

**276305**

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1 276305

1 Ready for **What's Next, Now™**



## 2 276305 - DU-86RBCK/ Execution Screen

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## 3 FUNCTIONAL OVERVIEW

### 3.1 Client Requirement

New screen suggested by Jamie Coates that allows orders and trips to be viewed together with sorts and filters. Provides enhanced visibility of traffic plan, easier method of update of resource and more direct method of execution re-plans / adjustments and adding backloads.

Currently, changes during execution are quite difficult to input into the planning screens and as a consequence there is a tendency for operators to work offline on printed traffic sheets / spreadsheets once the plan is finalised. Developing a specific view of trips and orders planned on those trips with filters and sorts combined with the ability to input resource and easily move orders from one trip (delayed en-route) to another trip would remove this manual off system method of working.

### 3.2 Solution

A new screen will be developed with the ability to filter and sort data in a manner similar to a spreadsheet. The layout of displayed fields will be configurable by user and each user will be allowed multiple displays to allow maximum flexibility of data display.

Rapid entry of resources will be available as will the ability to quickly add new payments for a trip.

A function will be available to view unscheduled orders, and then apply these to new or existing trips. It will also be possible to move orders from one displayed trip to another in a simple manner.

Existing functionality such as EFX etc will be available in the new screen to avoid users having to use several different screens.

Existing colour formats will be preserved such as the highlight of order reference fields when special instructions have been applied.

Double click on Trip References will display Trip Details similar to the existing Trip Forms, existing functionality will be applied to this new pop up.

Double click on Order References will display the Orders Form with currently selected order displayed.

Trip revenues & costs will subtotal for the displayed Trips and be displayed above the relevant columns.

### 3.3 Scope

This change will be applied to system version 10.5



## 4 FUNCTIONAL DESCRIPTION

The new screen will be developed to assist users amend trip details from one point in the system. When entering the screen the users will select a depot .a schedule from and schedule to and a data level before pressing the run query button.

The query will build up a where statement based on the values the user has selected. The data block will be a view based on order and trip information. The user is able to select the level of data - detail or Summary. All queries will be based on the user parameters Based at and Sched Group.

### 4.1 Detail Data Level

This will display one record of data per order on each trip. The information displayed will include the load and unload locations of each order on the trip, standard trip and order information.

### 4.2 Summary Data Level

This will display one record per trip. The order information displayed will relate to the first order loaded on the trip.

### 4.3 Data Block

All fields on the data block will be configurable , and some of the fields will be editable. The only information that the user will be able to edit will be the following trip details:

- Trip status
- Carrier id
- Driver id
- Tractor id
- Trailer type
- Trip Cost

Data changes will be subject to existing trip validation and any data change which does not conform to existing validation will not be allowed. Users will only be allowed to edit the Trip Cost field if it is empty. Adding a value into the field will generate a payment record between the Cost Centre and Carrier with a payment type Trip\_Haul\_Man.

All fields which are displayed in the data block will include a sort button and Filter field. The filter fields will be drop down lists based on the records returned from the main query. If the user selects a value in one of the filter fields, the query will automatically run and return a subset of the data based on the filter field. If the user populates multiple filter fields, the query will be rebuilt and run after each field is populated.

If the user selects a Carrier of EFX , the data returned will be all records where the carrier is EFX. If the user then selects a trip status of Planned, the data returned will be for all records where the carrier is EFX and the status is Planned.

The data block will be sorted by trip\_id and unload stop. If the user chooses to sort by a field, then the data block will be sorted by this field followed by Trip id and unload stop.

A command button ?Clear Filters? is available and this will set all the filter fields to null and rerun the main query.

A checkbox will be available next to each record in the data block, called Mark Trip. The user is able to select records using this check box and then press the ?Show Marked Trips? button to run a query which returns only the records selected. Selecting ?Clear Filters? will rerun the main query and remove the selections.

The cost, revenue and profit filters will not act as filter fields but will contain the total amount for each based on the query and filters selected. If a filter is added, this will be reflected in the totals.

### 4.4 Launching Other Screens

Users will be allowed to edit order details by double clicking the OMS\_REF/ EXTERNAL\_REF to launch the orders form in edit mode. Orders details will not be editable directly in the Executions screen. The user must close the orders screen before returning to the Execution screen



Double clicking in the trip\_id field will launch a pop up screen, which will mirror the trip details tab available on the Trip Planning and Trip Manipulation screen. All functionality currently available from the tab screens in the Planning and Manipulation screens will be available in the new pop up. To select another trip, the user must close the pop up screen and select the next trip within the data block.

Right clicking on the trip id will allow the user to select Trip Debrief which will take the user to the Trip Debrief screen.

The Unscheduled Orders button will launch the Order Well for the schedules listed in the main toolbar. From the order well users will be able to assign orders to trips and via cross dock. The Order well will include all functionality and filters currently available in the Trip Manipulation and Planning screens.

Within the main screen, users will be able to move an order from one trip to another using right click options.

From the main screen and the order well, using the right click option, the locations details form will be displayed for the delivery and collection locations.

Right click options will allow users to see the resource details for carriers, drivers, tractors and trailers. This information will not be editable.

## 4.5 Data Entry

Fast track payments will be allowed where the trip has no previous costs applied and the status is Accepted or above. In this instance the user will have the ability to enter an amount, select a payment type (which will default to Trip Haul Ma) and add an optional comment. This information will generate a payment record against the trip.

Users will be able to add and edit resource information (carrier, driver, tractor and trailer). Where the carrier is set as a poplist display type, users must select Drivers and Tractors from the LOV's provided. If the carrier is free text, the user can enter any driver or tractor.

When the user launches the trip detail tabs, they will be able to make the same data changes as are currently allowed in the Trip Manipulation and Planning screens.

All trip data changes are subject to the validate trip functionality, as in the trip screens.



## 5 REFERENCES

Ref No	Document Title & ID	Version	Date
1	276305 DU-86RBCK Execution Screen	0.1	05/07/10



## 6 DOCUMENT HISTORY

Version	Date	Status	Reason	Initials
0.1	12/07/10	Draft	Initial version	SEW
1.0	16/07/10	Issue	Reviewed and Issued	MJC

