Loads

Contents

1 Loads

This screen provides details of the loads for your site.

💡 **Note:** Your system administrator can modify the text of the labels on this screen. For simplicity, the default labels are shown here.

When you enter the Load Maintenance screen, you will be shown a filter, to find your loads.

You can filter through:

- *Load ID.*
- *Vehicle ID.*
- *User ID.*
- *Load Status* - a drop-down list of the possible load statuses (*Pending, Assigned, In Progress, Complete, Cancelled*).
- 2 date filters.
- *Route Code.*
- *Load Information.*

The date selectors allow you to filter from all the common load dates, namely:

- *Planned Start.*
- *Planned End.*
- *Actual Start.*
- *Actual End.*

You can choose the way that you want to filter the dates, from the following:

- *Specific* - on the specific date you enter.
- *Date Range* - between the dates that you enter, including those dates.
- *From* - from the date you enter forward, including that date.
- *Up To* - up to the date you enter, including that date.

To help you select a date, the screen will display a calendar pop-up.

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You can enter two date selections - remember that these are inclusive, so if you select on one planned start date and another planned start date, you won't get anything in the results, because a load can't start on two different dates.

Once you have entered the criteria, click **Search**. The screen will display a table of all the matching data. Any plain text boxes will match data that contains what you enter as the criterion.

Alternatively, if you click **Create Excel Spreadsheet**, the screen will export the load data to a Microsoft Excel spreadsheet. The functionality differs per the browser you have used to access the Admin system, but the likely result is the spreadsheet file will offered for download.

If you press **Search**, the screen will display the results in a results data table. A single line will be displayed per load found.

You can choose to hide or show almost all of the columns in the results table by using the **Select Columns** button on the header. The results table shows the following columns:

- *Load ID* - this is always displayed.
- *Planned Start*.
- *Actual Start*.
- *Planned End*.
- *Actual End*.
- *Mileage Start*.
- *Mileage End*.
- *Trailer*.
- *Vehicle*.
- *User*.
- *Status*.
- *Route Code*.
- *Load Information*.

You can sort the results table by clicking on the column header - clicking again will reverse the sort sequence.

Navigation of the table to different pages is controlled by the bottom bar pagination buttons. The top bar allows setting of the number of records displayed on each page.

The data table will colour the rows based on the status of the load being shown:

- *Pending* - no colour.
- *Assigned* - Grey.
- *In Progress* - Amber.
- *Complete* - Green.
- *Cancelled* - Red.

1.1 Actions against an Existing Load

You can set the status of a load to *Cancelled* by clicking the **Cancel** button against that line. 🔴 **Warning**: This will cancel all of the jobs under the load as well, so care should be taken with this option. You will be asked to confirm before this happens. If you do choose to proceed, the system will keep an audit log of the cancellation of the load.

You can select the load and drill through to the Job Details page with the **Details** button against each line.

If a load has been started, you can view the tracking information by clicking the **Tracking** button against the line. This will take you to the User Tracking screen.

You can edit, delete and create a new load, if you are a full admin user. 💡 **Note:** You can only edit or delete loads not in progress.

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Load Details

Details | Start Metric UDF | End Metric UDF

Edit   ↩ Close

Load ID: GENL13   Status: Complete
Assigned to: John Doe ▼   Vehicle: TW15ANW ▼
Route Code: [   ]   Trailer Id: [   ]

	Planned		Actual
Start:	23/12/2016 09:44	Start:	17/05/2017 10:27
End:	23/12/2016 13:14	End:	17/05/2017 10:31
Distance:	0	Distance:	0
Mileage Start:	0	Mileage End:	0

Load Information:
[   ]

Load Details

Details | Start Metric UDF | End Metric UDF

                                                  ↩ Close

Load Metrics

ODO Reading   [123]

Load Secure Visual Check   ☐

Sack Barrow on Vehicle   ☐

Load Details

Details | Start Metric UDF | End Metric UDF

                                                  ↩ Close

Load Metrics

ODO Reading   [121]

Fuel Cost   [   ]

Litres Bought   [   ]

Parking Ticket Number   [   ]

Post Checks
☐ Delivery Notes Signed/Printed
☐ Full Uniform Worn
☐ Failures phoned in

To edit the load through a pop-up screen, you can click the **Select** action against a line, then **Edit** and save the changes using the **Save** button provided. You can discard any changes you make by clicking **Close** or **Cancel**.

Within this pop-up, you can assign drivers and vehicles to a load, which can then be transferred to the device. You can do this using the drop-down lists the screen provides for User ID and Vehicle. You can also change the following:

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- *Route Code*.
- *Trailer ID* for the load.
- *Start* and *end planned date* and *time*.
- *Distance*.
- *Load Information*.

If a load has been started, completed or cancelled (status In Progress, Completed or Cancelled respectively), the pop-up might show several additional tabs, to view and edit UDF (User-defined Forms) data, depending on the system configuration:

- *Start Metrics UDF* - configurable data entry when the load is started, typically used to record metrics (e.g. Odometer) information.
- *End Metrics UDF* - configurable data entry when the load is completed.

If the load isn't complete, you will also be able to do the following from this pop-up:

- You can delete the load using the **Delete** button provided.
- You can cancel the load using the **Cancel** button provided.

In both cases, you will be asked to confirm that this is what you wanted to do before the screen deletes or cancels the load.

If you want to assign existing jobs to a load, you can select the *Job Assignment* action against a load in the row. The system will display the Job Assignment screen to let you select the jobs for the load.

If you want to sequence the jobs on a load, or link (consolidate) jobs together, you can select the *Job Sequence* action against a load in the row. The system will display the Job Sequencing screen to let you select the jobs for the load.

1.2 Creating a New Load

You can create a new load by clicking the **New** button on the header.

When you press this button, the screen will show the pop-up and allow you to enter the following fields:

- *Status*, selected from a list.
- *Assigned To*, selected from a list.
- *Vehicle*, selected from a list.
- *Route Code*.

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- *Trailer ID*.
- *Planned* load *Start* date and time, which can be configured to default to a number of days in the future.
- *Planned* load *End* date and time, which can be configured to default to a number of days in the future.
- *Distance planned*.
- *Load Information*.

The load status defaults to "Pending" and the site defaults to your logged-in site.

💡 **Note:** If the site you are using is configured as a warehouse site, you may also be able to create a linked load for any defined linked transport site. In that case, the screen will also prompt for:

- *Linked Load*, where you can select an existing transport load or create a new one.
- *Planned Start/End*, the planned start and end of the transport load.
- *Transport Vehicle*, where you can select a transport vehicle for the transport load.
- *Transport User*, where you can select a transport vehicle for the transport load.

When you save the new load using the **Save** button, the Load ID will be generated automatically. Alternatively, you can discard your new load changes with the **Discard** or **Close** buttons.

The system can be configured to immediately take you to the Job Assignment screen when the load is saved.

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