⚠ **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.

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+).

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.

Schedule Rules

⚠ **Warning**: Brief description here

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".

Contents

1 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

1.1 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.

1.2 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.

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