



Aptean

CALIDUS MCS Setup Guide

CALIDUS MCS

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1 Setup

 **Note:** This guide assumes familiarity with C-TMS processes for the following actions:

- Creating users.
- Creating and configuring user groups.
- Adding users to a group.
- Creating label printers.
- Changing user-definable system parameters.
- Finding and amending locations.
- Creating or amending reason codes.
- Running Oracle Reporting Suite data extracts.

1.1 Pre-Requisites

The MCS system must be configured and available.

Default cost centre must be configured.

Pallet Label format must be configured for the system.

You will be advised of these details by your OBS Logistics implementation team.

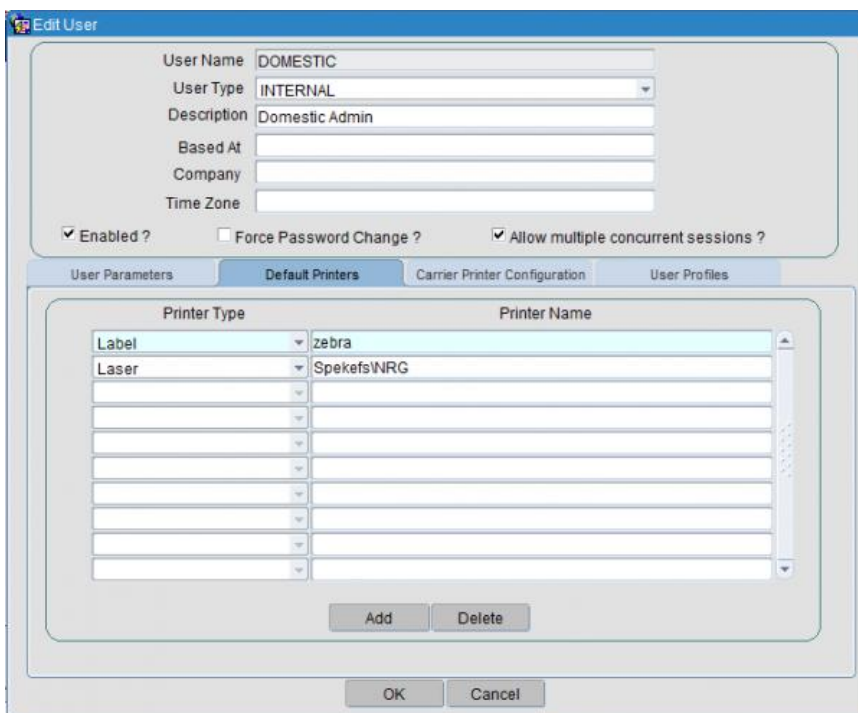
1.2 Access Control

1.2.1 MCS Users

Create MCS users and place them in their own group.

Set up each user with the default pallet label printer. This is dependent on the pallet label format, and should either be a Laser printer or label printer.

You will be advised of the printer type by your OBS Logistics implementation team.



Edit User

User Name: DOMESTIC
 User Type: INTERNAL
 Description: Domestic Admin
 Based At:
 Company:
 Time Zone:
☒ Enabled? ☐ Force Password Change? ☒ Allow multiple concurrent sessions?

Default Printers

Printer Type	Printer Name
Label	zebra
Laser	SpekefsWRG

Add Delete

OK Cancel



1.2.2 C-TMS Users

Provide access to the Shipment Pallets screen from the users' groups.

Set up each user with the default pallet label printer. This is dependent on the pallet label format, and should either be a Laser printer or label printer.

You will be advised of the printer type by your OBS Logistics implementation team.

The group for these users must have additional tabs and screens set up:

- Tabs:
 - ◆ LOCATION/MCS
- Screens:
 - ◆ Shipment Pallets

Access Groups

ACC_CTRL v2.55
C-TMS v11.29

Group Name	Description	Enabled
DEMO	Demo Group	<input checked="" type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Functions | **Menus** | Tabs | Reports | Extracts | Imports

Menu Authorised for use by Group

Menu	Description	In Menu ?
Shipment Pallets	DISPATCH SHIP_PALLETS	<input checked="" type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Menu Available

Menu	Description
Business Type Maintenance	ORDERS_SETUP.BUSINESS_TYPE_MAINT
Delivery Management	ORDER.DELIVERY
PTY Config	INTEGRATION_SETUP.PTY_CONFIG
Service Charges	FINANCE.SERVICE_CHARGES

New Copy Delete Save Close Add All Remove All

Access Groups

ACC_CTRL v2.55
C-TMS v11.33

Group Name	Description	Enabled
ADMIN	Administrator of MTS	<input checked="" type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Functions | **Menus** | **Tabs** | Reports | Extracts | Imports

Tab Authorised for use by Group

Form Name	Tab Name	Parent Tab	Description
LOCATION	LINKED		LINKED LOCATIONS TAB
LOCATION	LOCATION_USAGE		Location Usage
LOCATION	LOC_NET		Network
LOCATION	LOC_REFS		REFERENCES TAB
LOCATION	LOTS		LOTS TAB
LOCATION	MCS		MCS Parameters

Tab Available

Form Name	Tab Name	Parent Tab	Description
ORDERS	MTM_INFO		MTM Information Tab

New Copy Delete Save Close Add All Remove All



1.3 System Parameters

These will be initially created and configured by your Aptean implementation team.

Parameter Name	Config By	Config By Value	Value	Description
MCS_PREVENT_UNPLANNED	SYSTEM	NONE	N	Prevent unplanned items being scanned for pallet building
BKG_DEF_POPULATE_DEL	SYSTEM	NONE	N	Any order that are created via bookings will have Del Type
BKG_TYPE_9_DU_TYPE	SYSTEM	NONE	MB	Default DU Type for Type 9 Orders
CAL_DEFAULT_TIME_OFFSET	SYSTEM	NONE	0 04 1667	Default time offset which gets added to times in Order trac
CAL_DEFAULT_TIME_ZONE	SYSTEM	NONE	GMT (Greenwich Mean Time)	Description of timezone, used in Order Tracking form, free
CSB_EXPORT_PATH	SYSTEM	NONE	/webintfmsdem2/carrier_self_billing	Directory where carrier self billing exports are stored
CSB_REPORT_PATH	SYSTEM	NONE	/webintfmsdem2/carrier_self_billing	Directory where carrier self billing reports are stored
CUSTOMER_CONTROLLED_ORDER_F	SYSTEM	NONE	N	Y/N-Controls whether Order Revenue will be controlled by
DEBUG	SYSTEM	NONE	N	Debug enabled ? - Y or N
DSG_DEF_DU_TYPE	SYSTEM	NONE		Default DU Type for Orders created via the Dixons Booking
DSG_DEF_PRD_TYPE	SYSTEM	NONE		Default Product Type for Orders created via the Dixons Boi

You may modify all of these parameters using the system parameters maintenance screen in CTMS.

Note: Each of the parameters you can configure here are system-wide parameters and affect the functioning of MCS in your entire operation. You should take care in changing these parameters. Other configuration exists against the specific location, to affect functionality at that location alone.

Parameter	Description	Level	Notes
MCS_AWB_REQUIRED	This flag control whether the AWB (Air Way Bill) is requested during the pallet building and despatch processes in C-MCS.	SYSTEM	
MCS_DESPATCH_DISPLAY_DROP	Display the Drop Number in the Despatch Screen	SYSTEM	
MCS_DESPATCH_TO_PLAN	Enforce the despatch scanning of packages and pallets to the planned trips? (Y/N)	SYSTEM	
MCS_DISPLAY_ADDITIONAL	Display items scanned from different trips in MCS despatch? (Y/N)	SYSTEM	
MCS_DISPLAY_COMMTYPE_HAZ	This flag controls whether commodity code and hazardous information is displayed against items and pallets in C MCS pallet building.	SYSTEM	
MCS_DISPLAY_PROD_TYPE	This flag controls whether the Product Type is displayed against items and pallets in C- MCS in receipt, despatch and pallet building.	SYSTEM	
MCS_DYNAMIC_PALLET_BUILDING	This flag controls whether to allow pallet building to occur while scanning items for despatch in the items screen	SYSTEM	
MCS_EXCEPTIONS_DAMAGED	MCS exceptions at Receipt (excluding FNR and LATE) and Despatch will be marked as damaged items and be removed from onward trips (Y/N).	SYSTEM	
MCS_FAST		SYSTEM	



Parameter	Description	Level	Notes
	This parameter will control the level of validation performed during MCS scanning.		
MCS_FAST_VALIDATION	Is fast validation enabled	SYSTEM	
MCS_ITEM_DISPLAY_DU	This flag controls whether the DU type is displayed instead of the item type on item lists in MCS.	SYSTEM	
MCS_LOCATION_PROMPT	Prompt for Receipt Location at Receipt	SYSTEM	
MCS_MOVE_FULL_CONSIGNMENT	Move all items for an order during MCS split scanning.	SYSTEM	
MCS_NEW_DESPATCH_MODE	This flag controls whether the new Despatch screen is run	SYSTEM	
MCS_PALLET_LABEL_FORMAT	The format of pallet label produced by the pallet building option when printing pallet labels.	SYSTEM	
MCS_PREVENT_UNPLANNED	Prevent unplanned items being scanned for pallet building, despatch and receipt although expected for the route (Y/N)?	SYSTEM	
MCS_RECEIVE_TO_PLAN	Enforce the receipt scanning of packages and pallets to the planned trips? (Y/N)	SYSTEM	
MCS_SET_PALLET_ID	MCS set item Pallet Id	SYSTEM	
MCS_TEMPERATURE_SCAN	Prompt for Temperature Type at MCS Despatch	SYSTEM	
MCS_TENDERED_ITEMS	This flag controls whether MCS items are generated at the change to TENDERED status as well as at ACCEPTED status, or just ACCEPTED status.	SYSTEM	
MCS_UPDATE_SCAN_IMMEDIATELY	Allow items to count as despatched immediately after scanning? (Y/N)	SYSTEM	
MSC_STD_STATUS_CHANGES	Do trips go to EN-ROUTE and COMPLETED auto?	SYSTEM	Affects Despatch only. N means set to ACCEPTED if at PLANNED or TENDERED, otherwise EN-ROUTE. Any other value means set to EN-ROUTE status.

1.4 MCS Control Parameters

This will be set up by your Aptean implementation team.

This controls which cost centre is used for MCS reason codes.

CTP_KEY	CTP_VALUE	CTP_UPDATE_COUNTER	CTP_SITE_ID	CTP_SYNC_IND	CTP_DEVICE_SETTING
DEFAULT_COST_CENTRE	CONTRACT	1	ALL	0	0

1.5 Standing Data

1.5.1 Reason Codes

Set up for the default cost centre - you will be advised of the cost centre that by your OBS Logistics implementation team.



Reason Code	Usage	Description	Cost Centre	Cust Group	At Fault	At Fault Description	Action	Type	CBR
DAM	ITEM_NDN_CON	Damaged Item	NOLAN	+					
MIS	ITEM_NDN_CON	Missing	NOLAN	+					
BIT	ITEM_NDN_CON	Broken in Transit	NOLAN	+					

Note: You should set up the standard MCS reasons under your cost centre "+" for reason codes, so that they can be properly displayed on your TMS screens and reports, and so that they are not displayed as reason codes for a user to select on the device. See the recommendations and notes below.

Code	Description	Cost Centre	Notes
SL	Successfully Loaded	"+"	
SU	Successfully Unloaded	"+"	
ML	Missing Load	MCS CC	
NL	Not Loaded	"+"	
MI	Moved Item	"+"	
OP	On Pallet	"+"	
FNR	Freight not Received	MCS CC	Only configure if you want Freight Not Received functionality enabled.
UP	Unpacked Item	"+"	

Note:

- You should set up these reason codes against the MCS cost centre (set up above in the in the MCS Control Parameters by your implementation team) for the reasons you want to select for damages and exceptions processing only. You should have the Cust Group set to "+" (recommended) or the cust group for which these reason codes apply.
- Any other reason codes that you want displayed on the Item History (on the CTMS Orders screens and extracts) should be set to Cost Centre "+" - these will then not display on the MCS device.
- Reason codes will NOT display descriptions in the MCS Orders screen if the cost centre or cust group do not match the order, or the values of these settings against the reason code are not "+".
- Any reason code that begins with the word "Damaged" (in any case, upper, lower or mixed case) is considered a damages reason code and, regardless of where it is used, will automatically remove the items from any subsequent planned trips.
- Any reason code with action "LATE" can be used to make items available for despatch on other loads. Only configure this action if this is part of your process.

1.5.2 Depot Location Configuration

Each location to be enabled for C-MCS functionality must be set up as depot type "RDC".



The following flags may be configured:

- **MCS Active** - this flag controls whether C-MCS is used at this location.
- **MCS Identifier** - this is an identifier of the depot, used by MCS. This is displayed against items in receipt, so the user can see from which depot the items originated, to aid in unloading.
- **Receipt Only** - this flag controls whether the onward stops on this trip (and subsequent trips to the next RDC) are automatically debriefed with the time this stop is debriefed. If set, only the stop being receipted will be debriefed.
- **Despatch Only** - this flag controls whether the previous stops on this trip (and prior trips back to the previous RDC) are automatically debriefed with the time this stop is debriefed. If set, only the stop being despatched will be debriefed.
- **Print Pallet Label** - this flag controls whether pallets built through C-MCS at this location will use pre-printed stationary (when unchecked), or will print the label from C-MCS (when checked).
- **Pallet Building validation** - this flag controls the validation of pallets built through MCS. In all cases, pallets are retained until the pallet is received at the next depot location, whether this is an MCS-enabled location or not. Values are:
 - ♦ "To Next RDC" - items built onto pallets at this location will be validated that they are all going to the same next depot location;
 - ♦ "To Final RDC" - items built onto pallets at this location will be validated that they are all going to the same final delivery depot;
 - ♦ "By Final RDC Trip" - items built onto pallets at this location will be validated that they are all being delivered on the same final delivery trip.
- **Pallet Building Process** - values are:
 - ♦ "Continuous"
 - ♦ "Single"
- **Pallet Closure** - this flag controls whether pallet closure is an option for the C-MCS mobile device users.
- **Pallet Seal at Closure** - this option controls whether Seal number will be prompted for at pallet closure. Seal numbers are stored against a pallet in the AWB/Cons reference.
- **Trans-ship Enabled** - this flag enables the Trans-Ship process at this location. Trans-ship processing will identify whether the item is planned out of this location on a trip and, if so, will show the user the trip and vehicle and ask them to confirm by entering the vehicle registration. For pallets on the received trip, all items on the pallet must be planned out on the same trip. Successfully trans-shipped items will be marked as despatched on the outbound trip. If any item is not planned out of this location, or not all items on a pallet are planned together, the system will inform the user that trans-ship can't be completed and the items must be despatched separately.
- **Debrief Stop Times** - this flag controls whether C-MCS loading or unloading will debrief the stop times at that location.
- **Set Trip Status at Receipt** - if checked, the system will attempt to automatically move the trip to COMPLETED status when it is completed in C-MCS.
- **Set Trip Status at Despatch** - if checked, the system will attempt to automatically move the trip onto the next applicable status when it is completed in C-MCS. For PLANNED or TENDERED trips, this will be ACCEPTED status. For ACCEPTED trips, this will be EN-ROUTE.

1.6 MCS/WCS Locations

If using location confirmation in MCS, then WCS locations must be configured, as well as Locations matching those WCS locations.

WCS Locations are configured in the [WCS Maintenance](#) screen, on the Locations tab.



Additionally, the locations should be set up as normal locations.

This is through the standard Locations maintenance screen as above.

Only minor information is required here:

- Location ID - the same as the WCS Location ID.
- Location Type - by convention "WCS", but can be set to any valid location type. Avoid "RDC", "BRANCH", etc.
- Name - set to the name describing the location e.g. "Depot Ambient Receipt", "Depot Chilled Quarantine", etc.

1.7 Reports

Extract Suite reports can be configured for your system:

- MCS_DTLS/MCS DETAILS - the items and pallets that are awaiting scanning in your system.
- REASONS/ORD_ITEM_REASON - the reasons against order items, including scan reasons.
- TRIP SCANS/TRIP SCANS - Items scanned for a trip.
- O/S SCANS/MISSING_SCANS - Items not scanned.



2 Appendix A: Document References

A.1 References

Ref No	Document Title & ID	Version	Date
1			

A.2 Glossary

Term or Acronym	Meaning
AWB	Airway Bill; a receipt of goods required by airline carriers. It also serves as the carriage contract between the carrier and the shipper.
C-MCS	CALIDUS MCS, OBS Logistics Mobile Control System. See also MCS.
Carrier	The carrier completing the trip. Can comprise any carrier configured in the system, but normally Home Fleet (usually a carrier per depot), 3rd-party carriers, supplier/customer-own transport, own collection, etc.
Consolidating Centre	A depot that takes delivery of goods from several origins and consolidates them for trunking to outbases (q.v.) or final delivery to destinations. See also Consolidation.
Consolidation	In execution terms, this is the act of taking several jobs and combining them into a single execution job. This can be by several criteria but is broadly defined as: Same Location consolidation, where the delivery/collection points are identical; Linked Location, where the deliver/collection points have been configured to be seen as the same point within C-TMS and; Manual (Ad Hoc) Consolidation, where the driver decides that two jobs should be delivered/collected at the same time. In general transport terms, this is the act of taking like product from several sources (originating depots, warehouses, orders) going to the same destination or on the same vehicle and placing them on a transportable media. See also containerisation.
Containerisation	The action of taking items and placing them inside another item for tracking purposes. See also Asset.
Cost Centre	A part of an organisation to which costs may be charged for accounting purposes. For C-TMS, this is used for accounting purposes, and also to generally configure the system.
C-TMS	CALIDUS TMS, OBS Logistics' Transport Management System.
Cross-Dock	Also a specific location at which product is exchanged.
Customer	In 3PL terms, the customer on behalf of which the transport is being operated.
DDL	Drop-down list - a series of pre-designated answers to a particular question on a device, rather than requiring the user to key the answer in full.
Debrief	Comprises 2 parts: Stop debrief, where actual arrival and departure times against a trip are entered; Order debrief, where actual product and item quantities are entered; Driver/Trip debrief, where additional information is captured from the driver relating to the trip.
Depot	Any location that schedules and controls transport.
Despatch	In transport terms, the process of loading and despatching items out of a depot. In this implementation, the process of loading and despatching is predominantly controlled by C-MCS (q.v.). See also Loading.
Driver	Comprising drivers and crew assigned to a trip.
DU	Distribution/Deliverable Unit - Pallet, Package, etc.; Also Asset, Asset Type.
Fixed Route	In transport terms, a fixed route is a trip comprised of a series of fixed stops that are typically always visited. A C-TMS fixed route template (q.v.) can be used to create these.
Item	A single item for delivery/collection. A general terms, distinct from the DU of the deliverable item e.g. Pallet, Package, etc.
Loading	In transport terms, the process of loading and despatching items out of a depot. In this implementation, the process of loading and despatching is predominantly controlled by C-MCS (q.v.). See also Despatch.
Location	In C-TMS terms, a trip comprises visits or drops to many locations. A location can be of many different types.
Location Types	Usually one of: Depot, Customer, Delivery/Collection Location, Store, etc.
MCS	Mobile Control System, an application to execute mobile tasks, as opposed to transport management tasks from a console. For OBS Logistics, transport depot mobile tasks are handles



Term or Acronym	Meaning
	by <i>CALIDUS</i> MCS.
OMS Ref	A unique transport movement ID, referring to a single transport movement request.
Optimisation	Route building and optimisation of stops on a trip.
Order	Equiv: OMS Ref; a transport movement.
Order Status	The lifecycle of an order.
Outbase	A depot whose purpose is to deliver to final delivery destination within a geographically-restricted subsection of the whole catchment area; also ROC.
Reason Codes	Of many types: Adjustment, Non-conformance, Order.
Receipt	In transport terms, the process of receiving and uploading items into a depot. In this implementation, the process of receipt and unloading is predominantly controlled by C-MCS (q.v.). See also Unloading.
Region; Postal Region	Geographical Region.
Resources	Drivers, Crew, Tractors, Vehicles, Trailers (q.v.).
Route	A route is a fixed route that is repeated. A Trip is a unique trip, which may be created from a route.
ROC	Regional Operating Centre; a depot whose purpose is to deliver to final delivery destination within a geographically-restricted subsection of the whole catchment area; also Outbase.
RPE	Roll-pallet Equivalent - This is used to estimate volume and therefore capacity of vehicles within C-TMS.
Schedule	A day's plan, usually consisting of 24 hours, not necessarily from midnight to midnight.
Shunt	A trunk (q.v.) movement between depots using the trunk network, typically of a much shorter length than a trunk movement.
TLM	Transport Logistics Manager
Tractor	The driver cab, pulling the trailer.
Trailer	The trailer carrying the goods. Can be several types.
Trans-Ship	The process of receiving, cross-docking and despatching items within a depot, usually within a single transaction. In this implementation, this is the process at the ROC (q.v.).
Transport	Transport operations.
Trip	C-TMS: A selection of work to be completed, specifically a workload that lasts for an entire shift for a driver.
Trip Status	The lifecycle of a trip.
Trunk	A route between depots, transporting goods usually to be delivered from the destination depot, but any transfer of goods from the original receiving or originating depot in the network to the final delivery depot (the outbase).
Unloading	The process of receiving and uploading items into a depot. In this implementation, the process of receipt and unloading is predominantly controlled by C-MCS (q.v.). See also Receiving.
Vehicle	A generic term for the resource assigned to a trip. Can be tractor (q.v.), tractor plus trailer (q.v.), fixed vehicle (e.g. van). In C-TMS terms, the tractor ID is considered the vehicle ID, usually the registration.
Warehouse	This is a depot in C-TMS that is seen to be a warehouse, or origin and storage point for product for delivery.

A.3 Authorised By

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