Release Notes Logistics

January 2023

The release notes describe what's new for the Logistics Portal. In version 2022.10 of the Logistics Portal, the following updates are available:

Security Roles

Security roles have been developed to determine which pages of the Logistics Portal a user can access or edit. (All active users, regardless of security role, can always view their own profile and reset their own password.)

Users may be assigned any of the following roles:

- **Basic Read Access** – Grants read-only access to the Logistics, Kits, Devices, Customers, and Rules menus. This role has no access to the Kit Type Master List, Reports, Billing, or Users.

- **Logistics Fulfillment** – Grants read-only access to the Customers, Devices, and Rules menus and read and write access to the Logistics and Kits (read-only for Kit Type Master list) menus. This role has no access to the Reports, Billing, or Users.

- **Logistics Advanced** – Grants read-only access to the Customer and Rules menus. This role has read and write access to Logistics, Kits (read-only for Kit Type Master list), and Devices. This role has no access to the Reports, Billing, or Users.

- **Customer Administrator** – Grants read and write access to the Customers menu only.

- **Report Administrator** – Grants read and write access to the Reports menu only.
- **Billing Administrator** – Grants read and write access to the Billing menu only.
- **User Administrator** – Grants read and write access to Users menu, Rules menu, and Kit Type Master List.

User Summary Page

A new User Summary page has been created as a hub for Logistics users to view and edit user records, filter, sort, create new users, and export search results. This page's features include the following:

- **Is Agent column:** Users can flag a user as an agent so that they can be added to the Agent list menu in the applicable fulfillment records. On the User Summary page, this data appears as a column with the header **Is Agent** containing the value "Yes" or "No."

Example 1: Is Agent Column

- **Active/Inactive toggle:** In the upper left corner of the User Summary page, users can toggle between **Active** and **Inactive**. This filters the user list to only show users that are enabled (Active) or disabled (Inactive).

Example 2: Active/Inactive Toggle
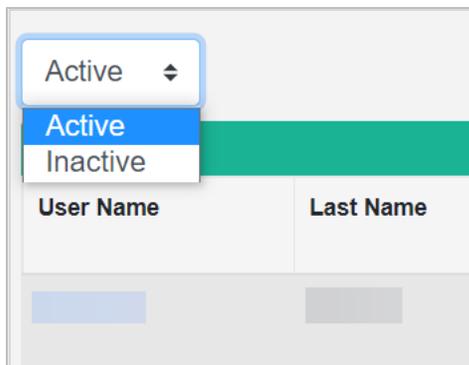
- **Filter By search bar:** At the top of the User Summary page, users can filter the user list by user name, first name, or last name (searchable when typed as **User_Name =**, **First_Name =**, or **Last_Name=**). Users can click **Go!** to return results or click **Clear Filter** to clear the previous search.

  Example 3: Filter By Search Bar
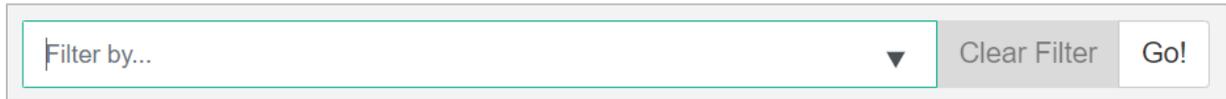
- **Quick menu:** On the far right of each row on the User Summary page is a quick menu for easy access to common actions without leaving the user list. When a user clicks to open the quick menu, it may reveal any of the following options:

  – **View User Detail** (opens the User Detail page)

  – **Change Password** (opens the Change Your Password page)

  – **Disable User** (disables an active user)

  – **Enable User** (enables an inactive user)

  Example 4: Quick Menu (Opened)
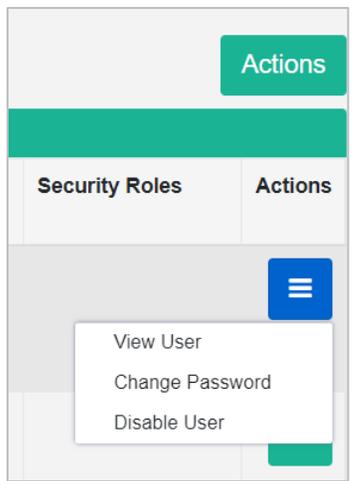
- **Export List:** In the upper right corner of the User Summary page, users can click **Actions** > **Export List** to export and download the currently displaying user list as an Excel file.

User Detail Page

A new User Detail page has been created as a hub for Logistics users to edit, disable, enable, or change the password for existing users individually.

The editable fields on this page include the following:

- First Name
- Last Name
- Time Zone
- Job Role/Title
- User Name
- Email
- Company

- Add As Agent
- Logistics Location
- Security Roles
- Notes
- History
- Password
- Confirm Password

New features for this page include:

- **Add as Agent checkbox:** Users can flag a user as an agent so that they can be added to the Agent list menu in the applicable fulfillment records. On the User Detail page, this information appears as the Add as Agent field containing a value of "Yes" or "No." Users can set this flag by checking or unchecking the **Add as Agent** checkbox when editing a user.

- **Uneditable disabled users:** Users ordinarily cannot edit information or change passwords for disabled users (the only available option is to **Enable** the disabled user).
- **Edit mode:** Users can edit another user's record by clicking **Actions** > **Edit User** on the User Details page.

Example 7: Edit User (Opened from Actions Menu)
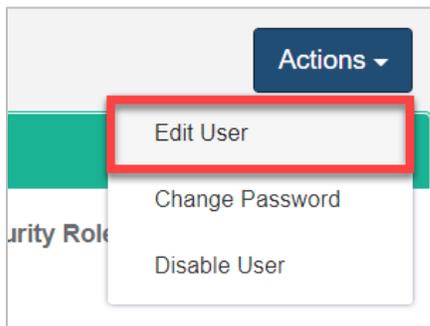
Monthly Billing Report

The Billing Report has been updated to show the VIV kit type number (also known as the SKU). This number also appears in a new location on the Service Level tab.

API Updates

In Kit PO outbound requests, the Device Type field has been updated to the tablet's internal part number. Each kit PO needs to have the tablet as a line item for us to send it to ODC.

Since the API updates, permissions have been reassigned as follows:

- Pick Slip Drop (Logistics Advanced)
- Device Linking (Logistics Advanced)
- Ship Confirm (Logistics Advanced)
- Device Receipt (Logistics Advanced)
- Device Status (Logistics Advanced)
- Reprocessing Complete (Medioh Only) (Logistics Advanced)
- Receive Inventory (ODC Only) (Logistics Advanced)
- Kit Build Linking (ODC Only) (Logistics Advanced)
- FulfillmentExternalController (Medioh Only)
    - Get Fulfillment List by Type (Basic Read Only, Logistics Fulfillment, Logistics Advanced)
    - Get Fulfillment by ID (Basic Read Only, Logistics Fulfillment, Logistics Advanced)
    - Ship Kit (Logistics Fulfillment, Logistics Advanced)
- Kit Detail (Medioh Only) (Basic Read Only, Logistics Fulfillment, Logistics Advanced)

Fixes

- **VIVY-5219** – The Logistics Portal Monthly Billing report zip file did not generate as expected. The report was displaying special characters instead of underscores. This issue was resolved, and the report zip file now generates.
- **VIVY-6871** – On the Fulfillment Orders page, it was possible to type a PO box value on the **Pick Up Address** card. Validation was added to prevent this type of information in the address boxes.
- **VIVY-6677** – On the Logistics Dashboard page, the **On Hold** card was opening the Reprocess Kit page rather than the Fulfillment Orders page and not showing the correct number of kits in On Hold status. The card now shows the total fulfillments on hold and opens the Fulfillment Orders page.
- **VIVY-6743** – The logic for the unread messages count on the Fulfillment Orders tab was not consistent with the logic for the unread message count filter in the Fulfillment List. This discrepancy was resolved, and the numbers are now consistent.
- **VIVY-6930** – When creating a device order, after adding the device models, the user could click **Previous** to change the manufacturer. The user could continue the order with devices that may not

be supported for the vendor. Now, if the user changes the manufacturer, the order is reinitialized to avoid errors.

- **VIVY-7398** – When exporting the Fulfillment Order list for kit pickups, the **Pickup Date** and **Received Date** were blank in the extract. The report now shows these dates.

- **VIVY-8706** – On the Fulfillment Orders page, the filter list for fulfillment types was missing the arrow icon.

- **VIVY-8985** – On the Kit Ship screen, the **Ship Canceled** reason menu was disappearing before the user could select it. The menu was updated to display as expected.

- **VIVY-8949** – When creating a device fulfillment order and marking it as shipped, if the user did not add a return tracking number, then the other tracking information was not visible on the Fulfillment Detail page. The system was updated to show the tracking information in this scenario.

- **VIVY-8950** – The list exported from the Fulfillment Orders page (filtered to Kit Pickup) was not showing values in the **Scheduled Pickup** columns. The columns now include this data after export.

- **VIVY-8936** – The validation for Kit Pickup Fulfillment Pickup Address PO Box was not working properly. If the user clicked **Edit** and then **OK** without modifying Address Line 1, an error message appeared. This error message no longer appears when editing the address.

- **VIVY-8900** – The request component replacement error message was showing the style code next to the kit number. This code was removed.

- **VIVY-8656** – On the Fulfillment List page, the horizontal scroll bar was not appearing when the columns extended past the default page width. The scroll bar is now visible as expected.

- **VIVY-8645** – In some scenarios, a Fulfillment record was created without an associated Fulfillment Detail record in the database. The system was updated so that this issue no longer occurs.

- **VIVY-8991** – The Kit Component Replacement, Kit Pickup, and Device Order pages all have a **Cancel** submenu in the **Action** menu. A formatting update was applied to the submenu for each of these pages to fix the issue of the submenu sometimes disappearing before the user can select an option.

- **VIVY-8978** – On the Kit Ship Fulfillment Detail Page Record Information card, the Logistics Center was appearing twice, and an extra character was visible to the right of Kit Pool. These display issues were fixed.