Document Cycle Tracking Service User Guide

Interactive Table of Contents:

Overview

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This is an interactive User Guide to the Pubnet Document Cycle Tracking Service (DCTS). Please use the *Interactive Table of Contents* at the beginning of this document as well as embedded links throughout the document to locate specific content. The *Table of Contents* is also accessible by click the icon labeled “Table of Contents” located in the upper right hand corner of every page.

DCTS is a web-based order tracking and shipping management system. Users and suppliers are able to view, link to and report on orders, invoices and shipping information through the Pubnet website (www.pubnet.org).

Another benefit DCTS offers is Compliance Checking. Compliance Checking ensures that documents being passed through are Pubnet-compliant. Each document is interrogated and any documents that are not compliant are flagged. Then both the user and supplier will be notified by email, as well as, having Pubnet tech support intervene and work with both parties to resolve the issue(s).

If you have questions concerning DCTS, contact Bowker Technical Support at Tel: 888-269-5372. For DCTS questions that do not require immediate response you can send an email to info@pubnet.org. Questions will be addressed during Pubnet business hours (8AM to 8PM Eastern Time, Monday-Friday, excluding holidays).

Getting Started

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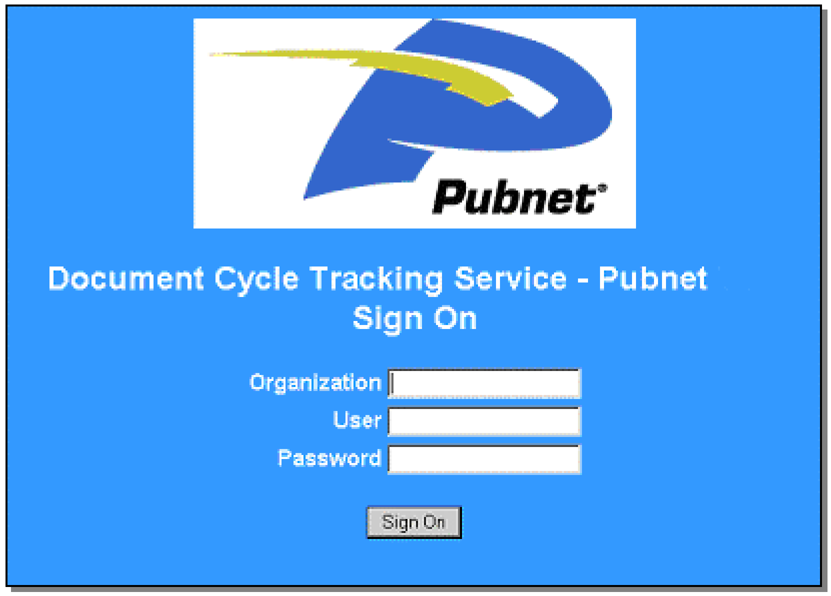
Signing On

Steps

1. **From your browser, go to www.pubnet.org and click on the DCTS logo.**

   DCTS

   The system displays the DCTS Sign On screen.



2. **At the Sign On screen, enter your Organization ID, User ID, and Password.**

   All of the sign on information is case sensitive. To move between the logon fields, either press the Tab key or use the mouse to move the cursor to the next field.

3. **When all three fields are complete, click Sign On.**

   Once signed on the Main Menu will appear.

The Main Menu & Standard Navigation Links

Here is an example of the DCTS Main Menu and the navigational functions it contains

The system determines which menu options are displayed based on the privileges that your administrator assigned to your User ID. You may not see all the option described in this guide or the Help Menu.

Signing Off

Steps

1. **From any DCTS page, choose Exit.**

   The system displays the DCTS sign on screen.

2. **Close the Internet Explorer window.**

Searching Documents Online-*Document Selection*

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Document Selection Screen

DCTS provides the ability to select documents and create reports based on certain criteria. You may start your search by clicking the ***Document Selection*** link from the [Main Menu](#).

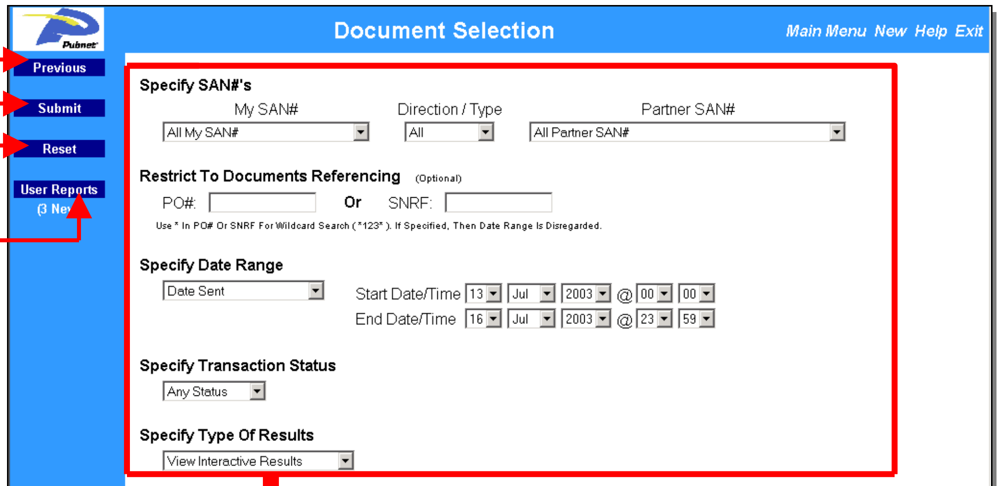
Here is an example of the Document Selection Page and an overview of it's functionality.

Navigates to the previous screen

Runs the list select query

Clears all fields to the default

Links to the User Reports Screen



The documents may be selected using the various criteria below:

- [Specify SAN#'s Direction/Type & Partner SAN#](#)
- [Restrict To Documents Referencing](#)
- [Specify Date Range](#)
- [Specify Transaction Status](#)
- [Specify Type of Results](#)

Searching Documents Online-*Document Selection*
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Specify SAN#’s, Direction/Type & Partner SAN#

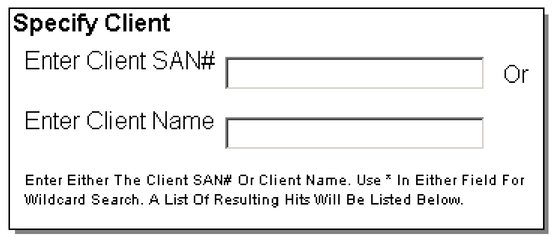
You may specify which of your SAN#’s to use in your selection criteria.

Steps

To specify which of your SAN#’s to use in your selection criteria

1. **Click on the *My SAN#* drop down menu**
2. **Choose the *My SAN#* option you wish to use:**

<table>
<tr><th>If you want to select by:</th><th>Then:</th></tr>
<tr><td>All SAN#’s tied to your Pubnet Account</td><td>1. Select All My SAN#.</td></tr>
<tr><td>A specific SAN# whose value you know</td><td>1. Select Prompt for Specific My SAN#
2. Enter the desired SAN# in the dialog box
3. Click OK</td></tr>
<tr><td>A specific SAN# whose value you do not know.

To conduct search for like terms place a * after your search text.</td><td>1. Select Search for Specific My SAN#
2. A new screen will prompt for the Client SAN# or Client Name


3. Enter the Client SAN# or Client Name
4. Click on the Client Search system button
5. The results of your search will be displayed


6. Click the radio button for the desired SAN#
7. You will then be brought back to the Document Selection Screen with the desired SAN# populated in the MY SAN# field</td></tr>
</table>

Searching Documents Online-*Document Selection*

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3. Choose the Direction/Type of document you wish to use:

If you want to select by:	Then:
All directions/types of documents	Select **ALL**
All documents that have been sent by you	Select **From Me**
All documents that have been sent to you	Select **To Me**
All Purchase Order (850) documents	Select **Po**
All Purchase Order Acknowledgement (855) documents	Select **Poa**
All Ship Notice (856) documents	Select **Ship Notice**
All Invoice (810) documents	Select **Invoice**

For more information on the document types see "User Report Descriptions".

4. Choose the Partner SAN# option you wish to use:

A drop down list will display a listing of all partner (vendor) SAN#s with whom you have a trading account

If you want to select by:	Then:
All partners with whom you have a trading account	Select **All Partner SAN#**
A specific partner	Select the appropriate partner SAN# / vendor from the drop down list

Restricting To Document Referencing

Restricting By PO#

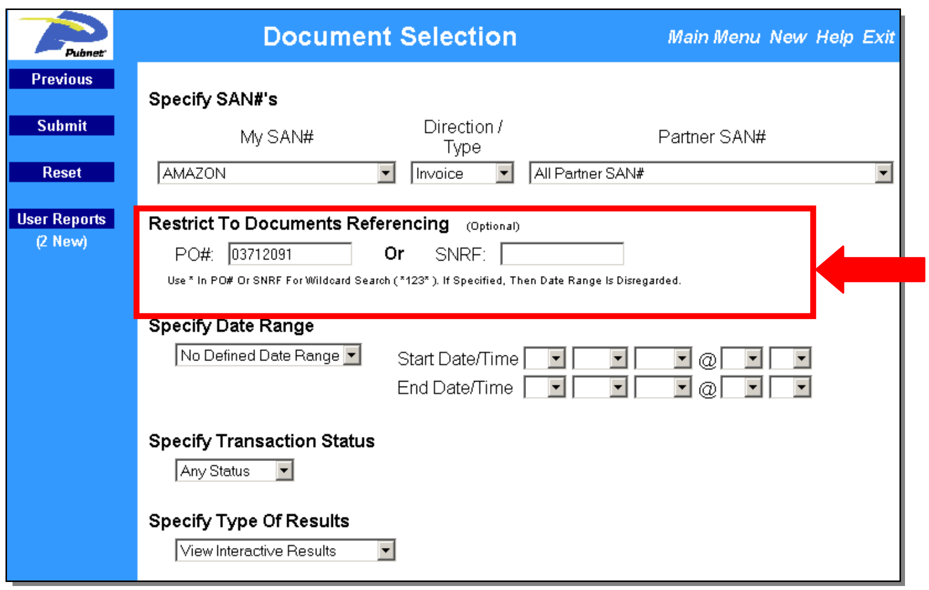
This is optional. If you wish to restrict your document selection to documents with a specific PO#, enter the PO# in the PO# box.

> *Note: If a PO# is specified then the Specify Date Range criteria is disregarded*

Restricting By SNRF

This is optional. If you wish to restrict your document selection to documents with a specific SNRF (Sender Reference), enter the SNRF in the SNRF box.

> *Note: If a SNRF is specified then the Specify Date Range criteria is disregarded*



Steps

Specify Date Range

You may specify a date range for the desired documents.

To specify which Date Range you wish to use in your selection criteria:

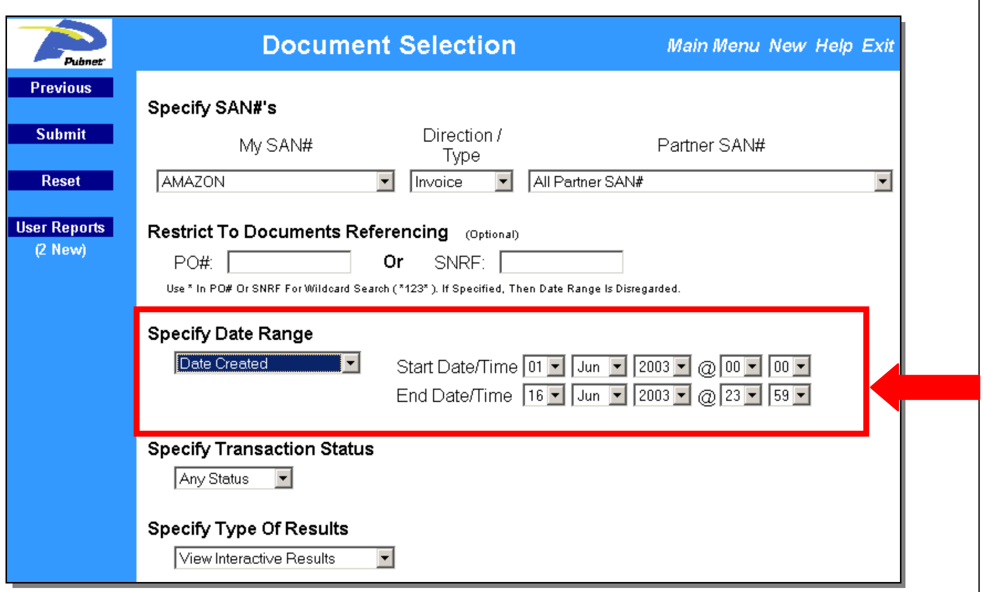
1. Choose the type of date you wish to use

If you want to select by:	**Then:**
No defined date range	Select **No Defined Date Range**
Date document was created	Select **Date Created**
Date document was sent	Select **Date Sent**
Date document was received	Select **Date Received**

2. Choose the Start Date and Time you wish to use

Remember the Date and Time you see displayed depends on the time settings in your personal administration options. For additional information, refer to "Understanding Personal Administration Options".

3. Choose the End Date and Time you wish to use



Steps

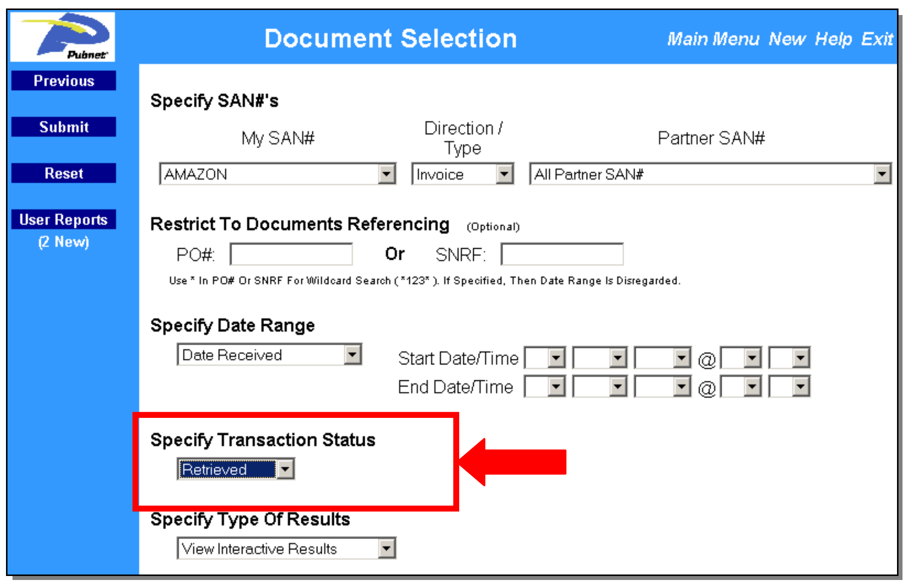
Specify Transaction Status

You may specify the status of the transaction for the desired documents.

To specify which Status you wish to use in your selection criteria

Choose the type of date you wish to use:

If you want to select by:	Then:
Any status	Select **Any Status**
Documents which have not been retrieved	Select **Not Retrieved**
Documents which have been retrieved	Select **Retrieved**



Specify Type of Results

You may specify the output of your document selection using the *Specify Transaction Status* drop down menu and the options listed below:

- View Interactive Results
- Generate Text Activity Report
- Generate CSV Activity Report
- Generate Detailed Report
- Generate Exceptions Report

Searching Documents Online-*Document Selection*

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Steps

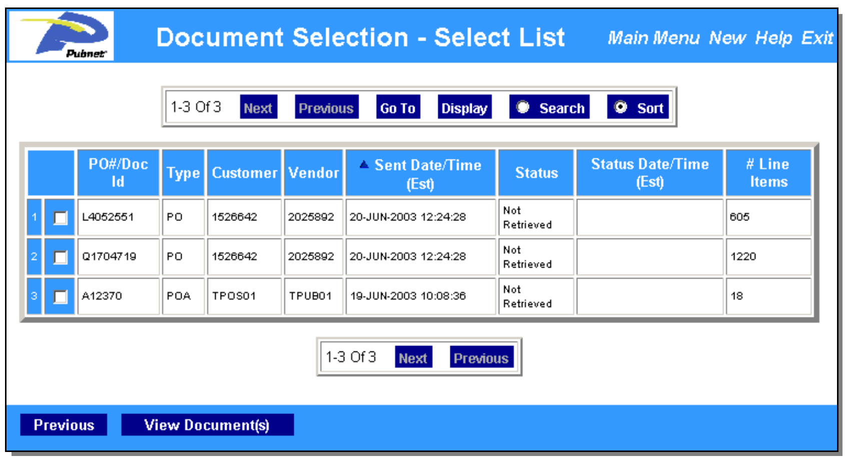
View Interactive Results

The *View Interactive Results* option allows you to view the output of your document selection directly online.

To view the results of your document selection:

1. **Select *View Interactive Results* from the *Specify Transaction Status* drop down list**
2. **Click the Submit button**

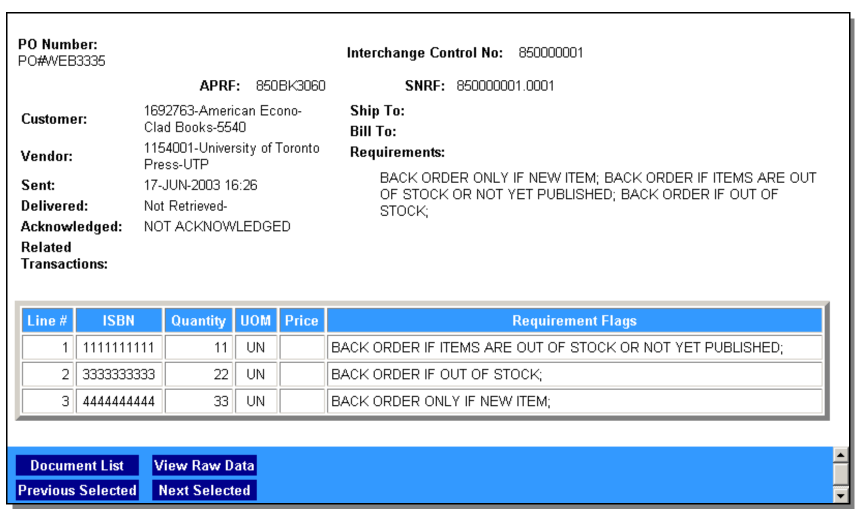
   The list of documents selected will then be displayed on screen similar to the example below.



		PO#/Doc Id	Type	Customer	Vendor	Sent Date/Time (Est)	Status	Status Date/Time (Est)	# Line Items
1		L4052551	PO	1526642	2025892	20-JUN-2003 12:24:28	Not Retrieved		605
2		Q1704719	PO	1526642	2025892	20-JUN-2003 12:24:28	Not Retrieved		1220
3		A12370	POA	TPOS01	TPUB01	19-JUN-2003 10:08:36	Not Retrieved		18

3. **Place a check next to the reports you wish to view and click *View Documents*.**

   A detailed view of the document will be brought up in a new window similar to the example below.



Line #	ISBN	Quantity	UOM	Price	Requirement Flags
1	1111111111	11	UN		BACK ORDER IF ITEMS ARE OUT OF STOCK OR NOT YET PUBLISHED;
2	3333333333	22	UN		BACK ORDER IF OUT OF STOCK;
3	4444444444	33	UN		BACK ORDER ONLY IF NEW ITEM;

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Generate Text Activity Report

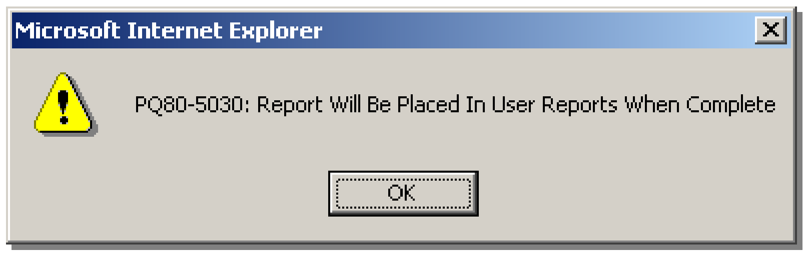
You can use the Text Activity Report option to retrieve a summary view of activity related to selected transactions.

Steps

To generate a text activity report:

1. **Select *Generate Text Activity Report* from the drop down list**
2. **Click the Submit button**

   You will get a message indicating that the resulting report will be placed in User Reports similar to the example below once started.



3. **Click OK**

   The report will be placed in User Reports with a type of "Pubnet Activity Rpt".

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Steps

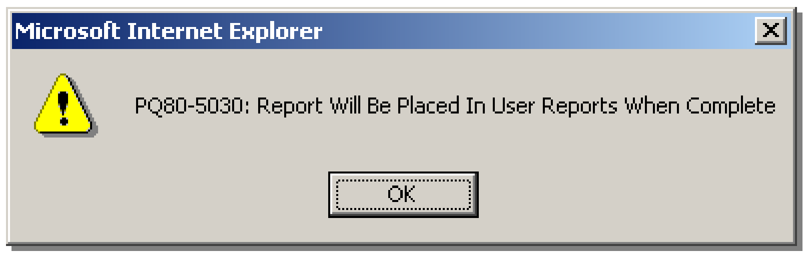
Generate CSV Activity Report

You can use the *CSV Activity Report* option to retrieve a summary view of activity related to selected transactions.

To generate a CSV Activity report

1. **Select the Generate CSV Activity Report option from the drop down list**
2. **Click the Submit button**

   You will get a message indicating that the resulting report will be placed in User Reports similar to the example below once started.



3. **Click OK**

   The report will be placed in User Reports with a type of "Pubnet Activity CSV".

Searching Documents Online-*Document Selection*

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Steps

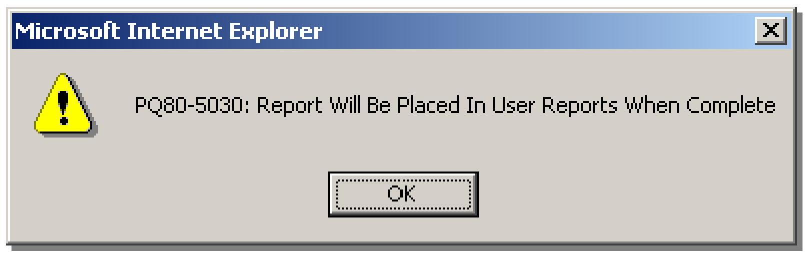
Generate Detailed Report

You can use the *Detailed Report* option to retrieve a detailed view of activity related to selected transactions that includes line item details.

To generate a Detailed Report

1. **Select the Generate CSV Activity Report option from the drop down list**
2. **Click the Submit button**

   You will get a message indicating that the resulting report will be placed in User Reports similar to the example below once started.



3. **Click OK**

   The report will be placed in User Reports with a type of "Pubnet Detailed Rpt".

Searching Documents Online-*Document Selection*

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Generate Exceptions Report

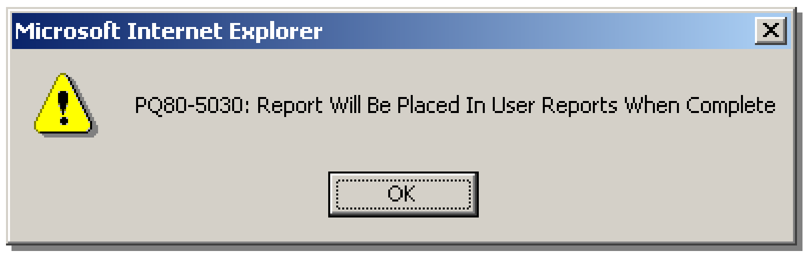
You can use the *Detailed Report* option to retrieve a detailed view of the transactions that contain Pubnet X12 Standards syntax errors.

Steps

To generate an Exceptions Report

1. **Select the Generate Exceptions Report option from the drop down list**
2. **Click the Submit button**

   You will get a message indicating that the resulting report will be placed in User Reports similar to the example below once started.



3. **Click OK**

   The report will be placed in User Reports with a type of "Pubnet Exception Rpt".

Document Selection Options-*Interactive Results*

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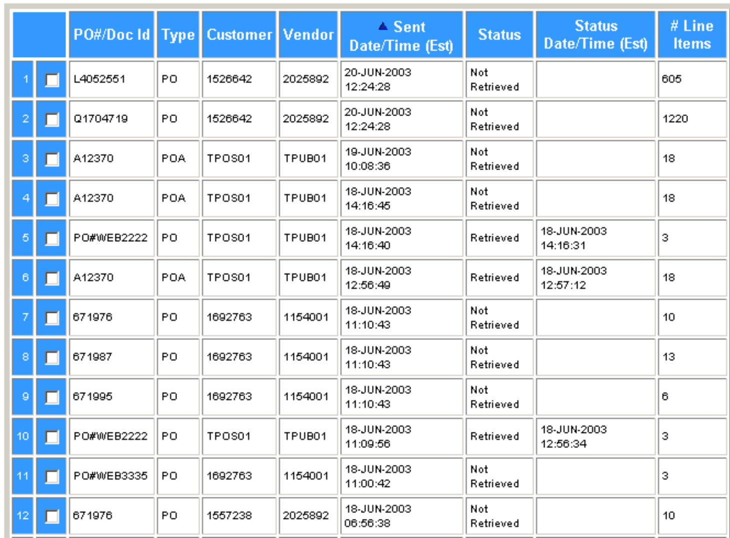
As you research transactions in DCTS, the system will sometimes return a large set of results. When this occurs, you can use the options on the navigation bar to locate an item that you don't currently see. In addition to the Next and Previous options, you can:

- **Advance** to a specific item number later in the results list (Go To)
- **Increase** the number of items displayed on a page (Display)
- **Locate** a specific record in a certain column (Search)
- **Sort** the results using a different column (Sort)

Navigation bar



		PO#/Doc Id	Type	Customer	Vendor	▲ Sent Date/Time (Est)	Status	Status Date/Time (Est)	# Line Items
1	☐	L4052551	PO	1526642	2025892	20-JUN-2003 12:24:28	Not Retrieved		605
2	☐	Q1704719	PO	1526642	2025892	20-JUN-2003 12:24:28	Not Retrieved		1220
3	☐	A12370	POA	TPOS01	TPUB01	19-JUN-2003 10:08:36	Not Retrieved		18
4	☐	A12370	POA	TPOS01	TPUB01	18-JUN-2003 14:16:45	Not Retrieved		18
5	☐	PO#WEB2222	PO	TPOS01	TPUB01	18-JUN-2003 14:16:40	Retrieved	18-JUN-2003 14:16:31	3
6	☐	A12370	POA	TPOS01	TPUB01	18-JUN-2003 12:56:49	Retrieved	18-JUN-2003 12:57:12	18
7	☐	671976	PO	1692763	1154001	18-JUN-2003 11:10:43	Not Retrieved		10
8	☐	671987	PO	1692763	1154001	18-JUN-2003 11:10:43	Not Retrieved		13
9	☐	671995	PO	1692763	1154001	18-JUN-2003 11:10:43	Not Retrieved		6
10	☐	PO#WEB2222	PO	TPOS01	TPUB01	18-JUN-2003 11:09:56	Retrieved	18-JUN-2003 12:56:34	3
11	☐	PO#WEB3335	PO	1692763	1154001	18-JUN-2003 11:00:42	Not Retrieved		3
12	☐	671976	PO	1557238	2025892	18-JUN-2003 06:56:38	Not Retrieved		10

Advancing to a Specific Item Number (Go To)

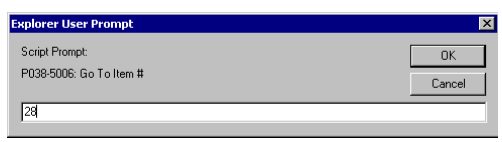
Use the Go To option if you want advance the display to another item number. For example, if the system currently displays items 1-20 of 100, you could use the Go To option to advance the display to item 50.

To advance to a specific item in the item list:

Steps

1. Choose the Go To radio button.

The system requests the item number you want to locate.



2. Enter the item number you want to locate, then choose OK.

The system advances the item list to the item you requested.

Document Selection Options-*Interactive Results*

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Increasing the Amount of Items Displayed (Display)

Choose the Display option if you want to increase (or decrease) the number of items displayed on the current page. By default, the system displays up to 20 items.

Steps

To change the amount of rows displayed in the item list:

1. **Choose the Display radio button.**

   The system requests the number of rows you want displayed per page.

2. **Enter the number of rows you want, and then choose OK.**

   The item lists displays the number of items you requested.

Searching for a Specific Value in a Column (Search)

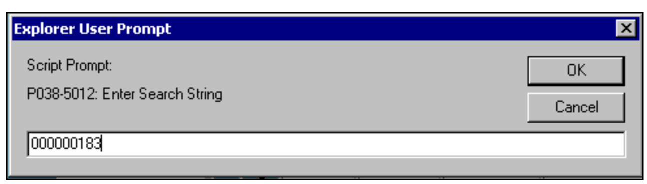
You can use the Search option to locate a specific value in one of the columns on the item list.

Steps

To search a particular column in the item list for a particular value:

1. **Choose the Search radio button.**
2. **Choose the Column label for the column you want to search.**

   The system requests the value you want to locate.



3. **Enter the value you want to locate and then choose OK. You can use the asterisk (*) character as a wildcard.**

   If the system finds a match, it advances the item list to the matching item.

Sorting the Results by a Different Column (Sort)

By default, the item list is sorted by DCTS reference number. You can use the Sort option to switch the sort criterion to a different column.

Steps

To sort the item list on a different column:

1. **Choose the Search radio button.**
2. **Choose the Column label for the column you want to search.**

   The system sorts the contents of the item list using the values in the column you selected.

		PO#/Doc Id	▼ Type	Customer	Vendor	Sent Date/Time (Est)	Status	Status Date/Time (Est)	# Line Items
1	☐	PO#WEB3333	PO	1692763	1154001	17-JUN-2003 08:33:02	Retrieved	17-JUN-2003 09:58:07	3
2	☐	PO#WEB3334	PO	1692763	1154001	17-JUN-2003 08:34:48	Retrieved	17-JUN-2003 09:58:08	3
3	☐	L4052551	PO	1526642	2025892	17-JUN-2003 09:01:33	Not Retrieved		605
4	☐	Q1704719	PO	1526642	2025892	17-JUN-2003 09:01:33	Not Retrieved		1220
5	☐	PO#WEB3334	PO	1692763	1154001	17-JUN-2003 09:58:39	Retrieved	17-JUN-2003 10:20:14	3
6	☐	L4052551	PO	1526642	2025892	17-JUN-2003 10:36:02	Not Retrieved		605
7	☐	Q1704719	PO	1526642	2025892	17-JUN-2003 10:36:02	Not Retrieved		1220
8	☐	PO#WEB3333	PO	1692763	1154001	17-JUN-2003 10:58:04	Not Retrieved		3
9	☐	PO#WEB3335	PO	1692763	1154001	17-JUN-2003 10:59:32	Retrieved	17-JUN-2003 14:24:53	3
10	☐	PO#WEB3335	PO	1692763	1154001	17-JUN-2003 11:12:59	Retrieved	17-JUN-2003 14:24:53	3
11	☐	PO#WEB3335	PO	1692763	1154001	17-JUN-2003 15:11:56	Retrieved	17-JUN-2003 15:12:09	3

3. **If you want to sort the column in the opposite order, click on the Column label again.**

   The system switches the contents of the item list to the opposite order.

> The symbol ▲ or ▼ in the column heading indicates which column is used to sort the item list and identifies whether the column is sorted in ascending (▲) or descending (▼) order.

Document Selection Navigation-*Interactive Results*

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Steps

List of Selected Documents Navigation

There are two system buttons on the List of Selected Documents Screen.

Choose the navigation button you wish to use based on the actions they create below:

If you want to:	**Then:**
Return to the previous screen	Select **Previous**
View the selected documents	Select **View Documents**

The information contained in a document varies according to document type. There are four document types tracked by DCTS listed below:

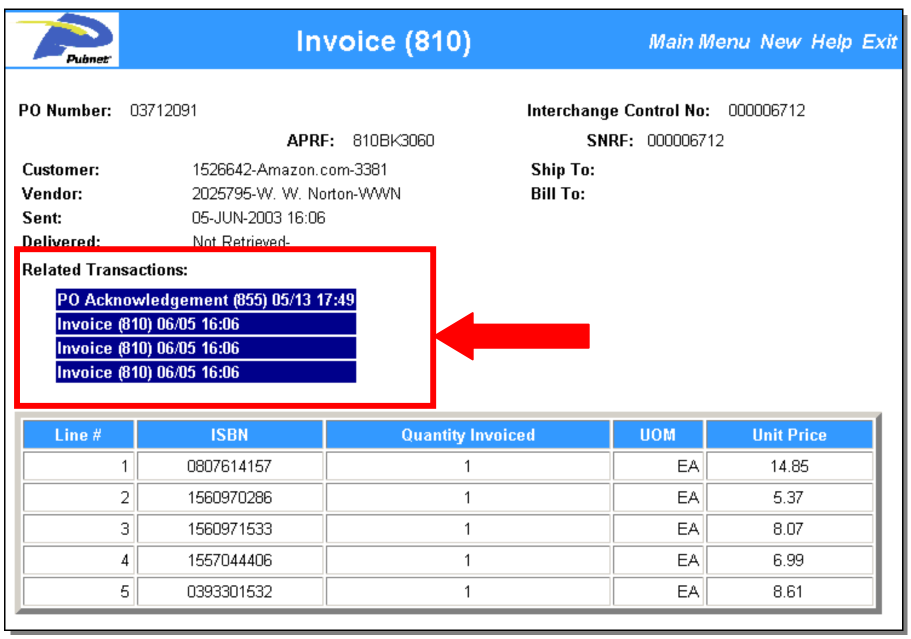
- Invoices
- Purchase Orders
- Purchase Order Acknowledgements
- Ship Notices

About Invoices

An invoice document is also known as an *Invoice Transaction Set (810)* for use within the context of an Electronic Data Interchange (EDI) environment. The transaction set can be used to provide for customary and established business and industry practice relative to the billing for goods/ services provided.

For more detailed information on the Invoice Transaction Set (810), click here.

Following is an example of the type of information contained in an Invoice document:



Pubnet

Invoice (810)

Main Menu New Help Exit

PO Number: 03712091
Interchange Control No: 000006712
APRF: 810BK3060
SNRF: 000006712

Customer: 1526642-Amazon.com-3381
Vendor: 2025795-W. W. Norton-WWN
Sent: 05-JUN-2003 16:06
Delivered: Not Retrieved-
Ship To:
Bill To:

Related Transactions:

PO Acknowledgement (855) 05/13 17:49
Invoice (810) 06/05 16:06
Invoice (810) 06/05 16:06
Invoice (810) 06/05 16:06

Line #	ISBN	Quantity Invoiced	UOM	Unit Price
1	0807614157	1	EA	14.85
2	1560970286	1	EA	5.37
3	1560971533	1	EA	8.07
4	1557044406	1	EA	6.99
5	0393301532	1	EA	8.61

Links are highlighted in purple and may be clicked on to view related transactions.

Viewing Interactive Documents-*Interactive Results*

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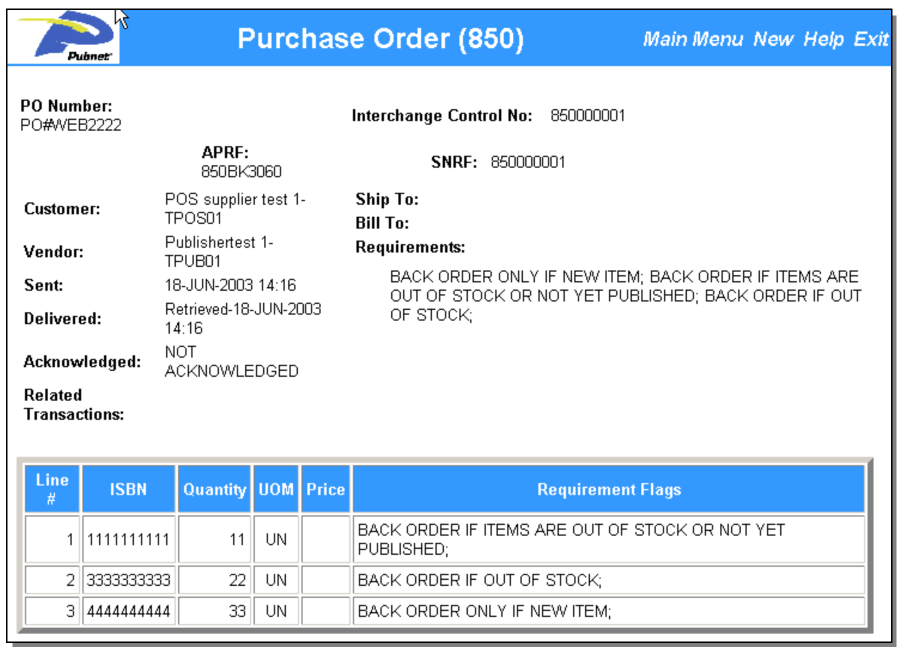
About Purchase Orders

A Purchase Order document is also known as the Purchase Order Transaction Set (850) for use within the context of an Electronic Data Interchange (EDI) environment. The transaction set can be used to provide for customary and established business and industry practice relative to the placement of purchase orders for goods/ services. This transaction set should not be used to convey purchase order changes or purchase order acknowledgment information.

For detailed information on the Purchase Order Transaction Set (850), click here.

Following is an example of the type of information contained in a Purchase Order document.



Purchase Order (850)

Main Menu New Help Exit

PO Number: PO#WEB2222

Interchange Control No: 850000001

APRF: 850BK3060

SNRF: 850000001

Customer: POS supplier test 1-TPOS01

Vendor: Publishertest 1-TPUB01

Sent: 18-JUN-2003 14:16

Delivered: Retrieved-18-JUN-2003 14:16

Acknowledged: NOT ACKNOWLEDGED

Related Transactions:

Ship To:

Bill To:

Requirements:

BACK ORDER ONLY IF NEW ITEM; BACK ORDER IF ITEMS ARE OUT OF STOCK OR NOT YET PUBLISHED; BACK ORDER IF OUT OF STOCK;

Line #	ISBN	Quantity	UOM	Price	Requirement Flags
1	1111111111	11	UN		BACK ORDER IF ITEMS ARE OUT OF STOCK OR NOT YET PUBLISHED;
2	3333333333	22	UN		BACK ORDER IF OUT OF STOCK;
3	4444444444	33	UN		BACK ORDER ONLY IF NEW ITEM;

Viewing Interactive Documents-*Interactive Results*

(continued)

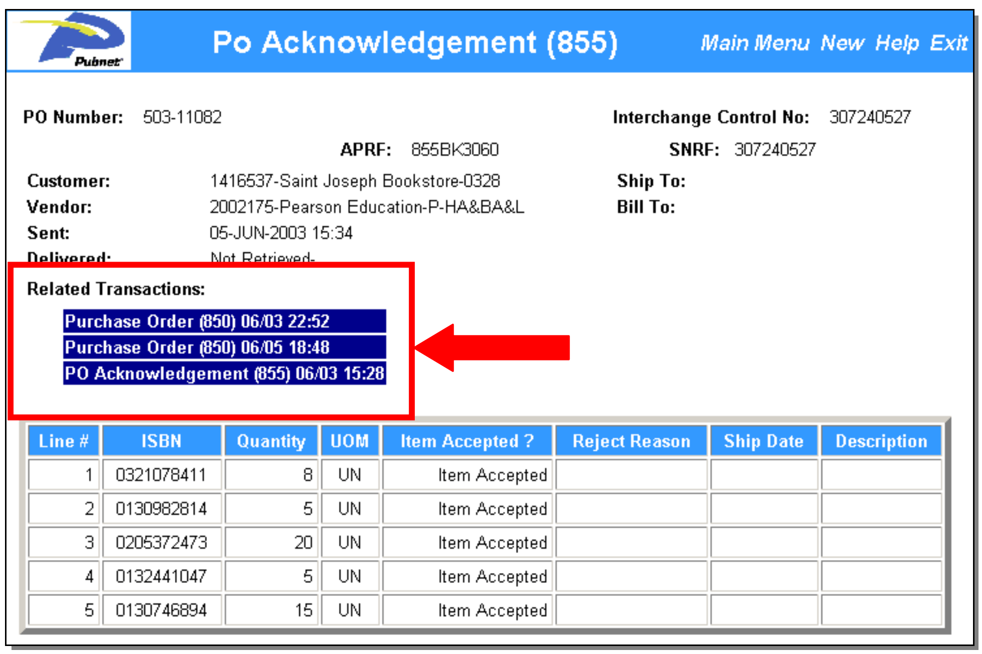
About Purchase Order Acknowledgements

A Purchase Order Acknowledgement document is also known as the Purchase Order Acknowledgment Transaction Set (855) for use within the context of an Electronic Data Interchange (EDI) environment. The transaction set can be used to provide for customary and established business and industry practice relative to a seller's acknowledgment of a buyer's purchase order.

This transaction set can also be used as notification of a vendor generated order. This usage advises a buyer that a vendor has or will ship merchandise as prearranged in their partnership.

For detailed information on the Purchase Order Acknowledgement Transaction Set (855), click here

Following is an example of the type of information contained in a Purchase Order Acknowledgement document.



Pubnet
Po Acknowledgement (855)
Main Menu New Help Exit

PO Number: 503-11082
Interchange Control No: 307240527
APRF: 855BK3060
SNRF: 307240527
Customer: 1416537-Saint Joseph Bookstore-0328
Vendor: 2002175-Pearson Education-P-HA&BA&L
Sent: 05-JUN-2003 15:34
Delivered: Not Retrieved-
Ship To:
Bill To:

Related Transactions:
Purchase Order (850) 06/03 22:52
Purchase Order (850) 06/05 18:48
PO Acknowledgement (855) 06/03 15:28

Line #	ISBN	Quantity	UOM	Item Accepted ?	Reject Reason	Ship Date	Description
1	0321078411	8	UN	Item Accepted			
2	0130982814	5	UN	Item Accepted			
3	0205372473	20	UN	Item Accepted			
4	0132441047	5	UN	Item Accepted			
5	0130746894	15	UN	Item Accepted			

Links are highlighted in purple and may be clicked on to view related transactions.

Viewing Interactive Documents-*Interactive Results*

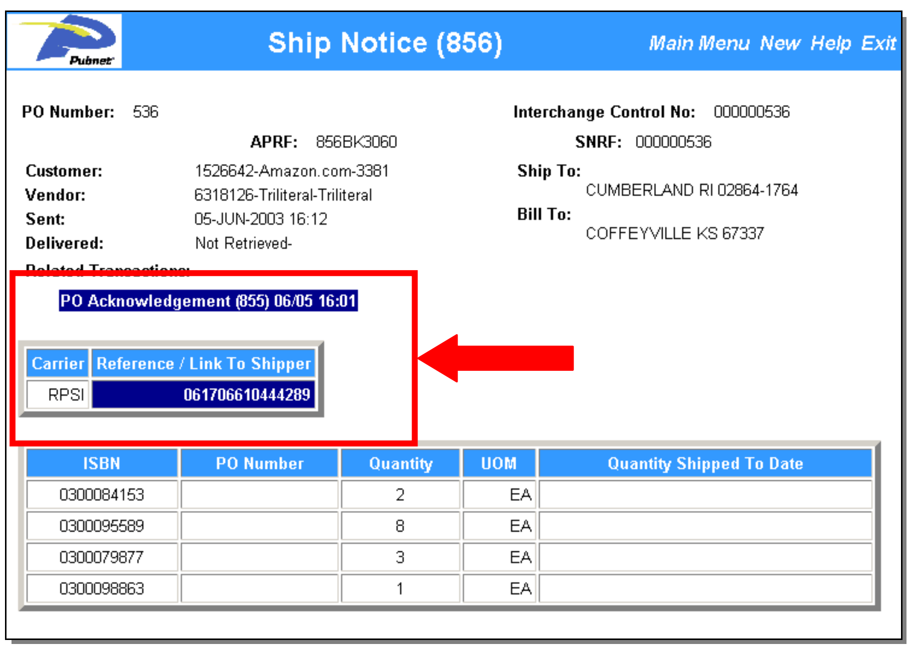
(continued)

About Ship Notices

A Ship Notice document is also known as the Ship Notice/Manifest Transaction Set (856) for use within the context of an Electronic Data Interchange (EDI) environment. The transaction set can be used to list the contents of a shipment of goods as well as additional information relating to the shipment, such as order information, product description, physical characteristics, type of packaging, marking, carrier information, and configuration of goods within the transportation equipment. The transaction set enables the sender to describe the contents and configuration of a shipment in various levels of detail and provides an ordered flexibility to convey information.

The sender of this transaction is the organization responsible for detailing and communicating the contents of a shipment, or shipments, to one or more receivers of the transaction set. The receiver of this transaction set can be any organization having an interest in the contents of a shipment or information about the contents of a shipment. For detailed information on the Ship Notice Transaction Set (856), click here

Following is an example of the type of information contained in a Purchase Order Acknowledgement document.



Ship Notice (856)

Main Menu New Help Exit

PO Number: 536

Interchange Control No: 000000536

APRF: 856BK3060

SNRF: 000000536

Customer: 1526642-Amazon.com-3381

Vendor: 6318126-Triliteral-Triliteral

Sent: 05-JUN-2003 16:12

Delivered: Not Retrieved-

Ship To: CUMBERLAND RI 02864-1764

Bill To: COFFEYVILLE KS 67337

Related Transactions:

PO Acknowledgement (855) 06/05 16:01

Carrier	Reference / Link To Shipper
RPSI	061706610444289

ISBN	PO Number	Quantity	UOM	Quantity Shipped To Date
0300084153		2	EA	
0300095589		8	EA	
0300079877		3	EA	
0300098863		1	EA	

Links are highlighted in purple and may be clicked on to view related transactions or the shipping information.

Viewing Document Navigation-*Interactive Results*

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System Buttons on the View Documents Screen

There are four system buttons on the View Documents Screen:

Steps

Choose the system button you wish to use based on the functions the provide below:

If you want to:	Then:
Return to the list of selected documents	Select **Documents List**
View the unformatted, raw data in a new browser window	Select **View Raw Data**
View the previous document in the list of selected documents	Select **Previous Selected**
View the next document in the list of selected documents.	Select **Next Selected**

User Report Descriptions

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The User Reports function displays any report(s) that you have generated for your own use. DCTS has four types of User: Reports

- Text Activity Report
- CSV Activity Report
- Detailed Report
- Exceptions Report

In addition to these reports, your company may also be able to access reports through the Organization Reports function that has been customized to meet your specific business requirements.

The reports can be generated on an on-demand basis, or they can be generated on a scheduled basis. You can generate the report for your own use, or you can generate the report so that other users of your organization can also view the report.

All reports with the exception of the CSV Activity Report may be viewed online. All reports may be downloaded as a compressed file.

User Report Descriptions *(continued)*

About The Text Activity Report

You can use the *Text Activity Report* to retrieve a summary view of selected documents. The *Text Activity Report* lists the Report Selection Criteria as well as the PO#, Type of Document, Customer & Vendor SAN#, Dates, Times and # of Line Items.

The following example shows the type of information that can be found in the Text Activity Report:

27-JUN-2003 14:45:10 **Page 1**

Activity Report

Requested By: Bookstores Test

Report Selection Criteria

Start Date & Time: 08-JUN-2003 05:00 **End Date & Time:** 16-JUN-2003 05:00

PO#: All

SNRF: All

Direction: All

Transaction Status: Any Status

Customer San#: all **Vendor San#:** all

Customer Name: **Vendor Name:**

PO Number	Type	Customer	Vendor	Date Sent	Status	Status Date	Lines
A12370	POA	TPOS01	TPUB01	09-JUN-2003 13:22:45	Retrieved	09-JUN-2003 13:25:43	37
A12370	POA	TPOS01	TPUB01	09-JUN-2003 13:49:47	Retrieved	09-JUN-2003 13:50:14	37
A12370	POA	TPSB	ENTS	13-JUN-2003 13:40:00	Not Retrieved		37
B513585	POA	1455427	1342118	10-JUN-2003 18:17:31	Not Retrieved		17
L4052551	PO	1526642	2025892	13-JUN-2003 14:17:52	Not Retrieved		606
L4052551	PO	1526642	2025892	13-JUN-2003 14:39:46	Not Retrieved		606
L4052551	PO	1526642	2025892	13-JUN-2003 15:34:48	Not Retrieved		606
L4052551	PO	1526642	2025892	13-JUN-2003 15:59:34	Not Retrieved		11
L4052551	PO	1526642	2025892	13-JUN-2003 16:04:04	Not Retrieved		606
L4052551	PO	1526642	2025892	13-JUN-2003 16:08:26	Not Retrieved		606
L4052551	PO	1526642	2025892	13-JUN-2003 16:21:25	Not Retrieved		606
PO#WEB2222	PO	TPOS01	TPUB01	09-JUN-2003 13:50:29	Retrieved	18-JUN-2003 12:56:34	4

When you generate the Report on a one-time basis, DCTS stores the report as a file (labeled **Pubnet Activity Rpt**) that you may download or display through the User Reports function. If you choose to create the report on a scheduled basis, you can choose whether the report is just for your own use (a **User Report**), or whether other users in your organization can also access the report (an **Organization Report**).

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About the CSV Activity Report

You can use the *CVS Activity Report* to retrieve a summary view of selected documents. The CSV Activity Report lists the Report Selection Criteria as well as the PO#, Type of Document, Customer & Vendor SAN#, Dates, Times and # of Line Items.

The following example shows the type of information that can be found in the CSV Activity Report.

	A	B	C	D	E	F	G	H
1	6/30/2003 7:54	Activity Report	Requested By: Bookstores Test					
2								
3	Report Selection Criteria							
4	Start Date & Time:	6/20/2003 5:00	End Date & Time:	7/1/2003 4:59				
5	PO#:	All						
6	SNRF:	All						
7	Direction:	All						
8	Transaction Status:	Any Status						
9	Customer San#:	all	Vendor San#:	all				
10	Customer Name:		Vendor Name:					
11								
12	PO Number	Type	Customer	Vendor	Date Sent	Status	Status Date	Lines
13	L4052551	PO	1526642	2025892	6/20/2003 12:24	Not Retrieved		606
14	Q1704719	PO	1526642	2025892	6/20/2003 12:24	Not Retrieved		1221
15								

When you generate the Report on a one-time basis, DCTS stores the report as a file (labeled **Pubnet Activity CSV)** that you may download through the User Reports function. If you choose to create the report on a scheduled basis, you can choose whether the report is just for your own use (a **User Report**), or whether other users in your organization can also access the report (an **Organization Report**).

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About the Detailed Report

You can use the *Detailed Report* to retrieve a detailed view of selected documents including line items. The *Detailed Report* lists the Report Selection Criteria, Document Header Information, as well as detailed information that varies according to the type of document.

The following example shows the type of information that can be found in the Detailed Report for a Ship Notice.

30-JUN-2003 15:28:16 **Page 1**

Detailed Report
Requested By: Bookstores Test

Report Selection Criteria

Start Date & Time: 05-JUN-2003 05:00 **End Date & Time:** 06-JUN-2003 04:59
PO#: All
SNRF: All
Direction: Ship Notice
Transaction Status: Any Status
Customer San#: all **Vendor San#:** all
Customer Name: **Vendor Name:**

30-JUN-2003 15:28:16 **Page 2**

Detailed Report
Requested By: Bookstores Test

PO Number: 536 **Interchange Control No:** 000000536
APRF: 856BK3060 **SNRF:** 000000536

Customer: 1526642-Amazon.com-3381 **Ship To:** CUMBERLAND RI 02864-1764
Vendor: 6318126-Triliteral-Triliteral
Sent: 05-JUN-2003 16:12:16 **Bill To:** LEXINGTON KY 40511
Delivered: Not Retrieved-
Related Transactions: PO Acknowledgement (855) 03-JUN-2003 16:26:56

Carrier	Reference / Link To Shipper
RPSI	061706610443831

Line #	ISBN	PO Number	Quantity	UOM	Quantity Shipped To Date
1	0262550229		1	EA	
2	0262050641		1	EA	
3	0262521857		1	EA	

See, "*Viewing Interactive Documents-Interactive Results*" for details on the type of information contained in the different document types.

When you generate the Map Usage Report on a one-time basis, DCTS stores the report as a file (labeled **Pubnet Detailed Rpt)** that you may download through the User Reports function. If you choose to create the report on a scheduled basis, you can choose whether the report is just for your own use (a **User Report**), or whether other users in your organization can also access the report (an **Organization Report**).

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About the Exceptions Report

You can use the *Exceptions Report* to retrieve a detailed view of selected documents that contain Pubnet X12 Standards syntax errors. The *Exceptions Report* lists the Report Selection Criteria, Document Summary Information as well as detailed information on the Pubnet syntax errors.

The following example shows the type of information that can be found in the Exceptions Report.

30-JUN-2003 07:51:26 **Page 1**

Exceptions Report

Requested By: Bookstores Test

Report Selection Criteria

Start Date & Time: 20-JUN-2003 05:00 **End Date & Time:** 01-JUL-2003 04:59

PO#: All

SNRF: All

Direction: All

Transaction Status: Any Status

Customer San#: all **Vendor San#:** all

Customer Name: **Vendor Name:**

PO Number	Type	Customer	Vendor	Date Sent	Status Date	Lines
L4052551	PO	1526642	2025892	20-JUN-2003 12:24:28		606
	552-UNRESOLVED:	If IT8_01 equals B, N, O, Y, Z, BK, SC, SP, SS, or SW, then IT8_02 must equal 0 or 1.				
	552-UNRESOLVED:	If IT8_01 equals B, N, O, Y, Z, BK, SC, SP, SS, or SW, then IT8_02 must equal 0 or 1.				
	552-UNRESOLVED:	If IT8_01 equals B, N, O, Y, Z, BK, SC, SP, SS, or SW, then IT8_02 must equal 0 or 1.				
	552-UNRESOLVED:	If IT8_01 equals B, N, O, Y, Z, BK, SC, SP, SS, or SW, then IT8_02 must equal 0 or 1.				
	552-UNRESOLVED:	If IT8_01 equals B, N, O, Y, Z, BK, SC, SP, SS, or SW, then IT8_02 must equal 0 or 1.				
	552-UNRESOLVED:	If IT8_01 equals B, N, O, Y, Z, BK, SC, SP, SS, or SW, then IT8_02 must equal 0 or 1.				
	552-UNRESOLVED:	If IT8_01 equals B, N, O, Y, Z, BK, SC, SP, SS, or SW, then IT8_02 must equal 0 or 1.				
	552-UNRESOLVED:	If IT8_01 equals B, N, O, Y, Z, BK, SC, SP, SS, or SW, then IT8_02 must equal 0 or 1.				
	552-UNRESOLVED:	If IT8_01 equals B, N, O, Y, Z, BK, SC, SP, SS, or SW, then IT8_02 must equal 0 or 1.				

When you generate the Map Usage Report on a one-time basis, DCTS stores the report as a file (labeled **Pubnet Exception Rpt)** that you may download through the User Reports function. If you choose to create the report on a scheduled basis, you can choose whether the report is just for your own use (a **User Report**), or whether other users in your organization can also access the report (an **Organization Report**).

Viewing User Reports

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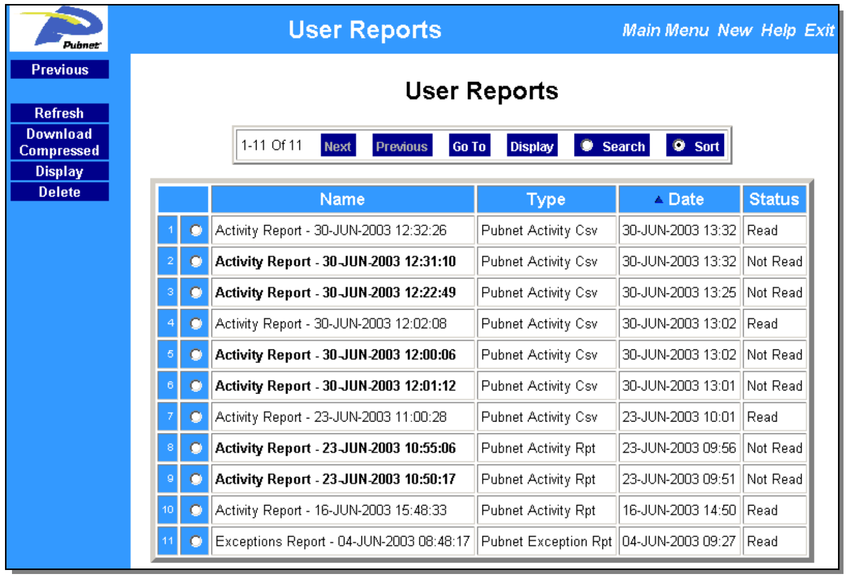
Steps

To view a User Report on-screen:

1. **From the Main Menu, choose *User Reports***

   Then the User Reports page will be displayed as the example shows below.



User Reports — Main Menu New Help Exit

Previous | Refresh | Download Compressed | Display | Delete

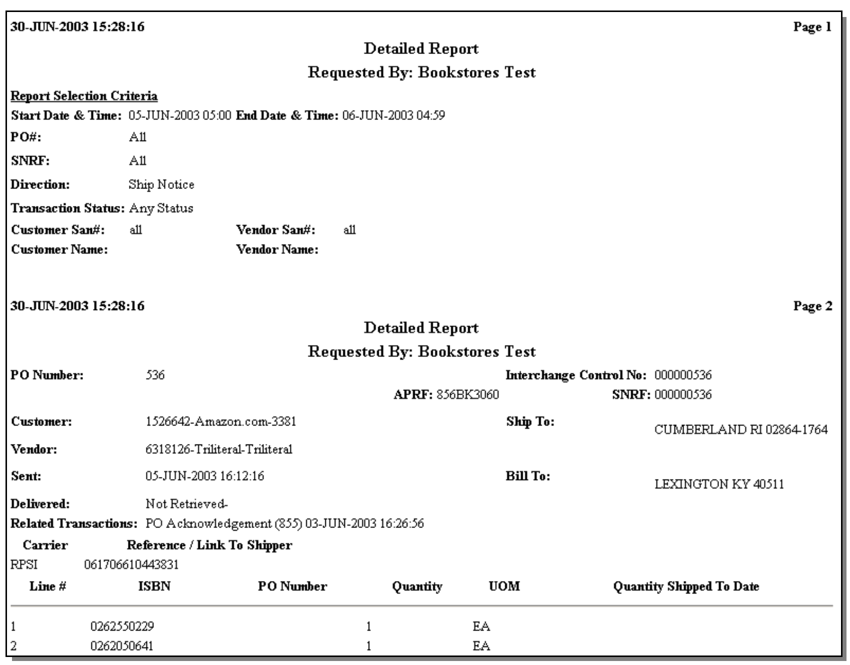
User Reports

1-11 Of 11 | Next | Previous | Go To | Display | Search | Sort

	Name	Type	Date	Status
1	Activity Report - 30-JUN-2003 12:32:26	Pubnet Activity Csv	30-JUN-2003 13:32	Read
2	Activity Report - 30-JUN-2003 12:31:10	Pubnet Activity Csv	30-JUN-2003 13:32	Not Read
3	Activity Report - 30-JUN-2003 12:22:49	Pubnet Activity Csv	30-JUN-2003 13:25	Not Read
4	Activity Report - 30-JUN-2003 12:02:08	Pubnet Activity Csv	30-JUN-2003 13:02	Read
5	Activity Report - 30-JUN-2003 12:00:06	Pubnet Activity Csv	30-JUN-2003 13:02	Not Read
6	Activity Report - 30-JUN-2003 12:01:12	Pubnet Activity Csv	30-JUN-2003 13:01	Not Read
7	Activity Report - 23-JUN-2003 11:00:28	Pubnet Activity Csv	23-JUN-2003 10:01	Read
8	Activity Report - 23-JUN-2003 10:55:06	Pubnet Activity Rpt	23-JUN-2003 09:56	Not Read
9	Activity Report - 23-JUN-2003 10:50:17	Pubnet Activity Rpt	23-JUN-2003 09:51	Not Read
10	Activity Report - 16-JUN-2003 15:48:33	Pubnet Activity Rpt	16-JUN-2003 14:50	Read
11	Exceptions Report - 04-JUN-2003 08:48:17	Pubnet Exception Rpt	04-JUN-2003 09:27	Read

2. **Select the report you wish to view and then click on the *Display* button.**

   A report in a new browser window will appear similar to the example below.



30-JUN-2003 15:28:16 Page 1

Detailed Report

Requested By: Bookstores Test

Report Selection Criteria

Start Date & Time: 05-JUN-2003 05:00 **End Date & Time:** 06-JUN-2003 04:59

PO#: All

SNRF: All

Direction: Ship Notice

Transaction Status: Any Status

Customer San#: all **Vendor San#:** all

Customer Name: **Vendor Name:**

30-JUN-2003 15:28:16 Page 2

Detailed Report

Requested By: Bookstores Test

PO Number: 536 **Interchange Control No:** 000000536

APRF: 856BK3060 **SNRF:** 000000536

Customer: 1526642-Amazon.com-3381 **Ship To:** CUMBERLAND RI 02864-1764

Vendor: 6318126-Triliteral-Triliteral

Sent: 05-JUN-2003 16:12:16 **Bill To:** LEXINGTON KY 40511

Delivered: Not Retrieved-

Related Transactions: PO Acknowledgement (855) 03-JUN-2003 16:26:56

Carrier	Reference / Link To Shipper
RPSI	061706610443831

Line #	ISBN	PO Number	Quantity	UOM	Quantity Shipped To Date
1	0262550229		1	EA	
2	0262050641		1	EA	

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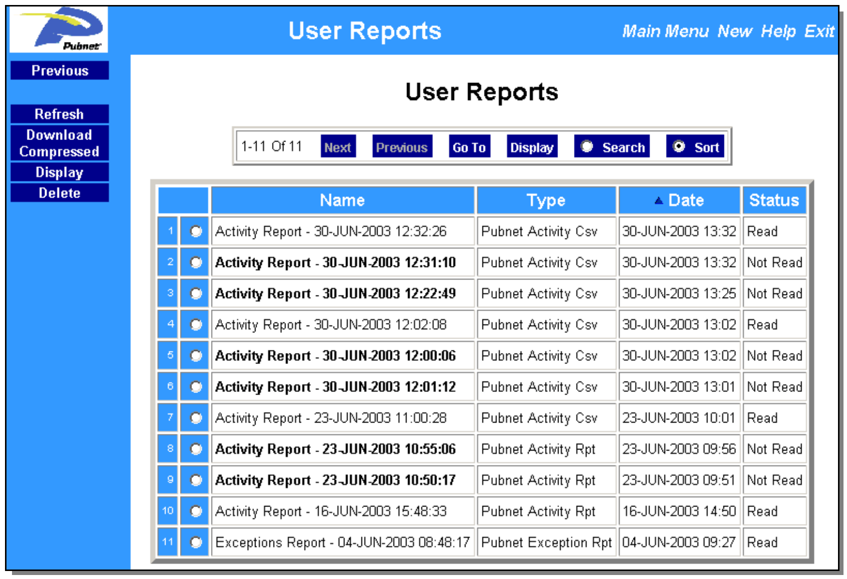
Downloading User Reports

Steps

To Download a User Report:

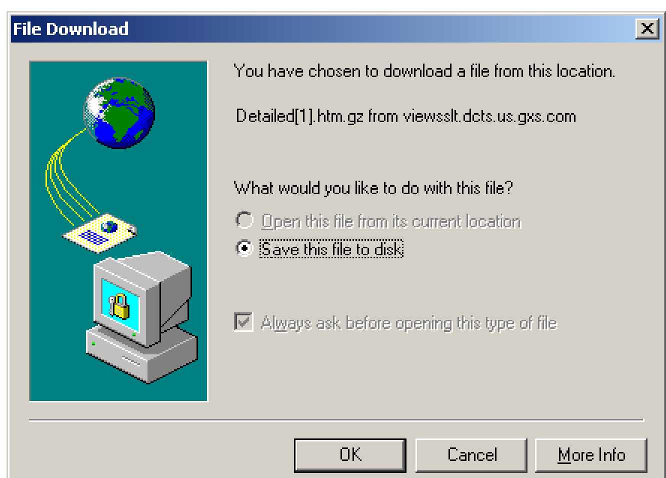
1. From the Main Menu, choose *User Reports*

The User Reports Page will then be displayed as the example shows below:



2. Select the report you wish to download and click the *Download Compressed* button.

The system then displays the following screen. The "Save this file to disk" option is highlighted.



3. Click OK

The system displays the following screen.

Downloading User Reports *(continued)*

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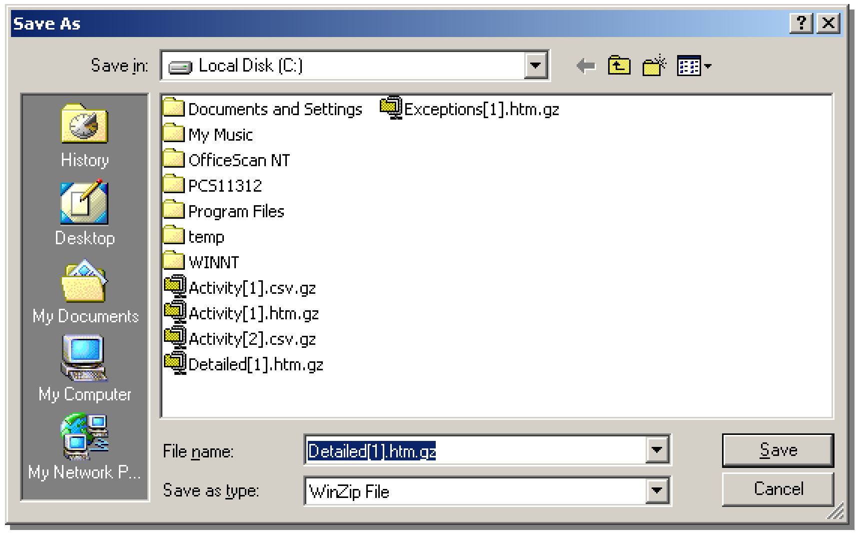
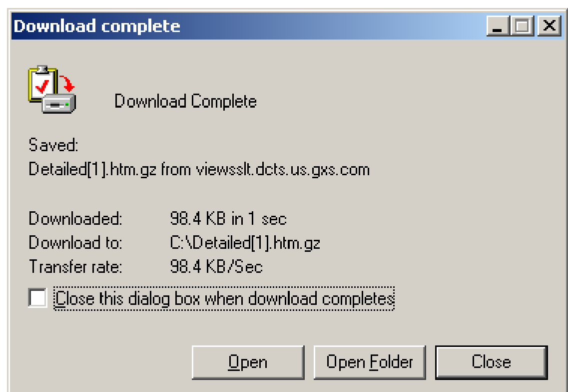
Steps



4. **Select the folder where you want to store the file.**
5. **Type the name you want to assign to the file in the File Name text box.**
6. **Click Save**

   The system downloads the compressed file and displays the following screen upon completion.



7. **Use the following table to determine your next action.**

If you want to:	**Then:**
Open the downloaded file	Select **Open** **Double click the file name** in WinZip window**.**
Open the folder to where the file was downloaded.	Select **Open Folder**
Close the screen	Select **Close**

Personal Administration Options

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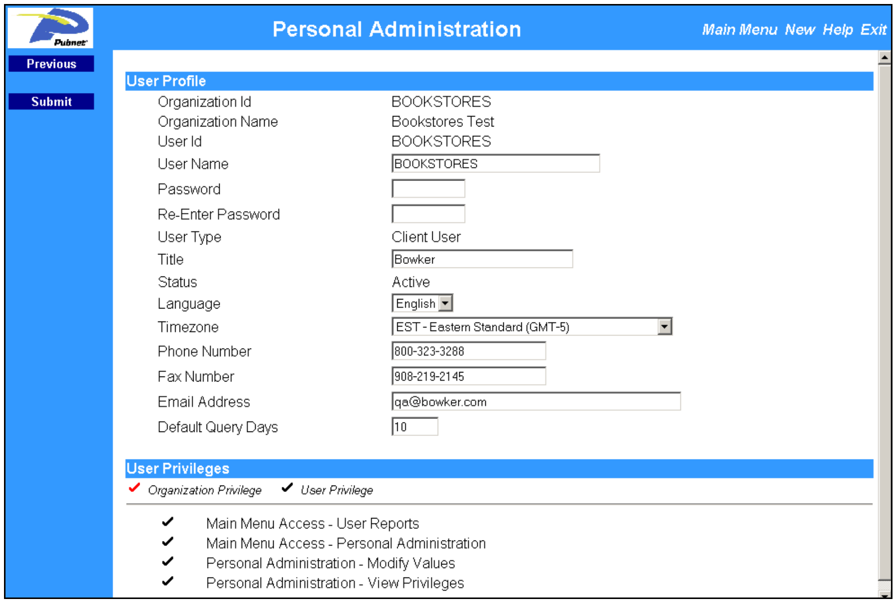
Managing Personal User Accounts

You can use the Personal Administration option to change your logon password and update your name, address, and phone number details. You can also use Personal Administration to switch to (or from) Daylight Savings Time, set your “cut off” time for displaying Delinquent Functional Acknowledgements (FAs), and modify the default time frame DCTS uses for general queries.



Your personal user account also shows your DCTS privileges. Check marks indicate whether the privileges apply to all users of your organization or your specific User ID.

A **red** check mark indicates the privilege has been given to your entire organizational level.

A **black** check mark indicates the privilege has been given specifically to your User ID.

Steps

Viewing Personal Profile Information

To view your personal DCTS profile information:

1. **Open the Main Menu and locate the Administration section.**
2. **Choose Personal Administration.**

   The system displays your personal profile.

Steps

Modifying Personal Profile Information

To modify your personal profile information:

1. **On the Personal Administration page, locate the information you want to change.**

If you want to…	Then…
Change your password	Type your new password in both the **Password** and **Re-Enter Password** fields. The password must be at least six characters long. These entries are case sensitive. For security purposes, you may want to use a mix of numbers and letters.
Change Title, Phone Number, Fax Number or Email Address	Type the new information in the appropriate field. Although this information is not currently used by the system, the **user name** is still a required field.
Switch your time zone or change to (or from) Daylight Savings Time	Click the **Timezone** drop down list and select the appropriate entry.
Change your default Query days	(*Default = 3 days*.) To change the value, type the new number of days you want in the **Default Query Days** text box.

2. **Click Submit.**

About Time Zones

The Client Administrator sets the time zone for an organization. If you prefer to view timestamp information based on a different time zone, you can change it in your personal profile. There are a few things to note when dealing with time zones:

- Changing your time zone does **not** change the time in the actual data.
- All date/time stamps collected and inserted into the DCTS database are in Eastern Time (ET).
- Your time zone may be different from that displayed by another DCTS user.