout tree.
- It divides the layout into different panes
- These are defined by the Primary and Secondary Pane nodes on the layout tree.
- Click on the Panel Splitter node to set properties for that panel. The properties for the panel are displayed in the adjacent Properties section of the advanced layout manager.
- Right-click on Primary Pane or Secondary Pane to add sub-panels or tables.

Configuration Options and Examples

Panel Splitter Properties



The screenshot displays the configuration interface for a Panel Splitter. On the left, a tree view shows the layout structure under 'Layout' > 'Panel Splitter (c_2)'. It includes a 'Primary Pane' with 'Order Release Table (c_29)', 'Order Release Table (c_30)', and 'Location Table (c_39)'; and a 'Secondary Pane' containing a 'Panel Splitter (c_31)' with its own 'Primary Pane' (four 'Buy Shipment Table' components) and 'Secondary Pane' (two table components). On the right, the 'Common' properties panel is shown with the following settings:

Property Name	Property Value
ID	c_2
Orientation	Vertical
Position	200
Positioned From End	False

Orientation

Determines the orientation of the panel. Horizontal panels splits the panels so the panes will be side-to-side. Vertical splits the panels so that one is on top of the other.

Position

The position of the splitter, in pixels, that separates the panes from one another.

Position From End

Determines if the splitter position is at the top (true) or bottom (false) of the screen.

Configuration Options and Examples

Adding a Table

The screenshot displays the configuration interface for adding a table. On the left is a tree view of the layout structure:

- Layout
 - Panel Splitter (c_2)
 - Primary Pane
 - Order Release Table (c_29)**
 - Order Release Table (c_30)
 - Location Table (c_39)
 - Secondary Pane
 - Panel Splitter (c_31)
 - Primary Pane
 - Buy Shipment Table (c_34)
 - Buy Shipment Table (c_40)
 - Buy Shipment Table (c_41)
 - Buy Shipment Table (c_42)
 - Secondary Pane
 - Equipment Table (c_36)
 - Shipment Ship Unit ID Table (c_43)

On the right, the configuration properties for the selected table are shown in two sections:

Common	
Property Name	Property Value
Add Header	TRUE ▾
Column Auto Wrap Off	False ▾
Column Header Auto Wrap Off	False ▾
Filter Limit	50
Header Label	UNPLANNED_ORDERS
ID	c_29
Screen Set ID	CAH_ORDER_RELEASE2 ▾

Population	
Property Name	Property Value
Detail	False ▾
Population Method	Saved Query ▾
Saved Query Name	UNASSIGNED ORDERS ▾

Configuration Options and Examples

Adding a Table

- You can add a table to the main layout, or to a primary or secondary pane of a split panel.
 - The table you select defines what data you see in the completed advanced layout. When you select a table, a parenthetical ID is associated with it. For example, (c_9).
 - This ID is used when referencing associated tables, as described below in the Properties section.
- It is possible to have the same type of table added to the same layout, but with each using a different saved query to return information.
 - The parenthetical ID helps to differentiate between these tables while defining the advanced layout.
 - Multiple tables grouped under the same pane are displayed as tabs when viewing the completed advanced layout.

Configuration Options and Examples

Table Properties – Population (Master/Detail)

- Detail
 - Determines if the table is a master table (FALSE) or a detail table (TRUE). Detail tables derive their data based upon what is selected on the master table.
 - Even if FALSE, can still assign Population Method
- Master ID
 - When working with certain tables, a master table is associated with a child table. The master table provides the criteria of how the child table is populated.

Configuration Options and Examples

Table Properties - Population (Master/Detail)

- Population Method
 - Action: Used when a layout is launched from an action where the action knows exactly how to populate the table. Use of this option is only for advanced users, and caution is recommended.
 - Open Search: The default method. Behaves as if an open search was run on a finder screen. The only criteria taken into account are the default criteria defined by the screen set.
 - Rule: Executes the rule defined in the rule ID.
 - Saved Query: Runs the query specified in the Saved Query Name.

Configuration Options and Examples

Master/Detail Example

ID	Shipment ID	Indicator	Service Provider ID	Shipment Type	Mode	Stat
LD.03392	03392	<input type="radio"/>	FLEET	TRANSPORT	TL	SEC
LD.03393	03393	<input type="radio"/>	FLEET	TRANSPORT	TL	SEC
LD.03394	03394	<input checked="" type="radio"/>	FLEET SP	TRANSPORT	TL	SEC
LD.03395	03395	<input type="radio"/>	FLEET	TRANSPORT	TL	SEC
LD.03396	03396	<input type="radio"/>	FLEET SP	TRANSPORT	TL	SEC
LD.03397	03397	<input type="radio"/>	FLEET	TRANSPORT	TL	SEC
LD.03398	03398	<input type="radio"/>	FLEET	TRANSPORT	TL	SEC
LD.03399	03399	<input type="radio"/>	FLEET SP	TRANSPORT	TL	SEC

Rows Selected 1 Total Found 8

ID	Shipment ID	Stop Num	Location	City	Province Code
LD.03394x1	03394	1	DC1	ONTARIO	CA
LD.03394x2	03394	2	90049 LOS ANGELES	LOS ANGELES	CA
LD.03394x3	03394	3	90002 LOS ANGELES	LOS ANGELES	CA

ID	Order Release ID	Indicator	Order Base ID	Early Pic
LD.ADD ORDER TO SHIPMENT 2	ADD ORDER TO SHIPME...	<input type="radio"/>		2013-10-
LD.ADD ORDER TO SHIPMENT 3	ADD ORDER TO SHIPME...	<input type="radio"/>		2013-10-

Shipments (Master)

Order Releases on Selected Shipment
(Detail)

Stops related to Selected Shipment
(Detail)

Configuration Options and Examples

Master/Detail Example Configuration

* ID SHIPMENT DRILL STOPS AND OR	Domain Name LD
Description Shipment Drill down stop and order release simultaneously	

Layout <ul style="list-style-type: none">Panel Splitter (c_2)<ul style="list-style-type: none">Primary Pane<ul style="list-style-type: none">Panel Splitter (c_5)<ul style="list-style-type: none">Primary Pane<ul style="list-style-type: none">Buy Shipment Table (c_8)Secondary Pane<ul style="list-style-type: none">Shipment Stop Table (c_24)Secondary Pane<ul style="list-style-type: none">Order Release Table (c_23)	Common <table border="1"><thead><tr><th>Property Name</th><th>Property Value</th></tr></thead><tbody><tr><td>Add Header</td><td>False ▾</td></tr><tr><td>Column Auto Wrap Off</td><td>TRUE ▾</td></tr><tr><td>Column Header Auto Wrap Off</td><td>False ▾</td></tr><tr><td>Filter Limit</td><td>50</td></tr><tr><td>Header Label</td><td></td></tr><tr><td>ID</td><td>c_24</td></tr><tr><td>Screen Set ID</td><td></td></tr></tbody></table> Population <table border="1"><thead><tr><th>Property Name</th><th>Property Value</th></tr></thead><tbody><tr><td>Detail</td><td>TRUE ▾</td></tr><tr><td>* Master ID</td><td>c_8 ▾</td></tr><tr><td>Population Method</td><td>Saved Query ▾</td></tr><tr><td>Saved Query Name</td><td>RELATED SHIPMENT STOPS ▾</td></tr></tbody></table>	Property Name	Property Value	Add Header	False ▾	Column Auto Wrap Off	TRUE ▾	Column Header Auto Wrap Off	False ▾	Filter Limit	50	Header Label		ID	c_24	Screen Set ID		Property Name	Property Value	Detail	TRUE ▾	* Master ID	c_8 ▾	Population Method	Saved Query ▾	Saved Query Name	RELATED SHIPMENT STOPS ▾
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Saved Query Name	RELATED SHIPMENT STOPS ▾																										

Configuration Options and Examples

Financials Example

Financial Workbench

BUY_SHIPMENT																
ID	Shipment ID	Bill of Lading	Indicator	Source City	Destination Location ID	Destination City	Destination Province Code	Service Provider ID	Total Actual Cost	Total Gross Weight	BS Event Group ID	Total Gross Volume	Start Time	End Time	Freight Terms	First Equip Group
CHAYES.51208	51208	ZOMISP-000121	●	KING OF PRUS...	AMSTERDAM	AMSTERDAM	NY	ZOMISP	50.00 USD	5000.00 LB		0.00 CUFT	2011-08-27 11:...	2011-08-27 03:...		28FT
CHAYES.51200	51200	ZOMISP-000120	■	KING OF PRUS...	AMSTERDAM	AMSTERDAM	NY	ZOMISP	50.00 USD	5000.00 LB		0.00 CUFT	2011-08-27 11:...	2011-08-27 03:...		28FT
CHAYES.51053	51053	CAH_DRAY_PR...	▲	HOUSTON	USHOU	HOUSTON	TX	CAH_DRA...	555.00 USD	40000.00 ...		2280.00 C...	2009-03-30 06:...	2009-03-30 06:...		40FT
CHAYES.51316	51316	ZOMISP-000103	▲	KING OF PRUS...	AMSTERDAM	AMSTERDAM	NY	ZOMISP	50.00 USD	5000.00 LB		0.00 CUFT	2009-02-24 10:...	2009-03-25 03:...		28FT
CHAYES.51123	51123	ZOMISP-000007	■	ATLANTA	HOUSTON	HOUSTON	TX	ZOMISP	0.00 USD	100.00 LB		0.00 CUFT	2008-10-22 08:...	2008-10-22 10:...		53FT
CHAYES.51182	51182	ZOMISP-000048	●	HOUSTON	AUS	AUSTIN	TX	ZOMISP	0.00 USD	0.00 LB		0.00 CUFT	2009-01-07 08:...	2009-01-07 11:...		53FT
CHAYES.51124	51124	ZOMISP-000008	○	ATLANTA	HOUSTON	HOUSTON	TX	ZOMISP	0.00 USD	0.00 LB		0.00 CUFT	2008-10-24 08:...	2008-10-24 10:...		53FT




Total Found 50

Invoice						
ID	Indicator	Invoice/Bill Number	Invoice/Bill Date	Invoice/Bill Source	Service Provider Alias Value	Amount Due
CHAYES.20040923-0001	■	DGANO.PORTLAND-0005	2004-09-23 01:00 AM P...	G	CHAYES.RED STAR	2199.78 USD
CHAYES.20041020-0006	■	CAH_DRAY_1-000016	2004-10-20 01:00 AM P...	G	CHAYES.CAH_DRAY_1	400.00 USD
CHAYES.20041020-0007	■	RED STAR-000021	2004-10-20 01:00 AM P...	G	CHAYES.RED STAR	758.27 USD
CHAYES.20041012-0001	▲	CAH_DRAY_1-000001	2004-10-12 01:00 AM P...	G	CHAYES.CAH_DRAY_1	400.00 USD
CHAYES.20041012-0002	■	RED STAR-000001	2004-10-12 01:00 AM P...	G	CHAYES.RED STAR	2425.33 USD
CHAYES.20050321-0001	●	RED STAR-000084	2005-03-21 12:00 AM P...	G	CHAYES.RED STAR	12715.10 U...
CHAYES.20040326-0001	●	DGANO.CHICAGO-0006	2004-03-26 12:00 AM P...	G	CHAYES.LAN DOOR-TO-...	1083.99 USD
CHAYES.20040326-0002	●	DGANO.CHICAGO-0007	2004-03-26 12:00 AM P...	G	CHAYES.LAN DOOR-TO-...	1083.99 USD
CHAYES.20041012-0003	▲	CAH_DRAY_1-000002	2004-10-12 01:00 AM P...	G	CHAYES.CAH_DRAY_1	400.00 USD

Voucher					
ID	Was Auto Approved	Approved By	Amount To Pay	Timestamp	Voucher Num
CHAYES.20041014-0005	△	CHAYES.ADMIN	400.00 USD	2004-10-14	
CHAYES.20041014-0006	△	CHAYES.ADMIN	2425.33 USD	2004-10-14	
CHAYES.20041014-0007	△	CHAYES.ADMIN	400.00 USD	2004-10-14	
CHAYES.20041014-0008	△	CHAYES.ADMIN	2425.33 USD	2004-10-14	
CHAYES.20041014-0009	△	CHAYES.ADMIN	400.00 USD	2004-10-14	
CHAYES.20041014-0010	△	CHAYES.ADMIN	2425.33 USD	2004-10-14	
CHAYES.20041014-0011	△	CHAYES.ADMIN	758.27 USD	2004-10-14	
CHAYES.20050311-0001	⊗	CHAYES.ADMIN	7572.70 USD	2005-03-11	

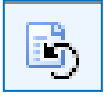

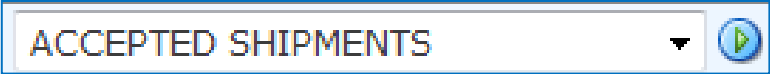

Configuration Options and Examples

Additional Capabilities

- Select and Add 
 - Allows you to find other records and then add them to the advanced layout. When selecting rows you are given the choice to Add Rows or Replace Rows.
 - When you choose to add rows, the selected rows are inserted into the existing rows in the table on the advanced layout.
 - When you replace rows, the table on the advanced layout is cleared and only the new rows that you select are placed in the table.
- Actions 
 - Select a record in the table and then click this icon to launch the Actions menu.
- Execute Default Search 
 - Removes all the records from the table and re-runs the finder set's default saved query.

Configuration Options and Examples

Additional Capabilities

- Refresh Selected 
 - Refreshes the selected records in the table.
- Remove Selected 
 - Removes the selected records from the table. It does not remove them from the database; it only affects if they are displayed on this page.
- Execute 
 - To change the saved query that is populating the data in the related table, select one from the drop-down list then click the Execute button.
- Export 
 - If no rows are selected in the table, then the entire table is exported to an Excel sheet. If rows are selected, you can choose to export just those rows, or all rows.

Program Agenda

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- 3 ➤ Real World Use Cases, Exel

Real World Use Cases - Exel

- Exel uses a variety of Advanced Layouts to manage their clients
- The basis for these are well formulated Saved Queries and Screen Sets
- The following few slides review a few specific examples for two clients, Fluidmaster (FM) and TOTO.



Real World Use Cases

Fluidmaster – FM Planning Example



- Primary Pane

- Shows Order Releases in an open status as they have failed to plan onto a shipment automatically.
- Planner uses this Advanced Layout to find orders that did not auto-execute as a stop gap process for orders that fall out of the normal FM daily planning procedures.

- Secondary Pane

- Queries to highlight shipments that are part of the Ready to ship process for Fluidmaster. This query pulls shipments in a status not tender accepted.
- Allows planner to find shipments that are not in a tender accept or pick up notification status. The planner will then manually executes tendering the shipment.

Fluidmaster

Real World Use Cases

Fluidmaster – FM Planning Example



Decision Control Center

OpenOrders					
Order Base	Carrier Pro	SI	Insert Time	Order Status Image	Time Window Emphas ID
0701		0800	2014-07-31 19:06 A...		BOTH
0701		0800	2014-07-31 19:07 A...		BOTH
0701		0800	2014-07-31 19:08 A...		BOTH
0701		0800	2014-07-31 19:09 A...		BOTH
3054469	TCA 2449	TCA 2449.1	2014-08-01 00:30 A...		PAST
3054474	TCA 2541	TCA 2467.1	2014-08-01 00:30 A...		PAST
3055122	00867466570	00867466570.1	2014-08-01 00:30 A...		PAST
3055130	29205872756	29205872756.1	2014-08-01 00:30 A...		PAST

Tender_Issues				
Shipment ID	Indicator	Service Provider ID	Shipment Type	Mode
1421206493	<input type="radio"/>	TFYI	TRANSPORT	TL
1421206497	<input type="radio"/>	TFYI	TRANSPORT	TL
1421206509	<input type="radio"/>	TFYI	TRANSPORT	TL
1421206513	<input type="radio"/>	TFYI	TRANSPORT	TL
1421206515	<input type="radio"/>	TFYI	TRANSPORT	TL
1421206517	<input type="radio"/>	TFYI	TRANSPORT	TL
1421206520	<input type="radio"/>	TFYI	TRANSPORT	TL
1421206521	<input type="radio"/>	TFYI	TRANSPORT	TL
1421206522	<input type="radio"/>	TFYI	TRANSPORT	TL

Fluidmaster

Real World Use Cases

TOTO – Planning Example



- An Advanced Layout is used by the planner to identify and resolve any tender issues related to shipments created.
- Saved Queries
 - The planner runs multiple bulk plans per day for this account and manual intervention in them is used frequently.
 - Tending of shipments can be missed, or there may be a reason the carrier or the customer asks the planner to hold a tender.
 - A tab of this Advanced Layout gives the planner continuous visibility to these shipments as a reminder that shipments exist and still need action.

TOTO[®]

Real World Use Cases

TOTO – Planning Example



- Tab defined to allow the planner to identify TL and Intermodal shipments that have a pick up appointment that has passed but the status of the shipments still shows Enroute_Enroute or Enroute_Not Started.
 - This means TL and Intermodal shipments that have not picked up on their scheduled pick up date.
 - The planner will then follow up with the carrier and DC to reschedule the shipment.
- Tab defined as a gap reminder to call out shipments that have been tendered to carriers but still have not been scheduled to pick up.
 - In this scenario for this account the planner tenders shipments to TL and Intermodal carriers and waits for the carrier to schedule the delivery appointments for the shipments.
 - Once the carrier schedules the delivery appointments then they request a corresponding pick up appointment from the planner.
 - This reminds the planner they need to follow up with carriers to get shipments scheduled is a certain time has passed and the carrier has not reached out for the appointment.

TOTO[®]

Real World Use Cases

TOTO – Planning Example



Advanced Layout

1 of 1

*** ID**
AL_TOTO_SHIP PLANNING_V1

Domain Name
EXEL

Description

Layout

- Panel Splitter (c_9)
 - Primary Pane
 - Panel Splitter (c_12)
 - Primary Pane
 - Buy Shipment Table (c_18)
 - Buy Shipment Table (c_22)
 - Order Release Table (c_24)
 - Secondary Pane
 - Secondary Pane
 - Panel Splitter (c_15)
 - Primary Pane
 - Buy Shipment Table (c_20)
 - Buy Shipment Table (c_23)
 - Secondary Pane

Properties

Property Name	Property Value

TOTO®

Real World Use Cases

TOTO – Planning Example



Decision Control Center

Shipment ID	Tender	Indicator	Orders	Stops	Insert Time
1421007079			1.00	2.00	2014-07-29 15:55 A...
1421104610			1.00	2.00	2014-07-30 13:16 A...
1421104611			1.00	2.00	2014-07-30 13:16 A...
1421104613			1.00	2.00	2014-07-30 13:16 A...
1421104628			1.00	2.00	2014-07-30 13:16 A...

Shipment ID	Tender	Indicator	Orders	Stops	Insert Time	SCAC	Mode
No data was returned.							

TOTO®

Q & A

Safe Harbor Statement

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