

290895 v3.0

Aptean Ltd
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1 290895

Aaptean

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?.

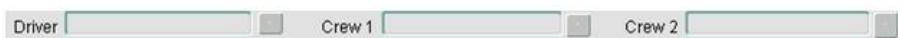
The ability to allocate and view up to 2 crew members on a trip will be added to the following screens in C-TMS

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_nameTRM_CHECK_CREW

Config_byCOST_CENTRE

Config_by_valueBGWCC

ValueY

DescriptionIndicates 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.

Action	C-TMS Modules	Administration	Edit	Help	Window
System Parameters					
Parameter Name	Config By	Config By Value	Value	Description	
ADM_ALLOW_ZERO_RP	SYSTEM	NONE	Y	Allow zero quantity to be returned from get charges (for RP)	
ACC_CONSOL_RADIAL_COSTS	SYSTEM	NONE	N	Indicates if radial charges are consolidated at delivery loca	
ACC_CALC_PAYMENT_ORD	SYSTEM	NONE	Y	Controls whether payment button is displayed on Orders it	
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 radial) are general	
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?	
BKO_DEF_POPULATE_DEL	SYSTEM	NONE	N	Any order that are created via bookings will have Del Type	
BKO_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 timezone, used in Order Tracking form, free	
CSB_EXPORT_PATH	SYSTEM	NONE	/u03/webin/trms/trms/carrier_self_bill	Directory where carrier self billing exports are stored.	
CSB_REPORT_PATH	SYSTEM	NONE	/u03/webin/trms/trms/carrier_self_bill	Directory where carrier self billing reports are stored.	
CUSTOMER_CONTROLLED_ORDER_F	SYSTEM	NONE	Y	Y/N-Controls whether Order Revenue will be controlled by	
DEBUG	SYSTEM	NONE	Y	Debug enabled ? - Y or N	
DS0_DEF_DU_TYPE	SYSTEM	NONE		Default DU Type for Orders created via the Dixons Booking	
<input type="button" value="Configure"/> <input type="button" value="Delete"/> <input type="button" value="Save"/> <input type="button" value="Close"/>					



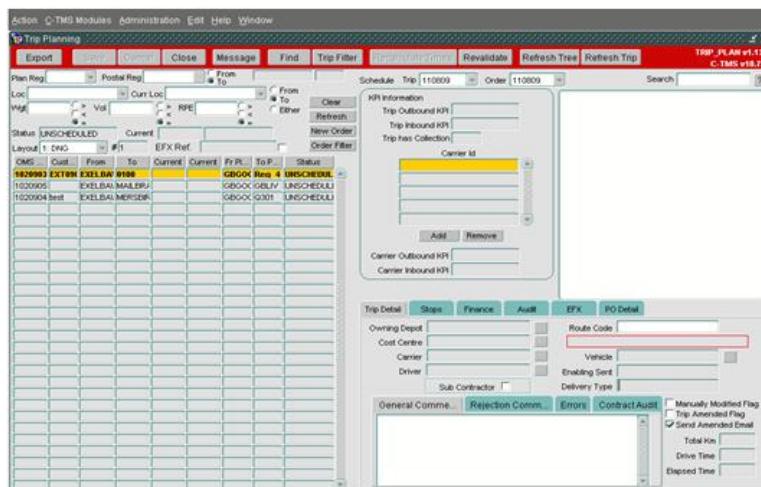
4 Functional Description

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.



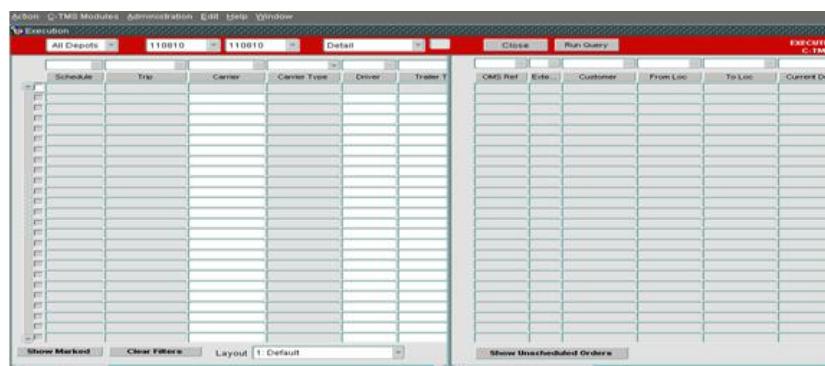
Currently, the Trip Manipulation screen accessed from the main menu allows planners to allocate up to an additional 2 crew members. This functionality will be added to the following screens:

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

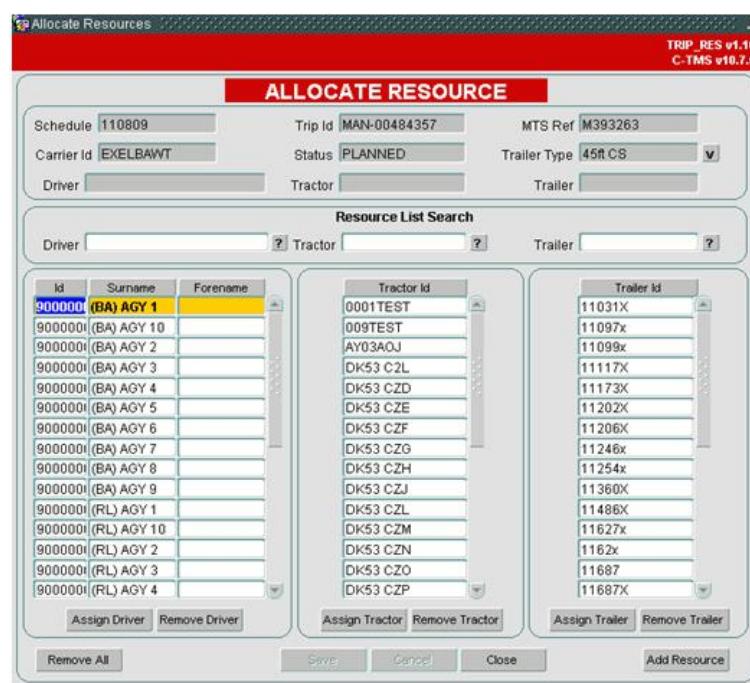


information. When the mouse is in the trip id field, right clicking will show the trip detail. The trip detail screen has been created based on the Trip Manipulation screen and already includes crew 1 and crew2.

4.3 Trip Overview Screen



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.



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.

Carrier ID	277083	TMS Ref		Carrier Name	CurrencyTest
Carrier Type	Fleet	Display Type	Poplist	Current Haulage Units	
Group Name	Fleet	Permit Debrief	<input type="checkbox"/>	Inactive	<input checked="" type="checkbox"/>
External Drivers	<input type="checkbox"/>	Smartphone	SMARTPHONE		

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

The 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

Version	Date	Status	Reason	Initials
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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