



Aptean

Maintenance Training

Calidus TMS - 12.45

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1 ADMINISTRATION - ACCESS CONTROL

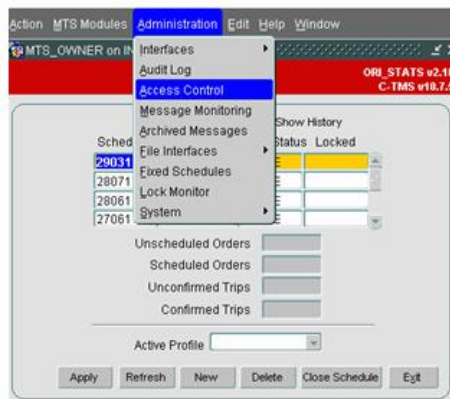
This screen allows an Administrator to create a Menu structure at a Group Level. This allows a user to be associated to a group, which will give them enough visibility (screens, tabs) for them to perform their daily duties. Other functions can also be performed using this screen such as:-

- Creating New Users.
- Creating multiple profiles for a user.
- Creating and amending new Groups.
- Editing User Profiles.
- Changing the passwords of Users.

All these options will be explained in more detail below.

1.1 Accessing the Screen

To gain access to the screen you must be an Administrator. A Standard user will not have visible of this menu option. It can be found by selecting the 'Administration' option followed by 'Access Control'.



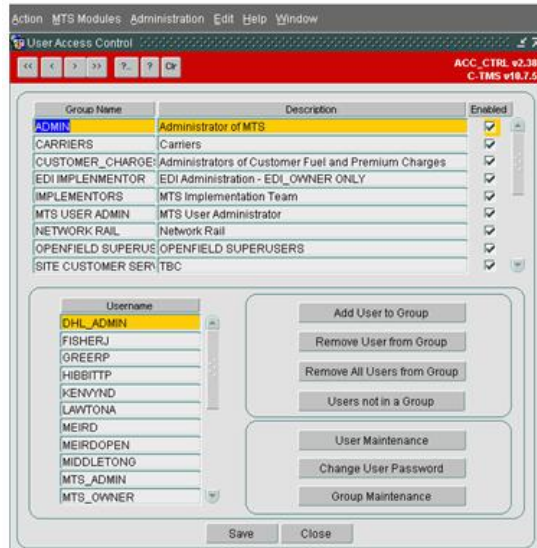
1.2 Access Control Main screen

This screen is view only and shows the existing User Groups and Users. Users can be associated to more than one group.

To view the Users for each group, the relevant Group Line should be highlighted.

There are a series of buttons to allow the user to Drill down further to add or edit data, expanded below.





1.3 User Maintenance

Administrators are given the ability to create users and administer user passwords. When setting up a new user, the Username, User Type, Description and Password are required. Once a user has been created, there are a number of mandatory User Parameters which are also created and cannot be deleted.



1.3.1 Creating a New User

- Click the **New** Button. The user is then populated with the screen below:

The screenshot shows the 'New User' form. It has a menu bar with 'Action', 'MTS Modules', 'Administration', 'Edit', 'Help', and 'Window'. Below the menu is a toolbar with icons for back, forward, search, and other functions. The main area is a form with fields for 'Username', 'User Type', 'Full Name / Description', 'Password', 'Based At', and 'Company'. There is a checkbox for 'Allow multiple concurrent sessions ?'. At the bottom are 'Save' and 'Cancel' buttons.

- Fill in the details on the Users screen, User Type being Internal and Based at starting with country of Residence e.g. UK.
- Click **Save**.



- The check box 'Allow Multiple concurrent sessions' allows a user to have several sessions to be opened without a warning being populated.

1.3.2 Editing a New User

Within the 'Edit' function, the Administrator can temporarily disable a user's account or can force a user to change their password. A number of parameters allow multiple selections, i.e., take for example the Carrier user parameter, a user may only be able access one carrier, another user may be able access two carriers. This can be set up quite simply in this form.

1.3.3 Change User Password

The Administrator can change the password of any user - this may be because the user has forgotten it.

1.3.4 User Parameters

By selecting the 'User Parameters' tab, the Administrator can limit the amount of data that is displayed to the user, for example, if a particular user should only see data belonging to a particular Cost Centre, then a user parameter can be added with a value selected from a list where appropriate.

A number of parameters allow multiple selections, i.e. take for example the Carrier user parameter, A user may only be able access one carrier, another user may be able access two carriers. This can be set up quite simply in this form. More details and a list of user parameters are referenced in the [User Parameters](#) section.

Note: For new users, you should:

- Click **Edit** for the user you have just created.
- Edit users BASED_AT, COST_CENTER, ENTRY_FORM and SCHED_GROUP and click **OK**.

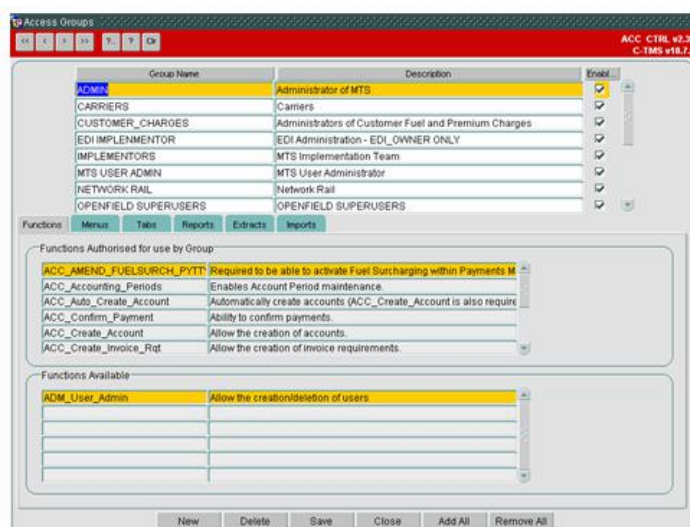


1.3.5 Default Printers

On selecting the 'Default Printers' tab an individual user can be allocated a default printer.

1.4 Group Maintenance

In order to determine which functions a group of users can perform the Administrator must identify the C-TMS business functions required. Once the menu structure has been identified, the Functions, Menus, Tabs, Reports, Extracts and Imports will need to be allocated in order to restrict/expand a user's group access to part or all functionality contained within.



1.4.1 Creating a New Group

- Click Group Maintenance then click **New**.
- Give the Group a Name and Description and check Enabled.
- For each tab add or remove processes using the **Add All/Remove All** buttons or double clicking a process to add one at a time.
- Click **Save**.

1.4.2 Editing a Group

- For the ADMIN Group in the Menus tab uncheck 'In Menu?' for Interface Errors and then click **Save**.
- Exit Form and Look for this at Administration > Interfaces.
- Will not be available.
- Put the Menu back where it was and click **Save**.
- Check Administration > Interfaces to see it is back.

1.4.3 Group Maintenance - Accessible Functionality

The screen has a series of tabs that allows the administrator to modify the features that the users in this group can access.

- Functions - functionality within screens that is accessible to the users in the group.
- Menus - menu items that are accessible to the users in this group.
- Tabs - tabs within screens that are accessible to the users in this group.
- Reports - Reports that are accessible to the users in this group.
- Extracts - Extracts that are accessible to the users in this group.
- Imports - Imports that are accessible to the users in this group.



Lists of all available tabs and functions can be found in [Access Control - Accessible Functionality](#).

A list of all the accessible menus can be found in [C-TMS Menu Hierarchy](#).

The Imports are variable data that is maintained in [Imports](#) maintenance.

Available [Extracts](#) and [Reports](#) are covered in their respective sections.

Each screen works similarly:

- A top panel shows the functionality that is accessible to the users in the group.
- A bottom panel shows the functionality that is currently not accessible to the users in the group.

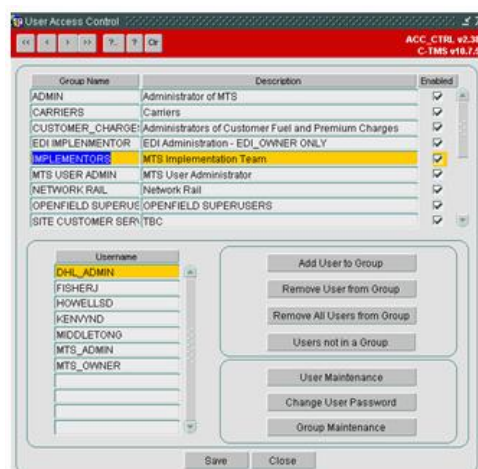
To make functionality accessible, double-click the item in the bottom panel and it will be added to the top panel.

To make functionality inaccessible, double-click the item in the top panel and it will be removed and shown in the bottom panel.

Example - tabs:

This tab allows the administrator the ability to control which tabs a group has access to. For example, the 'Bookings' group has access to the [Trip Manipulation](#) form, but they do not necessarily need to see anything to do with finance. Therefore, the administrator can restrict access to the Finance tab to the Bookings group. All forms which have tabs can be controlled in this way, except the Access Control form, which assumes that the administrator has access to ALL the tabs.

1.5 Users and Groups



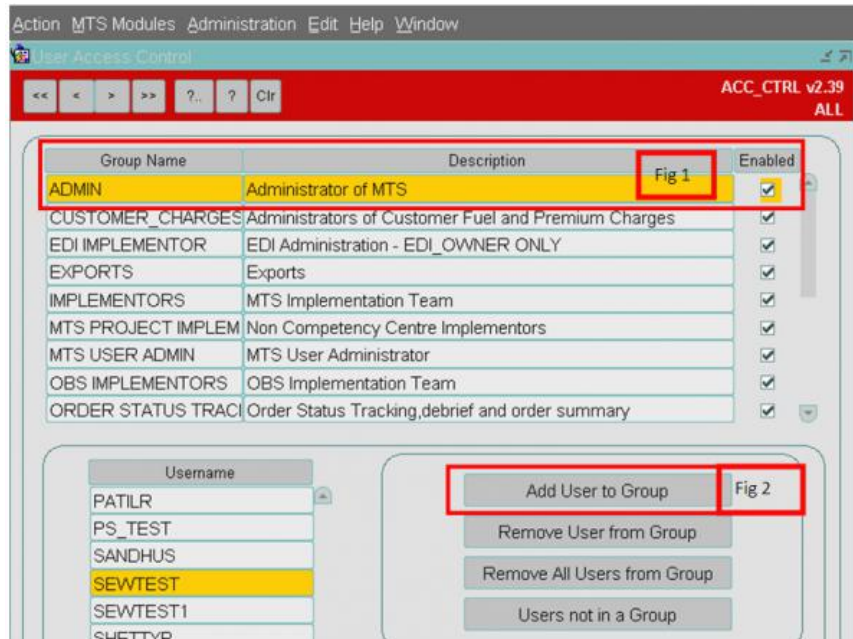
1.5.1 Adding a User to Group

Any number of users can be added to a group, this is done by highlighting the appropriate group and pressing **Add User to Group**. A list of users not already in the group will be displayed; it is then a matter of selecting the username.

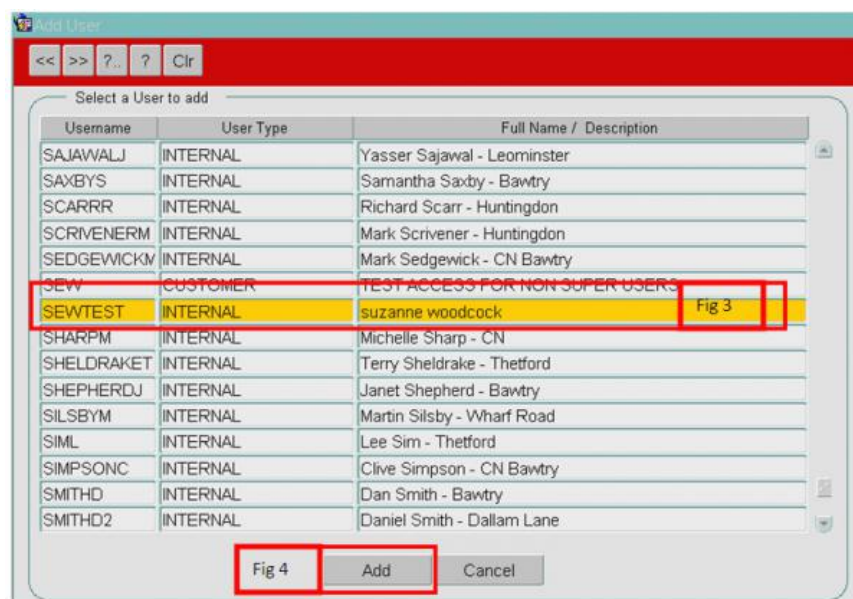
To add a user to a group take the following steps:

- Highlight the required Group that you want the user to be added to.
- Click the **Add User to a Group** button. A new form will be displayed.





- Highlight the required user to be added.
- Click the **Add** button.



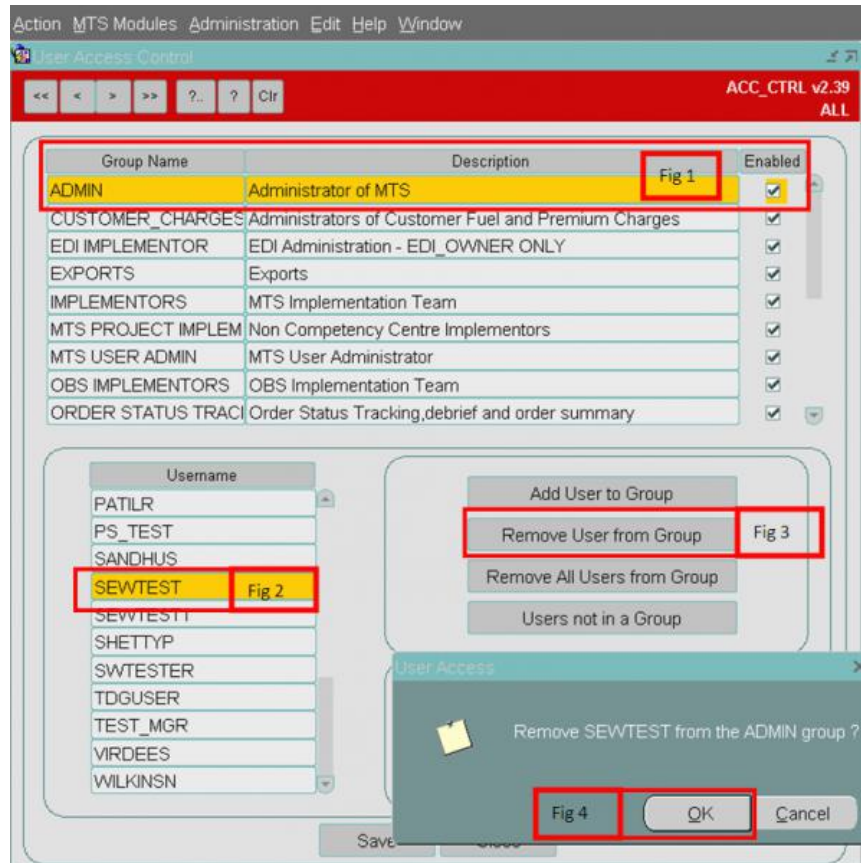
1.5.2 Remove User from Group

Users can be removed from a group at any time just by highlighting the User and clicking the button.

To Remove a User from a group take the following steps:

- Highlight the required Group.
- Highlight the required User.
- Click the **Remove user from Group** button.
- A pop up screen will be displayed asking the user to clarify the removal of the user from the group. Click the **OK** button to remove the user.



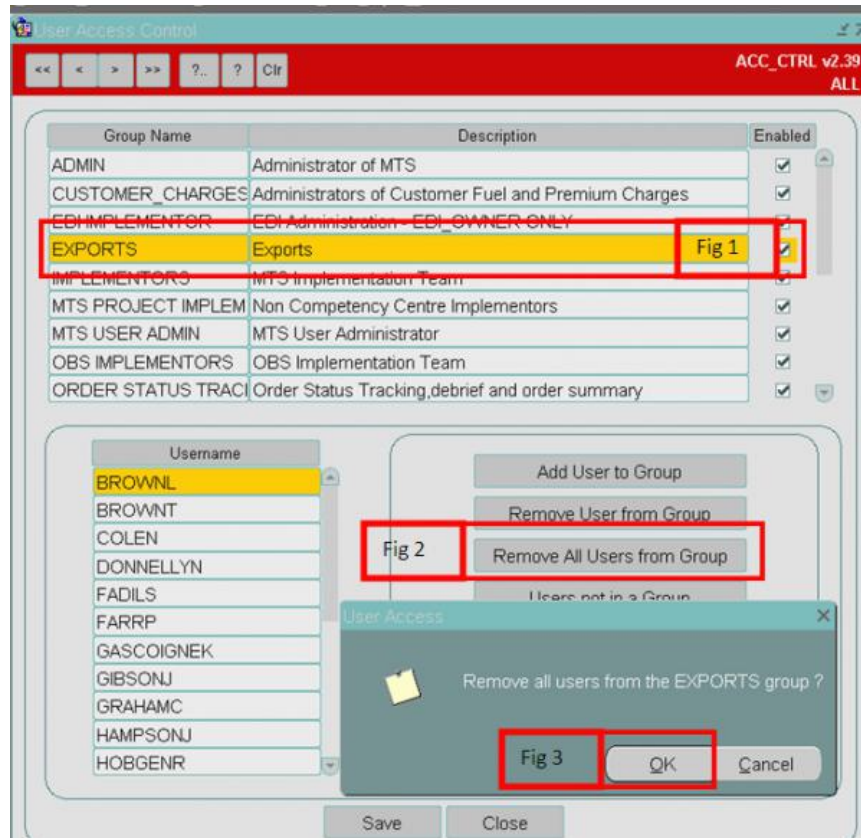


1.5.3 Remove All Users from Group

This button will remove all the users from a group in one action.

- Highlight the required Group.
- Click the **Remove All Users from Group** button. This will open a box.
- Click **OK** to proceed and remove all the users.





1.5.4 Users not in a Group

A list of users who do not belong to any group can be viewed.



2 Audit Log

The C-TMS Audit Log Screen provides the users with informational messages regarding the processes on C-TMS.

C-TMS Audit Log can be accessed from the C-TMS Modules menu.

Once selected the form as shown below will be displayed.

The screenshot shows the 'Audit Tracking' window. At the top, there's a menu bar with 'Action', 'C-TMS Modules', 'Administration', 'Edit', 'Help', and 'Window'. Below the menu bar is a toolbar with navigation icons. The main area contains search filters: 'Date' (10/10/14), 'Prog' (empty), and 'Type' (empty). There are also 'ORI_LOG v2.8' and 'C-TMS v11.11' labels in the top right. The central part is a table with 6 columns: Date, User, Prog Name, Type, Message, and Action Req'd. The table is currently empty. At the bottom, there are 'Actioned By' and 'on' fields, and buttons for 'Clear Log', 'Action Error', and 'Close'.

2.1 Audit log search

Enter the date for which you require the audit information. Click on the question mark to return the information. The information can be filtered on:

1. The program that generated the audit log
2. The type of record
3. Whether the record is actioned or un-actioned

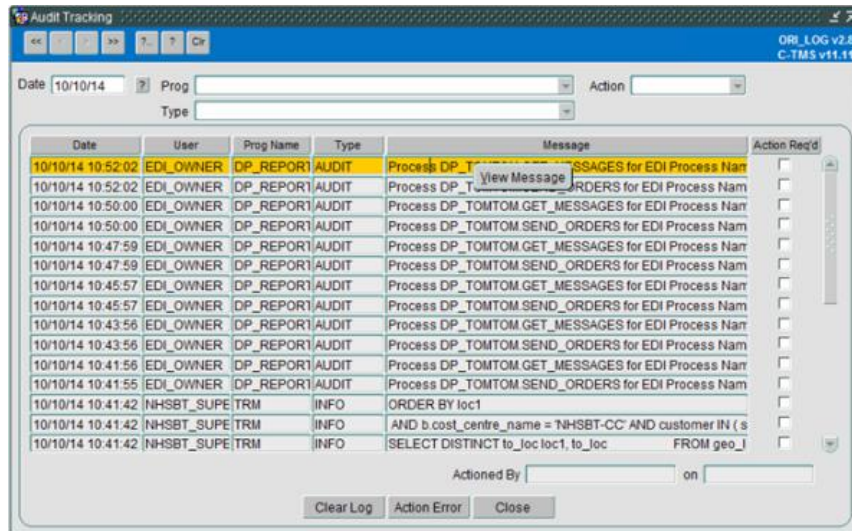
The screenshot shows the 'Audit Tracking' window with search filters: 'Date' (10/10/14), 'Prog' (TRIP - Trips), and 'Type' (INFO - Information Messages). The table is populated with 10 rows of audit log entries. The first row is highlighted in yellow. The columns are: Date, User, Prog Name, Type, Message, and Action Req'd. The 'Actioned By' and 'on' fields are at the bottom, along with 'Clear Log', 'Action Error', and 'Close' buttons.

Date	User	Prog Name	Type	Message	Action Req'd
10/10/14 10:35:34	NHSBT_SUPE	TRIP	INFO	OMS_SCAN OPD	<input type="checkbox"/>
10/10/14 10:34:10	NHSBT_SUPE	TRIP	INFO	OMS_SCAN OPD	<input type="checkbox"/>
10/10/14 10:31:45	NHSBT_SUPE	TRIP	INFO	OMS_SCAN OPD	<input type="checkbox"/>
10/10/14 10:07:25	NHSBT_SUPE	TRIP	INFO	OMS_SCAN OPD	<input type="checkbox"/>
10/10/14 10:06:08	NHSBT_SUPE	TRIP	INFO	OMS_SCAN OPD	<input type="checkbox"/>
10/10/14 10:02:20	NHSBT_SUPE	TRIP	INFO	OMS_SCAN OPD	<input type="checkbox"/>
10/10/14 10:01:34	NHSBT_SUPE	TRIP	INFO	OMS_SCAN OPD	<input type="checkbox"/>
10/10/14 10:00:18	NHSBT_SUPE	TRIP	INFO	OMS_SCAN OPD	<input type="checkbox"/>
10/10/14 09:58:52	NHSBT_SUPE	TRIP	INFO	OMS_SCAN OPD	<input type="checkbox"/>
10/10/14 09:57:44	NHSBT_SUPE	TRIP	INFO	OMS_SCAN OPD	<input type="checkbox"/>

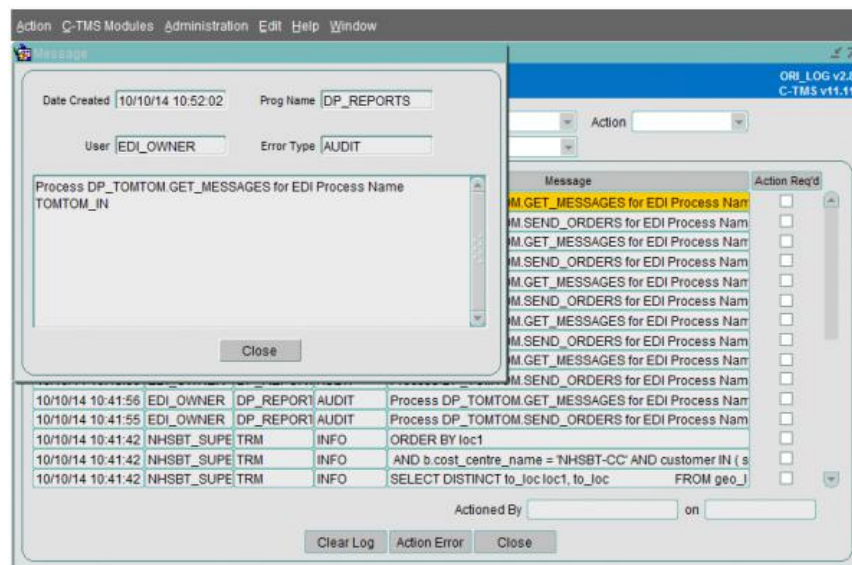


2.2 View Message

The message field can be scrolled to the right to view any more descriptive messages. In this case you can right click on the message and a new button **View Message** is shown as below.



By clicking on the **View Message** button the whole message can be viewed as shown:



2.3 Action a Log message

A log message can be marked to indicate that a remedial action was taken. This is indicated by the *Action Required* checkbox being ticked. To record that you have rectified the error you click the **Action Error** button and a pop-up box appears as below:



ORI_LOG v2.8
C-TMS v11.11

Actioned By:

Apply Cancel

Type	Message	Action Req'd
ERROR	Could not process acknowledgement message from Calidus	<input checked="" type="checkbox"/>
ERROR	Could not process acknowledgement message from Calidus	<input checked="" type="checkbox"/>
ERROR	Could not process acknowledgement message from Calidus	<input checked="" type="checkbox"/>
ERROR	Could not process acknowledgement message from Calidus	<input checked="" type="checkbox"/>
AUDIT	Process DP_TOMTOM_SEND_ORDERS for EDI Process Nam	<input type="checkbox"/>
AUDIT	Process DP_TOMTOM_SEND_ORDERS for EDI Process Nam	<input type="checkbox"/>
AUDIT	Process DP_TOMTOM_SEND_ORDERS for EDI Process Nam	<input type="checkbox"/>
INFO	Distance and Time for J2=>P250 from NET entry: 1/5	<input type="checkbox"/>
INFO	Distance and Time for P250=>J2 from REVERSE NET entry: 1	<input type="checkbox"/>
INFO	Distance and Time for J2=>P250 from NET entry: 1/5	<input type="checkbox"/>
INFO	Distance and Time for P250=>J2 from REVERSE NET entry: 1	<input type="checkbox"/>
INFO	Distance and Time for J2=>P250 from NET entry: 1/5	<input type="checkbox"/>
INFO	Distance and Time for P250=>J2 from REVERSE NET entry: 1	<input type="checkbox"/>

Actioned By: on

Clear Log Action Error Close

Choose the person who has actioned the error from the drop down list and press the **Apply** button.

Action: Kenneth Smith - Manchester
Adrienn Stubics - Filton
Julie Taylor - Colindale
Chris Thyer - Leeds
Sean Turner - Liverpool
Cliff Vadachellum - Tooting
Jackie Butler - Tooting
Duncan Wright - Newcastle

ORI_LOG v2.8
C-TMS v11.11

Action:

Apply Cancel

Type	Message	Action Req'd
ERROR	Could not process acknowledgement message from Calidus	<input checked="" type="checkbox"/>
ERROR	Could not process acknowledgement message from Calidus	<input checked="" type="checkbox"/>
ERROR	Could not process acknowledgement message from Calidus	<input checked="" type="checkbox"/>
ERROR	Could not process acknowledgement message from Calidus	<input checked="" type="checkbox"/>
AUDIT	Process DP_TOMTOM_SEND_ORDERS for EDI Process Nam	<input type="checkbox"/>
AUDIT	Process DP_TOMTOM_SEND_ORDERS for EDI Process Nam	<input type="checkbox"/>
AUDIT	Process DP_TOMTOM_SEND_ORDERS for EDI Process Nam	<input type="checkbox"/>
INFO	Distance and Time for J2=>P250 from NET entry: 1/5	<input type="checkbox"/>
INFO	Distance and Time for P250=>J2 from REVERSE NET entry: 1	<input type="checkbox"/>
INFO	Distance and Time for J2=>P250 from NET entry: 1/5	<input type="checkbox"/>
INFO	Distance and Time for P250=>J2 from REVERSE NET entry: 1	<input type="checkbox"/>
INFO	Distance and Time for J2=>P250 from NET entry: 1/5	<input type="checkbox"/>
INFO	Distance and Time for P250=>J2 from REVERSE NET entry: 1	<input type="checkbox"/>

Actioned By: on

Clear Log Action Error Close

The record is updated and the actioned by fields on the bottom right of the screen are updated:

Action: C-TMS Modules Administration Edit Help Window

ORI_LOG v2.8
C-TMS v11.11

Date: 09/10/14 Prog: Action:

Type:

Date	User	Prog Name	Type	Message	Action Req'd
09/10/14 16:59:26	EPOD	EPOD_WS	ERROR	Could not process acknowledgement message from Calidus	<input checked="" type="checkbox"/>
09/10/14 16:59:27	EPOD	EPOD_WS	ERROR	Could not process acknowledgement message from Calidus	<input checked="" type="checkbox"/>
09/10/14 16:59:31	EPOD	EPOD_WS	ERROR	Could not process acknowledgement message from Calidus	<input checked="" type="checkbox"/>
09/10/14 16:59:30	EPOD	EPOD_WS	ERROR	Could not process acknowledgement message from Calidus	<input checked="" type="checkbox"/>
09/10/14 16:59:28	EPOD	EPOD_WS	ERROR	Could not process acknowledgement message from Calidus	<input checked="" type="checkbox"/>
09/10/14 11:44:07	EDI_OWNER	DP_REPORT	AUDIT	Process DP_TOMTOM_SEND_ORDERS for EDI Process Nam	<input type="checkbox"/>
09/10/14 12:08:17	EDI_OWNER	DP_REPORT	AUDIT	Process DP_TOMTOM_SEND_ORDERS for EDI Process Nam	<input type="checkbox"/>
09/10/14 12:14:19	EDI_OWNER	DP_REPORT	AUDIT	Process DP_TOMTOM_SEND_ORDERS for EDI Process Nam	<input type="checkbox"/>
09/10/14 11:28:01	EDI_OWNER	DP_REPORT	AUDIT	Process DP_TOMTOM_SEND_ORDERS for EDI Process Nam	<input type="checkbox"/>
09/10/14 11:30:03	EDI_OWNER	GEO	INFO	Distance and Time for J2=>P250 from NET entry: 1/5	<input type="checkbox"/>
09/10/14 11:30:03	EDI_OWNER	GEO	INFO	Distance and Time for P250=>J2 from REVERSE NET entry: 1	<input type="checkbox"/>
09/10/14 11:30:03	EDI_OWNER	GEO	INFO	Distance and Time for J2=>P250 from NET entry: 1/5	<input type="checkbox"/>
09/10/14 11:30:03	EDI_OWNER	GEO	INFO	Distance and Time for P250=>J2 from REVERSE NET entry: 1	<input type="checkbox"/>
09/10/14 11:30:03	EDI_OWNER	GEO	INFO	Distance and Time for J2=>P250 from NET entry: 1/5	<input type="checkbox"/>
09/10/14 11:30:03	EDI_OWNER	GEO	INFO	Distance and Time for P250=>J2 from REVERSE NET entry: 1	<input type="checkbox"/>

Actioned By: Sean Turner - Liverpool on 10/10/14 13:22:03

Clear Log Action Error Close



To clear down the audit log records press the **Clear Log** button.

2.4 Further Configuration

The following are system parameters affecting this function:

Parameter	Description	Level
ADM_EXCLUDE_AUDIT_LOG	Processes that will be excluded from writing audit log records.	SYSTEM
ADM_EXCLUDE_PACKAGE_MSG	Packages whose adm log messages are not to be written	SYSTEM
ADM_LOG_ARC_DEL_DAYS	Number of days that ADM_LOG_ARCHIVE messages should be kept for	SYSTEM



3 User Parameters

Parameter	Controls	Visibility Control	Data Entry Control	Acceptable Values	Dropdown Ordering	Multiple Instances	Parameter Entry Validation	New User Auto Created	Default Value if Auto Created
ACCESSIBLE_FROM_LOCS	Restricts the visibility of orders in the 'Order Well' of the Trip Planning/Manipulation forms - both ACCESSIBLE_FROM_LOCS and ACCESSIBLE_TO_LOCS parameters must be used together. Only orders matching the assigned 'LOCATION IDs' for both 'FROM' and/or 'TO' will be displayed. A value of 'ALL' can be used for either 'FROM' or 'TO' location as long as one of the parameters is set to a valid location. If both parameters are left blank then ALL orders will be visible (Subject to other parameter settings).	Yes	No	Free Text	No Dropdown	No	Entered values unrestricted - Location IDs Cannot add a new instance if parameter already exists for specified value Multiple LOCATION IDs can be entered by comma separated values without any spaces.	Yes	Blank
ACCESSIBLE_TO_LOCS		Yes	No	Free Text	No Dropdown	No	Entered values unrestricted - Location IDs Cannot add a new instance if parameter already exists for specified value Multiple LOCATION	Yes	Blank



Parameter	Controls	Visibility Control	Data Entry Control	Acceptable Values	Dropdown Ordering	Multiple Instances	Parameter Entry Validation	New User Auto Created	Default Value if Auto Created
							IDs can be entered by comma separated values without any spaces.		
ALL_DEPOTS	<p>Enables the visibility of all trips with any OWNING DEPOT value. Cannot be used in conjunction with parameter BASED_AT and is generally a superuser only parameter.</p> <p>Enables the visibility of all DEPOTS in the Fixed Routes Execution screen and other DEPOT ID selection dropdowns.</p>	Yes	No	Dropdown - Y/N	Alphabetical	No	Must select value from dropdown	N	N/A
BASED_AT	<p>Restricts the visibility of order and trip data. Only trips with an OWNING DEPOT matching the assigned value will be displayed (subject to other parameter settings). This does not control data entry for OWNING DEPOT values. If this parameter is used with the SCHED_GROUP parameter, it will restrict visibility of order data to only show orders at status SCHED_COLL with a CURRENT_DEPOT/FROM_LOC matching the specified value.</p> <p>Restricts the visibility of Fixed Routes data in the Fixed Routes Maintenance screen. Only Fixed Routes with a DEPOT matching the specified will be displayed.</p>	Yes	No	Free Text	No Dropdown	Yes	Cannot add a new instance if parameter already exists for specified value. Must be a valid location code	N	N/A



Parameter	Controls	Visibility Control	Data Entry Control	Acceptable Values	Dropdown Ordering	Multiple Instances	Parameter Entry Validation	New User Auto Created	Default Value if Auto Created
CARRIER	Controls the data entry validation of trip data. When creating or amending a trip, only the specified CARRIER ID values will be accepted. Setting this parameter to ALL will allow entry of any CARRIER ID against a trip.	No	Yes	Dropdown - CARRIER NAMES + ALL	Alphabetical on CARRIER NAME	Yes	Must select value from dropdown. Cannot add a new instance if parameter already exists with a value of 'ALL'. Cannot add a new instance if parameter already exists for specified value	Y	"ALL"
CARR_GROUP	Controls the data entry validation of trip data. When creating or amending a trip, only CARRIER IDs associated to the CARRIER GROUP of the specified value will be accepted. Setting this parameter to ALL will allow entry of any CARRIER ID against a trip (subject to other parameter settings).	No	Yes	Dropdown - CARRIER GROUP NAMES + ALL	Alphabetical on CARRIER GROUP NAMES	Yes	Must select value from dropdown Cannot add a new instance if parameter already exists with a value of 'ALL' Cannot add a new instance if parameter already exists for	Y	"ALL"



Parameter	Controls	Visibility Control	Data Entry Control	Acceptable Values	Dropdown Ordering	Multiple Instances	Parameter Entry Validation	New User Auto Created	Default Value if Auto Created
							specified value		
CONTROL_TOWER	This parameter controls the system parameter settings available for the SMTP_ORDER_SENDER and SMTP_TRIP_SENDER parameter. If these system parameters are set to be 'Config by' CONTROL_TOWER, then the available 'Config Value' will match the assigned value/s. This enables dynamic control of the email senders address, as used in the MTS Carrier Maintenance emailing functionality.	No	Yes	Dropdown - LOCATION NAMES marked as control tower	Alphabetical on LOCATION NAME	Yes	Must select value from dropdown. Cannot add a new instance if parameter already exists for specified value	N	N/A
COST_CENTRE	Restricts the visibility of order and trip data, also controls the data entry validation for COST CENTRE fields. Only orders and trips with a COST CENTRE matching the assigned value will be displayed. When creating or amending an order or trip, only the specified COST CENTRE values will be accepted. Setting this parameter to ALL will display all orders and trips and allow entry of any COST CENTRE value against them (subject to other parameter settings).	Yes	Yes	Dropdown - COST CENTRE NAMES + ALL	Alphabetical on COST_CENTRE_NAME	Yes	Must select value from dropdown. Cannot add a new instance if parameter already exists with a value of 'ALL' Cannot add a new instance if parameter already exists for specified value.	Y	"ALL"
CUSTOMER	Restricts the visibility of order data, also controls the data entry	Yes	Yes	Dropdown - CUSTOMER	Alphabetical on CUSTOMER NAME	Yes	Must select value from	Y	"ALL"



Parameter	Controls	Visibility Control	Data Entry Control	Acceptable Values	Dropdown Ordering	Multiple Instances	Parameter Entry Validation	New User Auto Created	Default Value if Auto Created
	validation for CUSTOMER ID fields. Only orders with a CUSTOMER ID matching the assigned value will be displayed. When creating or amending an order, only the specified CUSTOMER ID values will be accepted. Setting this parameter to ALL will display all orders and allow entry of any CUSTOMER ID value against them (subject to other parameter settings). This parameter has no impact on trip data.			NAMES + ALL			dropdown. Cannot add a new instance if parameter already exists with a value of 'ALL'. Cannot add a new instance if parameter already exists for specified value		
CUST_GROUP	Restricts the visibility of order data, also controls the data entry validation for CUSTOMER ID fields. Only orders with a CUSTOMER ID associated to the CUSTOMER GROUP of the specified value will be displayed. When creating or amending an order, only the CUSTOMER IDs associated to the CUSTOMER GROUP specified will be accepted. Setting this parameter to ALL will display all orders and allow entry of any CUSTOMER ID value against them (subject to other parameter settings). This parameter has no impact on trip data.	Yes	Yes	Dropdown - CUSTOMER GROUPS + ALL	Alphabetical on CUSTOMER GROUP	Yes	Must select value from dropdown. Cannot add a new instance if parameter already exists with a value of 'ALL'. Cannot add a new instance if parameter already exists for specified value	Y	"ALL"
DEF_CALLOUT_DEL_TYPE	A default delivery type for callout jobs when creating a scheduled	No	Yes	Free Text	No Dropdown	No	Entered values	N	N/A



Parameter	Controls	Visibility Control	Data Entry Control	Acceptable Values	Dropdown Ordering	Multiple Instances	Parameter Entry Validation	New User Auto Created	Default Value if Auto Created
	callout job from call logging.						unrestricted		
DEF_CALLOUT_SERVICE	A default service level for callout jobs when creating a scheduled callout job from call logging.	No	Yes	Free Text	No Dropdown	No	Entered values unrestricted	N	N/A
DEF_INSPECT_DEL_TYPE	A default delivery type for inspection jobs when creating from call logging.	No	Yes	Free Text	No Dropdown	No	Entered values unrestricted	N	N/A
DEF_INSPECT_SERVICE	A default service level for inspection jobs when creating from call logging.	No	Yes	Free Text	No Dropdown	No	Entered values unrestricted	N	N/A
DEL_TYPE	Restricts the visibility of order data, also controls the data entry validation for DELIVERY TYPE fields. Only orders with a DELIVERY TYPE matching the assigned value will be displayed. When creating or amending an order, only the specified DELIVERY TYPE values will be accepted. Setting this parameter to ALL will display all orders and allow entry of any DELIVERY TYPE against them (subject to other parameter settings). This parameter has no impact on trip data.	Yes	Yes	Dropdown - DELIVERY TYPES + ALL	Alphabetical on DELIVERY TYPE	Yes	Must select value from dropdown. Cannot add a new instance if parameter already exists with a value of 'ALL' Cannot add a new instance if parameter already exists for specified value	Y	"ALL"
ENTRY_FORM	This parameter controls whether the selected form opens automatically when first logging in to the system. The form will open over the top of the existing ORI_STATS screen.	No	No	Dropdown - Carrier Trip Management, Debrief Invoice, Lane Based Orders, Orders, Order Templates, Order Tracking,	Alphabetical	No	Must select value from dropdown	N	N/A



Parameter	Controls	Visibility Control	Data Entry Control	Acceptable Values	Dropdown Ordering	Multiple Instances	Parameter Entry Validation	New User Auto Created	Default Value if Auto Created
				Trip Debrief, Trip Manipulation					
EXP_DELIMITER	Enables the delimiter for MTS CSV Export files to be controlled at user level. Under standard functionality all CSV Export files would be comma spirited ','. The data delimiter in all CSV Export files will be set to the value specified. A blank value will be ignored and will use the default comma ','.	No	No	Free Text	No Dropdown	No	.	N	N/A
EXTERNAL_CALL_LOGGIN	Whether this user is authorised to use the call logging system only as an external user, with some limited functionality.	No	Yes	Free Text	No Dropdown	No	Y/N	N	N/A
FIXED_ROUTES_DEPOT	This parameter controls the DEPOT selection which is available in Fixed Routes Maintenance and Fixed Routes Execution screens. It enables execution or amendment of a Fixed Route with a DEPOT matching the specified value. It can be overridden by the parameter ALL_DEPOTS.	Yes	No	Free Text	No Dropdown	Yes	Entered values unrestricted - Location IDs. Cannot add a new instance if parameter already exists for specified value. Multiple DEPOTS can be entered by comma separated values without any spaces	N	N/A



Parameter	Controls	Visibility Control	Data Entry Control	Acceptable Values	Dropdown Ordering	Multiple Instances	Parameter Entry Validation	New User Auto Created	Default Value if Auto Created
LBO_TRACKING	Restricts visibility of order and trip data in the Order Tracking and Order Debrief screen. If set to 'Y' the display is restrict to only show trips which contain orders that have been generated form Lane Based Order functionality for Order Lanes which the user has been setup to use.	Yes	No	Dropdown - Y/N	Alphabetical	No	Must select value from dropdown	N	N/A
ORD_COLLECT_FROM	Allowed to collect orders from all locations.	No	Yes	Dropdown	Alphabetical	No	Select value from dropdown	N	N/A
ORD_PRD_QTY	If set this will automatically populate the Order Line Product Qty to the specified value for manual order creation. This will auto generate the first order line and will also be applied to any additional order lines created.	No	Yes	Free Text	No Dropdown	No	Entered values unrestricted - Number	N	N/A
ORD_PRD_TYPE	If set this will automatically populate the Order Line Product Type to the specified value for manual order creation. This will auto generate the first order line and will also be applied to any additional order lines created.	No	Yes	Dropdown - PRODUCT TYPES marked as active	Alphabetical on PRODUCT TYPE	Yes	Must select value from dropdown. Cannot add a new instance if parameter already exists for specified value	N	N/A
OST_DISP_DEBRIEF_MSG	This parameter controls a warning message in the Order Tracking screen which will display on entry of the form for overdue trips - not completed/delivered.	No/center>	No	Dropdown - Y/N	Alphabetical	No	Must select value from dropdown	N	N/A
OST_SWITCH_LOCS	This parameter controls the display of the label within the	No	No	Dropdown - Y/N	Alphabetical	No	Must select value from	N	N/A



Parameter	Controls	Visibility Control	Data Entry Control	Acceptable Values	Dropdown Ordering	Multiple Instances	Parameter Entry Validation	New User Auto Created	Default Value if Auto Created
	'Source/Destination' field in the Order Tracking screen. The field will show the order transactions labelled from the perspective of the order 'From' location ('From : SOURCE') or the order 'To' location ('To : Destination'). This has no impact on the visibility of any order or trip data, it is purely for labelling description control.						dropdown		
REGIONS	Restricts the visibility of order data. Only orders with a PLANNING REGION associated to either the 'FROM' or 'TO' location of the order matching the specified value will be displayed (subject to other parameter settings). This parameter has no impact on trip data.	Yes	No	Free Text	No Dropdown	No	Entered values unrestricted - Location IDs. Cannot add a new instance if parameter already exists for specified value. Multiple REGIONS can be entered by comma separated values without any spaces	N	N/A
SCHED_GROUP	"Restricts the visibility of order data, also controls the data entry validation for GROUP NAME fields. Only orders with a GROUP NAME matching the assigned value will be displayed. When creating or amending an order,	Yes	Yes	Dropdown - GROUP NAMES + ALL	Alphabetical on GROUP NAME	Yes	Cannot add a new instance if parameter already exists with a value of	Y	"ALL"



Parameter	Controls	Visibility Control	Data Entry Control	Acceptable Values	Dropdown Ordering	Multiple Instances	Parameter Entry Validation	New User Auto Created	Default Value if Auto Created
	only the specified GROUP NAME values will be accepted. Setting this parameter to ALL will display all orders and allow entry of any GROUP NAME value against them (subject to other parameter settings). Will also restrict trip data depending on the setting of parameter TRM_TRIP_FILTER."						'ALL'. Cannot add a new instance if parameter already exists for specified value.		
SHOW_ORD_VOL	This parameter controls the display of the 'DUs' and 'Volume' fields in the Order Entry Targets screen. If set to 'N' the fields will not display.	No	No	Dropdown - Y/N	Alphabetical	No	Must select value from dropdown	N	N/A
TRM_TRIP_FILTER	Restricts the visibility of trip data. This parameter controls the trip filter checkbox in the Trip Planning/Manipulation forms and specifies whether the BASED_AT and/or SCHED_GROUP parameter will control the display of trips. It will include trips with stop LOCATION IDs which match the specified BASED_AT values, and/or include trips which contain orders having GROUP NAMES which match the specified SCHED_GROUP values.	Yes	No	Dropdown - BASED_AT, SCHED_GROUP, BOTH	Alphabetical	No	Must select value from dropdown	N	N/A
X_COUNTRY	This parameter is redundant and not referenced in any MTS functionality.	No	No	Dropdown - COUNTRY NAMES	Alphabetical on COUNTRY NAME	Yes	Must select value from dropdown. Cannot add a new instance if parameter	N	N/A



Parameter	Controls	Visibility Control	Data Entry Control	Acceptable Values	Dropdown Ordering	Multiple Instances	Parameter Entry Validation	New User Auto Created	Default Value if Auto Created
							already exists for specified value.		



4 Group Accessible Functionality

This page shows all tabs and functions that may be made available to groups within [Access Control](#)

4.1 Tabs

Tab	Description	Form
CARRIER_PRINTERS	Carrier Printer Configuration tab	ACC_CTRL
ACCOUNTS	ACCOUNT MAINTENANCE TAB	ACC_MAINT
ACC_CURRENCY	CURRENCY	ACC_MAINT
ACC_CURRENCY_USAGE	CURRENCY USAGE	ACC_MAINT
ACC_PERIODS	ACCOUNT PERIODS MAINTENANCE TAB	ACC_MAINT
ACC_SERVICES	Services	ACC_MAINT
ACC_SERVICE_CAPTURE	Services Capture	ACC_MAINT
CHARGE_TYPES	CHARGE TYPES MAINTENANCE TAB	ACC_MAINT
INVOICE_REQTS	INVOICE REQUIREMENTS MAINTENANCE TAB	ACC_MAINT
INVOICE_TERMS	INVOICE TERMS MAINTENANCE TAB	ACC_MAINT
JOURNALS	JOURNAL MAINTENANCE TAB	ACC_MAINT
PARTIES	Party Tab	ACC_MAINT
POSTCODE_MATRIX	Post Code Matrix Maintenance	ACC_MAINT
TOLL_CHG	Toll Charges	ACC_MAINT
TXN_TYPES	PAYMENT TYPES MAINTENANCE TAB	ACC_MAINT
VAT_CODES	VAT CODES	ACC_MAINT
ADJ	ADJUSTMENTS	AGREEMENTS
AGREEMENT_AUDIT	AUDITS	AGREEMENTS
BUYER	BUYER TAB	AGREEMENTS
COL_DEL	COL DEL TAB	AGREEMENTS
IND	INDEXES	AGREEMENTS
OPERATOR	OPERATOR TAB	AGREEMENTS
SELLER	SELLER TAB	AGREEMENTS
ADJ_REASON_CODES	ADJUSTED REASON CODE MAINTENANCE	BDM
ASSET_ORIGINS	Asset Origins	BDM
CROSSDOCK_PATHS	CROSSDOCK PATHS MAINTENANCE	BDM
DELIVERY_METHOD	Baxter Delivery Methods	BDM
DELIVERY_TYPES	Delivery Type	BDM
FIXED_COSTS_BY_ROUTE	Fixed Costs by Route	BDM
GROUP_NAMES	GROUP NAME MAINTENANCE	BDM
LATE_REASONS	Late Reasons	BDM
LOCATION_TYPES	LOCATIN TYPES MAINTENANCE	BDM
LOCATION_ZONES	Location Zones	BDM
MIN_TI_QTY	MIN. TI QTY MAINTENANCE	BDM
NOTE_TYPE	Note Types	BDM
ORDER_STATUSES	ORDER STATUS QUERY	BDM
PAR_KEYS	Maintain Paragon Keys	BDM
PAR_STAGING_POSTS	PARAGON STAGING POSTS INFORMATION	BDM
PAR_XDOCK	X-dock Paths	BDM
REASON_CODES	REASON CODE MAINTENANCE	BDM
ROUTE_CODE	Baxter Route Codes	BDM
SERVICE_LEVELS	Service Levels	BDM
SERVICE_TYPES	SERVICE TYPES MAINTENANCE	BDM
SHIFT_PATTERNS	Shift Patterns	BDM
STORAGE_TYPE	Storage Types	BDM
SURCHARGES	FUEL SURCHARGES	BDM
SVC_AUDIT	SERVICE TYPE AUDIT DETAILS	BDM



Tab	Description	Form
SVC_DTL	SERVICE TYPE DETAILS MAINTENANCE	BDM
TEAM_DETAILS	Team Details	BDM
TRANSPORT_MODES	Transport Modes	BDM
TRIP_STATUSES	TRIP STATUS QUERY	BDM
BASIC	Basic Bookings details	BOOKINGS
SAP	Basic Bookings details	BOOKINGS
BUSINESS_TYPE	Business Types	BUS_TYPE
CARRIER_REGIONS	Carrier Regions	BUS_TYPE
CUSTOMER_PRODUCT	Customer Products	BUS_TYPE
TRAILER_GROUPS	Vehicle Groups	BUS_TYPE
CARRIER_ROUTES	Carrier Routes	CARRIER_RULES
CARRIER_ROUTES_SERVICES	Carrier Routes Services	CARRIER_RULES
CARRIER_RULES_COMMODITY	Commodity Type	CARRIER_RULES
CARRIER_RULES_COMMODITY_CLASS	Commodity Class	CARRIER_RULES
CARRIER_RULES_DU_TYPE	Carrier Rules DU Types	CARRIER_RULES
CARRIER_RULES_PRODUCT_TYPE	Carrier Rules Product Type	CARRIER_RULES
CARRIER_RULES_SHIPMENT	Carrier Rules Shipment	CARRIER_RULES
ABANDONED	Abandoned Tab	CAR_TRIP_MAN
ACCEPTED	Accepted Tab	CAR_TRIP_MAN
AMENDED	Amended Tab	CAR_TRIP_MAN
COMPLETED	En-Route Tab	CAR_TRIP_MAN
DELETED	Deleted Tab	CAR_TRIP_MAN
EN_ROUTE	En-Route Tab	CAR_TRIP_MAN
REJECTED	Rejected Tab	CAR_TRIP_MAN
TENDERED	Tendered Tab	CAR_TRIP_MAN
STANDARD_JOURNEY_TAB	Standard Journey	CONTRACT
TARRIFF_DETAILS_TAB	Tariff Details	CONTRACT
COST_CENTRE	COST CENTRE MAINTENANCE	CUST_COST
CUSTOMER	CUSTOMER MAINTENANCE	CUST_COST
CUSTOMER_CHARGING	CUSTOMER SERVICE FEE MATRIX	CUST_COST
CUSTOMER_GROUP	CUSTOMER GROUP MAINTENANCE	CUST_COST
CUSTOMER_GROUP_CHARGING	CUSTOMER GROUP SERVICE FEE MATRIX	CUST_COST
CUSTOMER_USAGE	CUSTOMER USAGE MATRIX	CUST_COST
CUST_CHARGES	CUSTOMER CHARGES	CUST_COST
CUST_COUNTRIES	Countries	CUST_COST
CUST_CUTOFF	Customer Time Cutoffs	CUST_COST
CUST_GROUP_USAGE	COST CENTRE USAGE MATRIX	CUST_COST
CUST_PARAMS	CUSTOMER PARAMS	CUST_COST
DEBRIEF_PARAMS	CUSTOMER DEBRIEF PARAMS	CUST_COST
HANDOVER_LOC	Customer Handover Location	CUST_COST
REMOTE_PRINTER	Remote Printer Details	CUST_COST
SELLER	New Suppliers	CUST_COST
STD_INSTR	Customer Default Special Instructions	CUST_COST
EDI	EDI tab	EDI_MAINT
AUDIT	TRIP AUDIT TAB	EXECUTION
EFX_TAB	EFX DETAIL TAB	EXECUTION
ERRORS	ERRORS ON TRIP TAB	EXECUTION
FINANCE	TRIP FINANCE TAB	EXECUTION
GENERAL	GENERAL TRIP DETAIL COMMENTS TAB	EXECUTION
PO_DETAIL	PO DETAIL TAB	EXECUTION
REJECTION	REJECTION TRIP DETAIL COMMENTS TAB	EXECUTION
SERVICES	Services	EXECUTION
SJC_DATA	ADDITIONAL COMMENTS TAB	EXECUTION



Tab	Description	Form
STOPS	TRIP STOPS DETAIL TAB	EXECUTION
TRIP_DETAIL	TRIP DETAIL TAB	EXECUTION
LAT_LONG	Lat/Long Request	GEOGRAPHY
TP_CURRENCY	CURRENCY MAINTENANCE	GEOGRAPHY
TP_MISC	MISCELLANEOUS MAINTENANCE	GEOGRAPHY
TP_NON_WORKING_DAYS	NON WORKING DAYS MAINTENANCE	GEOGRAPHY
TP_NON_WORKING_DEPOT	Assign non working days to depots	GEOGRAPHY
TP_NON_WORKING_ROUTE	Assign non working days to routes	GEOGRAPHY
AUDIT	Audit TAB	IMPORTS_EXEC
IMPORT	Import TAB	IMPORTS_EXEC
CONFIG	IMPORTS CONFIGURATION TAB	IMPORTS_MAINT
DECODES	DECODES MAINTENANCE TAB	IMPORTS_MAINT
DECODES_AUDIT	DECODES AUDIT TAB	IMPORTS_MAINT
FORMULAE	FORMULA MAINTENANCE TAB	IMPORTS_MAINT
BNL_ORDERS_IN	BNL Orders In	INT_ERR
CARR_MAN	Carrier Manifests	INT_ERR
DEBRIEF_ORDER	Debrief Orders	INT_ERR
DSG_BOOKINGS	DSG Bookings	INT_ERR
DSG_TRIP_DETAILS	DSG Trip Details	INT_ERR
EFX_IN_ERR	EFX INBOUND ERROR	INT_ERR
EMTS_ORDERS	EMTS ORDERS INTERFACE ERRORS	INT_ERR
EPOD_WS_AUDIT	Epod Interface results	INT_ERR
INT_PO_INBOUND	Inbound Purchase Orders	INT_ERR
INT_PO_OUTBOUND	Outbound Purchase Orders	INT_ERR
LOGNET	LOGNET INTERFACE ERRORS	INT_ERR
LOTS	Lots	INT_ERR
ORDERS	UNISON ORDERS INTERFACE ERRORS	INT_ERR
POD_DETAILS	POD Details	INT_ERR
PO_CIC	Purchase Order Customer Invoice Consolidation	INT_ERR
PROCESS_ITEMS	Order Items	INT_ERR
TESLA_ORDERS	Tesla Order Interface	INT_ERR
TMS_WMS_INT	TMS WMS INTERFACE ERRORS	INT_ERR
UNSCHEDULED_ORDERS	Unscheduled Orders aborted process.	INT_ERR
WEB_SERV_LABEL_AUDIT	Web Service Label Audit	INT_ERR
XML_CONTROL	XML Outbound	INT_ERR
XML_ORDERS	XML Orders	INT_ERR
XML_SESSIONS	XML Sessions	INT_ERR
XML_TRIP	XML Trips	INT_ERR
ADDITIONAL_DTL	LANE MAINTENANCE - ADDITIONAL DETAILS	LB_ADMIN
COMBINATIONS	LBO ADMIN - COMBINATION MAINTENANCE	LB_ADMIN
CUTOFF	LBO ADMIN - CUT OFF TIMES MAINTENANCE	LB_ADMIN
GROUPS	LBO ADMIN - GROUP MAINTENANCE	LB_ADMIN
LANES	LBO ADMIN - LANE MAINTENANCE	LB_ADMIN
LANE_AUDIT	LANE MAINTENANCE - LANE AUDIT	LB_ADMIN
LANE_CHARGING	LANE MAINTENANCE - LANE CHARGING	LB_ADMIN
LANE_DETAIL	LANE MAINTENANCE - DETAILS	LB_ADMIN
ORDERS	LBO ADMIN - ORDER QUERY	LB_ADMIN
RULES	LBO ADMIN - RULES MAINTENANCE	LB_ADMIN
USERS	LBO ADMIN - USER MAINTENANCE	LB_ADMIN
ORDER_EXP	Kerridge Load Tab	LOAD_INT
ADDRESS	ADDRESS MAINTENANCE	LOCATION
CONSTRAINTS	CONSTRAINTS MAINTENANCE TAB	LOCATION
CONTACTS	CONTACTS MAINTENANCE TAB	LOCATION



Tab	Description	Form
DG_PALLETS	DG PALLETS TAB	LOCATION
DISTRIB_PATH	DISTRIBUTION PATH MAINTENANCE TAB	LOCATION
EPOD	EPOD TAB	LOCATION
FLEET_INSPECTION	Fleet Inspection Tab	LOCATION
GEO_LOCATION_CARRIERS	PREFERRED CARRIERS TAB	LOCATION
INFO	Information	LOCATION
INVENTORY	Stack Inventory	LOCATION
LAT_LONG	Lat/Long Request	LOCATION
LINKED	LINKED LOCATIONS TAB	LOCATION
LOCATION_USAGE	Location Usage	LOCATION
LOCATION_WINDOW	Location Windows	LOCATION
LOC_NET	Network	LOCATION
LOC_REFS	REFERENCES TAB	LOCATION
LOTS	LOTS TAB	LOCATION
MCS	MCS Parameters	LOCATION
PARAMS	PARAMETERS MAINTENANCE	LOCATION
PARTNERSHIPS	PARTNERSHIPS MAINTENANCE TAB	LOCATION
PATHS	PATHS MAINTENANCE	LOCATION
ROLES	ROLES MAINTENANCE TAB	LOCATION
SLOTS	SLOT MAINTENANCE	LOCATION
SPECIAL	SPECIAL MAINTENANCE	LOCATION
SUPP_DU	DU TYPES TAB	LOCATION
TRAILER_TYPES	TRAILER TYPES MAINTENANCE TAB	LOCATION
WMS_PARAMS	LOCATION WMS PARAMS	LOCATION
BLOCKS	Blocks	LOCK_MONITOR
JOBS	Jobs	LOCK_MONITOR
LOCKS	Locks	LOCK_MONITOR
MULTI_SESS	Multiple Sessions	LOCK_MONITOR
PRINT_QUEUE	Print Queue Control	LOCK_MONITOR
SESSIONS	Sessions	LOCK_MONITOR
ORDER_EXP	LogiX Order Export	LOGIX_INT
TRIP_IMP	LogiX Trip Import	LOGIX_INT
E_ADDRESS	MESSAGE MAINTENANCE TAB	MSG_MAINT
MSG_CONFIG	MESSAGE REQUEST MAINTENANCE TAB	MSG_MAINT
MSG_TYPE_REQ	MESSAGE REQUEST MAINTENANCE TAB	MSG_MAINT
RECIP_CONFIG	MESSAGE REQUEST MAINTENANCE TAB	MSG_MAINT
SMS_ENQ	Audit	MSG_MAINT
SMS_MAINT	Maintenance	MSG_MAINT
SYNC_LOCS	SYNCHRONIZE LOCATIONS TAB	MTM_IF
SYNC_TRIPS	SYNCHRONIZE TRIPS TAB	MTM_IF
ADD_DETAIL	General Information Tab	ORDERS
ADD_REFS	Add Refs	ORDERS
AUDIT	Audit Tab	ORDERS
AUDIT_ARCHIVE	Order Audit Archive Tab	ORDERS
FINANCE	Finance Tab	ORDERS
GENERAL	General Information Tab	ORDERS
HAZARDOUS_DATA	Hazardous Data	ORDERS
ITEM_CONTENT	Order Item Contents	ORDERS
LOC_DETAIL	LOC DETAIL	ORDERS
MTM_INFO	MTM Information Tab	ORDERS
NON_CONFORM	Non-Conform Tab	ORDERS
ORDER_ITEMS	Order Items Tab	ORDERS
SAP_DETAIL	SAP details	ORDERS



Tab	Description	Form
SERVICES	Services	ORDERS
TP_COMMENTS	Comments Tab	ORDERS
TP_FINANCE	Finance Tab	ORDERS
TP_LOCATIONS	Locations Tab	ORDERS
TP_TOTALS	Totals Tab	ORDERS
TRIP_DETAIL	Trip Details Tab	ORDERS
WHITE_GLOVE	White Glove	ORDERS
DETAIL	Detail	ORDTEMPL
GENERAL	General	ORDTEMPL
MTM_INFO	MTM Info	ORDTEMPL
SAP_DETAIL	SAP details	ORDTEMPL
CARRIER_ROUTES	Carrier Routes	ORS
CARRIER_ROUTES_SERVICES	Carrier Routes Services	ORS
CARRIER_RULES_DU_TYPE	Carrier Rules DU Types	ORS
CARRIER_RULES_PRODUCT_TYPE	Carrier Rules Product Type	ORS
CARRIER_RULES_SHIPMENT	Carrier Rules Shipment	ORS
ORDER_EXP	Paragon Orders Export	PAR_INT
TRIP_IMP	Paragon Trip Import	PAR_INT
AUDIT	AUDIT DETAIL_TAB	PLANNING
CAR_COSTS	CAR COSTS_TAB	PLANNING
EFX_TAB	EFX DETAIL_TAB	PLANNING
ERRORS	ERRORS DETAIL_TAB	PLANNING
FINANCE	FINANCE DETAIL_TAB	PLANNING
GENERAL	GENERAL DETAIL_TAB	PLANNING
PO_DETAIL	PO DETAIL_TAB	PLANNING
REJECTION	REJECTION DETAIL_TAB	PLANNING
SERVICES	Services DETAIL_TAB	PLANNING
SJC_DATA	SJC DETAIL_TAB	PLANNING
STOPS	STOPS DETAIL_TAB	PLANNING
TRIP_DETAIL	TRIP DETAIL_TAB	PLANNING
ADVANCE_CONFIG	ADVANCE CONFIGURATION TAB	PRODUCT
DU_USAGE_LOC	DU USAGE LOCATION MAINTENANCE TAB	PRODUCT
LOC_PRODUCT_ITEM	LOCATION/PRODUCT ITEM MAINTENANCE TAB	PRODUCT
PICKING_RATES	PICKING RATES MAINTENANCE TAB	PRODUCT
PICKING_RATE_USE	PICKING RATE USE MAINTENANCE TAB	PRODUCT
PRD_COMMODITY	Commodity	PRODUCT
PRD_HAZARDOUS_CLASS	Hazardous Class	PRODUCT
PRD_PRODUCT_FACTOR	PRODUCT FACTOR MAINTENANCE TAB	PRODUCT
PRD_PROD_NON_COMP	Product Compatibility Tab	PRODUCT
PRODUCT_GROUP	Product Group	PRODUCT
PRODUCT_ITEM	PRODUCT ITEM MAINTENANCE TAB	PRODUCT
PRODUCT_TYPE	PRODUCT TYPE MAINTENANCE TAB	PRODUCT
PRODUCT_VOLUMES	Product Volumes Maintenance	PRODUCT
SSL_PROD_MAPPING	SSL PRODUCT MAPPING TAB	PRODUCT
TEMP_TYPES	TEMPERATURE TYPES MAINTENANCE TAB	PRODUCT
BOOK_STATUS	Booking Status	PTV_CONFIG
CARRIER	Carriers	PTV_CONFIG
CONFIG	Configurable Parameters	PTV_CONFIG
DECODES	Decodes	PTV_CONFIG
DEL_TYPE	Delivery Types	PTV_CONFIG
GENERAL	General Parameters	PTV_CONFIG
ORD_STATUS	Order Status	PTV_CONFIG
ORD_TIME_TYPE	Order Time Types	PTV_CONFIG



Tab	Description	Form
TRIP_STATUS	Trip Status	PTV_CONFIG
VEHICLE	Vehicles	PTV_CONFIG
CARRIER_ROUTING_UKMAIL	Carrier Routing UKMail	RESOURCE
CARR_HAZ_COM	CARRIER HAZARDOUS QTY MAINTENANCE	RESOURCE
EQUIPMENT	Equipment	RESOURCE
HAULIER_LANES	HAULIER LANES MAINTENANCE	RESOURCE
OWN_CHARGES	Own Charges	RESOURCE
RES_AVAILABILITY	Resource Availability	RESOURCE
RES_CARRIER	CARRIER MAINTENANCE	RESOURCE
RES_CARRIER_CONFIG	Carrier Config	RESOURCE
RES_CARRIER_FORMATS	Carrier Formats	RESOURCE
RES_CARRIER_FORMATS_MAP	Carrier Formats Mapping	RESOURCE
RES_CARRIER_GROUP	CARRIER GROUP MAINTENANCE	RESOURCE
RES_CARRIER_ROUTING	Carrier Routing	RESOURCE
RES_CARRIER_SERVICE_LEVEL	CARRIER SERVICE LEVEL MAINTENANCE	RESOURCE
RES_CARRIER_TRACKING	Carrier Tracking	RESOURCE
RES_CARRIER_TYPE	CARRIER TYPE MAINTENANCE	RESOURCE
RES_CAR_SVC_TYPE	CARRIER SERVICE TYPE MAINTENANCE	RESOURCE
RES_DESPATCH_UNIT_TYPE	DESPATCH UNIT TYPE MAINTENANCE	RESOURCE
RES_FIXED_CHARGE	CARRIER FIXED CHARGE MAINTENANCE	RESOURCE
RES_LOAD_RATE	LOAD RATE MAINTENANCE	RESOURCE
RES_PERSON	DRIVER MAINTENANCE	RESOURCE
RES_PROD_CONV	CONVERSION FACTOR OF A PRODUCT AGAINST A LOCATION	RESOURCE
RES_RPE	RPE MAINTENANCE	RESOURCE
RES_RPE_CUST	Customer RPE Calc	RESOURCE
RES_TRACTOR	TRACTOR MAINTENANCE	RESOURCE
RES_TRAILER	TRAILER MAINTENANCE	RESOURCE
RES_TRAILER_GROUP	Trailer Group	RESOURCE
RES_TRAILER_PRODUCT	Trailer Product DU	RESOURCE
RES_TRAILER_TYPE	TRAILER TYPE MAINTENANCE	RESOURCE
RES_VEHICLE	VEHICLE MAINTENANCE	RESOURCE
RES_VEHICLE_INFORMATION	Resource Maintenance	RESOURCE
RES_VESSEL	VESSEL MAINTENANCE	RESOURCE
STANDARD_DU_TYPES	STANDARDISED DU MAINTENANCE	RESOURCE
ROUTE_BASED_SCHEDULING	Route Scheduling Tab	ROUTES_EXEC
ROUTE_LOG	Route Log Tab	ROUTES_EXEC
ROUTE_TRIPS	Routes and Trips Tab	ROUTES_EXEC
AUDIT	Route Audit	ROUTES_MAINT
DETAIL	Route Detail	ROUTES_MAINT
CARRIER_CODE	Carrier Code	SAP_MAINT
DEL_PRIORITY	Delivery Priority	SAP_MAINT
HANDLING_CODE	Handling Code	SAP_MAINT
INSP_REQ	Inspection Required	SAP_MAINT
PRODUCT_ITEM	Product Item	SAP_MAINT
TEST_REQ	Testing Required	SAP_MAINT
AUDIT	Audit tab	SCHED_RULES
DELIVERY_SCHEDULE	Delivery Schedule	SCHED_RULES
SCHEDULE_RULES	Sched Rules tab	SCHED_RULES
SCHED_ENGINE_CTRL	Scheduling Engine Control tab	SCHED_RULES
TOP_UP_MAINT	Top Up Maintenance	SCHED_RULES
AWB_CONS_MAINT	Consignment/AWB Maintenance	SHIPMENT_PALLETS
PACKAGE_MAINT	Package Maintenance	SHIPMENT_PALLETS
PALLET_MAINT	Pallet Maintenance	SHIPMENT_PALLETS



Tab	Description	Form
SHIP_ENQ	Enquiry	SHIP_ORD
BKG_MSG_TYPE	Booking Type Tab	STATIC_DATA_MAINT
GEO_LOC_GRP	Location Group Name Tab	STATIC_DATA_MAINT
ORD_MSG_TYPE	Order Type Tab	STATIC_DATA_MAINT
REGION_DATA	Region Data	STATIC_DATA_MAINT
REGION_DEPOT_DATA	Region Depot Data	STATIC_DATA_MAINT
REPORT_CONFIG	Configuration for PL Transport Order Report	STATIC_DATA_MAINT
REP_ORDER_TERMS	Terms for PL Transport Order Report	STATIC_DATA_MAINT
MENUS	Menu View Tab	SYS_CFG
PRINTERS	Printers Tab	SYS_CFG
REPORTS	Reports Tab	SYS_CFG
SYSTEMS	Systems Tab	SYS_CFG
ADD_REFS	Additional References tab	TRIPDTL
AUDIT	AUDIT DETAILS TAB	TRIPDTL
COLL_DEL_DEBRIEF	COLL DELL DEBRIEF TAB	TRIPDTL
DEBRIEF	DEBRIEF TRIP DETAILS TAB	TRIPDTL
ERRORS	ERRORS TAB	TRIPDTL
FINANCE	FINANCE DETAILS TAB	TRIPDTL
GENERAL	GENERAL TRIP DETAILS TAB	TRIPDTL
GENERAL1	GENERAL TAB	TRIPDTL
ORDER_DEBRIEF	ORDER DEBRIEF/TRIP DETAILS TAB	TRIPDTL
ORDER_ITEMS	ORDER ITEMS DEBRIEF	TRIPDTL
ORDER_SERVICES	Services	TRIPDTL
REJECTION	REJECTION MESSAGES TAB	TRIPDTL
SERVICES	Services	TRIPDTL
TRIP_STOP_TASK	Trip Stop Tasks	TRIPDTL
TRIP_TASK	Trip Tasks	TRIPDTL
AUDIT	TRIP AUDIT DETAILS TAB	TRIPSUM
EFX_TAB	EFX TAB	TRIPSUM
ERRORS	ERRORS ON TRIP TAB	TRIPSUM
FINANCE	TRIP FINANCE DETAILS TAB	TRIPSUM
GENERAL	GENERAL TRIP DETAIL COMMENTS TAB	TRIPSUM
PO_DETAIL	PO DETAIL TAB	TRIPSUM
REJECTION	REJECTION TRIP DETAIL COMMENTS TAB	TRIPSUM
SERVICES	Services	TRIPSUM
SJC_DATA	ADDITIONAL COMMENTS TAB	TRIPSUM
STOPS	TRIP STOPS DETAIL TAB	TRIPSUM
TRIP_DETAIL	TRIP DETAILS TAB	TRIPSUM
AUDIT	TRIP DETAILS TAB	TRIPSUM_JRL
STOPS	TRIP DETAILS TAB	TRIPSUM_JRL
TRIP_DETAIL	TRIP DETAILS TAB	TRIPSUM_JRL
AUDIT	TRIP AUDIT DETAILS TAB	TRIP_PLAN
EFX_TAB	EFX TAB	TRIP_PLAN
ERRORS	ERRORS ON TRIP TAB	TRIP_PLAN
FINANCE	TRIP FINANCE DETAILS TAB	TRIP_PLAN
GENERAL	GENERAL TRIP DETAIL COMMENTS TAB	TRIP_PLAN
PO_DETAIL	PO DETAIL TAB	TRIP_PLAN
REJECTION	REJECTION TRIP DETAIL COMMENTS TAB	TRIP_PLAN
SERVICES	Services	TRIP_PLAN
SJC_DATA	ADDITIONAL COMMENTS TAB	TRIP_PLAN
STOPS	TRIP STOPS DETAIL TAB	TRIP_PLAN
TRIP_DETAIL	TRIP DETAILS TAB	TRIP_PLAN
BULK_ORDERS_TAB	BULK_ORDERS_TAB tab	WAREHOUSE



Tab	Description	Form
CONTAINER_TAB	CONTAINER_TAB tab	WAREHOUSE
DRYICE_TAB	DRYICE_TAB tab	WAREHOUSE
PALLETS_TAB	PALLETS_TAB tab	WAREHOUSE
WAREHOUSE_TAB	WAREHOUSE_TAB tab	WAREHOUSE
UPDATE_ORD_LOCATIONS	Update WCS Locations	WCS_MAINT
WCS_EXCEPTIONS	WCS Message Exceptions	WCS_MAINT
WCS_LOCATION	WCS Locations	WCS_MAINT
WCS_LOC_TYPE	WCS Location Types	WCS_MAINT
WCS_MSG_IN	WCS Inbound messages	WCS_MAINT
WCS_MSG_OUT	WCS Outbound messages	WCS_MAINT
WCS_QUEUE	WCS App Queue Maintenance	WCS_MAINT
WCS_READVICE	Readvise 431 Messages	WCS_MAINT
UPDATE_ORD_DATES	Update order dates	WCS_UTILS
UPDATE_ORD_LOCATIONS	Update current locations on orders	WCS_UTILS

4.2 Functions

Name	Description
ACC_ACCOUNTING_WEEKS	Enables Account Year Start Date maintenance.
ACC_AMEND_FUELSURCH_PYTTYTYPE_STATUS	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.
ACC_Create_Payment	Ability to manually create payments.
ACC_Delete_Account	Allow the deletion of accounts.
ACC_Delete_Invoice_Rqt	Allow the deletion of invoice requirements.
ACC_Delete_Payment	Ability to manually delete payments.
ACC_Diff_EFX_Payment	Ability to amend Payment Type and Status for a Trip with a Carrier Id of EFX, in the TRIP screens
ACC_Edit_Invoice	Ability to edit invoice details.
ACC_Export_Invoices	Enables Invoices to be Exported.
ACC_Invoice_Process	Allow user to progress invoice status.
ACC_Invoice_Progress	Allow user to progress invoice status.
ACC_Invoice_Regress	Allow user to regress invoice status.
ACC_REMOVE_EXP_INVOICES	This is required to be able to remove an Invoice from an Export.
ACC_RESEND_EXPORT_INV	This is required to be able to re-send an Export.
ACC_Set_Invoice_No	Enables Assignment or clear invoice number.
ACC_Update_Payment	Ability to update payments.
ACC_View_Trip_Finance	Ability to view finance information pertaining to Trips.
ADM_ALL_MAINT	Read/Write Access to all Maintenance Screens
ADM_Business_Type_Maint	Business Type Maintenance
ADM_CHANGE_PWORD	Ability to change passwords with Access Control.
ADM_CLOSE_SESSION	This is required to be able to Close sessions from within the Lock Monitor form.
ADM_CONFIG_LAYOUT	Ability to configure a block layout.
ADM_CUST_CHARGES	Ability to add Customer Fuel and Premium Charges
ADM_DELETE_CUST_COST	Required to be able delete customer, customer groups and cost centres from the CUST_COST form.
ADM_DISPLAY_PWORD	Allows the display of Password



Name	Description
ADM_GENERATE_MENU	Ability to generate menus.
ADM_GEO_MAINT	Location Maintenance.
ADM_LANE_CHANGE_ALL	Enable modification of restricted LANE fields (eg CUSTOMER, FROM_ID)
ADM_ORI_PARAM	Controls whether user can amend system parameters, without it the form is read only.
ADM_PLAN_REGION_UPDATE	Enables Planning Region Updates to all Locations.
ADM_PRD_MAINT	Product Maintenance.
ADM_PROFILE_ADMIN	Allow the deletion of user profiles
ADM_REMOVE_EXP_INVOICES	This is required to be able to remove an Invoice from an Export.
ADM_RESEND_EXPORT_INV	This is required to be able to re-send an Export.
ADM_RES_MAINT	Resource Maintenance.
ADM_TRIP_CHANGE_ALL	Ability To Change Trips Regardless of Status
ADM_User_Admin	Allow the creation/deletion of users
ALLOW_HOLD_ORDERS	Allow orders to be given the status of ON-HOLD
ALLOW_INVENTORY_UPDATE	Allow inventory details to be updated
ALLOW_SPLIT_ORDERS	Allow users to split and duplicate orders
ASSET_MGMT_SU	Ability to maintain assets
BKG_Auto_Summary	Ability to perform an Auto Summary
BKG_CHANGE_CONF_STATUS	Ability to change the status of a CONFIRMED Booking.
BKG_CHANGE_PROV_STATUS	Ability to change the status of a PROVISIONAL Booking.
BKG_Copy_Bookings	Ability to copy Bookings from one Schedule Date to another
BKG_Create_Booking	Ability to create a Booking record
BKG_Create_TIs_Advance	Ability to create Transport Instructions for Advances
BKG_Create_TIs_Left_Off	Ability to create Transport Instructions for Left Offs
BKG_Create_Transport_Instructions	Ability to create Transport Instructions
BKG_Delete_Booking	Ability to delete a Booking record
BKG_Delete_Schedule_Bookings	Ability to delete all Bookings for a Schedule Date
BKG_Edit_Booking	Ability to edit a Booking record
BKG_Process_Advances	Ability to process Advances - includes creating and deleting both Advances and Advance Allocations
BKG_Process_Manual_Advances	Ability to manually process Advances - inc. create and delete both Advances and Advance Allocations
BKG_Rev_TIs_Adv_Sched_Unsched	Level 2 - Ability to reverse the creation of Unshed Due Date and Sched/Unshed Advance TIs
BKG_Rev_TIs_All	Level 1 - Caution! Ability to reverse the creation of any TIs - Sched/Unshed, Adv/Due Date
BKG_Rev_TIs_Unsched	Level 3 - Ability to reverse the creation of Unshed Due Date and Unshed Due Date TIs
BKG_Reverse_TIs	Ability to reverse the creation of Transport Instructions
CNT_Create_Tariff	Ability to Create Tariffs.
CNT_Delete_Charge	Ability to delete charges
CNT_Delete_Standard_Journey	Enables Std Journeys to be deleted.
CNT_Delete_Tariff	Ability to Delete Tariffs.
CNT_Delete_Tier	Ability to Delete Tiers.
CNT_Delete_Tier_Name	Ability to Delete Tier Names
CNT_Edit_Tariff	Ability to Edit Tariffs.
CUST_CHANGE_POD_AVAIL	Ability to update Pod Document Available flag.
Confirm_Revenue_Item	Confirm Revenue item
Create_Revenue_Item	Create Revenue item
DBA_CHANGE_PASSWORD	.
EXACT_DELETE_EXPORT	This is required to be able to re-send an Export.
FIXED_SCHEDULES	Populate schedules with data from "Fixed Schedules".
FIXED_TEMPLATE	Ability to Import Templates
FN_BOTH_PK_DL_ROUTE_STOP_TYPES	Group has ability to Collect and Deliver on Stop



Name	Description
FN_FAST_ORDER	Allows Fast order entry
FN_RE_SEND_INVOICE	Enable the invoice to be re-sent after being exported.
GEO_ACTIVATE_LOCATION	Ability to update an Inactive Location to Active.
GEO_SUBURB_ADDRESS_UPDATE	Allows updating addresses when validating suburb-postcodes and the location exists on an order.
Group_Access_Ctrl	Grant and revoke access to user groups.
IMP_OVERRIDE_MAX_UPLOADS	Ability To Override Maximum Number of Uploads for an Import Type
ISO_LIVE_FEED_CONFIG	Ability to manipulate Isotrak Live Feed.
KN_Cost_Summary	Allow Cost Summary Report to be run.
LBO_ALLOW_PAST_DATES	Ability to create an order in the LBO form with a collection/delivery date in the past.
LBO_Override_Cutoff_Time	Ability to override a cut-off time for LBO
LOC_DEL_MULTIPLE_SLOTS	Ability to Delete multiple Slots
MAINTAIN_SCHEDULE_RULES	Ability to maintain schedule rules
MSG_amend_sending_address	Ability to edit a sending email address for a Message Type
OMS_AMEND_SVC_FLAGS	This is required to be able amend the late, urgent or manual order flags in the Orders form.
OMS_Copy_DB_Templates	Copy Order Batches/Templates from one Database to another.
OMS_FLAG_SPEC_INSTRUCTIONS	Should 4 key Order Refs be flagged if an Order has special instructions.
OMS_Generate_Orders	Generate Orders from Template.
OMS_Maintain_Batches	Maintain Batches.
OMS_Maintain_Templates	The ability to maintain Order Templates and Batches.
OMS_REBOOK_ORDER	This is required to be able to re-book an order
OMS_RESET_NEW	Reset orders back from status NEW.
OMS_edit_populated_customer_ref	Ability to edit a customer ref that has already been populated
ORD_Abort_Restore	Ability to Restore aborted orders
ORD_Apply_POD	Ability to apply PODs.
ORD_Cancel_Restore	Ability to Cancel/Restore orders.
ORD_Create_Order	Allow manual creation of orders.
ORD_Debrief	Ability to debrief Orders and associated data.
ORD_Disp_Ord_Summ_Tab	Display Order Summary Finance Tab.
ORD_Edit_Cancelled	Ability to edit cancelled orders.
ORD_Edit_Delivered	Ability to edit delivered orders.
ORD_Edit_Invalid	Ability to edit invalid orders.
ORD_Edit_New	Ability to edit New orders.
ORD_Edit_Price	Ability to display and edit price.
ORD_Edit_Sched_Coll	Ability to edit Sched_Coll orders.
ORD_Edit_Sched_Del	Ability to edit Sched_Del orders.
ORD_Edit_Scheduled	Ability to edit scheduled orders.
ORD_Edit_Unscheduled	Ability to edit unscheduled orders.
ORD_Export_Orders	Ability to export orders.
ORD_Modify_Del_Type	Change the delivery type of an order.
ORD_Modify_POD	Ability to modify PODs.
ORD_POPUP_CALENDAR	Ability to use the Calendar Date picker.
ORS_Edit_Req_Field	Ability to edit required fields in ORS report
POM_Create_PO	Create new Purchase Orders
POM_Create_Transport_Instructions	Generate TIs from Purchase Orders
POM_Delete_PO	Delete Purchase Orders
POM_Edit_PO	Edit Purchase Orders
POM_Rev_TIs	Reverse TIs for Purchase Orders
POM_Reverse_TIs	Reverse TIs for Purchase Orders
PO_CANC_DEL	Allow status Change of Cancelled or Deleted Purchase Order.
PRD_Picking_Rates	Ability to view picking rates tab on maintenance form



Name	Description
PRD_Product_Pick_Rate	Ability to view product pick rate use tab on maintenance form
RDT_ACCESS	Allow RF loading messages to be sent for trips
RES_Service_Type	Change Service Types.
RE_SUBMIT_ORDER	Enable button to resubmit ORDER
RTE_CREATE_ROUTE	Ability to Create Route based Templates
RTE_DELETE_ROUTE	Ability to Delete Routes
RTE_EDIT_ROUTE	Ability to Edit Routes
RTE_HAULIER_TRIP_PLANNING	Allow the maintenance of Haulier Lanes and Trip Planning by Haulier Lanes.
RTE_SCHEDULE_ROUTE	Ability to carry out Route Based Scheduling
Remove_Revenue_Item	Remove Revenue item
SCH_Automatic_Create_Schedule	Ability to Automatically create a schedule based on data in Orders Forms
SCH_Close_Schedule	Ability to close a schedule.
SCH_Manual_Create_Schedule	Ability to manually create a schedule
SDM_DELETE_REGION	Ability to update a region code.
SEND_TO_PARAGON	Send the order out to Paragon via API
SET_PREFERENCES	Ability to assign trip overview preferences to user groups
SPLIT_ORDER_FOR_ITEMS	Allow orders to be split for selected items.
TRIP_MSG_HOLDS	Allow users to run trip message holds screen (TRIP_MSG_HOLDS)
TRM_APPLY_ACTUALS	Ability to apply actual Times, Weights and Volumes to Stops and Orders.
TRM_Abandon_Trip_Abort_Order	Ability to Abandon Trips and Abort Orders.
TRM_Abort_Stop	Ability to Abort Stop.
TRM_Accept_Trip	Change trip status from PLANNED to ACCEPTED or EN-ROUTE.
TRM_COMBINED_DOCUMENTS	Allow printing of reports for the combined documents for the Trip Sheet, CMR Note and Delivery Note.
TRM_Complete_Trip	Change trip status to COMPLETED.
TRM_Confirm_Trip	Change trip status from ACCEPTED to CONFIRMED.
TRM_Create_Stop	Ability to Create a new stop on a trip.
TRM_Create_Trip	Create Trips.
TRM_DISPLAY_MAP	Display 'Show Map' option in Trip screens
TRM_Delete_Stop	Ability to Delete Stops from trip.
TRM_Delete_Trip	Delete Trips.
TRM_ENABLE_REDIRECTION	Allow trips and orders to be redirected to a different delivery point.
TRM_ENABLE_REJECTIONS	Allow trips and orders to be rejected upon delivery and to be returned to the supplier.
TRM_Enable_Depot	Ability to update change the owning depot of a trip.
TRM_MAINTAIN_TRIP	Ability to modify trip information.
TRM_MINIMIZE_FLEET	Can run minimize fleet process.
TRM_Maintain_Trip	General ability to maintain Trip-related information
TRM_Move_Stops	Ability to move the order of stops on a trip.
TRM_ROUTE_CODE_AVAIL	Allows the route code to be amended in the trip planning screens
TRM_Reset_Trip	Change trip status from CONFIRMED or ACCEPTED to PLANNED.
TRM_SEND_TO_PARAGON	Send the orders to Paragon for planning via the API process.
TRM_Split_Merge_Trip	Ability to split/merge Trips
TRM_UN_SCHEDULE_TRIPS	Ability to unschedule an order from a specified trip and any onward trips.
TRM_UN_ORD_UPD_BOOKREF_DUQTY	Ability to update the DU Qty and Booking Ref for Unscheduled Orders in the TRIPSUM form.
TRM_UPD_DU_QTY_TRIPSUM	Ability to update the DU Qty for scheduled Orders in the TRIPSUM form.
TSK_Invoke_Task_List	Ability to invoke Task Lists
TSK_Maintain_Task_List	Ability to maintain Task Lists
TSK_Task_List_Admin	Ability to administer executed Task Lists

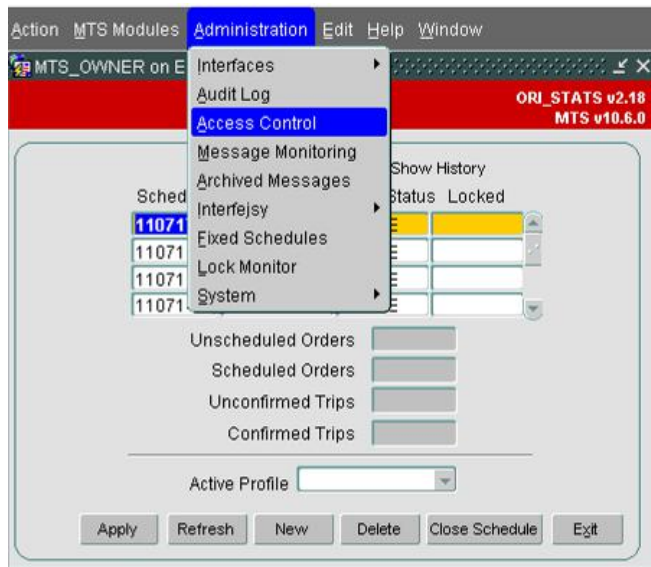


Name	Description
Update_Revenue_Item	Update Revenue item
VIEW_RELEASES	Prompt user to read latest release info on logon
WHS_Maintain_Items	Warehouse Configuration Maintenance.

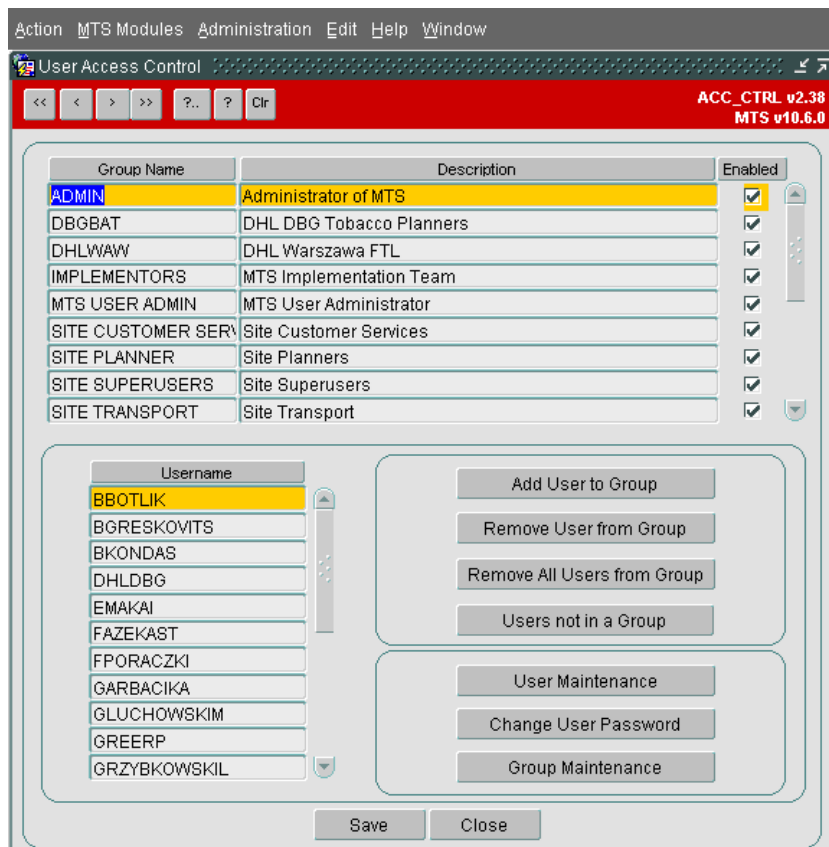


5 Adding a Cust Group to a User

1. Access the access control screen



2. Select the User Maintenance Button



3. Highlight the relevant Username and click the Edit Button



Action MTS Modules Administration Edit Help Window

Users

<< >> ?.. ? Clr

Username	User Type	Full Name / Description
BBOTLIK	INTERNAL	Edit Botlikné - DHLHUN
BGRESKOVITS	INTERNAL	Brigitta Greskovits - DHLHUN
BKONDAS	INTERNAL	Barbara Kondás - DHLHUN
CHMURAM	INTERNAL	MICHAL CHMURA - DHLDBG
DHLDBG	INTERNAL	DBG TEST
EMAKAI	INTERNAL	Éva Makai - DHLHUN
FAZEKAST	INTERNAL	Tamas Fazekas - DHLHUN
FPOACZKI	INTERNAL	Ferenc Poráczki - DHLHUN
GARBACIKA	INTERNAL	ARKADIUSZ GARBACIK - DHLPOL
GLUCHOWSKIM	INTERNAL	DHLCC - MARIUSZ GLUCHOWSKI
GREERP	INTERNAL	Peter Greer - TMSVCC
GRZYBKOWSKIL	INTERNAL	LUKASZ GRZYBKOWSKI - DHLPOL
IBOKROSNE	INTERNAL	Ildikó Bokrosné - DHLHUN
INEMETH	INTERNAL	Ildikó Szűcs-Németh - DHLHUN
IPOGACSAS	INTERNAL	Zsolt Pogácsás - DHLHUN
ISKRAE	INTERNAL	EWELINA ISKRA - DHLRAC
JSZUCS	INTERNAL	János Szűcs - DHLHUN
KCSUZI	INTERNAL	Kálmán Csúzi - DHLHUN

New Edit Delete Save Close

4. Highlight the CUST_GROUP line and select the Edit Button

Edit User

User Name: CHMURAM
 User Type: INTERNAL
 Description: MICHAL CHMURA - DHLDBG
 Based At:
 Company: DHL
☒ Enabled ?
☐ Force Password Change ?
☐ Allow multiple concurrent sessions ?

User Parameters Default Printers User Profiles

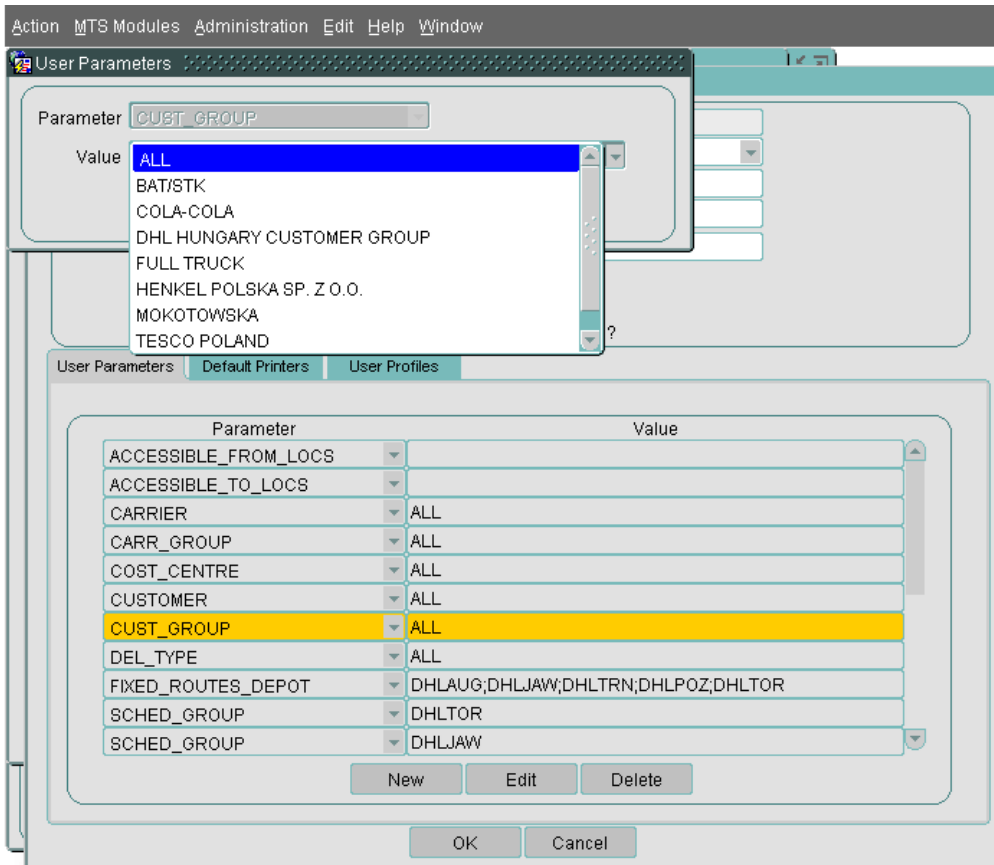
Parameter	Value
ACCESSIBLE_FROM_LOCS	
ACCESSIBLE_TO_LOCS	
CARRIER	ALL
CARR_GROUP	ALL
COST_CENTRE	ALL
CUSTOMER	ALL
CUST_GROUP	ALL
DEL_TYPE	ALL
FIXED_ROUTES_DEPOT	DHLAUG;DHLJAW;DHLTRN;DHLPOZ;DHLTOR
SCHED_GROUP	DHLTOR
SCHED_GROUP	DHLJAW

New Edit Delete

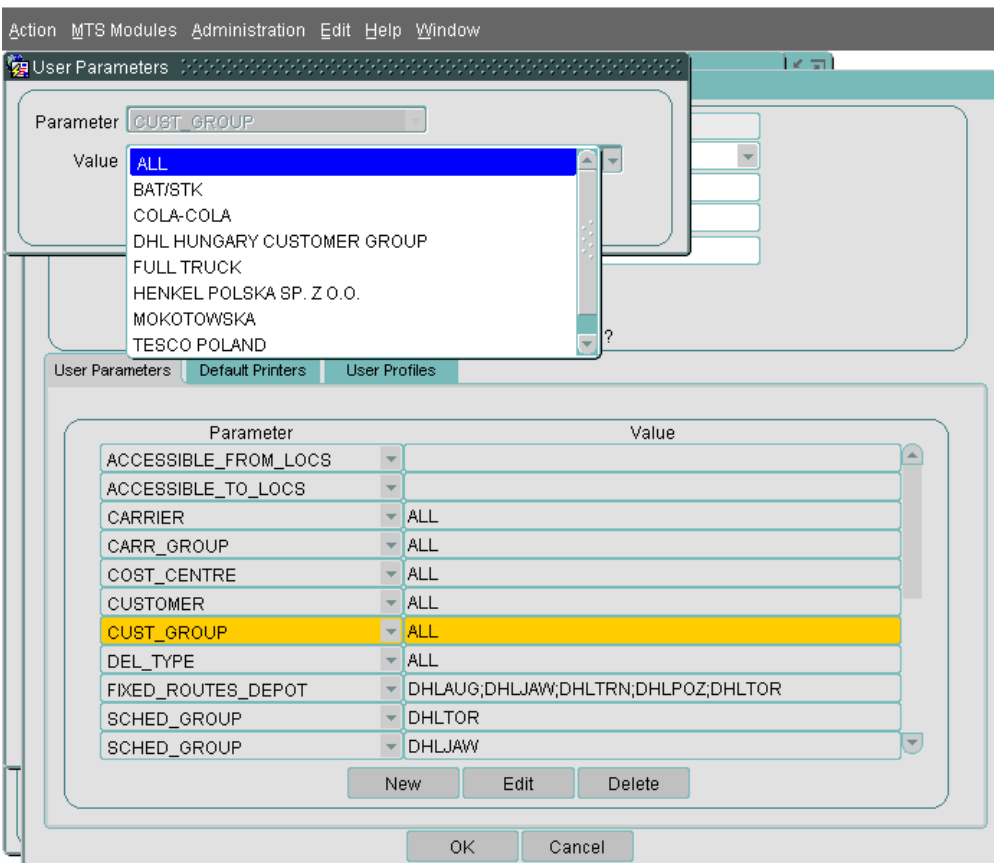
OK Cancel

5. Select the relevant Customer Group from the list of values and click OK





If the user is responsible for more than one Customer then select the ?New? Button and Repeat the steps. After selecting the new Button the user needs to select the Cust_Group option from the first drop down list and then select the Customer group from the second drop down list



These steps will enable the user to see all locations from within their own respective projects

Note in the example below I have added two Customer groups to a user

The 'Edit User' dialog box is shown with the following fields and options:

- User Name: CHMURAM
- User Type: INTERNAL (dropdown)
- Description: MICHAL CHMURA - DHLDBG
- Based At: (empty field)
- Company: DHL
- ☒ Enabled ?
- ☐ Force Password Change ?
- ☐ Allow multiple concurrent sessions ?

Below these fields are three tabs: 'User Parameters', 'Default Printers', and 'User Profiles'. The 'User Profiles' tab is selected, showing a table of parameters and their values:

Parameter	Value
ACCESSIBLE_FROM_LOCS	
ACCESSIBLE_TO_LOCS	
CARRIER	ALL
CARR_GROUP	ALL
COST_CENTRE	ALL
CUSTOMER	ALL
CUST_GROUP	TESCO_PL
CUST_GROUP	CC
DEL_TYPE	ALL
FIXED_ROUTES_DEPOT	DHLAUG;DHLJAW;DHLTRN;DHLPOZ;DHLTOR
SCHED_GROUP	DHLTOR

At the bottom of the 'User Profiles' tab are buttons for 'New', 'Edit', and 'Delete'. At the bottom of the entire dialog box are 'OK' and 'Cancel' buttons.



6 Maintenance

6.1 Customers/Cost Centres

6.1.1 Customers:

- The 'Customer' tab is used to create, maintain or delete a customer. To create a customer, simply place the cursor on the 'Customer ID' column and press the 'New' button.
- Enter the Customer Name and the Contact Name in the appropriate. The Customer Type must be 'Customer'.
- The Customer Group should be populated if the customer is to be grouped by a customer group name.
- The 'Unison Interface Value' must be entered only if the Order details related to the customer will be interfaced from Unison into MTS.
- The 'POD document available' flag should be checked only if the POD documents are to be stored in TOKAIRO for this customer.
- The 'Consolidate Order' flag should be checked when the customer orders needs to be consolidated for charge benefits.
- Enter the Country Code and click on the Save button. Once the customer is saved, then click on the Location associated with this customer. The address details will be populated based on the location address details and then press the 'Save' button.
- The 'Allocation Method' can be setup as RPE or Weight.

6.1.2 Customer Group:

- Customer Group is used within MTS to group a number of Customer ID into a single group. This will allow access control of the locations/sites to view and manipulate orders.
- To create a 'Customer Group' place the cursor on the Customer Group column and click on the 'New' button. Input details and Invoice Format

6.1.3 Cost Centre:

- A 'Cost Centre' is associated to an Order based on the set up done in this form.
- A new functionality has been introduced where the 'Internal Revenue' flag is flagged, and when a 'Trip Status' is changed from 'Planned' to 'Accepted' then the system would validate to check if an contract exists between the two 'Cost Centres' that are involved in the trip.

6.2 Resources

6.2.1 Carriers:

- "Carriers" tab and this allows you to set up either own fleet or hauliers.
- Note that the "Display Type" can be set to either "Poplist" or "Freetext", the latter will allow free text entry of data into the trips allocated to this carrier (driver, vehicle etc) and the former will force you to select data from predetermined lists which we will see later in this section.
- "Fleet" resources should be set up with a "Hub Location" and the "Enforce Start at Hub" and "Enforce End at Hub" boxes ticked to enable them to operate correctly. This will ensure that all trips allocated to these carriers will start and end at this location as opposed to hauliers who will generally be utilised from location to location rather than round trips.

6.2.2 Carrier Groups:

- The "Carrier Groups" are used to define reporting priorities
- Generally two "Carrier Groups" require mandatory set up: a "Fleet" and "Haulier".

6.2.3 Carrier Types:

- The carrier type is linked to the carrier and also the various costing methods associated with freight payment.
- There are four types of cost method that can be applied to the carrier, these are "MANUAL" whereby the cost can be allocated to the trip manually, "EXTERNAL" whereby the trip cost will be allocated from an external source like MTM, "CONTRACT" whereby the trip cost will be calculated within MTS via contracts and tariffs and "EXT_CONTRACT" which looks for an external value and if one is not found it uses the "CONTRACT" method.



6.2.4 Trailer Types:

- The "Drive Time Modifier" defaults to a value of "1.00" this can be used to factor speeds for vehicles such as vans and make them faster than articulated lorries
- The trailer also has to have the compartments defined. This is shown on the right hand section of the screen, which enables you to allocate temperature compatibilities to the trailer types dependent on the site configuration and utilization
- This section must be completed in order for trailers to be allocated to trips
- When setting up a new trailer type you have to specify the length, volume and maximum RPE capabilities for that trailer which will be used when allocating the trailer to trips
- In most cases it will be the RPE value that governs the capacity of the trailer and once this has been set a trailer will not automatically allocate to a trip if it's RPE capacity has been exceeded

6.2.5 Trailers:

- Enter a Trailer, but needs to be allocated to a trailer group
- Allocate a carrier group to the trailer. This will normally be "Fleet" for own fleet or "Hauliers" for 3rd party carriers
- The trailer is now allocated to a carrier group. The trailer will now be available to assign to a trip
- If a trailer id is no longer required you are able to make it inactive

6.2.6 Drivers:

- In much the same way as the "Trailers" tab enables specific trailer resources to be set up the "Drivers" tab enables the actual drivers to be set up so that they can be allocated to trips with vehicles
- Enter the "Id" this is a free text field and would normally be the drivers payroll number, "Job Title" which is a system value and will generally be "DRIVER", "Forname" and "Surname" are both free text fields
- Needs to be linked to a carrier. Allocate a carrier id to the driver. This will be the carrier id of the depot where the driver is based.
- The driver will now be available to assign to trips using the chosen carrier.
- If the driver id is no longer required you are able to make it inactive

6.2.7 Despatch Unit Types:

- Are the physical resources on which goods are despatched and delivered; e.g. pallets or roll cages
- When setting up the "DU Type" the volume and maximum weight capacities need to be known and entered. The RPE value will be used when orders are being generated and if using Pallets rather than Roll Pallets (Cages) this value should be set to one so as to enable a direct conversion. If both Roll Pallets and Pallets are being used then this value should be the correct conversion factor applicable to the "DU Types" being used.

6.2.8 Load Rates:

- "Load Rates" can be configured to fix time at locations where product is either loaded or unloaded, a fixed value can also be applied to the start up and close down of a trip
- Enter the name for the "Loading Rate", any time to be applied at start up or close down: "SU/CL Mins", select whether or not this time should be applied and then define any fixed time to be applied at stops which can then be added to a value per despatch unit: "Dflt Mins per Du"
- You can also assign different DU types to a load rate with varying default mins for loading/unloading.

6.2.9 Tractors:

- In a similar way to "Drivers", "Tractors" can be allocated to trips to enable more accurate control of resources. Any tractors set up in this form will be available to select from a list displayed from the "Trip Manipulation" form if the carrier applied to the trip is set to "Poplist".
- Tractors set to "Inactive" will not be selectable
- The "tractor" needs to be linked to a carrier. The tractor will now be available to assign to trips when using the carrier the tractor has been allocated to

6.3 Locations

- Locations are used to maintain the details related to a specific location such as their Address information, Contacts and Constraints
- Query existing locations by clicking '?' or enter the ID of the location with a '%' as shown and click on the query button



- You can traverse through the Address, Constraints, Trailer Types and Contacts tabs to get relevant details of them.
- The Location ID should identify the location uniquely. The Location Type can hold one of the 3 types - BRANCH, RDC or SUPPLIER
- In the address tab the most important fields are the Postal Code and Country. The 'Postal Reg' and the 'Planning Reg' will be populated by the system based on the postal code.
- The Lat and Long fields will be populated by the system referring to Map point once the location is used in an Order.
- The Constrain Type specifies the constrain in a specific location such as only a 11 ft truck is allowed on Mondays between 10:00 to 17:00 hours
- Trailer Types tab specifies the trailers that are compatible with the location
- The details of the Contacts for the location can be maintained in the Contacts tab
- When the 'Include' option is selected then only those trailers mentioned in the list are compatible with the location.
- When the 'Exclude' option is selected then, excluding those trailer all other trailers are compatible with the location

6.4 Network

- Network Table are used to maintain the Distance and Time between two locations in MTS
- The Network Table can be queried based on the Source Location or the Destination Location. To query on the Source Location, just select the 'Source Location' from the search criteria drop down box and enter the source location in the 'From Loc' and click on the query button
- To Create a New Point to Point network table, click on the 'New' button and enter the details. Once you have entered the details, click 'OK' to save the new point to point details of distance and time

6.5 Countries

Enables Country information to be maintained as for those clients who trade with other countries, VAT may need to be calculated at a different rate.

6.6 Contracts

- Used to store a set of rates agreed between DHL and a customer, or between DHL and a "Carrier"
- There are 2 types of contract
 - ◆ Contract between a Cost Centre and a Customer or a Carrier
 - ◆ Contract between one Cost Centre with and another Cost Centre
- In any contract, two parties are involved. For trip rates, the agreement is between a DHL Cost Centre and a Carrier, whereas for Order rates the agreement is between a DHL Cost Centre and a Customer
- Read Contracts User Guide for full set of rules determining how Contracts are maintained (Projects/DHL-Transport/Product Management/Training/Guides/Consumer Networks)

6.7 Products

Assists in the creation, maintenance and retrieval of MTS Host Products data. Product data configures the way the MTS Host functions and is used by many of the key functions including Trip Manipulation, Generating TI's and Bookings

6.8 Business Data

6.8.1 Group Names

Displays valid Order Groups that exist in MTS Host. Order groups are used to group orders together, for example all orders from a location could be grouped together.

6.8.2 CrossDock Paths

Crossdocks are used within MTS Host to configure deliveries from A to B via C. This approach is commonly used for long distance deliveries and helps provide a better utilisation of resources. A Crossdock is created for a To Location, From Location, Product Type and Via Location, for example Non Perishable deliveries from Rugby to Crosby should be delivered via Haydock.



6.8.3 Adjustment Reason Codes

Provides a list of valid adjustment reason codes, an adjustment reason code can be selected when performing a Manual Advance.

6.8.4 Reason Codes

Displays a list of valid Reason Codes and their usage. These codes can be used to record why a user has opted to perform a certain action, an example of this is when a user Reverses TI's they can enter the reason for the reversal. This table is now used to maintain non conformance codes for collections and deliveries.

6.8.5 Min Ti RPE Quantity

Defines the minimum number of RPE's that should be placed on an order during Create TI's processing.

6.8.6 Trip Statuses

Displays a read only list of Trip status that are used within MTS, it also shows which options are set against a particular status, for example whether a carrier is required to set a Trip to a particular status.

6.8.7 Order Statuses

Displays a read only list of Order status that are used within MTS, it also shows which options are set against a particular status, for example Orders in that status can be Re-booked.

6.9 Message Maintenance

- When a trip is planned carriers and locations can receive automatic e-mail/fax tenders. This document is for guidance in how to set up recipients in message maintenance
- To enable Locations to receive messages, the recipient needs to be set up in the system by selecting the Locations radio button. Enter the email address in the 'Address Value' field. If you want to add more recipients follow the same instruction
- Click on the 'Message Requests' and select the message type as 'General Location information message' and the medium as EMAIL
- In order to send message to Locations, select a trip that is in 'Accepted' status from the Trip Planning or Trip Manipulation screen and click on the 'Messages' button
- Messages for Carrier are also set up in the same way as has been done for Locations, but with the following exceptions. On the 'Message Requests' tab, you will need to select 'Trip Invitation' or 'Trip Invitation - Amendment' for the Message Type
- Once the setup is done, message will be sent to Carriers automatically whenever a Trip that is assigned that particular carrier, to a status of 'Tendered'
- all the time windows on the Trip should be in a future date

6.10 Accounts

- Accounts Maintenance function is used to maintain the account type of a particular entity such as Customer, Carrier or a Cost Centre
- If you are setting up a Customer Account, then select the Customer option from the drop down box. The Owner would be the Customer ID and the Account ID field will be populated from the Customer ID field. Populate the VAT Country code accordingly
- 'Invoice Requirements' tab allows the set up of the Account that needs to be Debited and the Account that needs to be created for a given transaction
- In case of Customer receivables, the Debit Account must be the Customer Account and the Credit Account must be the 'Exel' Account
- In case of Vendor/Carrier payment, the Debit Account must be the 'Exel Account' and the Credit Account must be that of the Vendor/Carrier
- The other mandatory fields in this form are the VAT Country Code and the 'Action' field must be set to 'Manual'



6.11 Task Lists

Provides functionality to execute a sequence of MTS Tasks without having to manually run each Task on completion of the preceding Task. Examples of Tasks are Bookings Auto Summary and Create TI's function

6.12 Fixed Routes

- "Fixed Routes" are used to automatically allocate orders onto predetermined trips
- The route code will govern the order in which the routes are displayed in the main screen. The "Name" should concisely describe the route detail. The "Depot" is the one with which the route is associated and the "Priority" will control which route takes an order if there are two possibilities
- The "Max Trips" number defines the number of each particular route that can be generated
- Routes can be allocated to individual days or all through the week.
- The "Carrier ID" field determines the carrier that will be associated when the route is generated, likewise "Trailer Type" field will determine the trailer associated with the trip and the "Cost" populates the MTM cost field on the trip detail tab, note this is for reference and not applied to the trip in the fixed route process. Each route can be made inactive if no longer required.
- When setting up a new route only the origin and destination locations need to be entered, a close down location for own fleet is not required. Stops can be made mandatory and it must be stated whether they are pick ups "PK" or deliveries "DL". The "Offset" determines the target time for each stop and the "Early" and "Late" times signify the permitted window. N.B. the times are calculated in total minutes i.e. twelve hours is represented by 720 minutes.
- Stops can be added, deleted or inserted and also moved up and down within the route if desired using the available U (up) D (down) buttons.

6.13 Imports

Allows for data to be loaded into the system without the need for a formal electronic interface. The import mechanism allows a file from a users PC to be uploaded to the server and from there it can be loaded into the database

