

285419 v1.0

Aptean Ltd
Copyright © 2011-2026.

Contents

- 1 285419.....1
 - 1.1 Client Requirement.....2
 - 1.2 Solution.....2
 - 1.3 Scope.....2
- 2 Set-up.....3
 - 2.1 Pre-requisites.....3
 - 2.2 Menu Structure.....3
 - 2.3 Data.....3
 - 2.4 Implementation Advice.....3
- 3 Functional Description.....4
- 4 AUTHORISED BY.....7

1 285419



DHL C-TMS

Balance of Debrief Unilever

FUNCTIONAL SPECIFICATION - 10.6

01/07/2011 - 1.0

Reference: FS 285419 KM-8DAN4M



1.1 Client Requirement

Balance of Debrief Unilever outstanding points as a result of rio KM-8A6DYZ and KM-8A6EC

If ?Time Reason? is set to Mandatory it is not looking at the ?Delivery Threshold?. In particular - Early. If it is early we want to just default the reason ?early? and not have to enter a reason. The interface already handles this but currently by setting ?Time Reason? to Mandatory it is over-riding the rule in the interface.

If ?Line Item? Reason is set to Mandatory, an un-necessary ?OK? is required for each time If ?Line Item? Reason is not Mandatory, items are off but set to ?order and line debrief?, when you come to ?save? it still makes you press ?OK? twice. Once for order and one for lines.

The simple answer is the rules are still applicable and to raise the popup when the Time Variance would normally display Red. However, the customer KPI tolerance allows x mins and initially operations would only want to capture reason if outside tolerance so ideally I think if we had a parameter defined by customer for when it should raise the Late Reason popup e.g. Unilever we could set it to 30 mins so if Time Variance is Red and it is greater than 30 mins a popup box is raised.

In terms of when we raise the popup, usually we debrief times separately to quantities so should be at stop level.

1.2 Solution

If the delivery time is between the order delivery windows (including any variance for the customer) then the time variance field shows green and a reason code is not be required. If the actual arrival is outside of the order delivery windows (including any variance) then the time variance field shows red and a reason code is required (providing the customer is set up to enter reason codes).

Currently there is one parameter against the customer called mandatory time reason code. This controls whether a reason code is required for late or early arrivals. A new parameter will be added called mandatory early reason code.

If this new parameter is set then if the actual arrival time is earlier than the early del time of the order, the variance field will show as red and a default reason code of ?EARLY? will be added to SCH_ORD_LATE_REASON for the order. This will prevent the user having to enter a reason code manually.

There are currently messages that pop up when a discrepancy is entered on the Item and Line level quantities. These messages inform the user that a non conformance must be entered. This will be changed to remove the messages and just show the Non conformance reason pop up window without displaying the message, as users did not want to press ?Ok? each time.

N.B. If non conformance is not required (as set in the customer parameters) the existing message informing the user that they can enter non conformance reasons if required will still display.

1.3 Scope

This change will be applied to system version 10.6



2 Set-up

2.1 Pre-requisites

N/A

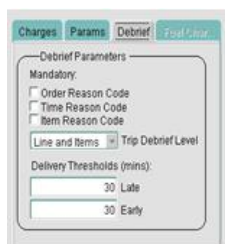
2.2 Menu Structure

N/A

2.3 Data

N/A

2.4 Implementation Advice



The screenshot shows a software window titled 'Debrief Parameters' with four tabs: 'Charges', 'Params', 'Debrief', and 'Tool Setup'. The 'Debrief' tab is active. Inside the window, there is a section labeled 'Mandatory:' with three checkboxes: 'Order Reason Code', 'Time Reason Code', and 'Item Reason Code'. Below these is a dropdown menu labeled 'Line and Items' and a text field labeled 'Trip Debrief Level'. At the bottom, there is a section labeled 'Delivery Thresholds (mins):' with two input fields: '30 Late' and '30 Early'.

Any one of the above tick boxes must be set an early threshold must be entered for Customers requiring this functionality.



3 Functional Description

Currently in the Customer Maintenance screen, there is a Debrief tab which controls how orders for the customer should be de-briefed.

The screenshot shows the 'Customer Maintenance' window with the 'Debrief' tab active. The 'Customer ID' is set to 'UNILEVER'. The 'Customer Name' is 'Unilever West Thurrock'. The 'Order Revenue Charging Type' is set to 'Allocation Method'. The 'Debrief Parameters' section includes a 'Mandatory' checkbox for 'Time Reason Code'. The 'Delivery Thresholds (mins)' section has input fields for 'Late' (30) and 'Early' (30) thresholds.

There is a check box labelled ?Time Reason Code? and if this is checked for a customer, any order that is delivered later than the order window will require a reason code.

The screenshot shows the 'Trip Details' window with the 'Time Reason Code' checkbox checked. A message box is displayed, stating: "The late reason code flag is set for customer ASJ CARTER. You will be forced to enter a late reason code." The message box has 'OK' and 'Cancel' buttons.

If the checkbox has been selected, the user will enter a threshold time for early and late deliveries. The values are always entered in minutes. If an order is delivered LATE after the late threshold time is added, the user is automatically informed that the delivery is late and is taken to the Time reasons screen.

The screenshot shows the 'Time Reasons' window. The 'Schedule Name' is '110630', the 'OMS Ref' is '1020499', and the 'Trip ID' is 'MAN-00483766'. The 'Late Code' field is empty, and the 'Comments' field contains text.



However, if an order is delivered EARLY, after the early threshold time is added, the user is not currently directed to the Time reasons screen.

The functionality will be changed so that when an order is delivered earlier than the delivery window including the early threshold time, a record will be automatically created in the reason table for the order. The record will be based on the following data:

SCHED_NAME The schedule the trip is on
 OMS_REF The oms_ref of the order delivered early
 TRIP_ID The Trip_id of the trip being debriefed
 LATE_CODE ?EARLY?
 COMMENTS ?Order was delivered earlier than the threshold time?

The variance field will display as red, to indicate that the order was delivered outside of the delivery window, including threshold times.

Example

Delivery Window: 30/06/2011 15:30 - 17:45

Early Threshold time 30 MINUTES

If the order is delivered before 30/06/2011 15:00 an ?EARLY? non conformance record will be automatically generated against the order.

If the user enters quantities at item or line level which are different to the planned quantities, they are informed that they will be forced to enter a non-conformance before being forwarded to the Non Conformance screen.

The screenshot shows a software interface for managing delivery orders. At the top, there's a header bar with 'TRIPOTL v2.88' and 'C-TMS v10.7.2'. Below this, a 'Sched' field is set to '110630' and a 'Trip' field is set to 'MAN-00493766 30/06/11 17:47 EXELBAWT MERSBIRK ACCEPTED'. A 'Refresh' button is visible. The main area contains a table with columns for 'Stop', 'Load', 'Location', 'Unload', 'Location', 'OMS Ref', 'Line Prod Type', 'DU Qty', 'DU City', 'DU City', 'Plan', 'Desp', 'Del', 'Plan', 'Desp', 'Del', 'Plan', 'Desp', 'Del', 'Exchange', 'Time', 'C', 'D'. The first row shows '1 Bawtry_Excel Baw 2 Birkenhead_Mer 1020499 1 AMBENT 12 10 9 12.00'. A warning message box is overlaid on the table, stating: 'The Delivered quantity is less than the Despatched quantity. You will be forced to enter a non conformance code for customer A&J CARTER.' The message box has an 'OK' button. At the bottom, there are buttons for 'Set Desp Times', 'Set Del Times', 'Set Actuals', 'Save', 'Cancel', 'Close', 'Set Item Actuals', and 'Set All Actuals'.

The functionality will be changed so that the user is forced to the Non conformance screen without the message being displayed first. This functionality will apply to all levels of debrief, ensuring the user does not have to select Ok before the non-conformance screen is displayed.



If the customer has not been set up for non-conformance, where all the check boxes for the de-brief options are unchecked (see next screen shot), messages will still be displayed informing the user that they can create non-conformance.

Any attempt to suppress the non-conformance messages must be based on at least one of the above check boxes being checked.

Table Updates Required

Insert into SCH_LATE_CODES (LATE_CODE, DESCRIPTION)

VALUES (?EARLY?,?Order was delivered Earlier than threshold time?);

References

Ref No	Document Title & ID	Version	Date
1	EST- 285419 KM-8DAN4M Balance of Debrief Unilever v3.0	3.0	29/03/2011

Glossary

Term or Acronym	Meaning
C-TMS	Calidus TMS

Document History

Version	Date	Status	Reason	Initials
0.1	01/07/2011	Draft	Initial version	SEW
1.0	05/06/2011	Issue	Reviewed and Issued	MJC



4 AUTHORISED BY

<i>Matt Crisford</i>	Development Manager
<i>Peter Greer</i>	TMSCC MTS Product Manager

