

289004 v0.1

Aptean Ltd
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1 289004

Aaptean

DHL C-TMS

Additional Changes to Carrier Planning

FUNCTIONAL SPECIFICATION - 10.6

- 0.1

Reference: FS 289004 DK-8HFAZF

1.1 Client Requirement

Change Request Summary:

To resolve issues that have been found while testing the new development for the site.

Change Request Details:

Issue 72 - During the meeting with DM at OBS it was discussed that the operator should be able to right click the trip id and select view trip details and get the TRIP DETAILS screen which is the top right of the Trip Manipulation Screen.

Issue 78 - As per conversations with DM the operation should be able to key directly into the Carrier field (with a lookup), Vehicle, cost per tonne fields in the new Carrier Trip Plan screen.

Issue 79 - As per conversation with DM, there should be a column in this screen for the "MARGIN" which would be the calculation between total cost and total revenue

Benefits identified as a result of the change:

This will enable the operation to continue using systems in the same way as current and will allow greater visibility and less screens to be accessed to allow the planners to perform their day to day activities.

1.2 Solution

Issue 72 - Add Trip Debrief screen

In the Trip Plan Screen, the user is able to right click in the TRIP_ID to display a pop up menu. A new item will be added to the menu called ?View Trip Details?.

When the user selects this menu item, a new pop up canvas will be displayed based on the current Trip Details tab canvas in the Trip Manipulation screen.

The new Pop-Up screen will display the following tab canvas

- Trip Details
- Stops
- Finance
- Audit
- EFX

The Pop-Up screen can be exited using a close button and the user will be returned into the carrier planning screen.

The new view trip details screen will provide the following insert and change functionality in each tab

TRIP DETAILS

- Add comments
- Edit comments
- Assign a driver
- Assign a vehicle

STOPS

- Assign a Trailer Type
- Remove a Trailer Type
- Assign a Trailer id
- Remove a Trailer id



- Insert Stop
- Append a Stop
- Delete a Stop
- Abort Stop
- Move Stopover (back)
- Reset Stopover
- Move Stopover (forward)
- Move Stop

Double click on Haulage activity to view an order in the order screen

The Audit and Finance tabs are for display purposes and visibility.

A new menu item will be available when the user selects right click called SHOW MAP. Currently this function only works for trips , passing in load stop and unload stop. This functionality will be used for SCHEDULED orders , in addition changes will be made to user SHOW MAP for UNSCHEDULED orders. If the load and unload stops are null, as the order has not yet been added a trip, the SHOW_MAP will use the from and to locations of the order.

Orders will be generated, one order per trip, so the request to apply an order to an existing will not be developed.

Issue 78 - Change Carrier

A new menu item will be available when the user right clicks over a trip. The new menu item will be named Re-Brief Trip. When the menu item is selected, a pop up canvas will display the following fields:

CARRIER_ID

VEHICLE_TYPE

COST_PER_TONNE

The fields will display the existing data stored in each field but will allow users to change the values. A Look up based on the carriers the user has access to will be provided for changing the carrier.

Once the data has been amended as required, the user will select a new command button labelled ?Save & Rate?. Selecting the button will save any data changes to the database, delete any existing payments for the trip and will generate a new payment based on the cost per tonne and the carrier.

The user is able to change single fields or all fields. The vehicle type will be based on the registration and will write back to TRACTOR_ID in the database. The Vehicle type field will not be mandatory and can be left blank.

A second command button Cancel will also be available. If the user selects this, any data changes made will be ignored and the trip will not be re-rated.

After a trip has been re-briefed, the OPENFIELD_DRVR_MAN report will be re run for the trip selected. Based on how the carrier is set up, the report will be e-mailed or faxed.

Currently the report is run when the trip is set to Accepted, this will be amended so that the report also runs when the trip is re-briefed.

Issue 79 -Add Margin Field

A new field will be added to the Carrier Trip Planning screen called MARGIN. The field will be a calculated field based on the difference between total cost and total revenue.

The field will be a non database item on the form and will be populated post-query, this will ensure the value is recalculated and displayed after any re-rating or changes made to the trip or orders.

The field will be added as a column to the configurable layout and will show with a Red, Amber or Green background.

A percentage based system parameters will be introduced to control Amber and Green on the margin value based on percentage. A loss will show Red, a low percentage profit margin, say to 5% will show Amber and above will show Green.



1.3 Scope

This change will be applied to system version 10.6.0.



2 Set-up

2.1 Pre-requisites

None

2.2 Menu Structure

?Unchanged?

2.3 Data

?Unchanged?



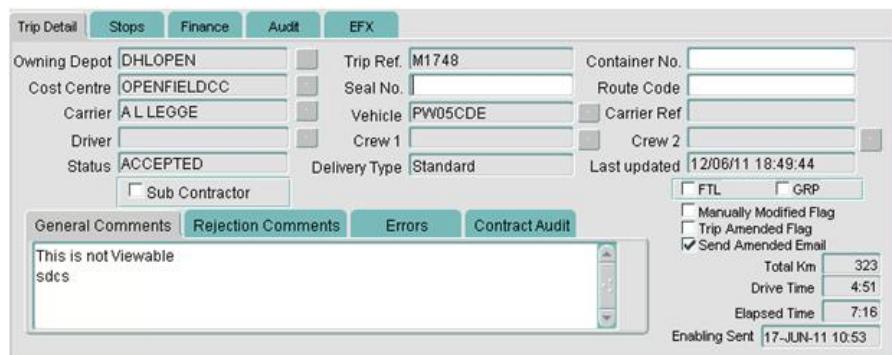
3 Functional Description

3.1 Add Trip Details Tab

A new menu item will be added to the TRIP_ID right click. The new menu item will be labelled View Trip Detail.



When selected, the menu item will launch a new pop up canvas based on the tab details currently displayed in the Trip Manipulation screen (see below)



All of the above tabs will be available and this include the functionality from command buttons and right click menus.

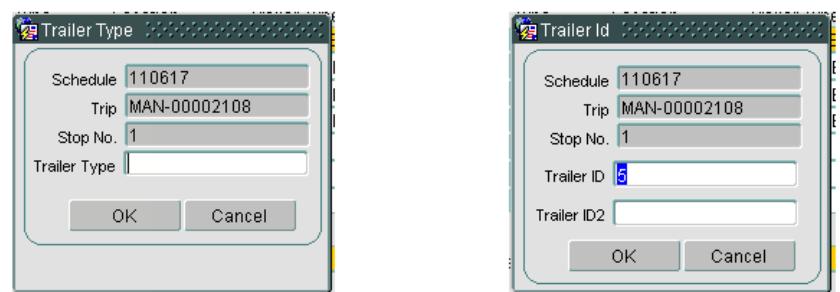


This is the menu available from right click in the STOPS tab and will also be available in the new pop up screen.

The menu items will allow users to configure the stop block on the stops tab, add the blocks and move blocks.

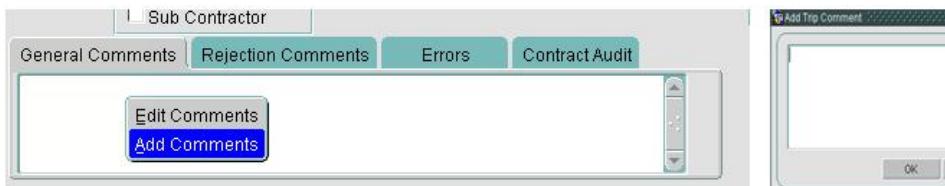
This will be achieved by looking at the code in the menu on the Trip Manipulation screen and applying the code to the Carrier Trip Planning screen.

The user will also be able to assign Trailers and Trailer types. When selecting these menu options a new pop up screen will be displayed allowing the user to add a trailer or a trailer type.



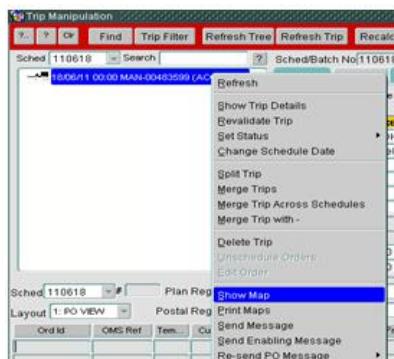
In the main Trip tab, the user will be able to amend some of the trip details and edit the comments . The comments will be edited via a right click option which will display a new pop up screen.





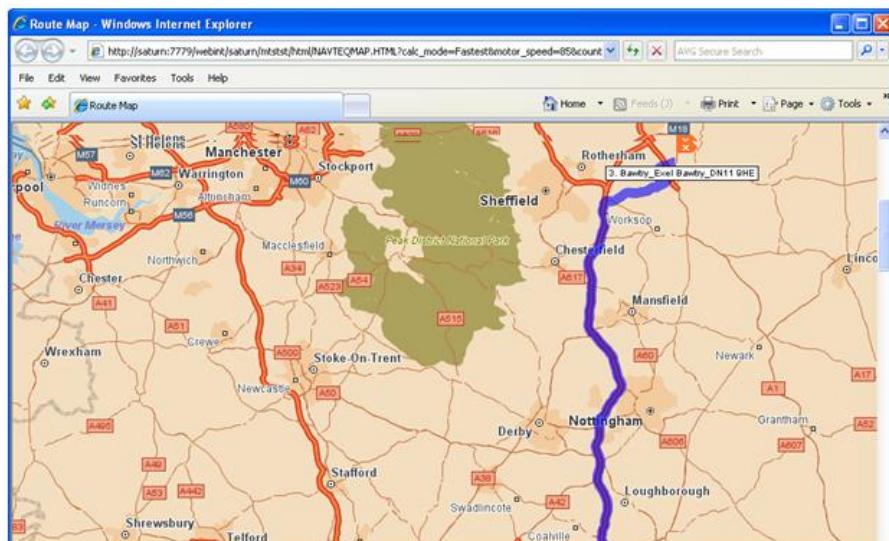
3.2 Show Map

In the trip Manipulation and Trip Planning screens, the user can right click on the trip trees to display a menu. One option available is SHOW MAP, when selected, this will launch a web page which shows the route of the trip using the load locations to identify where the trip is going.



The show map will be added to the Carrier Trip Planning screen, however the data block on this screen shows both scheduled and unscheduled orders. If the show map is selected for a scheduled order, the map displayed will cover the route of the trip the order is on. If the Show Map is selected for an unscheduled order, the map displayed will show a point to point route of the order.

The Show Map will be available on the Trip right click menu (when the user selects the trip_id) and the order right click menu (when the user selects the oms_ref). Selecting SHOW MAP in the trip menu will only display maps for scheduled orders, select Show Map from the order menu will only show the route of the order even if the order is on a trip.



Above is a sample map for a trip, the purple line shows the route of the trip and the orange flag shows stop 3 at Bawtry.



3.3 Change Carrier

A new menu items will be added to the trip menu, called Rebreif Trip. When selected, this will allow users to change one or all of the fields carrier_id, vehicle_type and cost_per_tonne.



When the pop up screen is first displayed, the fields will display the existing data, which the user will be able to overwrite. Below is an example of how the new screen will look



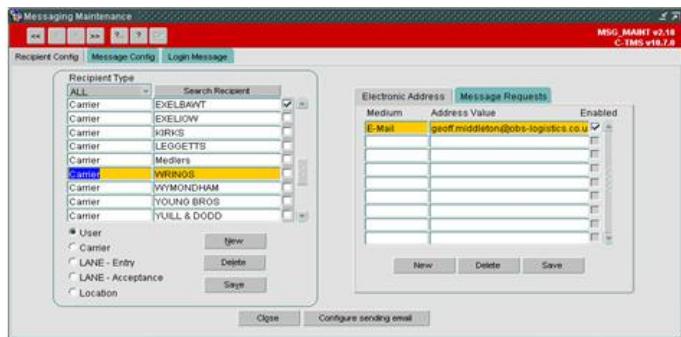
By selecting ?Save and Rate?, the system will assume that changes have been made. The data in the fields will be saved to the database and any existing payments for the trip will be deleted. A new payment will be created using the value in the Cost per tonne field.

If the user selects Cancel, any data changes made in the screen will be ignored and the information stored in the database will be retained.

Screen Data Entry Field	Source Data
Schedule	SCH_TRIP.SCHED_NAME
Trip id	SCH_TRIP.TRIP_ID
Carrier	SCH_TRIP.CARRIER_ID
Vehicle	SCH_TRIP.TRACTOR_ID
Cost Per Tonne	SCH_TRIP.COST_PER_TONNE

When a trip is re-briefed , the OPENFIELD_DRVE_MAN report will run and the medium associated with the Carrier (as maintained in the Message Maintenance screen) will determine how the report is distributed.





3.4 Margin

A new calculated field will be added to the main data block called Margin. The field will be based on the difference between order cost and order revenue.

Description	Result	Colour
Loss	Cost > Revenue	RED
Low Profit	Revenue (5%) > Cost	AMBER
Profit	Revenue over 5% > Cost	GREEN

The 5% margin to identify low profit will be controlled by a system parameter and the user will be able to set their own value.

The new field will be added to the configurable layout.

Table Updates Required

References

Ref No	Document Title & ID	Version	Date
1	EST 289004 DK-8HFAZF Additional Changes to Carrier Planning v1.1	1.1	06/06/11

Glossary

Term or Acronym	Meaning
C-TMS	Calidus TMS

Document History

Version	Date	Status	Reason	Initials
0.1	30/06/2011	Draft	Initial version	SEW



4 AUTHORISED BY

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