

**266210**

Aptean Ltd  
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1 266210



## 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.

The screenshot shows the 'Trip Debrief' screen with a table of order line items. The table has columns for Stop, Location, Cust Ref, Line Prod Type, DU Type, Plan, Actual, and a new field for minutes variance. The data shows a trip from Bawtry to South Yorkshire with a planned arrival time of 12:42 and an actual arrival time of 13:12, resulting in a 30-minute variance.

Stop	Location	Cust Ref	Line Prod Type	DU Type	Plan	Actual	Minutes
1	Bawtry_Excel Bawtry_D	777	1	AMBERT CHEP PA	1.000	20.68	1.00
2	SOUTH_YORKSH						
3							

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.



Column	Curr Width	Min Width	New Width
OMS_REF	51	30	
LINE_NO	14	14	
PRODUCT_TYPE	41	30	
DU_TYPE	42	30	
QUANTITY	32	30	
ACTUAL_DESPATCHED	32	30	
ACTUAL_QUANTITY	32	30	
WEIGHT	41	30	
ACTUAL_WEIGHT	43	30	
PLAN_CUBE	32	30	
ACTUAL_CUBE	32	30	
CASES	28	28	
ACTUAL_CASES	28	28	
TICKET_RETURNED	18	15	
TICKET_DATE	50	40	
MEDIA_RETURNS_DU_	62	30	
MEDIA_RETURNS_QUA	40	30	
RECEIVED_DU_TYPE	62	30	
RECEIVED_QUANTITY	40	30	

Current selected width: 624  
Maximum allowed width: 624

OK Delete Cancel

### 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.

Schedule Name: 090629 Trip ID: MAN-00464275 OMS Ref: 996767

Reason Code	Comments

New OK Delete Cancel

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 v2.39  
MTS v10.5.8

Customers Customer Group Cost Centres

Customer ID: **4CX**  
A&J CARTER  
A&J Carter  
AA GRIGGS  
ACCANTIA  
ACCROL  
ACKERMAN  
ACUSHNET  
AD TRANSPORT  
ADDGARDS LTD  
ALAN FIRMS  
ALCAN  
ALPHA

Customer Name:   
Contact Name:   
MTM Customer Code:   
Customer Group:   
Customer Type: Customer

Late Order Days Threshold:   
Interface Orders to LOGNET:   
Unison Interface Value:   
POD document available:   
Consolidate Orders: ☒

Country:   
No. (abcdefghij) 1234567890

Location: St Albans\_4CX (Cas) Town: St Albans  
Address: Popwell House County:   
Cottonmill Lane Postcode: AL1 2HQ

Order Revenue Charging Type:   
Allocation Method:   
LOTS Owner:   
Fuel Charge %: 9.00 Active: ☒

Premium Charges

	Active	%	Fixed #
Sun	<input checked="" type="checkbox"/>	5.00	
Mon	<input checked="" type="checkbox"/>	10.00	
Tues	<input type="checkbox"/>		
Wed	<input type="checkbox"/>		
Thurs	<input type="checkbox"/>		
Fri	<input type="checkbox"/>		
Sat	<input checked="" type="checkbox"/>		112.00

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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