

253313

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1 253313



2 253313 - MW-7F8JZV Summary Report of Trip for Road Ops Team

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3 Functiona Overview

3.1 Client Requirement

The 'Road Ops' team requires a summary report of each trip giving all required details within the trip to use instead of creating a folder.

The report (layout enclosed - does not need to be exact, but the needs to have all data shown) needs to be able to be created direct out of 'MTS'. Please provide cost for development of this report to be run through normal report functionality (criteria is just 'M Ref') and additional cost to run this report direct from within the trip via a button to print the report for the trip you are currently in (trip sum).

This report has been successfully tested through 'Access' and has removed the need to create files for each trip. The only draw back is that currently we need to extract the data to import into 'Access' to run this report, so the initial saving's on stationery and time will be increased once you can print direct out of 'MTS' without going through an external reporting system.

3.2 Solution

A new report will be created to run from the existing 'Reports' menu and 'Trip Manipulation' and 'Trip Planning' screens. The report will run with the mandatory parameters 'Exchange Rate' and 'Trip Ref' which relates to column 'BILL_OF_LADING' in table 'SCH_TRIP'. An example of this is 'M12345'. The report will be named 'ISC Road Ops Trip Control Report'.

The layout of the report will be as follows:

- The heading of the report will contain information relating to the Trip.
- This will be followed by all information relating to the Orders on the Trip - multiple orders will span multiple lines. Within the Order section there will be 3 sets of details:
 - ♦ Customer Address information
 - ♦ Order Line/Product information - e.g. list all lines of Products on Order
 - ♦ Order Comments information
- The footing of the report will contain information related to the Payment information of each Order (e.g. list all Order Payment information) and the Trip Payment information.

Trip heading information will include: Week No, Trip No, Trip Status, FTL/GRP, Trailer ID, Container Ref, Seal No, Schedule Date and User.

Customer address information will include: OMS Ref, Customer, Collection Address, Delivery Address, Booking Ref, Customer Ref, Del Pint Ref, Origin and Destination.

Order line/product information will include: OMS Ref, DU Type, Quantity, Volume, Weight, Imp/Exp, Order Early Collect, Order Early Deliver, Trip Early Collect and Trip Late Delivery.

Order comments information will include: OMS Ref, Order Comments, Non Conformance Collect and Non Conformance Deliver.

Order footing information will include: OMS Ref, Customer, Revenue Type, MTS Invoice, Logis Invoice, Currency, Ex Rate, Invoice, Amount and £.

Trip footing information will include: Supplier, Cost Type, Narrative 2, Narrative 3, Currency, Ex Rate, Invoice, Amount, £ and Margin £.



This data for the report will be picked up from tables: SCH_ORD, SCH_ORDER_LINE, SCH_TRIP, SCH_ORD_NON_CONFORM, SCH_HAULAGE_ACTIVITY, ACC_PAYMENT and ACC_INVOICE.

This is a basic layout of how it should look for a Trip with 2 Orders on it:

Report Title and Date/Time	
Trip Heading	
Order 1	
Customer Address	
Order Line/Product	
Order Comments	
Order 2	
Customer Address	
Order Line/Product	
Order Comments	
Order 1 Payment	
Order 2 Payment	
Trip Payment	

The change request also includes functionality to run this report from the ?TRIPSUM? screen. This will require the addition of an ?Export? button on ?TRIPSUM? and ?TRIP_PLAN? screens.

A new System Parameter named ?TRM_SHOW_TRIP_EXPORT_BTN? will determine whether the new ?Export? button will be displayed on screen. If this parameter exists in table ADM_SYSTEM_PARAM and is set to ?Y?, then the button will be visible. This parameter will be set up for client ?ISC? and set to value ?Y?. The button will be positioned in the Control Bar of the screen, to the right of the current ?Close? button. The ?Export? button will call the Reports screen and will automatically pass in the current Trip Ref in focus. The user will then just have to click the ?Print? button to run the report. This button will have similar functionality to the ?Export? button currently in use in the ?PAYMENTS? screen.

When the report is requested via the new button then there will be another popup box displayed in which the exchange rate for the payments made in any non-base currencies used may be converted into the base currency (e.g. ?Euro? to ?Sterling?).

3.3 Scope

This change will be applied to system version 10.5.0 on IIBTST and once approved IIBPRD



4 Set-Up

4.1 Pre-requisites

A new report and system parameters will be required as described in the Data Section

4.2 Data

A new set of report parameters will be required for the new report called ?ISC Road Ops Trip Control Report?. See section 3.1 for more details.

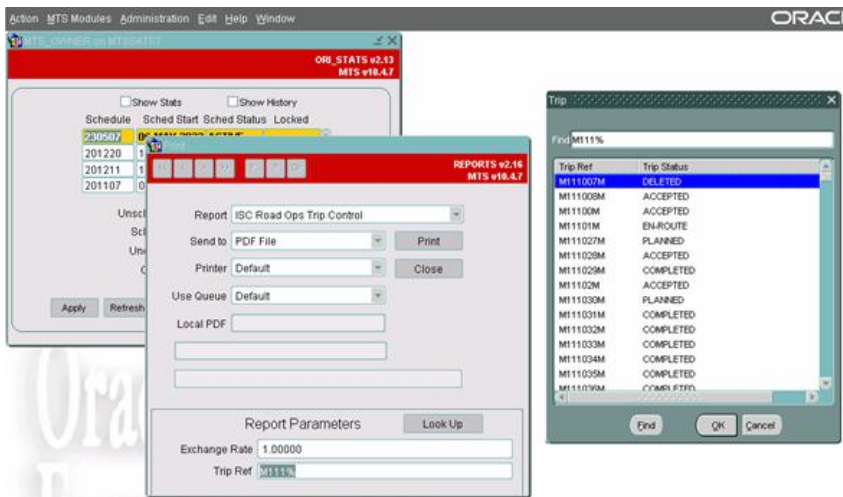
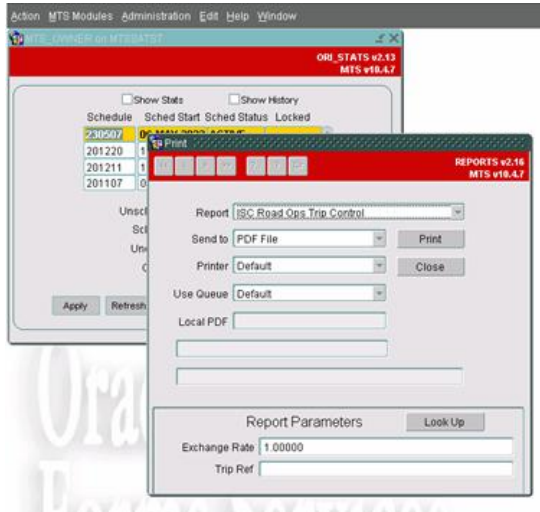
A new system parameter ?TRM_SHOW_TRIP_EXPORT_BTN? will be required to enable the new ?Export? button in the ?Trip Manipulation? and ?Trip Planning? screens. See section 3.2 for more details.



5 Functional Description

5.1 Report Parameter Set-Up

The report parameters will need to be setup so that the new report may be run from the ?REPORTS? form with the opportunity to run the report for a single ?Exchange Rate? (defaulted to 1.00000 and with a limit of 4 digits and 5 decimal places allowed) and ?Trip Ref?:



5.2 System Parameter Set-Up

A new system parameter will need to be setup so that the new ?Export? button may be displayed in the ?Trip Manipulation? and ?Trip Planning? screens.

This system parameter will be called ?TRM_SHOW_TRIP_EXPORT_BTN? and will be setup for the client and set to a value of ?Y?.

ADM_SYSTEM_PARAM



Parameter Name	Config By	Config By Value	Value	Description
TRM_SHOW_TRIP_EXPORT_BTN	SYSTEM	NONE	N	Show the Export button in the trip screens - Y or N
TRM_SU_DFLT_FIXED_TIME	SYSTEM	NONE	30	Default Start Up time (minutes)
TRM_TRACTOR_RQD_FOR_ENROUTE	SYSTEM	NONE	N	Is a Tractor (Vehicle) required before a Trip can be set to E
TRM_TRAILER_RQD_FOR_ENROUTE	SYSTEM	NONE	N	Is a Trailer Id required on every stop before a Trip can be s
TRM_TRIP_STATUSES	SYSTEM	NONE	ACCEPTED,EN-ROUTE,COMPLETE	List of Trip Statuses to control which trips displayed in Trip
TRM_UNLOAD_DFLT_FIXED_TIME	SYSTEM	NONE	30	Default unloading time (minutes)
TRM_UNLOAD_DFLT_MINS_PER_RPE	SYSTEM	NONE	5	Default unloading rate per RPE (minutes)
TRM_USE_MAX_RPE_OF_LARGO_TRAIL	SYSTEM	NONE	Y	Controls whether MTS uses Max RPE of Largest Trailer Ty
UNISON_ORDER_INT_TYPE	SYSTEM	NONE	UNISON_ORDER	EIH interface Type (UNISON ORDER)
UNSCHED_ORDERS_DEL_DAYS	SYSTEM	NONE	30	Unscheduled orders on schedules older than this value w
ACC_ALLOW_MULTIPLE_CCY	SYSTEM	NONE	N	Can multiple currencies be defined in the database?
ASN_ACK_PATH	SYSTEM	NONE	\\webintmtssats\interface\ASN\ack	File path for ASN Acknowledgement
BKG_ACK_PATH	SYSTEM	NONE	\\webintmtssats\interface\BKG\ack	File path for BKG Acknowledgement
BKG_TYPE_9_DU_TYPE	SYSTEM	NONE	MB	Default DU Type for Type 9 Orders
CAL_DEFAULT_TIME_OFFSET	SYSTEM	NONE	125	Default time offset which gets added to times in Order trac
CAL_DEFAULT_TIME_ZONE	SYSTEM	NONE	CET (Central European Time)	Description of timezone, used in Order Tracking form, free
CSB_EXPORT_PATH	SYSTEM	NONE	\\webintmtssats\carrier_self_billing	Directory where carrier self billing exports are stored.
CSB_REPORT_PATH	SYSTEM	NONE	\\webintmtssats\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

5.3 Change to the ?Trip Manipulation? screen (?TRIPSUM? form)

The ?Trip Manipulation? screen will be changed to include a new ?Export? button on the screen from which the new ?ISC Roads Ops Trip Control? report may be produced for the ?Trip Ref? selected on screen. The new ?Export? button will be placed to the right of the existing ?Close? button on the control bar.

The button will only be displayed if the system parameter ?TRM_SHOW_TRIP_EXPORT_BTN? has been set to ?Y?.

If the button is pressed then it will call the ?Reports? screen pre-populated with the report name and trip so that the output parameters may be set as required.

This button will have similar functionality to the ?Export? button present in the ?Payments? screen (?PAYMENTS? form) where the report form is called.

Before the ?Reports? screen is called, a popup box will be called to allow the appropriate exchange rate for the non-base currency used to the base currency to be specified. The exchange rate may be stored for the trip and used when the report is run.

For example, the existing layout is as follows:

Trip Detail	Stops	Finance	Audit
1 16/07/08 12:26 13:13 02:00 03:00 SU Healthcare Int 095 - No			
2 17/07/08 10:00 10:47 14:00 15:00 CL Germany DC (31101)			

5.4 Change to the ?Trip Planning? screen (?TRIP_PLAN? form)



The ?Trip Planning? screen will be changed to include a new ?Export? button on the screen from which the new ?ISC Roads Ops Trip Control? report may be produced for the ?Trip Ref? selected on screen. The new ?Export? button will be placed to the right of the existing ?Refresh Trip? button on the control bar and all other existing buttons moved to the left to create space for it.

The button will only be displayed if the system parameter ?TRM_SHOW_TRIP_EXPORT_BTN? has been set to ?Y?.

If the button is pressed then it will call the ?Reports? screen pre-populated with the report name and trip so that the output parameters may be set as required.

This button will have similar functionality to the ?Export? button present in the ?Payments? screen (?PAYMENTS? form) where the report form is called.

Before the ?Reports? screen is called, a popup box will be called to allow the appropriate exchange rate for the non-base currency used to the base currency to be specified. The exchange rate will be stored for the trip and used when the report is run.

For example, the existing layout is as follows:

5.5 ?ISC Road Ops Trip Control? Report (?ROADS_OPS_TRIP_CONTROL? report)

A new report will be created to extract the relevant details about the trip selected.

The report will be in sections as follows:

- Trip Header Section: Trip Information - once per page
- Repeating Order Detail Section: Customer Address Information - once per order
- Repeating Order Detail Section: Order Line/Product Information - once per order
- Repeating Order Detail Section: Order Comments Information - once per order
- Repeating Order Footing Section: Order Payment Information - once per order payment
- Repeating Trip Footing Section: Trip Payment Information - once per trip payment

The exchange rate will be passed into the report as parameter from the popup box in the TRIP screens or as a single parameter from the reports screen itself; and it will be displayed under the heading ?EX RATE? in the report and used to convert any non-base currencies to the base currency and displayed under the heading ?£?. The ?MARGIN £? will be expressed in the base currency.

The order comments information is optional so if no comments exist for an order then this section of the report will be absent.

The length of the order and payment sections will not be fixed as the information will use as many lines as are required for the records selected.





6 References

Ref No	Document Title & ID	Version	Date
1	EST-253313 MW-7F8JZV Initial Estimate	1	11/08/08
2	1 page example.pdf	N/A	N/A
3	MW-7F8JZV.xls	N/A	N/A



7 Document History

Version	Date	Status	Reason	Initials
1a	20/08/08	Draft	Initial version	PDR
1	29/08/08	Issue	Reviewed and Issued	JAT
2a	08/09/08	Issue	Modified Layout of Report	PDR
2	11/09/08	Issue	Review and Issue	DJM



8 Authorised By

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