⚠️ **Warning**: This is an incomplete guide.

Contents

Contents

1 Alert Maintenance

⚠️ **Warning**: This is an incomplete guide.

Ready for **What's Next, Now**™

2 Asset Adjustments

🔴 **Warning**: This is an incomplete guide.

This screen allows you to make adjustments to the Asset counts in the system.

This screen contains only a details panel, which is immediately shown.

The following actions are available on the Details panel:

- **Save** - save a new record or changes to an existing record.
- **Help** - help on this screen.
- **Undo** - undo change made since last save.
- **Clear** - clear all fields.
- **Toggle** - toggle display of all accordion headers.

You can enter the following information:

- *Transport Unit Code* - the transport unit being adjusted. You can enter the value directly or use the look-up provided. The screen will display a pop-up window displaying all the transport units configured in the system. You can configure these in the Transport Units screen. You can select a value by clicking on the row, or discard entry by closing the window.
- *Quantity* - the quantity to adjust.
- *Notes* - any notes to store against the adjustment.

Ready for **What's Next, Now**™

3 Asset Location Adjustments

🔴 **Warning**: This is an incomplete guide.

Ready for **What's Next, Now**™

4 Asset Locations

⚠ **Warning**: This is an incomplete guide.

This screen allows you to maintain the Asset counts at locations in the system.

You can query data by and/or choose to display data as follows:

- *Location Code.*
- *Location Name.*
- *Owner Code.*
- *Transport Unit Code.*
- *Description.*
- *Quantity.*

The following actions are available on the Details panel:

- 🗋 **New** - create a new record.
- 🖫 **Save** - save a new record or changes to an existing record.
- 🗑 **Delete** - delete an existing record.
- ⦵ **Help** - help on this screen.
- ↺ **Undo** - undo change made since last save.
- ✐ **Clear** - clear all fields.
- ▬ **Toggle** - toggle display of all accordion headers.

You can change or add the following information:

- *Location Code* - the location of the asset.
- *Location Name* - the location name.
- *Owner Code* - the owner code. You can enter the value directly or
- *Transport Unit Code* the transport unit. You can enter this directly or use the ⊞ **Lookup** button. The screen will display a list of all transport unit types. You can select a transport unit by clicking the row, or cancel entry by closing the window.
- *Description* - the description of the asset.
- *Quantity* - the quantity of this transport unit at the location.

Ready for **What's Next, Now**™

5 Assets

⚠ **Warning**: This is an incomplete guide.

This screen allows you to maintain the assets in the system.

You can query data by and/or choose to display data as follows:

- *Unique ID* - a system-generated unique ID.
- *Asset ID*.
- *Transport Unit Code*.
- *Owner Type*.
- *Owner Code*.
- *Location Code*.
- *Quantity*.
- *Active*.
- *Created By*.
- *Created Date*.
- *Last Updated By*.
- *Last Updated Date*.
- *Last Active Change By*.
- *Last Active Change Date*.
- *Last Process Id*.
- *Update Counter*.

The following actions are available on the Details panel:

- 🗋 **New** - create a new record.
- 💾 **Save** - save a new record or changes to an existing record.
- 🗑 **Delete** - delete an existing record.
- ⑦ **Help** - help on this screen.
- ↺ **Undo** - undo change made since last save.
- ✐ **Clear** - clear all fields.
- ━ **Toggle** - toggle display of all accordion headers.

You can change or add the following information:

- *Asset ID* - the unique ID of the trackable asset.
- *Transport Unit Code* - the transport unit type. You can maintain these in the Transport Units screen. You can enter the code directly or use the ⊞ **Lookup** button provided. The screen will display a pop-up window of all transport unit types in the system. You can select a code by clicking on the row, or cancel entry by closing the window.
- *Owner Type* - a drop-down list identifying the owner of the asset. Values: Organisation; Supplier; Customer.
- *Owner Code* - the owner of the asset. This may be an organisation, carrier or customer, dependent on the owner type selection above. The screen will label this appropriately based on this selection. You can maintain the data in the Organisation, Carriers and Customer screens respectively. You can enter the code directly or use the ⊞ **Lookup** button provided. The screen will display a pop-up window of all data of that type in the system. You can select a code by clicking on the row, or cancel entry by closing the window.
- *Location Code* - the location of the asset. You can maintain these in the Locations screen. You can enter the code directly or use the ⊞ **Lookup** button provided. The screen will display a pop-up window of all locations in the system. You can select a code by clicking on the row, or cancel entry by closing the window.
- *Quantity* - the quantity of that asset. Usually 1.

Ready for **What's Next, Now**™

6 Auto Planning

⚠ **Warning**: This is an incomplete guide.

This process is controlled by a windows service that must be running on your server - check with your OBSL Support representatives that this is the case.

The auto-planning process (or scheduling engine) uses configuration in the system to automatically plan orders onto fixed routes.

The process is controlled by parameters that configure the interface.

- System - The parameters that control the running of the interface.
- Organisation - The parameters that control the configuration of the interface.

The orders are planned according to the schedule rules and onto the fixed route templates created in the system, through the zones that have been defined.

- Routes - fixed route templates determine the structure of the trips that will be created. Templates can be created for trunk routes (for moving the order through the trunk network) and collection/delivery routes.
- Service Level - service levels are used to automatically define the collection and delivery windows, which make orders available for auto-planning.
- Schedule Rules - schedule rules determine the collection and delivery windows, which make orders available for auto-planning. The rule selected when the order is created or amended also marks the order as available or unavailable for auto-planning.
- Location Zones - postcode zones define where the order will start or end, which is used by the schedule rules and the fixed route templates to determine whether the order can be planned onto this route.

6.1 System Parameters

The parameters that control the running of the interface are found on the System maintenance screen:

- *Trunk Load Rate Zero* - if enabled, loading rates are not applied in planning.
- *Auto-planning is enabled* - If ticked, auto-planning will run and attempt to plan orders onto fixed routes.
- *Auto-planning sleep (seconds)* - the number of seconds in between attempts to plan. Typically this should be set to 3 minutes or more (180+).

6.2 Organisation Parameters

The parameters that control the configuration of the interface are found on the Organisation maintenance screen:

- *Auto Plan Service Level* - ⚠ **Warning**: Redundant - now uses the schedule rule selected when creating/amending the order to determine whether an order is to be auto-planned.
- *Auto Plan Time Ahead (hours)* - the number of hours ahead of current time that orders are valid to be picked up by the auto-planner. For example, if set to 1 hour, and the time is 15:00 only orders from 16:00 on this date and into the future will be selected, based on the late collection date and time of the order.

6.3 Schedule Rules

⚠ **Warning**: Brief description here

Ready for **What's Next, Now**™

6.4 Checking Processing

The order import interface success or failure can be audited through the EDI Log screen.

The imports will be marked as "AUTO_PLANNING".

Ready for **What's Next, Now**™

7 Category

⚠️ **Warning**: This is an incomplete guide.

Ready for **What's Next, Now**™

»»»»»

8 Error Log

⚠ **Warning**: This is an incomplete guide.

Ready for **What's Next, Now**™

9 Initial Setup

🔴 **Warning**: This is an incomplete guide.

Instructions for user setup and role access to follow.

- Prior to access, the user will need to create a profile
- Once the user profile has been created, the user will need to link into a group

9.1 Initial Basic Setup

The system will be provided with the following already created:

- Organisation.
- Basic user role.
- Administrative user with password.
- All programs, menus and menu options configured in a standard way.
- Standard order statuses.
- Standard trip statuses.
- Standard parameters, including the system and system parameters configured.
- GB timezone.
- GBP currency.
- Standard VAT code.
- GB location zone.
- GB country.

Change the password for the administrative user.

9.2 Static Data Setup

Organisation Parameters

User Parameters

Role Parameters

Customer Parameters

Customer group

Customers

9.3 Geographical Data Setup

Timezones

Countries

Location types

Locations

Ready for **What's Next, Now**™

9.4 Transport Units setup

Transport Unit Categories

Transport Unit Types

9.5 Product Setup

Pre-requirements:

- Transport Units setup

Product Group

Temperature Type

Product Type

9.6 Resource Setup

Carrier Parameters

Carrier Groups

Carriers

Person Parameters

Drivers

Carrier assignment

Vehicle Type Categories

Vehicle Types

Vehicles/Trailers

Carrier assignment

9.7 Users Setup

Pre-requirements:

- Static Data Setup
- Geographical Data Setup
- Resource Setup

Once you have configured resources, you can then configure users and roles for the system in the way that you will use them. Use the Roles administration screen for this.

For each role required, you will need to set up parameters, usually selected from the following:

Label	Description	Long Description	Notes

Ready for **What's Next, Now**™

Label	Description	Long Description	Notes
Carrier	Accessible Carrier	Accessible Carrier	You will typically want to have one or many accessible carriers.
Customer	Accessible Customer Code	Accessible Customer Code	You may want to restrict planning and orders to a single or many customers.
Customer Group	Accessible Customer Group Code	Accessible Customer Group Code	You may want to restrict planning and orders to a single or many customer groups.
Accessible Depot	Accessible Depot	Accessible Depot for user organisation	You may want to restrict planning to a single or many depots.
Allow Order Amend	Allow Order Create and Amend Indicator	Allow this user to Create and Amend Orders	If this is a read-only user, you may want visibility of orders without the facility to amend them. This must be set to Yes to allow order amendments for users in that role.
Organisation	Accessible Organisation Code	Accessible Organisation Code	You will want to set a default organisation.

Other parameters are available that may also be set for differing results - see the Roles screen documentation for more information.

Users may then be created using the Users administration screen and assigned to the role or roles created above.

The users may also have additional parameters created against them, usually selected from the following:

Label	Description	Long Description	Type	Values
Owning Depot	Owning Depot	Owning Depot for user organisation	You will want to set an owning depot for the user.	

Other parameters are available that may also be set for differing results - see the Users screen documentation for more information.

9.8 Finance Setup

Pre-requirements:

- Static Data Setup
- Service Levels Setup
- Transport Units Setup

Organisations updated

Currencies

Accounts

Payment Methods

VAT Codes

Contract Types

Rates

Contracts

9.9 Orders Setup

Pre-requirements:

- Static Data Setup

Ready for **What's Next, Now**™

- Geographical Data Setup
- Service Levels Setup
- Transport Units Setup
- Product Setup
- Finance Setup (optional)

Order Categories

Order Parameters

Order Templates (optional)

Orders may now be created.

9.10 Fixed Routes Setup

Pre-requirements:

- Static Data Setup (optional)
- Geographical Data Setup
- Resource Setup
- Service Levels Setup (optional)

Loading/Unloading Rates

Location Zone Types

Location Zones

Fixed Route templates

9.11 Planning Setup

Pre-requirements:

- Static Data Setup
- Geographical Data Setup
- Orders Setup
- Resource Setup

Loading/Unloading Rates

You can now create trips.

Ready for **What's Next, Now**™

10 Load Maintenance

⚠ **Warning**: This is an incomplete guide.

Ready for **What's Next, Now**™

11 Missing Geocodes

⚠️ **Warning**: This is an incomplete guide.

Ready for **What's Next, Now**™

12 Orders Interface Configuration

⚠️ **Warning**: This is an incomplete guide.

This process is controlled by a windows service that must be running on your server - check with your OBSL Support representatives that this is the case.

Currently, this interface supports the following:

- EBB Bespoke Interface

12.1 Organisation Parameters

The parameters that control the interface are found on the Organisation maintenance screen:

- *IF MSA Database* - connection parameters for the database to connect to for the data.
- *IF Reprocess* - whether the interface attempts to re-process data.
- *IF Sleep Time* - a number of seconds in between processing tuns for the interface to sleep.

12.2 Checking Processing

The order import interface success or failure can be audited through the EDI Log screen.

The imports will be marked as "ORDER_IMPORT".

Failed orders will be marked as status "FAILED". These can be reprocessed (once the underlying fault is resolved) by clicking the audit record and clicking the **Reprocess** Reprocess button.

Ready for **What's Next, Now**™

13 Planning

🔴 **Warning**: This is an incomplete guide.

🔴 **Warning**: Still to be added:

- Configuration in general
  - ♦ Order well column configuration
  - ♦ Trip card configuration
- Order well columns
- Order well instructions column - can expand
- Double-click order - open new tab showing the order.

13.1 Planning

-
Planning order well
-
Planning onto existing trips

Ready for **What's Next, Now**™

Full-screen with expanded details and warnings

Planning map view

Optimisations

13.2 Resourcing

Ready for **What's Next, Now**™

Resourcing drivers

Resourcing vehicles

Resourcing trailers

13.3 Execution

Ready for **What's Next, Now**™

Send trips to C-ePOD

Ready for **What's Next, Now**™

14 Program and Menu Administration

🔴 **Warning**: This is an incomplete guide.

14.1 Adding a new Program

Create the program with the correct screen name.

💡 **Note:** The program must be in upper-case.

Refs: Program Maintenance

14.2 Creating a new Sub-menu

Create the sub-menu and add it to the roles that need it.

Refs: Menu Maintenance

14.3 Adding Programs to a Menu

Identify the sub-menu onto which the program is to be added.

Create an entry for that program on that menu as a menu option.

Refs: Menu Options

14.4 Activating the Menu

You can check the menu by:

- Log out and back in to the system with a user with that role.
- Change role using the ⚙ **Settings** button on any screen's toolbar.

The menu will be re-created and contain the new screen.

Refs: General Screen Usage
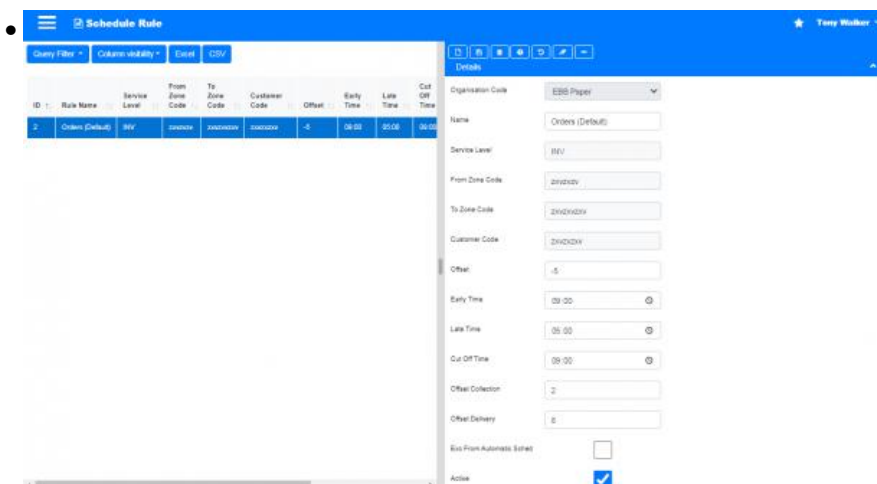
Ready for **What's Next, Now**™

15 Schedule Rules

🛑 **Warning**: This is an incomplete guide.

This screen allows you to maintain the schedule rules. The system uses these rules to default collection and delivery windows on orders that match them, and also to indicate whether orderrs that match these rules should be automatically planned.

-

Schedule rules

You can query data by and/or choose to display data as follows:

- *ID.*
- *Rule Name.*
- *Service Level.*
- *From Zone Code.*
- *To Zone Code.*
- *Customer Code.*
- *Offset.*
- *Early Time.*
- *Late Time.*
- *Cut Off Time.*
- *Offset Collection.*
- *Offset Delivery.*
- *Exc from Automatic Sched.*
- *Active Records Only.*

The following actions are available on the Details panel:

- 🗋 **New** - create a new record.
- 🖫 **Save** - save a new record or changes to an existing record.
- 🗑 **Delete** - delete an existing record.
- ⑦ **Help** - help on this screen.
- ⟲ **Undo** - undo change made since last save.
- ✐ **Clear** - clear all fields.
- ▬ **Toggle** - toggle display of all accordion headers.

15.1 Details section

You can change or add the following:

- *Organisation.*
- *Name.*
- *Service Level.*
- *From Zone Code.*
- *To Zone Code.*
- *Customer Code.*
- *Offset.*
- *Early Time.*
- *Late Time.*
- *Cut Off Time.*
- *Offset Collection.*
- *Offset Delivery.*
- *Exc from Automatic Sched.*
- *Active.*

Ready for **What's Next, Now**™

16 Schedules

⚠ **Warning**: This is an incomplete guide.

Ready for **What's Next, Now**™

17 Tractors

⚠ **Warning**: This is an incomplete guide.

18 Trailer Scheduling

🔴 **Warning**: This is an incomplete guide.

Ready for **What's Next, Now**™

19 Trailers

🔴 **Warning**: This is an incomplete guide.

Ready for **What's Next, Now**™