

288550 v1.1

Aptean Ltd
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1 288550

Aaptean

DHL C-TMS

Order Nos in Waterfall Screen

FUNCTIONAL SPECIFICATION - 10.6

10/06/2011 - 1.1

Reference: FS 288550 DK-8GWF4E





2 Functional Overview

2.1 Client Requirement

Change Request Summary:

Order Numbers need to be visible in the Waterfall screen.

Change Request Details:

For the customer to have access to the Waterfall screen and be able to see the status of the orders on the associated trips the order numbers will need to be added to the waterfall screen. As the order number is the only relevant number to the customer this is the only way they will be able to identify the status of the trip / order. We have looked at the TRIP EXECUTION screen as suggested by Dave Meir but this screen does not automatically refresh and would not be the best screen to give access to the customer.

Benefits identified as a result of the change:

This was part of the "SELL" to the customer that we would be able to let them see the status of the trips / orders.

2.2 Solution

Viewing order details will be controlled using a Cost Centre parameter.

If the cost centre parameter is set, the order data items Oms ref and external ref will be added to the configurable block on the Waterfall screen. The two fields will be available to select for each status block.

Currently the screen is based on a view (V_TRIP_OVERVIEW) which selects trip and stop details. A new view will be created based on the existing view , but also including order information for Loaded orders(V_TRIP_OVERVIEW_ORDERS). 5 new data blocks will be created based on this view.

Five new tabs will be created and named as follows :

PLANNED_ORD

ACCEPTED_ORD

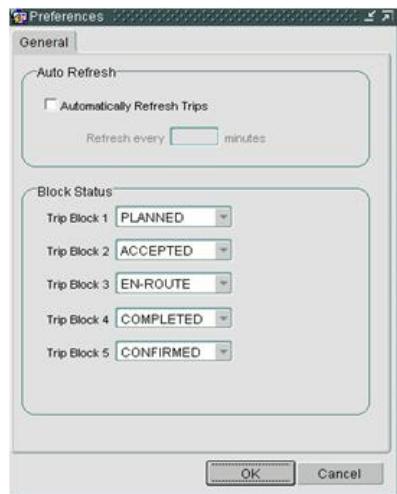
EN-ROUTE_ORD

COMPLETED_ORD

CONFIRMED_ORD

The new tabs will be based on V_TRIP_OVERVIEW_ORDERS and will include the loaded order data. Users will use the preferences pop up screen to select the new tabs . The new tabs will only be available if the cost centre parameter has been set.





If a user has selected the new trip blocks, they should be including at least one order data field in the configurable items, otherwise the data will appear as duplicate trip information.

2.3 Scope

This change will be applied to system version 10.6.0.



3 Set-up

3.1 Pre-requisites

None

3.2 Menu Structure

?Unchanged?

3.3 Data

One new system parameter

NAME	VALUE DESCRIPTION	CONFIG_BY	CONFIG_VALUE
TRM_ORD_OVERVIEW	Y Y or N, indicates whether the ORD_<STATUS> are available in the preferences form in Waterfall	COST CENTRE	DHLOPE
	New records added to new table PREFERNCE_STATUS		

STATUS

ORD_DELETED
ORD_CANCELLED
ORD_PLANNED
ORD_ABANDONED
ORD_COMPLETED
ORD_ACCEPTED
ORD_EN-ROUTE
ORD_CONFIRMED
ORD_TENDERED
ORD_REJECTED
ORD_SEMI_FIXED

New record added to ADM_FUNCTION

FN_NAME DESCRIPTION

SET_PREFERENCES Allows users to apply a preference in Waterfall to a user group



4 Functional Description

The Waterfall screen is based on a database view, V_TRIP_OVERVIEW, which looks at the trip stop details. A new view will be created to include order details of orders loaded on the trip. The link to non conformance will be based on an outer join as not all orders will have non conformance records.

```

SCH_TRIP_STOP
  SCH_HAULAGE_ACTIVITY SCH_ORD
    Stop_id
    Stop_id          Oms_ref
    Oms_ref          External_ref
    Activity_name = ?Load?

SCH_ORD_NON_CONFORM
  Oms_ref
    Reason_code
    Reason_comments
  
```

The new view will result in the trip information being duplicated for each order loaded on the trip. Users who do not want to see order information in the waterfall screen should still be able to view the current display based on the original view.

To allow this, the existing control blocks will be copied.

Currently, there are 20 control blocks which determine which status are reported in the Waterfall screen. The user selects the Preference tab from the right click menu and the selection made by the user is used to set the control blocks.

```

TRIP_BLOCK1_CTRL TRIP_BLOCK2_CTRL TRIP_BLOCK3_CTRL TRIP_BLOCK4_CTRL TRIP_BLOCK5_CTRL
TRIP_BLOCK1      TRIP_BLOCK2      TRIP_BLOCK3      TRIP_BLOCK4      TRIP_BLOCK5
TAB_BLOCK1      TAB_BLOCK2      TAB_BLOCK3      TAB_BLOCK4      TAB_BLOCK5
TAB_BLOCK1_CTRL TAB_BLOCK2_CTRL TAB_BLOCK3_CTRL TAB_BLOCK4_CTRL TAB_BLOCK5_CTRL
Another 20 data blocks will be created and named as below. The new data blocks will be based on the new view and will be placed over the original blocks. Block 6 will be stored above block1, block7 above block 2 etc.
  
```

```

TRIP_BLOCK6_CTRL TRIP_BLOCK7_CTRL TRIP_BLOCK8_CTRL TRIP_BLOCK9_CTRL TRIP_BLOCK10_CTRL
TRIP_BLOCK6      TRIP_BLOCK7      TRIP_BLOCK8      TRIP_BLOCK9      TRIP_BLOCK10
TAB_BLOCK6      TAB_BLOCK7      TAB_BLOCK8      TAB_BLOCK9      TAB_BLOCK10
TAB_BLOCK6_CTRL TAB_BLOCK7_CTRL TAB_BLOCK8_CTRL TAB_BLOCK9_CTRL TAB_BLOCK10_CTRL
  
```

The difference between the new view and the existing view will be four fields and the data frequency. The four new fields added to the V_TRIP_OVERVIEW_ORD view will be oms_ref, external_ref, reason_code and reason_comment.

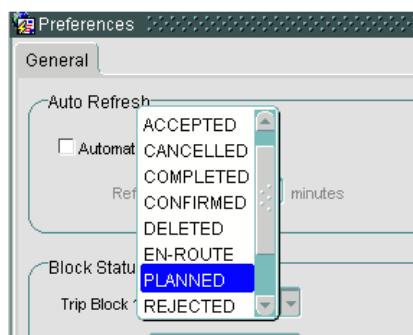
The TRIP_BLOCK and TAB_BLOCK data blocks are based on the views. Blocks 1 to 5 will remain based on the original view and blocks 6 to 10 will be based on the new view.

Blocks 1 and 6 , 2 and 7, 3 and 8 etc will be stored on the same tab and the display of each block will be controlled by the user preferences. To achieve this, the items in each block must be identical. The user will select a select a STATUS, an



original Status will result in the original block being displayed and the new block hidden.

The original blocks will require the oms_ref, external_reference, reason_code and reason_comment items to be added so they have the same items as the new blocks. As these fields do not exist in the original view, the items will be added as non data base items and will never be populated.



When the user selects OK, if the value selected for any of the blocks starts with ORD, the new block will be displayed instead of the original block. This will be achieved by hiding the original block. Once the block display has been resolved the value of the status will be manipulated and used to set the status field on the relevant control block.

To manipulate the data, the substr and ltrim functions will be used to extract the status from the preference. (Developers Note - see notes in folder)

4.1 Storing and Re Using Preferences

Currently, when the user selects preferences, they only last for the duration that the screen is open. The next time they enter the screen, a default setting is used based on values in the SCH_TRIP_STATUS table.

A new table, TRIP_OVERVIEW_PREF will be created which will store a preference against a user, allowing the preference to be used every time the screen is opened. The new table will store the user name and the status against each block.

Currently when the form is opened, the F_INITIALISE_TRIP_BLOCKS selects the default preference from the SCH_TRIP_STATUS table. A new cursor in this procedure will first search for a record in the new table (TRIP_OVERVIEW_PREF) for the current user. If a record is found, this will be used to set the block where clause and determine which block is displayed. (Developer Notes - see attached)

Whichever status is used to set Block1, the same status will be used to set Block6, the blocks will always be linked as follows:

BLOCK1 BLOCK6
 BLOCK2 BLOCK7
 BLOCK3 BLOCK8
 BLOCK4 BLOCK9
 BLOCK5 BLOCK10



A new procedure will be created, called F_SHOW_SELECTED_BLOCKS. This will be called as part of the initialisation and will determine which block is displayed on the tabs. The records in the new TRIP_OVERVIEW_PREF table will be used to determine for each sequence 1 to 5, whether the original blocks or new order blocks are displayed. If there is no record in the preference table, the original blocks will be displayed.

The preference screen will be based on the new TRIP_OVERVIEW_PREF table and will list the five status fields.

Trip Block 1	PLANNED
Trip Block 2	ACCEPTED
Trip Block 3	EN-ROUTE
Trip Block 4	COMPLETED
Trip Block 5	CONFIRMED

When the user selects OK, this will be saved in the new table as follows

USERNAME	SEQUENCE	PREF_STATUS
MTS_OWNER 1	1	PLANNED
MTS_OWNER 2	2	ACCEPTED
MTS_OWNER 3	3	EN-ROUTE
MTS_OWNER 4	4	COMPLETED
MTS_OWNER 5	5	CONFIRMED

A new command button will be displayed on screen called APPLY_TO_GROUP. This buttons display will be controlled by new function called SET_PREFERENCES. This function will be assigned to certain user groups, using the ACCESS_CONTROL screen, meaning only specific people will see the command button.

Group Name	Description	Enabled
ADMIN	Administrator of MTS	<input checked="" type="checkbox"/>
CUSTOMER_CHARGES	Administrators of Customer Fuel and Premium Charges	<input checked="" type="checkbox"/>
EDI_IMPLEMENTOR	EDI Administration - EDI_OWNER ONLY	<input checked="" type="checkbox"/>
EXPORTS	Exports	<input checked="" type="checkbox"/>
IMPLEMENTORS	MTS Implementation Team	<input checked="" type="checkbox"/>
MTS_PROJECT_IMPLEMENTORS	Non Competency Centre Implementors	<input checked="" type="checkbox"/>
MTS_USER_ADMIN	MTS User Administrator	<input checked="" type="checkbox"/>
OBS_IMPLEMENTORS	OBS Implementation Team	<input checked="" type="checkbox"/>

Functions Authorised for use by Group

ACC_AMEND_FUELSEARCH_PYTTYPE_B	Required to be able to activate Fuel Surcharging within Payments Maintenance.
ACC_Accounting_Periods	Enables Account Period maintenance.
ACC_Auto_Create_Account	Automatically create accounts (ACC_Create_Account is also required).
ACC_Confirm_Payment	Ability to confirm payments.
ACC_Create_Account	Allow the creation of accounts.
ACC_Create_Invoice_Rqt	Allow the creation of invoice requirements.

Functions Available

ADM_User_Admin	Allow the creation/deletion of users.
ASSET_MGMT_SU	Ability to maintain assets

When a user has defined a preference, selecting the new button will display a small pop up screen. The pop up screen will contain a field called group name. A list of values will be provided, listing all the groups available. When the user selects a group and selects OK, all the users in the group will be identified. If records already exist for the user in the preference table then no further action will be taken. If there are no records for the user, the current preference will be added to the table for the user. (Developer see notes).

A checkbox will also be available on the screen, called OVERWRITE. If this is checked, any records in the preference table for any of the users in the group will be removed and the current preference will be created for all users in the group.



4.2 Configurable Layout

Within each block on the main screen, the user is able to right click and select configure layout. The configure layout will always be based on the current block selected. Code must be added to allow users to configure layout for the new order blocks.

To achieve this, the following procedures will be copied for blocks 6 to 10

F_ATTRIBUTES_INITn

F_ADD_BLOCKn_ITEMS

If the user has chosen a non ORD status, the OMS_REF ,EXTERNAL_REF, ITEM_CODE and ITEM_COMMENTS will not be available in the configurable layout. If the user has chosen an ORD status, the four order based fields will be available in the configurable layout.

If the user selects ITEM_CODE or ITEM_COMMENTS, the data will be displayed in RED FONT.

If a user has chosen an ORD status, they should configure their layout to include the order fields.

Table Updates Required

Create table TRIP_OVERVIEW_PREF

```
USER_ID      VARCHAR2(25)
SEQUENCE     NUMBER
PREF_STATUS  VARCHAR2(25)
CREATED_DATE DATE
CREATED_BY   VARCHAR2(25)
Create table PREFERENCE_STATUS
```

PREF_STATUS VARCHAR2(25)

References

Ref No	Document Title & ID	Version	Date
1	EST-288550 DK-8GWF4E Order Nos in Waterfall Screen v1.0	1.0	07/06/11

Glossary

Term or Acronym	Meaning
C-TMS	Calidus TMS

Document History



Version	Date	Status	Reason	Initials
0.1	07/06/11	Draft	Initial version	sew
1.0	07/06/2011		Reviewed	MJC/DNG
1.1	10/06/2011	Issue	Added reason code and description. Review and Issue	SEW



5 AUTHORISED BY

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