

**290895 v3.0**

Aptean Ltd  
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1 290895



DHL C-TMS

# Allocate Resource from Trip Overview

FUNCTIONAL SPECIFICATION - 10.7

10/08/2011 - 3.0

Reference: FS 290895 AR-8KCB4F





## 2 Functional Overview

### 2.1 Client Requirement

#### Change Request Summary:

Enhance Allocate Resource from Trip Overview to allow second man to be allocated to trip. Paul McGoran/Manchester/UK/NFC

#### Change Request Details:

The order interface will be configured so that a prefix of the Del Point Ref field will define the order to be one or two man. This field will be shown in the header details for orders & on the planning screens. This field should be interfaced with the order to Paragon so that planning can be done with visibility of this information.

Initially this value will be set via the interface on receipt of orders from QJI (order capture) GJ confirmed that the view described in SDD v3.0 is acceptable (rather than say a tick box).

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

Allows the 2nd man constraint to be passed to Paragon where it is used as part of the iconography

### 2.2 Solution

In the QJI system an order will be identified as requiring a 2 man crew. This will be passed to C-TMS as part of the DEL\_POINT\_REF field. The information in del point ref will be sent to Paragon allowing paragon to know when to assign two resources. Extracting the information to populate DEL\_POINT\_REF and sending the information to Paragon will be covered in the two RIOs ?Order EDI? and ?Paragon?.

The ability to allocate and view up to 2 crew members on a trip will be added to the following screens in C-TMS

TRIP\_PLAN.fmb

TRIP\_OVERVIEW.fmb

EXECUTION.fmb

The functionality currently exists in the Trip Manipulation screen



The data will be stored in the existing fields SCH\_TRIP.DRIVER\_ID2 and SCH\_TRIP.DRIVER\_ID3. The same validation as carried out with the driver will be performed. If the crew member does not exist in the RES\_PERSON table, a new record will be added and the id will be stored against the TRIP.

A list of values will be available for users to look up the crew members. Depending upon the way the Carriers are set up (POP LIST (i.e. select from a fixed list of values or FREETEXT no restriction on what values are entered), If the carrier is set to POPLIST the list of values will be based on only those driver records which have been associated with the carrier. Drivers and crew members may only be allocated to a trip once the Carrier has been allocated.

There will be no distinction made in the RES\_PERSON table between drivers and crew members. A driver on one trip may be allocated as a crew member on another trip.



If a planner allocates a second crew member and none of the orders scheduled on the trip indicate a 2 man requirement, a message will be displayed to inform them, however there will be no error process to stop users from allocating more than one resource to a trip.

When the trip is set to Accepted, if there are any orders scheduled on the trip with a 2 man requirement and the second man has not been assigned, a message will be displayed to tell the planner there is a requirement for a second man to be allocated.

## 2.3 Scope

This change will be applied to system version 10.7.



## 3 Set-up

### 3.1 Pre-requisites

None

### 3.2 Menu Structure

No Change

### 3.3 Data

A new record will be added to the ADM\_SYSTEM\_PARAM table:

Param\_name TRM\_CHECK\_CREW

Config\_by COST\_CENTRE

Config\_by\_value BGWCC

Value Y

Description Indicates if the Check\_Crew functionality should be run.

### 3.4 Implementation Advice

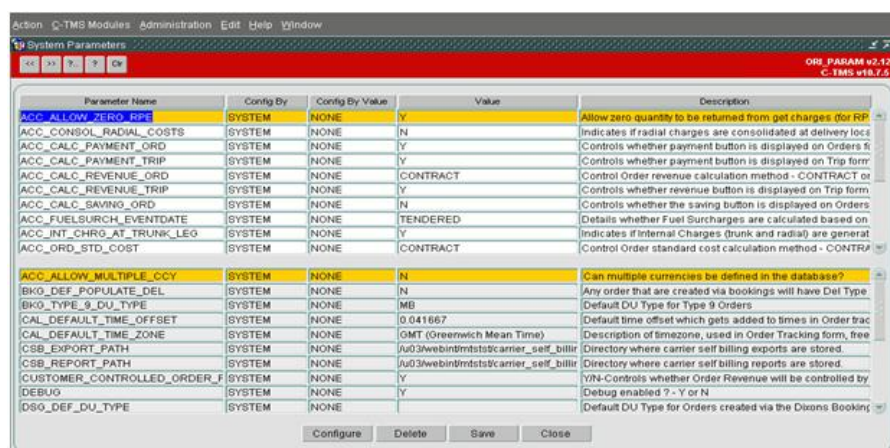
Three existing screens will be updated

EXECUTION

TRIP\_PLANNING

TRIP\_OVERVIEW

A new cost centre parameter will be added and can be edited from the System Parameter Maintenance screen. The new parameter will be called TRM\_CHECK\_CREW and will be created specifically for the British Gas Waste Cost Centre. The parameter should be set to Y.



Parameter Name	Config By	Config By Value	Value	Description
ACC_ALLOW_MULTIPLE_CCY	SYSTEM	NONE	N	Can multiple currencies be defined in the database?
ACC_ALLOW_RADIAL_COSTS	SYSTEM	NONE	N	Indicates if radial charges are consolidated at delivery loc
ACC_CALC_PAYMENT_ORD	SYSTEM	NONE	Y	Controls whether payment button is displayed on Orders
ACC_CALC_PAYMENT_TRIP	SYSTEM	NONE	Y	Controls whether payment button is displayed on Trip form
ACC_CALC_REVENUE_ORD	SYSTEM	NONE	CONTRACT	Control Order revenue calculation method - CONTRACT or
ACC_CALC_REVENUE_TRIP	SYSTEM	NONE	Y	Controls whether revenue button is displayed on Trip form
ACC_CALC_SAVING_ORD	SYSTEM	NONE	N	Controls whether the saving button is displayed on Orders
ACC_FUELSURCH_EVENTDATE	SYSTEM	NONE	TENDERED	Details whether Fuel Surcharges are calculated based on
ACC_INT_CHRG_AT_TRUNK_LEG	SYSTEM	NONE	Y	Indicates if Internal Charges (trunk and radia) are generat
ACC_ORD_STD_COST	SYSTEM	NONE	CONTRACT	Control Order standard cost calculation method - CONTRA
ACC_ALLOW_MULTIPLE_CCY	SYSTEM	NONE	N	Can multiple currencies be defined in the database?
BKG_DEF_POPULATE_DEL	SYSTEM	NONE	N	Any order that are created via bookings will have Del Type
BKG_TYPE_9_DU_TYPE	SYSTEM	NONE	MB	Default DU Type for Type 9 Orders
CAL_DEFAULT_TIME_OFFSET	SYSTEM	NONE	0.041667	Default time offset which gets added to times in Order trac
CAL_DEFAULT_TIME_ZONE	SYSTEM	NONE	GMT (Greenwich Mean Time)	Description of time zone, used in Order Tracking form, free
CSB_EXPORT_PATH	SYSTEM	NONE	ju03\webin\mdstst\carrier_self_billir	Directory where carrier self billing exports are stored.
CSB_REPORT_PATH	SYSTEM	NONE	ju03\webin\mdstst\carrier_self_billir	Directory where carrier self billing reports are stored.
CUSTOMER_CONTROLLED_ORDER_F	SYSTEM	NONE	Y	YN-Controls whether Order Revenue will be controlled by
DEBUG	SYSTEM	NONE	Y	Debug enabled ? - Y or N
DSO_DEF_DU_TYPE	SYSTEM	NONE		Default DU Type for Orders created via the Dixon's Booking



## 4 Functional Description

When orders are received from QJI, the DEL\_POINT\_REF field will be populated to indicate if the order requires a second crew member. This will be indicated by the value 2M. Where a second crew member is required, in addition to allocating a driver, the system should also be allocating the second crew member. The Del\_Ponit\_Ref field will be manually updateable, but code to check that a two man resource is required would expect to see 2M.

Currently, the Trip Manipulation screen accessed from the main menu allows planners to allocate up to an additional 2 crew members. This functionality will be added to the following screens:

### 4.1 Trip Planning

The new fields will be added under the route code. The fields will also include a lookup button, allowing users to search the existing records for a crew member.

### 4.2 Execution Screen

The two new fields will be added to the configurable layout and will be available for users to select to view and add





information. When the mouse is in the trip id field, right clicking will show the trip detail. The trip detail screen has been created based on the Trip Manipulation screen and already includes crew 1 and crew2.

4.3 Trip Overview Screen

The screenshot shows the 'Trip Overview' window with three main sections: 'PLANNED', 'ACCEPTED', and 'EN-ROUTE'. Each section contains a table of trip details. The 'PLANNED' section has a '1. Order L...' button and an 'Alloc Resource' button. The 'ACCEPTED' section has a '1. Order V...' button and an 'Alloc Resource' button. The 'EN-ROUTE' section shows a single trip with a '3' in the first column.

PLANNED	Trip ID	Trip Stops	Trailer Type	Trailer ID	OMS Ref	Reason Code	Reason Comm
2	MAN-00484357	1. Bawtry_East Bawtry DN11 9HE (SU) 2. Bakewell_M	45R CS		1020903		
1. Order L...	MAN-00484356	1. MILTON KEYNES_DM15 OYS (SU) 2. Bawtry_Eas			1020903		
Alloc Resource							

ACCEPTED	Trip ID	Trip Stops	Trailer Type	Trailer ID	OMS Ref	Reason Code	Reason Comm
0							
1. Order V...							
Alloc Resource							

EN-ROUTE	Trip ID	Trip Stops	Trailer Type	Trailer ID	Tractor	Driver	Start Time	Finish Time
3	MAN-00484355	1. MILTON KEYNES_DM15 OYS (SU) 2. Phoenix_Yha	45R CS		5X00YMP		09/06/2011 00:00	09/06/2011 09:43

Within the Trip Overview screen, trips at Planned and Accepted status have a command button called Alloc Resources. When this button is selected a pop up canvas is displayed allowing the planner to allocate resources to the trip.

The screenshot shows the 'Allocate Resource' window. It has a header 'ALLOCATE RESOURCE' and a sub-header 'TRIP\_RES v1.10 C-TMS v10.7.5'. The main area contains a 'Resource List Search' section with fields for Driver, Tractor, and Trailer. Below this is a list of resources with columns for Id, Surname, Forename, Tractor Id, and Trailer Id. The list includes resources like (BA) AGY 1, (BA) AGY 10, (BA) AGY 2, (BA) AGY 3, (BA) AGY 4, (BA) AGY 5, (BA) AGY 6, (BA) AGY 7, (BA) AGY 8, (BA) AGY 9, (RL) AGY 1, (RL) AGY 10, (RL) AGY 2, (RL) AGY 3, and (RL) AGY 4. There are buttons for 'Assign Driver', 'Remove Driver', 'Assign Tractor', 'Remove Tractor', 'Assign Trailer', 'Remove Trailer', 'Remove All', 'Save', 'Cancel', 'Close', and 'Add Resource'.

Id	Surname	Forename	Tractor Id	Trailer Id
9000000	(BA) AGY 1		0001TEST	11031X
9000000	(BA) AGY 10		009TEST	11097x
9000000	(BA) AGY 2		AY03AOJ	11099x
9000000	(BA) AGY 3		DK53 C2L	11117X
9000000	(BA) AGY 4		DK53 CZD	11173X
9000000	(BA) AGY 5		DK53 CZE	11202X
9000000	(BA) AGY 6		DK53 CZF	11206X
9000000	(BA) AGY 7		DK53 CZG	11246x
9000000	(BA) AGY 8		DK53 CZH	11254x
9000000	(BA) AGY 9		DK53 CZJ	11360X
9000000	(RL) AGY 1		DK53 CZL	11486X
9000000	(RL) AGY 10		DK53 CZM	11627x
9000000	(RL) AGY 2		DK53 CZN	1162x
9000000	(RL) AGY 3		DK53 CZO	11687
9000000	(RL) AGY 4		DK53 CZP	11687X

A copy of this screen will be created. The screen will be made wider allowing a fourth data block for crew members to be displayed. The Crew Member block will be based on the Driver block and will contain two command buttons, Assign Crew and Remove Crew. A Resource List Search will be available and Crew 1 and Crew 2 will be added to the main screen header for viewing purposes.

The value of the Cost centre parameter TRM\_CHECK\_CREW will determine if the original Allocate Resource screen or the new Allocate Resource screen is displayed.

If a crew member has been assigned in Crew 1 and the user selected Assign Crew, the record selected will be added to Crew 2. If the user selects Remove Crew, any data stored in Crew 1 or Crew 2 will be removed.

4.4 Carrier Maintenance



In the Carrier Maintenance screen, carriers are assigned a display type of Pop List or Free text. If a carrier has been set up as Poplist, then users can only assign drivers and crew members that have been assigned to the carrier. If the display type is set as Freetext, then users are able to enter new crew members when assigning the resources and the record will be automatically created.

Any List of values available for the crew member fields will be based on the display type of the carrier.

There will be no distinction made between drivers and crew members, driver records are allocated to carriers in the Resources Maintenance screen

When a trip is set to accepted a new procedure will be created which will check if any of the orders scheduled on the trip require a two man crew. If there are orders and a crew member has not been assigned a message will be displayed to inform the user.

Additionally, if a crew member has been assigned and there are no orders scheduled which require a 2 man crew, a message will be displayed. In both instances, the trip will not be prevented from going to status ACCEPTED.

The check will be carried out based on the value of a new Cost Centre parameter called ?TRM\_CHECK\_CREW?

## Table Updates Required

No table changes are required for this development.

## References

Ref No	Document Title & ID	Version	Date
1	EST 290895 AR-8KCB4F Allocate Resource from Trip Overview v1.0	1.0	09/08/11

## Glossary

Term or Acronym	Meaning
C-TMS	Calidus TMS



**Document History**

<b>Version</b>	<b>Date</b>	<b>Status</b>	<b>Reason</b>	<b>Initials</b>
0.1	09/08/11	Draft	Initial version	SEW
0.2	09/08/11	Draft	Reviewed	MJC
0.3	09/08/11	Draft	Revised	SEW
1.0	09/08/11	Issue	Reviewed and Issued	MJC
2.0	10/08/11	Issue	Corrected Estimate times	SEW
3.0	10/08/11	Issue	Updated Del_point_ref information	SEW



## 5 AUTHORISED BY

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