

Appian Overview and Integration

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Purpose of this document

This document describes the setup and functional steps to setup and use Ceres with the TMW Systems Appian software to facilitate routing related to Agency deliveries, Donation pickups, and Warehouse/Location transfers.

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Purpose

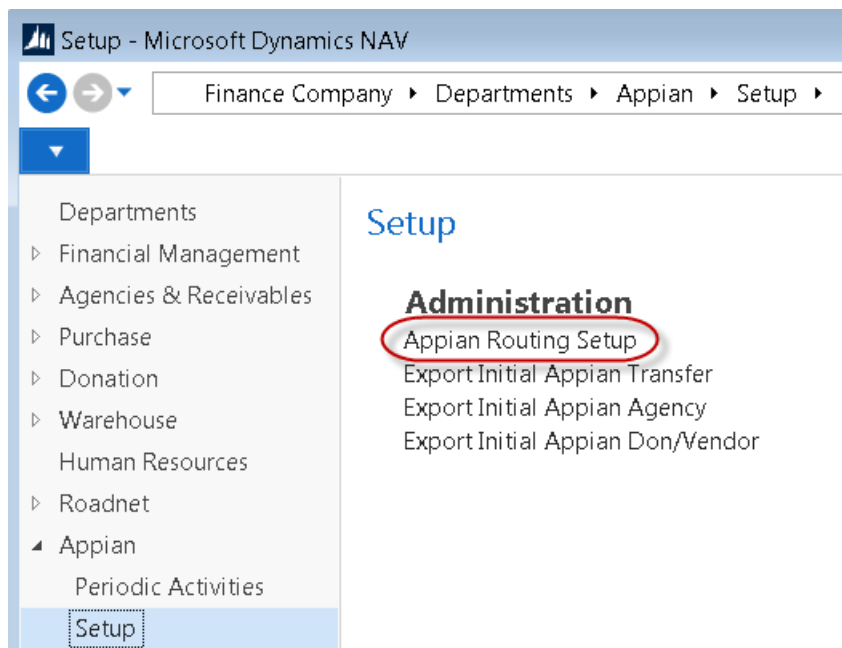
Currently there are two primary truck/ delivery routing solutions used in the Feeding America network, Roadnet and TMW Systems Appian Logistics. Both integrate with Ceres, and have procedure documents related to that use.

This document describes the setup and functional steps to setup and use Ceres with Appian to facilitate routing for Agency deliveries, Donation pickups, and Warehouse/Location transfers.

Ceres object release 4.01.56 is required for the functionality documented in this procedure.

Setup

The Appian Routing Setup can be accessed from Departments → Appian → Setup → Administration → Appian Routing Setup.



General FastTab

The General FastTab describes the basic setup for Appian.

The screenshot shows the 'Appian Routing Setup' dialog box with the 'General' tab selected. The dialog contains the following fields and values:

Field	Value
Appian No. Series:	APPIAN
NST Outbound Appian Direct...	D:\Client Backups\...
Appian File Directory:	ng America) Ceres\...
Default State:	MO
Version:	1
Last Dispatch Date:	12/07/12
Pallet Count Meth...	System
Pallet Cubic Feet:	1.50
Rounding Precision:	0.01
Rounding Type:	Nearest

An 'OK' button is located at the bottom right of the dialog.

Appian No. Series: Allows the user to define a number series so multiple export files can be stored in the same folder without appending or overwriting each other.

NST Outbound Appian Directory: Directory where the outbound Appian files will be stored.

Appian File Directory: Directory where the Appian files will be stored.

Default State: Typically the state where the food bank resides. This field is updated automatically from the routing import

Version: Version of the Appian file. This field is updated automatically from the routing import.

Last Dispatch Date: Date the information was last dispatched. This field is updated automatically from the routing import.

Pallet Count Method: Select from the drop down as to how you would like the pallet count to be calculated. The options are System or Manual.

- If System is selected, the Pallet Count will be calculated by dividing the Total Cubic Feet by Pallet Cubic Feet
- If Manual is selected, the Pallet Count will be calculated by totaling the Frozen Pallet Count, Ref Pallet Count, and Dry Pallet Count as specified on the Delivery/Web FastTab of the Order Header

Pallet Cubic Feet: Average pallet size used to calculate truck loads and capacity.

Rounding Precision: Input the rounding precision for the total cubic feet calculation. Input .01 to round to two decimal.

Rounding Type: Select the rounding precision for the total cubic feet calculation. The options are Nearest, Up, or Down.

Agency FastTab

The Agency FastTab provides information about the Agency & Agency Order/Pick files.

Agency ^			
Last File Processed:	<input type="text"/>	User Defined Field 2:	<input type="text"/>
Last File Processed Date/Time:	<input type="text"/>	User Defined Field 3:	<input type="text"/>
User Defined Field 1:	<input type="text"/>	User Defined Field 4:	<input type="text"/>
		User Defined Field 5:	<input type="text"/>

Last File Processed: Name of the Agency file that was last processed. This field is updated by Appian.

Last File Processed Date/Time: Date and time the last Agency file was processed. This field is updated automatically by Appian.

User Defined Fields 1-5: The user can select up to fields from the Sales (Agency) Header Table to be included in the export file. These fields are not mandatory.

Donation FastTab

The Donation FastTab provides information about the Donation Order files.

Donation ^			
Last File Processed:	<input type="text" value="C:\Appian\Sample ..."/>	User Defined Field 2:	<input type="text"/>
Last File Processed Date/Time:	<input type="text" value="12/12/2012 8:42:..."/>	User Defined Field 3:	<input type="text"/>
User Defined Field 1:	<input type="text"/>	User Defined Field 4:	<input type="text"/>
		User Defined Field 5:	<input type="text"/>

Last File Processed: Name of the Donation file that was last processed. This field is updated by Appian.

Last File Processed Date/Time: Date and time the last Donation file was processed. This field is updated automatically by Appian.

User Defined Fields 1-5: The user can select up to fields from the Purchase/ Donation Header Table to be included in the export file. These fields are not mandatory.

Transfer FastTab

The Transfer FastTab provides information about the Transfer Order files.

Transfer			
Last File Processed:	C:\Temp\Testing_Upload...	User Defined Field 2:	
Last File Processed Date/Time:	9/7/2016 10:52 AM	User Defined Field 3:	
		User Defined Field 4:	
User Defined Field 1:		User Defined Field 5:	

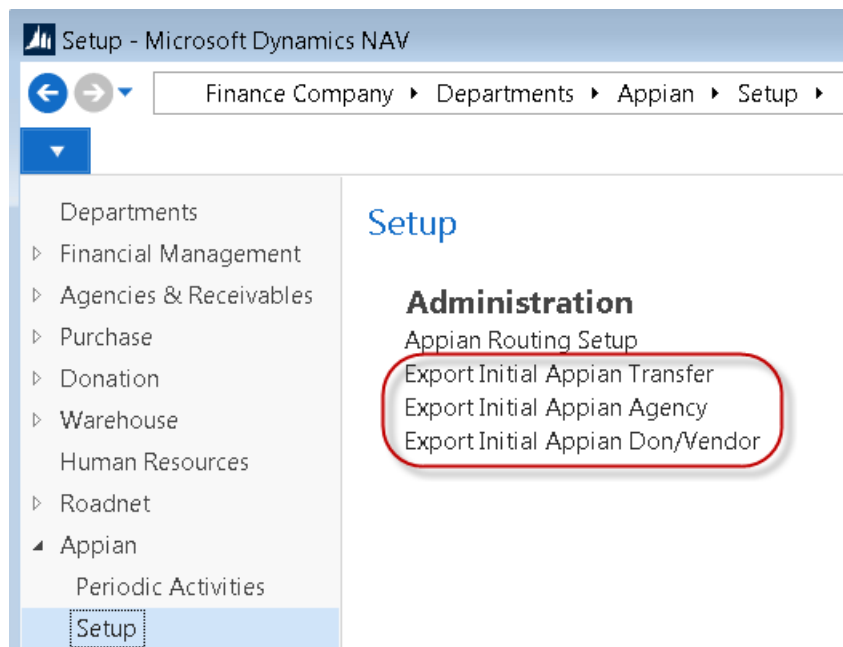
Last File Processed: Name of the Transfer file that was last processed. This field is updated by Appian.

Last File Processed Date/Time: Date and time the last Transfer file was processed. This field is updated automatically by Appian.

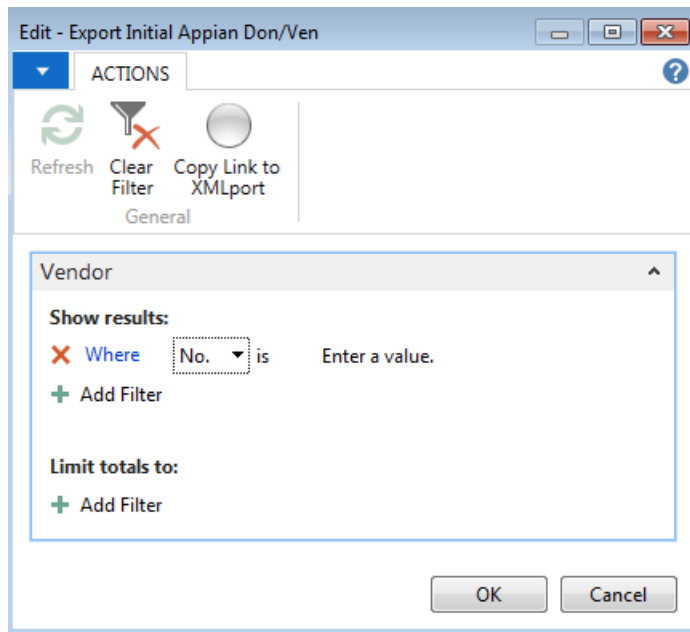
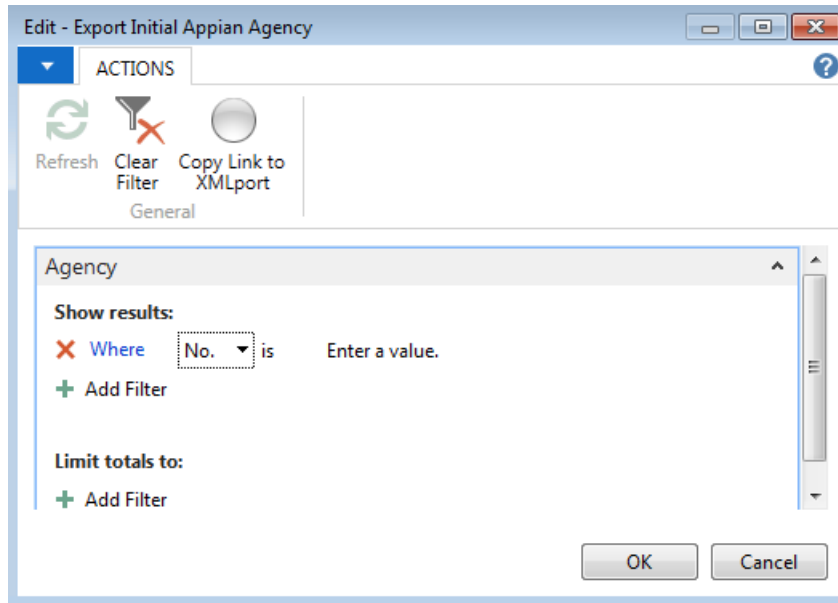
User Defined Fields 1-5: The user can select up to fields from the Transfer Header Table to be included in the export file. These fields are not mandatory.

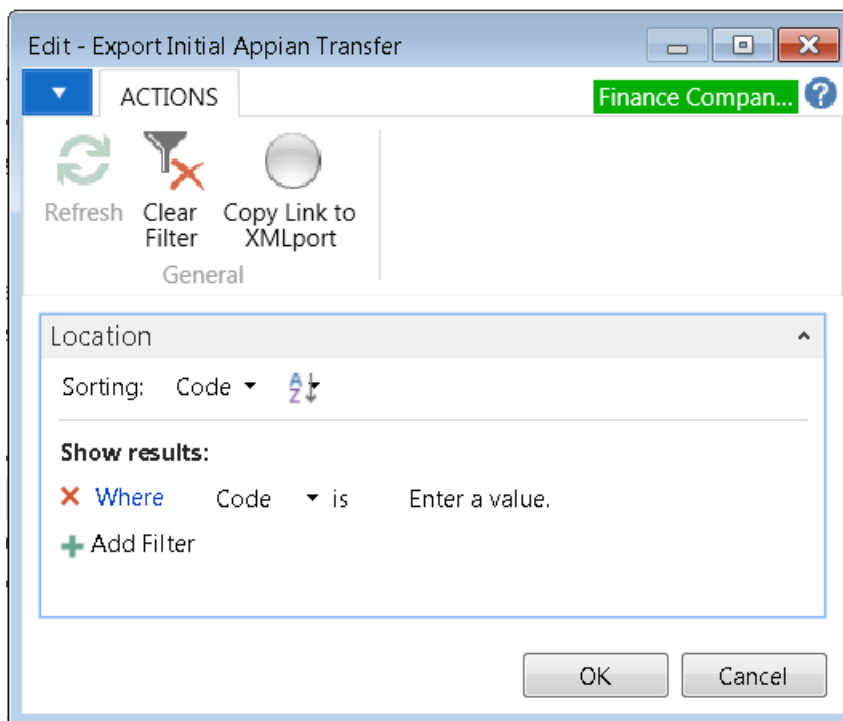
Administration

1. Prior to the first time you route either Agency, Donation, or Transfer orders, you need to run the Export Initial Appian Agency, Export Initial Appian Don/Vendor, and/or Export Initial Appian Transfer functions. This creates a Master File for Appian with the Addresses for Agencies, Donors, and Locations. The processes can be found by going to Departments → Appian → Setup Administration.



2. It is only necessary to run these functions one time. If a new Agency, Donor/Vendor, or Location is added afterwards, Appian will automatically pick them up.





Workflow

The Agency Order, Donation Order, or Transfer Order page will have an Appian FastTab where all information related to the routing status is selected and updated.

1. All Agency Orders will by default be routed through Appian. If the user doesn't want a particular order routed, uncheck the Export to Appian field in the Shipment Method setup. In the below example, only orders with a Shipment Method of DELIVER and PICKUP will be routed.

Shipment Methods

Type to filter

Code

Sorting: Code

No filters applied

Code	Description	Schedule Templat...	Export to Appian
DELIVER	Delivery	DELIVER	<input checked="" type="checkbox"/>
INHOUSE	Inhouse Pickup		<input type="checkbox"/>
PICKUP	Pickup at Food Bank	PICKUP	<input checked="" type="checkbox"/>
SHOPPING	Shopping Floor	SHOPPING	<input type="checkbox"/>

NOTE: Shipment Method is required to export Agency Orders and/or Donation/Purchase Orders to Appian, it is not required for Transfer Orders.

2. The Appian Routing Sent and Appian Routing Date fields are automatically updated when exporting the data to Appian.
3. The Route, Stop and Leg fields are updated when routing information from Appian is imported back into Ceres.

Edit - Agency Order - AO-00385 - The Salvation Army

HOME ACTIONS NAVIGATE REPORT

View Manage Post... Post and Print... Previous Process Picking List by Order Order Confirmation... Report OneNote Notes Links Show Attached Refresh Clear Filter Previous Next Go to Page

AO-00385 · The Salvation Army

General	AO-00385	C0416	5/1/2014	Open	▼
Shipping		64106	5/1/2014	Partial	▼
Lines					▼
Invoicing	C0416		5/1/2014	No	▼
Delivery/Web					▼
Appian					▲

Route : 100 Export to Appian: ☒

Stop : 10 Appian Routing Sent: ☐

Leg: 4 Appian Routing Date:

Agency Sales History... ▲

Agency No.:	C0416
Orders:	3
Invoices:	0
Return Orders:	0
Credit Memos:	0
Pstd. Shipments:	4
Pstd. Invoices:	4
Pstd. Return Rece...:	0
Pstd. Credit Mem...:	2

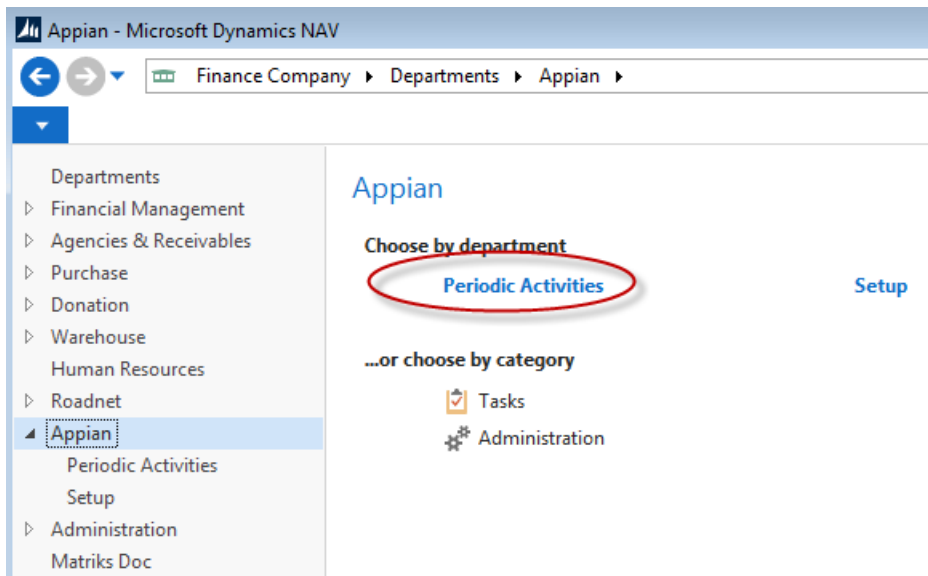
Agency Line Details ▲

Item No.:	
Substitutions:	0
Agency Fees:	0
Agency Line Disc...:	0

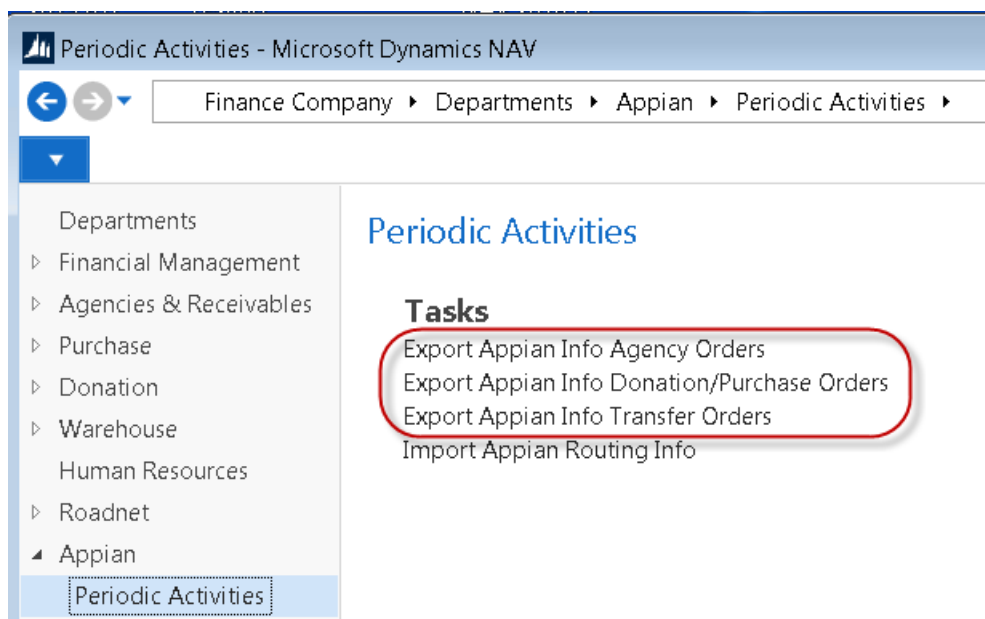
OK

Create Appian Export file for Agency Orders, Donation Orders, or Transfer Orders

1. To create the export file to use in Appian, go to Departments → Appian → Periodic Activities.



2. Select Export Appian Order Info. Agency Orders, or Export Appian Order Info. Donation/Purchase Orders, or Export Appian Info Transfer Orders.



3. If Assign File Name is checked, Ceres will automatically create a unique file name for the export file based on the Number Series that was set up for Appian.

Edit - Export Appian Order Info. Agency Orders

ACTIONS

Clear Filter Page

Action

Assign File Name: ☒

File Name:

Agency Document Header

Show results:

Where No. is Enter a value.

And Shipment Method Code is

And Shipment Date is Enter a value.

And Order Handling Group Code is Enter a value.

And Order Routing Group Code is Enter a value.

+ Add Filter

Limit totals to:

+ Add Filter

OK Cancel

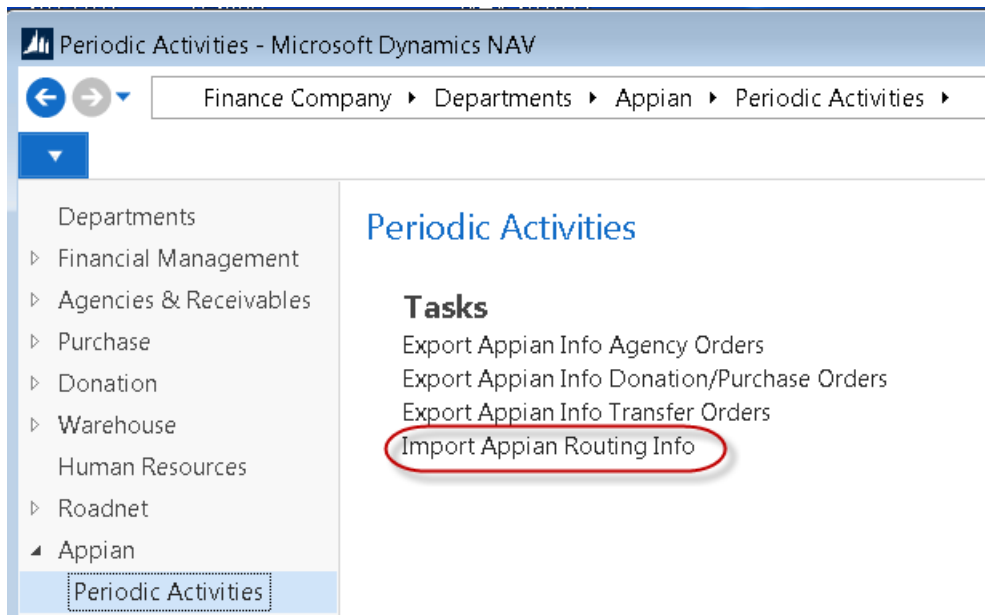
4. Enter the appropriate filters you want and then click OK.
5. The export file will be generated and placed in the folder, specified on the Appian Setup page.
6. Locate the exported file and import it into Appian for route assignments.

_TEMP_a5e63b915c90495f907287740a02c993 - Notepad

ACCOUNT NO.	ORDER NO.	ACCOUNT NAME	CONTACT	PHONE	GROSS WEIGHT	ADDRESS	ADDRESS2	CITY
D-1011	DOR-0031	Albertson's	Charlie Cook	778-365-2422	0			Chicago IL
D-1011	DOR-0036	Albertson's	Charlie Cook	778-365-2422	54,556.2			Chica
D-1000	DOR-0044	USDA/Dept. of General Admin.	Gail Baker			12,765	1222-46th Ave. East	

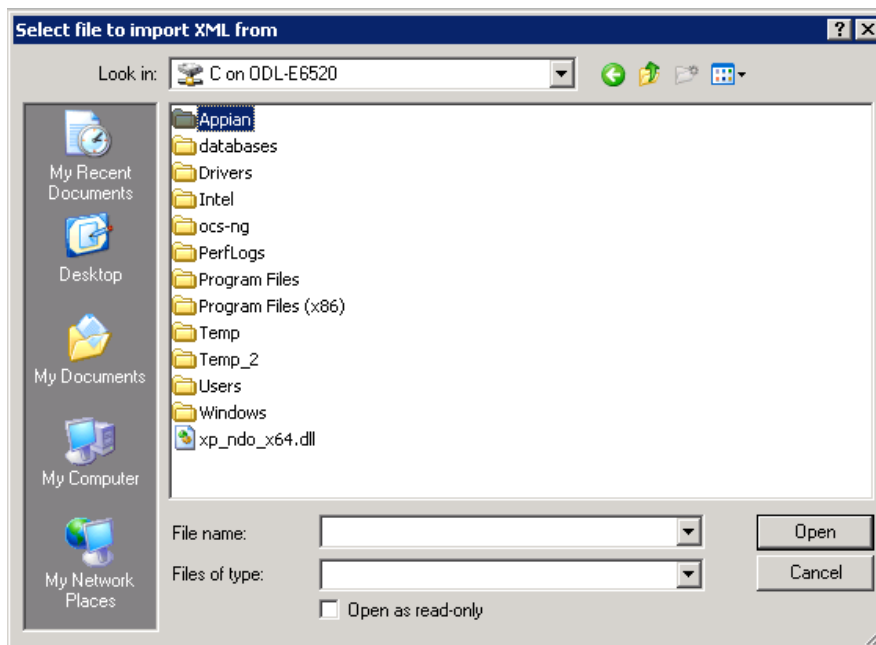
7. Once the export is processed by Appian, an export file will be generated by Appian with a recommended Route and Stop. This information file must be imported by the user in order to update the Inventory Picks. The user will run the Import for the matching released Agency Orders with the Appian Export Date populated. The fields for Route and Stop will be updated on the Agency Order Header and flow to Picks when they are created.

8. To import the file from Appian into Ceres, go to Departments → Appian → Periodic Activities and select Import Appian Routing Info

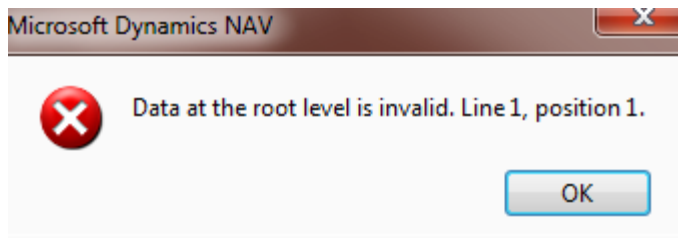


NOTE: The Import Appian Routing Info process imports routing information for all document types (Agency Orders, Donation/Purchase Orders, and Transfer Orders). Due to this, the number series used for each document type must be unique.

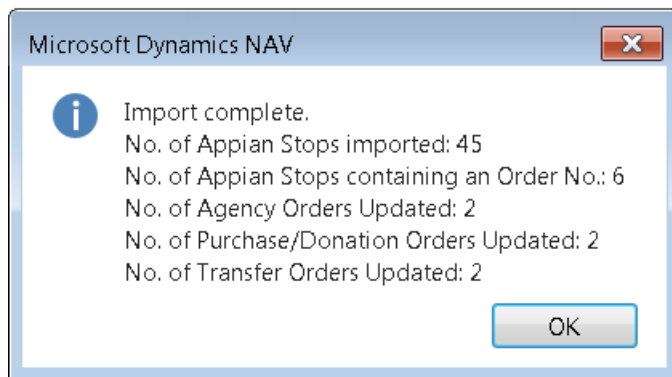
9. The file dialog opens up. Browse to the folder where you stored your Appian files and select the appropriate file to import. Click Open to import the file.



10. If Ceres is unable to import the file, for whatever reason, an error message similar to the one below will display. Resolve any files issues and trying importing again.



11. Once the Import is completed a recap of import will be displayed.



12. Once the Route and Stop are populated on an Agency Order, the Inventory Picks can be generated by Shipment Date, Route and Stop.

A screenshot of a form titled "Appian". It contains several fields and checkboxes. On the left, there are three input fields: "Route :" with the value "100", "Stop :" with the value "10", and "Leg:" with the value "4". On the right, there are three checkboxes: "Export to Appian:" (checked), "Appian Routing Sent:" (checked), and "Appian Routing Date:" with a dropdown menu showing "8/13/2014".

Supplemental Addresses

When Donation Orders are exported by Appian, the Donor's physical address will be used and not the Supplemental Address, if applicable.

Related Topics:

1. Agency Order Overview
2. Donation Order Overview
3. Inventory Pick Enhancements
4. Order Handling Groups Order Routing Groups
5. Supplemental Addresses and Ship To Addresses