

**287312 v1.0**

Aptean Ltd  
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1 287312



DHL TMS

# Changes to the Trip Screens for Phase 2

FUNCTIONAL SPECIFICATION - 10.6

- 1.0

Reference: FS 287312 MW-8BNL82



## 1.1 Client Requirement

### Change Request Summary:

Changes to the Trip Screens for Phase 2b final development

### Change Request Details:

Add docs received date and invoice number to new PO Detail tab - we also need a message send button also adding to this tab as well as a check box to populate new CIC screen. When modifying carrier, check customer level flag, if set and vessel id is populated, then prompt to either clear carrier or cancel

When using apply x-dock, allow new tick box to schedule both parts of order onto single trip, also cater for changes to trip where an order is scheduled on more than one left off the trip

Amend values pop up should have collection window values and delivery location, prompt to change scheduleExtend "Find" option to search on Vehicle ID

### Benefits identified as a result of the change:

All 7 RIOs combined total over 164 Days worth of processing time saving on the Tesco contract annually

## 1.2 Solution

### PO Tab in the Trip Screens

The fields DOCS\_RECEIVED\_DATE and INVOICE\_NUMBER are currently entered on the Purchase Order screen. Both fields will be added to the PO tab on the trip screens. If there is data in the Purchase Order screen, this will be populated in the trip screen, users will also be able to update the fields in the trip screen. When the fields are updated via the trips screens, this will not be written back to the Purchase Order screen.

A scroll bar will be added to the right hand side of the purchase order data block on the tab.

MST Send button will be added to the PO tab, allowing the milestone records to be re sent. If the scan\_url field is null, the field will be populated with the data from sch\_ord comments. When the button is selected a new record will be added to the INT\_PO\_OUTBOUND\_FILE table, which will be processed using the xml outbound code. The version number will be incremented and a record added to the Audit Table to record the message was sent.

In addition to adding a record to the INT\_PO\_OUTBOUND\_FILE, a record will also be added to the trip audit table, which will display in the audit tab of the trip screen.

### Carrier Changes



If the carrier id is changed and the vessel id has been populated, the user will be prompted to cancel the change or clear the vessel. Cancelling the change will reset the carrier id to the original value, clearing the data will set the vessel id to null.

## **XDock Changes**

A new check box will be added to the Xdock Order screen. The check box will be labelled ?Schedule All? and will create the X-Dock leg and then schedule the delivery leg on the same trip.

A new function will be created which cross docks the orders and then schedules the delivery leg, this will be done using the existing Apply via crossdock code and creating a new version of the Apply to Trip code. After the crossdock process, the trip will be saved to allow the delivery legs to be assigned to the new trip.

Any issues with the trip will result in the trip being deleted and all orders unscheduled.

To accommodate trips where an order is loaded more than once, new code will be added to the unscheduled order process. If a trip has more than one Load on the specific trip, when unscheduling the order, all haulage activity will be deleted bypassing the existing validation regarding multiple loads.

## **Amend Values**

The amend values pop up screen will be updated to include the following fields

ECDT

LCDT

EDDT

LDDT

TO\_LOCATION

Only users with the required access, via a new function will be able to alter the newly added fields. If the date changes result in a new schedule, the user should be prompted and asked if they wish to change the schedule on the order, based on the same code that exists in the order screen when the date fields are changed.

## **Find Option**

A new LOV will be created based on tractor id. The List of Values will show the sched\_name and trip\_id for the latest trips that the tractor has been assigned to. The data will be displayed in descending schedule order and the number displayed will be limited using row number.

The code behind the Find button on the Find canvas will be amended to search based on tractor id (vehicle).

## **CIC**

A new screen will be created to store CIC information. This screen will be created as part of RIO 287316 MW-8BNLNT Hold Customer Invoice Consolidation Details. A check box will be added to each order line on the PO TAB, when selected this will trigger the OMS, PO and E-book data to be inserted into the CIC tables.

## **XDOCK MTR and XDOCK FDR**



Two new trigger points will be created based on the Mother and Feeder details. XDock MTR and XDock FDR will be added to the list of triggers from the right click ?Resend PO Message? on the trip tree. The data created and sent will be same as the data created and sent for a BOOKING trigger. The Trip status will be set to XDock MTR or XDock FDR.

A record will also be added to the trip audit table to indicate that an XDock MTR or XDock FDR has been sent. The user will select the triggers and there will not be any automation of the trigger records.

All changes will be applied to the TRIP PLAN, TRIP MANIPULATION and EXECUTION screens.

## 1.3 Scope

This change will be applied to system version 10.6.



## 2 Set-up

### 2.1 Pre-requisites

RIO 287316 MW-8BNLNT Hold Customer Invoice Consolidation Details

### 2.2 Menu Structure

?Unchanged?

### 2.3 Data

TRM\_VAL\_CAR\_VESSEL = ?Y?

?TRM\_DISP\_SCHED\_ALL? = ?Y?



## 3 Functional Description

All changes will be applied to the Trip Manipulation, Trip Planning and Execution screens.

### 3.1 PO Tab in Trip Screens

Two new fields will be added to the block, to be displayed after the COURIER\_REF field. The new fields will be added to the SCH\_ORD\_PO\_DATA table and will inherit any data populated in the same fields on the SCH\_PURCHASE\_ORDER table.

Users will be able to populate the two new fields in the Purchase Order tab; this data will be written back to the SCH\_ORD\_PO\_DATA but will not be written to the SCH\_PURCHASE\_ORDER table.

A new scroll bar will be added to the right hand side of the data block. The scroll bar will be added to the tab canvas to ensure it is always visible to the user.

A new command button will be added to the PO Detail tab called ?MST Send?. This button will inherit the code from the send button on the Purchase Order screen with one exception. Rather than creating a message for the selected Purchase Order, a message will be created for each purchase order associated with the trip.

The new procedure behind the MST Send button will loop through all of the purchase orders on the trip and for each purchase order will call the existing procedure INT\_XML.WRITE\_PO\_MSG, passing in the following data:

PO\_REFERENCE

PO\_ID

ITEM\_NUMBER

PO\_NUMBER

The purchase order data will be selected using the PO Reference from the tab form. A new record will be added to the control table INT\_PO\_OUTBOUND\_FILE for each purchase order, which will then trigger a message using the existing outbound xml code.

A record will be added to the Trip Audit tab to record that the PO MST messages have been resent.

### 3.2 Carrier Changes

If a user changes the carrier id after a vessel has been allocated then a message will be displayed prompting the user to clear the vessel or cancel the carrier change.

If the user selects Cancel, the carrier change will be ignored, if the user selects OK, the carrier will be changed and the vessel will be set to null.





The code will be added to the WHEN-VALIDATE-ITEM trigger on the Carrier id and will be parameterised using a new parameter: TRM\_VAL\_CAR\_VESSEL which will be set to ?Y? for this functionality to work.

### 3.3 Cross dock Changes

Location Id	Location Name	New Trip?	Schedule	Trip Id	Carrier ID
		<input checked="" type="checkbox"/>	110221		
		<input type="checkbox"/>			
		<input type="checkbox"/>			
		<input type="checkbox"/>			
		<input type="checkbox"/>			
		<input type="checkbox"/>			
		<input type="checkbox"/>			
		<input type="checkbox"/>			
		<input type="checkbox"/>			
		<input type="checkbox"/>			

A new field will be added to the Cross dock order screen and displayed based on a new system parameter: ?TRM\_DISP\_SCHEDULE\_ALL? = ?Y?. The field will be a check box called ?Schedule All?. When selected, in addition to creating the cross dock leg(s) for the order(s), the system will also create the delivery leg on the same trip. The Schedule All checkbox will be added to SCH\_TRIP table and the value will be stored against the trip.

To achieve the new functionality, when the user selects OK, the Apply via cross dock code will be called as is current functionality. The cross dock trip will be saved and then value of the new ?Schedule All? checked box will be selected. If the check box has been selected the Apply to Trip code will be called to schedule the delivery leg(s) onto the specified Cross dock trip.

Where multiple cross docks are listed, selecting the SCHEDULE\_ALL checkbox will indicate that all the cross docks in list and the delivery leg will be applied to the same trip. To achieve this, the user will check the new trip check box for the first cross dock and leave it blank for the rest (see below).

Location Id	Location Name	New Trip?	Schedule	Trip Id	Carrier ID
EXELBAWT	Bawtry_Excel Bawtry_DN11 9HE	<input checked="" type="checkbox"/>	110507		
EXELBELL	Bellshill_Excel Bellshill_ML4 3JB	<input type="checkbox"/>	110507		
EXELBANK	Bankbury_Bankbury Depot_OX16 2OU	<input checked="" type="checkbox"/>	110507		
		<input type="checkbox"/>			
		<input type="checkbox"/>			
		<input type="checkbox"/>			
		<input type="checkbox"/>			
		<input type="checkbox"/>			
		<input type="checkbox"/>			
		<input type="checkbox"/>			

This will apply all of the cross dock legs to the same trip. The SCHEDULE ALL check box will then be selected to identify if the delivery leg should also be applied to the trip.

Similar to existing functionality, if a validation error is returned, the trip will still be created. If any of the functionality fails, the orders will be unscheduled and the trip deleted.

Currently if an order is loaded on the same trip more than once, when the user attempts to un-schedule the order, the action fails with an error. Changes will be made to the TRM.UNSCHEDULE\_ORDER. The order will be unscheduled from all stops on any trip it is currently scheduled on and will return to unscheduled status.



### 3.4 Amend Values

Four new fields will be added to the above screen, the collection windows(Earliest Col, Latest Col), schedule name and delivery location. When the user selects OK, the system will update the order based on the values in the Edit Values window.

All Delivery windows, collection windows , delivery location and schedule name will be displayed based on the value of system parameters.

A new procedure will be created based on the functionality available in the Order screen. The collection and delivery windows on the Edit Values screen will be compared to the windows on the order table. If there is any difference, the changed windows will be converted to a schedule.

The new schedule will be compared to the current order schedule. If there is a difference, the user will be prompted with the value of the new schedule and asked if they which to move the order.

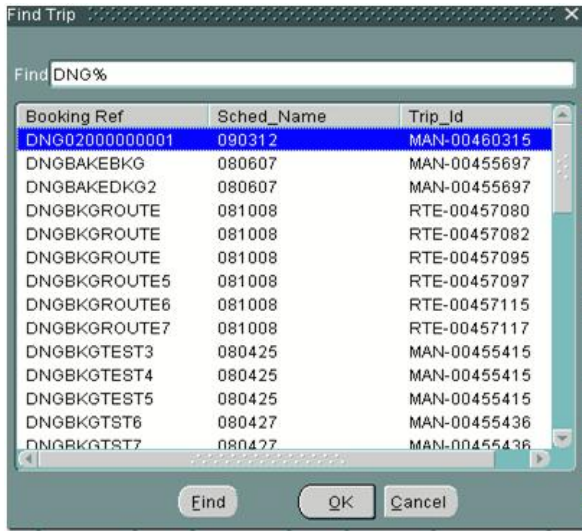
For multiple orders, the code will loop through each order until it finds an order where the schedule could be changed. Once an order has been found, the user will be asked if they want to update the schedule and the schedule will be updated for all orders.

As with current functionality, multiple orders must have the same delivery location to use the edit values

### 3.5 Find Option

A new option will be added for Tractor id. When the user enters a tractor id and selects Find, a new List of Values will run which will return the tractor id, the schedule in descending order and trip id.





In accordance with existing functionality, when the user highlights a record and selects Find, they will be directed to the selected trip.

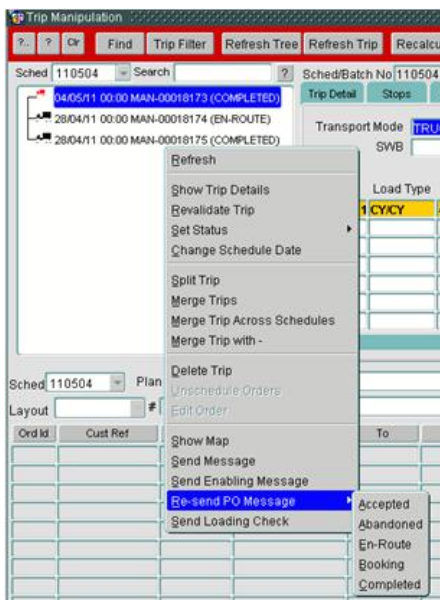
### 3.6 CIC

As part of RIO MW-8BNLNT Hold Customer Invoice Consolidation Details, a new screen will be created. Within the Trip Screens PO Tab, a check box labelled CIC will be added to each order line

**This will be developed as part of RIO MW-8BNLNT**

Development time has been reduced to reflect this.

### 3.7 XD0CK MTR and FDR



Two new triggers will be added to the Re-send PO Message menu called XD0CK MTR and XD0CK FDR. The data created and sent will match the data currently sent when a user selects to Resend a Booking message.



In addition to the message being sent, a record will be added to the AUDIT table

Sched/Batch No	100514	Not registered	Trip No	MAN-00473037	EFX Ref.	
Trip Detail	Stops	Finance	Audit	EFX	PO Detail	
Action	Trip Status	Carrier	Action Date	Actioned By		
CREATE	PLANNED		14/05/10 15:52	MTS_OWNER		
MODIFY	EN-ROUTE	WINCANTON	24/05/10 09:29	MTS_OWNER		
MODIFY	COMPLETED	WINCANTON	10/06/10 22:45	MTS_OWNER		
MODIFY	CONFIRMED	WINCANTON	11/06/10 12:44	MTS_OWNER		
<b>PO MSG</b>	<b>BOOKING</b>	<b>WINCANTON</b>	<b>06/05/11 17:22</b>	<b>MTS_OWNER</b>		

The trip status in the Audit screen will be displayed as XDCK\_MTR or XDCK\_FDR. The actual trip status will not be changed.

### Table Updates Required

Two new fields will be added to the SCH\_ORD\_PO\_DATA table;

```
ALTER SCH_ORD_PO_DATA
```

```
ADD COLUMN DOCS_RECEIVED_DATE DATE;
```

```
ADD COLUMN INVOICE_NUMBER VARCHAR2(20);
```

One new field will be added to the SCH\_TRIP table

```
ALTER SCH_TRIP
```

```
ADD COLUMN SCHED_ALL VARCHAR2(1);
```

### References

Ref No	Document Title & ID	Version	Date
	EST-287312 MW-8BNL82 Changes to Trip Screens for Phase 2 v2.0	2.0	06/04/2011

### Document History

Version	Date	Status	Reason	Initials
0.1	09/05/11	Draft	Initial version	SW



0.2	17/05/11	Review	Reviewed	MC
0.3	18/05/11	Draft	Revised after review	SW
1.0	18/05/11	Issued	Reviewed and issued	MC



## 4 AUTHORISED BY

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