

**266210**

Aptean Ltd  
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1 266210

Ready for **What's Next, Now™**



## 2 266210 - PA-7SWCRM/ Debrief Screen Enhancements

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## 3 FUNCTIONAL OVERVIEW

### 3.1 Client Requirement

Allow 'Configure Layout' of Trip Debrief fields (lower section) TRPDTL v2.61, and include Book Time Field (on order) in parameters. Highlight 'Late' arrival by comparison of Actual Arr Time against Book Time with new Minutes variance field (Red/Green) as per Order tracking Screen to RHS of screen.

Add 'Late reason' button (name is a suggestion only) which invokes a pop-up window to record reasons for Late from drop-Down box of options. Record Late Reason on Order level non conformance tab. reasons List attached

Added by ss 16.06.09: As delivery targets are currently being used, in order to ensure that a significant amount of orders are not highlighted as late (e.g. 10 mins outside current five minute windows) we will need a way to apply an order tolerance to each customer for example: Customer Birds Eye, tolerance +/- 30 minutes from late delivery time. This might be best done on customers form and configurable by users.

When entering actual order arrival times the same times should be applied to all orders on that stop automatically by MTS (or perhaps a pop up window to ask the user if this should be applied to all the orders) .

The reason codes will need to remain generic and not mention specific customers.

When estimating this RIO please bear in mind that we are likely to request a report from MTS that will reflect the data in these forms (RIO to follow)

### 3.2 Solution

A ?Minutes? variance field will be added to the order line block. A comparison will be made between the actual arrive time at a stop and the booking time window from the order. The variance will be shown in this field, for early times this field will show as green, for late times the field will display as red. A new field will be added to customer's form that will allow a tolerance value to be added. This value will determine how much time must pass before an arrival at a stop is considered to be late. A new column will be added to SCH\_ORDER to store the variance time.

This new field will be included in the configure layout functionality.

A button will be added to the block that will allow the entry of late reasons. If the order is marked as late (variance field will be red), the user will be able to press this button to enter the reason. Pressing this button will bring up a new popup window. In this window will be a drop down that will contain the late reason codes. A comments field will also be available; this will be free text and allow the user to add any comments about the late time.

Two new tables will be required to store this information. The first SCH\_LATE\_CODES will store the late codes that are available. The second table SCH\_TRIP\_LATE will store the reasons against a trip stop for the late time.

SCH\_LATE\_CODES will store the late code, and description (see document attached to RIO) and will be used to populate the drop down list on the Late popup window.

SCH\_TRIP\_LATE(name to be confirmed) will store the oms\_ref, trip id, stop id, location, and reason code for the late time. Comments will also be stored in this table.

### 3.3 Scope

This change will be applied to system version 10.6.



## 4 SET-UP

### 4.1 Data

New System Registry TRM\_SHOW\_LATE\_BTN needs to be setup to indicate whether the late reasons button is displayed on the screen.

Late reason codes need to be loaded into table SCH\_LATE\_CODES.



# 5 FUNCTIONAL DESCRIPTION

## 5.1 Trip Debrief Screen

A new field will be added to the order line block on the TRIPDTL screen.

Stop	Load Location	Stop	United Location	Cust Ref	Line Prod Type	DU Type	Plan	Actual Despatch/Deliver	Plan Weight	Actual Volume	Plan Volume	Actual Freq	Actual Cases	C/D	POD/POD
1	Bawtry_Exel Bawtry	2	SOUTH_YORKSHIRE	777	1	AMBIENT CHEP PA	1.000	20.68		1.00		4			

Stop	Planned Arr	Dep	Actual Arr	Dep	Type	Location	Distance	Drive Mins	Trailer Type	Trailer Id	Activities
1	16/06/09 12:42	13:12			SU	Bawtry_Exel Bawtry_D	0	0	45FT	442305	
2	16/06/09 13:25	13:47			DL	SOUTH_YORKSHIRE_D	16	13	45FT	442305	
3	16/06/09 14:00	14:30			CL	Bawtry_Exel Bawtry_DN	16	13	45FT	442305	

The field will contain the minutes variance between the planned and the actual arrive time for the unload stop for the order.

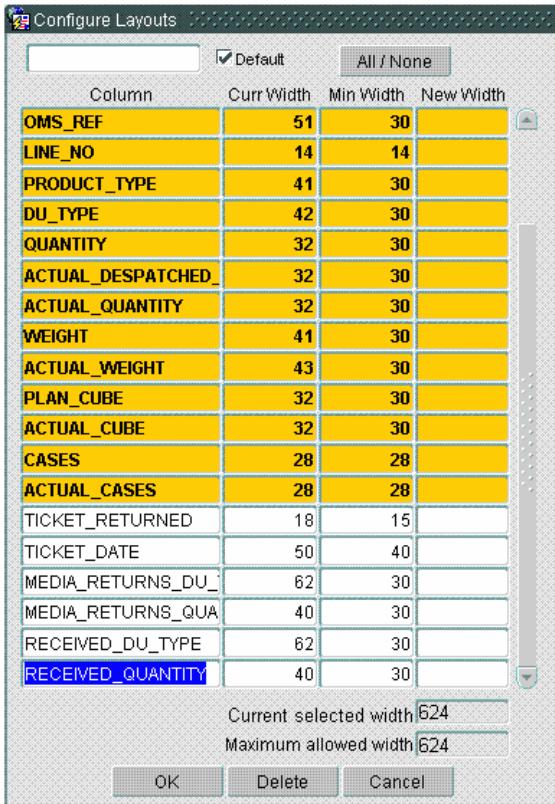
If the actual arrive time is between the early del time and late del time of the order then this field will show as green. If the actual arrive time is after the late del time (allowing for customer tolerance) then the field will show as red indicating the order is late. The value from this field will be stored in a new field on the SCH\_ORDER\_LINE table.

When the actual arrive time is entered for a stop, the variance time will be updated for any orders that are unloaded at that stop. A new procedure in the package TRM will be created to update the necessary records.

A new system registry will control whether the variance times are updated or not. If the registry is switched on then the times will be updated, if the registry is off the form will work as it does now with no additional updates.

This new field will be included in the configure layout functionality. This will allow the field to be displayed or hidden as required.



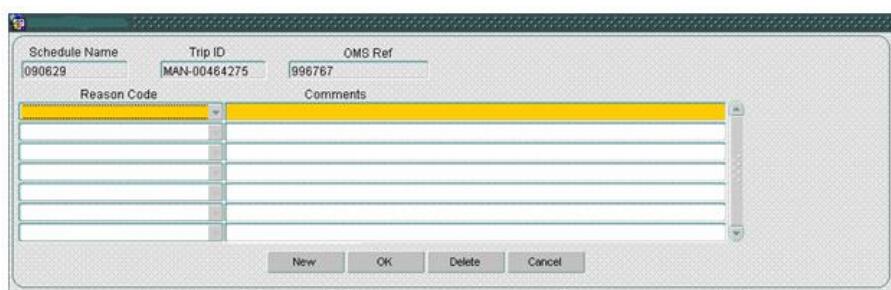


### 5.1.1 Late Reasons

A new button will be included on the screen called Late Reasons. This will bring up a popup window similar to the non conformance. The popup will contain the Sched name, OMS ref, and trip ref of the order highlighted when the button is pressed. The visibility of this button will be controlled by a new registry called TRM\_SHOW\_LATE\_BTN.

A drop down list will contain the reason codes that the user can assign to the order. The values in this list will initially be entered from a document (attached to the RIO). (N.B. this data will not be visible or editable in MTS. This can be done but has not been included in this RIO to minimise costs.) The reason codes will be held on a new table SCH\_LATE\_CODES. See Appendix A for table definition.

A free text field will also be available which will allow the user to add comments.



The late reasons will be stored against each order in a new table SCH\_ORD\_LATE\_REASON. See Appendix A for table definition.

### 5.2 Customers Screen

To allow for delivery targets per customer a new field will be added to the customers screen. This field will contain a tolerance in minutes to indicate how long after the late Del time is considered to be late.



Customers

CUST\_COST v2.29  
MTS v16.5.8

Customers Customer Group Cost Centres

Customer ID <b>4CX</b>	Customer Name	Order Revenue Charging Type
Contact Name	Allocation Method	
MTM Customer Code	LOTS Owner	
Customer Group		
Customer Type	Customer	Fuel Charge % 9.00 Active <input checked="" type="checkbox"/>
Late Order Days Threshold		
Interface Orders to LOGNET		
Unison Interface Value		
POD document available	Consolidate Orders <input checked="" type="checkbox"/>	
County	No. abcdefghijkl1234567890	
Location	St Albans_4CX (Cas)	
Address	Town St Albans Fopwell House Cottonmill Lane	County
		Postcode AL1 2HQ

New Delete Cancel Save Close



## 6 REFERENCES

Not Applicable



## 7 DOCUMENT HISTORY

Version	Date	Status	Reason	Initials
0.1	01/07/09	Draft	Initial version	DNG
0.2	02/07/09	Review	Reviewed	MJC
0.3	05/07/09	Draft	Revised Version	DNG
1.0	07/07/09	Issue	Reviewed and Issued	MJC



## 8 AUTHORISED BY

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