YARDIQ

# Gate Process

## User Guide

A backup gate transaction logger for use when Spider TMS is unavailable. Captures drop-offs, pickups, and double moves, then exports per-site CSV reports for reconciliation once Spider is back online.

| | |
|---|---|
| **Where** | Operator dropdown → Gate Process |
| **Who** | Clerks / managers with Gate Process permission enabled |
| **Sites** | Newark, Savannah |
| **Output** | gate_log Google Sheet — viewable in Audit Resolution → Gate Logs |
| **Required** | Site, Transaction Type, Driver, Company, Equipment Number(s) |

*Document version 1.0 — covers Gate Process tool, Gate Logs viewer, per-site CSV downloads, and clear-logs workflow.*

# 1. What is the Gate Process Tool?

The Gate Process tool is a manual backup for Spider TMS gate transactions. When Spider goes down — whether due to network issues, scheduled maintenance, or unexpected outages — clerks can continue capturing drop-offs and pickups using this tool. Every entry is timestamped, attributed to the clerk who entered it, and saved to a dedicated **gate_log** sheet that managers can review and export later.

Once Spider is back online, the saved entries can be reviewed in the dashboard, downloaded as CSVs, and used to backfill the official system of record.

### Three transaction types are supported

| | |
|---|---|
| DROP OFF | **Drop Off** — equipment is being dropped at the yard. Captures container/chassis/trailer numbers, yard location, reefer plug-in status, driver and company info. |
| PICKUP | **Pickup** — equipment is being picked up. Captures pickup number, equipment type and ID, driver and company info. Quick path with minimal fields. |
| DOUBLE MOVE | **Double Move** — drop and pickup in a single visit. Combines all fields from both transaction types into one entry. Industry term: dropping one piece of equipment while picking up another. |

# 2. Access & Permissions

Gate Process is gated by a per-user permission flag called **gateAccess**. It does not appear in the operator menu unless this permission is enabled on the staff record. This keeps the tool out of the way for clerks who don't need it, while making it instantly accessible for the team handling backup gate work.

## How to grant access

1. Open the Dashboard → **Maintenance** tab → **Staff**.
2. Click the staff member you want to grant access to.
3. Tick the **"Gate Process (Spider Backup)"** checkbox in the editor.
4. Save the staff record.
5. The user signs in (or refreshes), and Gate Process now appears in their Operator dropdown.

## Where it appears

Once granted, Gate Process shows up in three places, all controlled by the same permission flag:

| Location | What you see |
|---|---|
| Operator app — top nav | New "Gate Process" item inside the Operator dropdown menu, between Chassis Pre-Trips and I |
| Home portal — top nav | Same "Gate Process" item appears in the Operator dropdown when accessed from index.html. |
| Home portal — Operator Platform card | A new line "Gate Process: Allowed" appears in the access summary on the home page card. Hid |

# 3. Filling out a Gate Log Entry

The form uses progressive disclosure — fields appear as you make selections, so the screen only shows what's relevant to the transaction type you picked. Required fields are marked with the appropriate input type and won't accept submission until populated.

## Step 1 — Select Site

The site dropdown re-themes the entire form to match: Newark turns the accent **blue**, Savannah turns it **orange**. This visual cue helps clerks at multi-site operations confirm they're logging to the correct yard before submitting.

## Step 2 — Pick Transaction Type

Three pill buttons: **Drop Off**, **Pickup**, **Both** (labeled "Double move"). Tapping a pill reveals the relevant fields below. Until a pill is selected, the rest of the form is hidden — this keeps the initial view minimal.

### Step 3 — Fill Drop Off Section

*(visible if Drop Off or Both is selected)*

**Equipment Type**: Container (with chassis), Chassis (bare), or Trailer.

**Equipment IDs**: depending on type — container number, chassis number, or trailer number. Multiple ID fields appear for a container-on-chassis combo.

**Reefer flow**: if the container is a reefer, choose between "Plugged In" (with temperature input) or "Non Plug-In".

**Yard Location**: dropdown of all valid yard sections for the selected site. Newark covers 100–1000. Savannah covers 100–1200, 2000–3400, and 4000.

### Step 4 — Fill Pickup Section

*(visible if Pickup or Both is selected)*

**Pickup Number**: the booking, release, or pickup reference from the customer.

**Equipment Number**: the container, chassis, or trailer being picked up.

### Step 5 — Driver, Company, Notes

These three fields appear once a transaction type is chosen. Driver name and Company are required for all entries. Notes are optional — useful for capturing damage notes, missing seals, or any handoff details that don't fit the structured fields.

### Step 6 — Submit

The Submit button writes the entry to the gate_log Google Sheet. A success message confirms the save with a green checkmark; the form clears for the next entry. If the network is unreachable, the save will retry automatically.

# 4. Reviewing Gate Logs in the Dashboard

Submitted entries are visible to managers via the dashboard. Open the Dashboard, navigate to **Audit Resolution**, and switch to the **Gate Logs** sub-tab.

## Stats summary

Four big numbers at the top show counts for the currently filtered set: **Total Entries**, **Drop Offs**, **Pick Ups**, and **Double Moves**. These update live as you change filters.

## Filters

- **Site** — All / Newark / Savannah.
- **Date** — pick a single date to see entries from that day only.
- **Transaction Type** — All / Drop Off / Pick Up / Drop & Pick Up.
- **Clerk** — type-as-you-go substring filter on the clerk name.

All filters apply **client-side** after the initial load, so changes are instant. The "Refresh Now" button re-pulls from the server when needed.

## Entries table

Recent entries are shown in reverse-chronological order. Each row displays Time, Site, Type (with icon), Clerk, Equipment, Driver, Company, Yard location, and Pickup #. Site names are colored — **blue for Newark**, **orange for Savannah** — for at-a-glance recognition.

**Tap any row** to open a detail modal showing every populated field, including reefer status, temperature, and notes.

# 5. Per-Site CSV Downloads

Four download buttons sit beneath the filters. Each produces a full-fidelity CSV with all 40 columns from the gate_log sheet, properly escaped for special characters (commas, quotes, newlines inside fields).

| Button | Output File | Contents |
|---|---|---|
| **Download Newark CSV** | gate_log_newark_<date>.csv | All Newark entries, ignoring all filters |
| **Download Savannah CSV** | gate_log_savannah_<date>.csv | All Savannah entries, ignoring all filters |
| **Download All Sites** | gate_log_all_<date>.csv | Every entry across all sites |
| **Download Filtered View** | gate_log_filtered_<date>.csv | Whatever is currently visible based on the active filters |

## Typical reconciliation workflow

1. Spider TMS comes back online after an outage.
2. The dispatcher or yard manager opens the dashboard.
3. Filter Gate Logs to the date range covering the outage.
4. Download the per-site CSV (or filtered view).
5. Use the CSV to backfill missing entries into Spider.
6. Once verified, optionally clear the logs (see next section).

# 6. Clearing Gate Logs

After reconciliation, the gate_log sheet can be cleared so the dashboard starts fresh for the next outage. **This action is permanent.**

■ **DESTRUCTIVE ACTION**

Deleted gate log entries cannot be recovered through the dashboard. **Always download a backup CSV first** if there's any chance you might need the data later. Spreadsheet revision history may preserve older versions, but don't rely on it.

## How to clear logs

Three red buttons appear beneath the download buttons: **Clear Newark Logs**, **Clear Savannah Logs**, and **Clear ALL Logs**.

1. Click the appropriate button. A confirmation modal opens.
2. The modal shows the exact count of entries that will be deleted (e.g. "This will permanently delete **47 entries** for **Newark**").
3. Type **DELETE** (uppercase, exactly) into the confirmation field.
4. The "Permanently Delete" button enables. Click it.
5. The server deletes the matching rows. The status line turns green with the deletion count, the modal closes, and the table refreshes.

## Permission required

The clear operation requires the same **gateAccess** permission as submitting. A manager who wants to clear logs needs that permission enabled on their own staff record. Every clear operation is logged on the backend with the clerk name, target site, and number of rows deleted — visible in the Apps Script execution log.

# 7. What Gets Saved

Every Gate Process submission writes one row to the gate_log Google Sheet. The schema has 40 columns. Most columns are populated only when relevant — for example, reefer fields are blank for non-reefer entries, and pickup fields are blank for drop-only entries.

| Column | Notes |
|---|---|
| **Timestamp** | ISO timestamp set on the server when the entry is saved |
| **ClerkName** | Name from the signed-in operator profile |
| **Site** | Newark or Savannah |
| **TransactionType** | Drop, Pickup, or Both |
| **EquipmentType** | Container, Chassis, or Trailer (drop side) |
| **ContainerNumber, ChassisNumber, TrailerNumber** | IDs for the dropped equipment (only one populated per row, except container-on-chassis) |
| **Section** | Yard location chosen from the dropdown |
| **ReeferContainer, PlugIn, Temperature** | Reefer flow — populated only when the dropped container is flagged as reefer |
| **PickupNumber, PickupEquipmentType, PickupContainerNumber, PickupChassisNumber, PickupTrailerNumber, PickupEquipmentNu** | Pickup-side fields — populated for Pickup and Both entries |
| **Driver, Company, Notes** | Driver name, trucking company, optional free-text notes |
| **RowId** | Unique ID generated by the backend for the saved row |

*Some legacy columns from earlier schemas (Shift, Customer, ManagerOverride, etc.) still exist in the sheet but are no longer populated by the current form. They're preserved for backward compatibility with older entries.*

# 8. Troubleshooting

## "Gate Process doesn't appear in my Operator menu"

Permission isn't granted. Have a manager open Dashboard → Maintenance → Staff, find your record, and tick the "Gate Process (Spider Backup)" checkbox. After saving, refresh the page (or sign out and back in).

## "Submit fails with a permission error"

The backend re-checks gateAccess on every save. If you saw the form, your client thinks you have access — but if the staff record was just changed, your session may be stale. Sign out and back in to refresh your profile.

## "Gate Logs sub-tab is empty after I submit an entry"

Click **Refresh Now** in the Gate Logs sub-tab. The table caches client-side after the first load and only re-pulls when the refresh button is tapped.

## "Clear button stays disabled"

You must type **DELETE** in all uppercase letters into the confirmation field. Lowercase or partial typing won't enable the button. The button also stays disabled if there are zero entries to delete for the selected scope.

## "CSV download won't open"

The browser downloads the CSV to your default download folder. Some browsers flag downloads from unknown sources — check the browser's download bar or notification panel for a "Keep" or "Allow" prompt. Once allowed, the file opens with Excel, Google Sheets, or any text editor.

## "Yard location I need isn't in the dropdown"

Newark currently covers sections 100–1000. Savannah covers 100–1200, 2000–3400, and 4000. If a new section is added at either yard, the locations list needs to be updated in the operator app — contact your YardIQ administrator to add it.

---