Aptean

Execution - Trip Overview (Waterfall) Guide

Calidus TMS - 12.48

29th April 2025 - 4.0
Reference: EXECUTION

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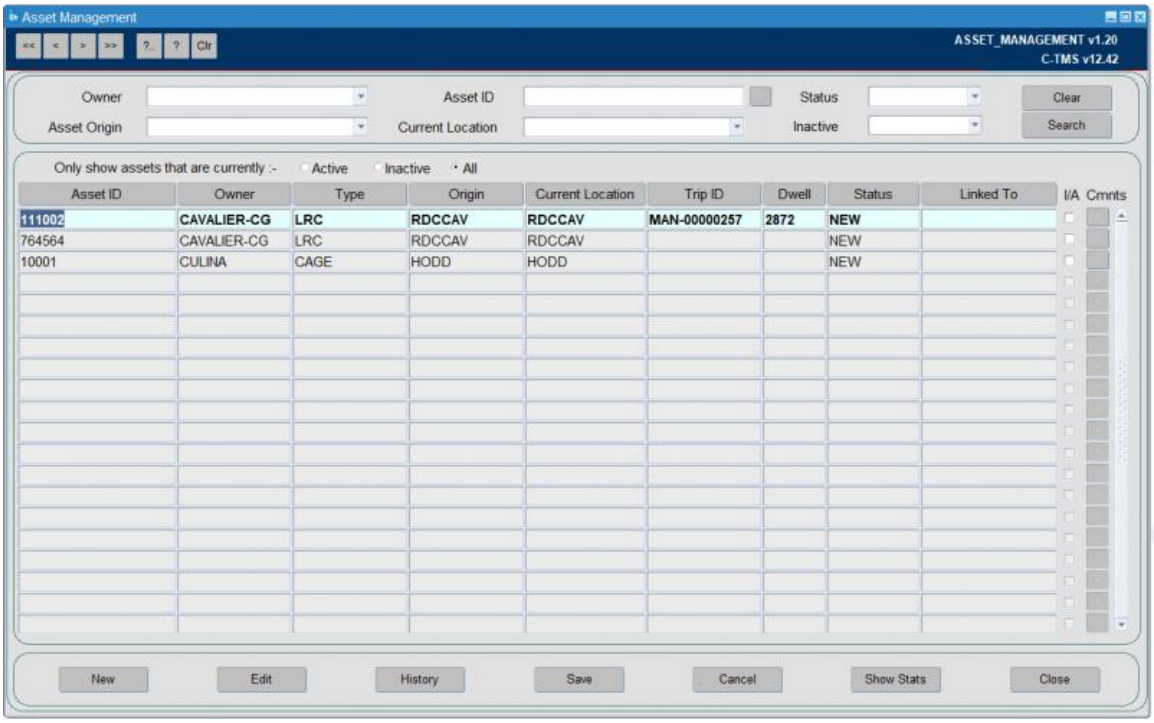
1 Asset Management

Asset ids are held against the order items. The system allows for DU types to be maintained as permanent assets, and then for those permanent asset IDs to be entered against the depots. Then, the system will track the asset automatically as it moves throughout the network and to customer locations, maintaining a full audit trail.

The Asset Management screen is accessed under C-TMS Modules - Maintenance.

1.1 Asset Management

The Asset Management screen allows you to add and track the audit history and current status of a unique and Asset ID for a particular DU type where the assets are recorded against specific order items.



Note: Only permanent asset IDs are tracked in Asset Management, any temporary Asset IDs are not stored.

1.1.1 Asset Filter

The screen opens displaying all Asset ID?s that exist in the system, regardless of status whether they are active or inactive. A toggle exists to enable the viewing of only active assets.

Key attributes of the asset can be filtered on to narrow down the display, either by customer (owner), the current location based on planning activity or the original origin of the asset.

The header of the Asset Management screen allows you to filter the Asset data based on the following fields:

- Owner.
- Asset Origin.
- Asset_ID - a unique asset ID can be selected but note this is only after an Owner is selected.
- Current Location.
- Status.
- Inactive.

All of the search fields are drop down lists but will also allow you to enter text. The search fields can be used in combination.

The screen displays the following information:

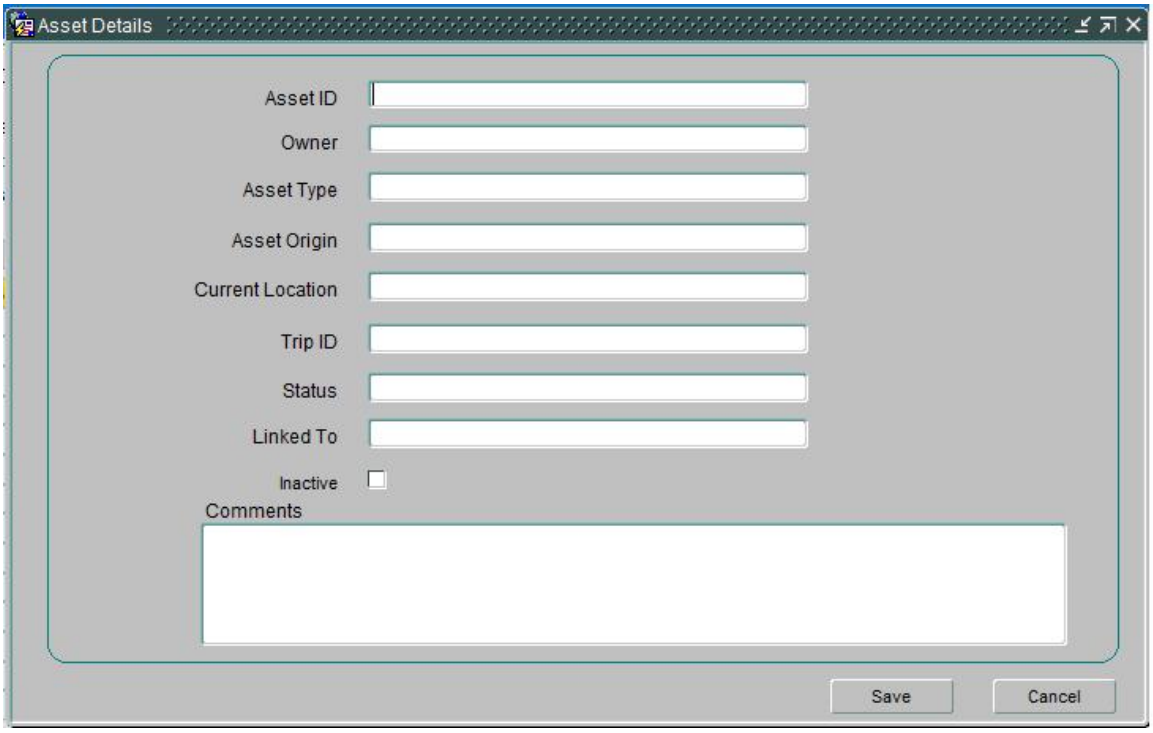
- Asset ID
- Owner
- Type
- Origin
- Current Location
- Trip ID
- Dwell - a dwell time in days, calculated based on the DATE field of the last movement. Dwell is not calculated for ASSETS which are at a status of IN TRANSIT. If the current location of an asset is not IN TRANSIT, the dwell is displayed in days, not including the current day.
- Status
- Linked To
- I/A - displaying whether the asset is inactive.
- Cmnts - a button to show any comments against the asset in a pop-up, allowing view, edit, add or remove comments.

The New, Edit and Delete buttons will be enables based on the user. If the user is a SUPERUSER, the buttons will be enabled, if the user is not a SUPERUSER, the buttons will be disabled. Supper users will also have access to a right click option allowing them to maintain the records in Asset Status.

You can access history of an asset using the **History** button.

1.1.2 New Asset - Manual Entry

To generate a new Asset ID, click the **New** button:



This is also the same screen when the **Edit** button is clicked to make amendments to an Asset.

The key asset criteria should be entered for a new asset:

- The unique asset ID - reflecting the traceable barcode attached to the asset.
- Owner - the asset owner.
- The Asset Type - A selection of the DU Type?s configured in C-TMS marked as Re-usable. A lookup is provided.
- Asset Origin - A selection of the depot centres of type RDC .

You can also enter:

- Current Location.

- Trip ID.
- Status.
- Linked To.
- Inactive - displaying whether the asset is inactive.
- Comments.

1.1.3 New Asset - Automated from C-EPOD Debrief

If Permanent Assets have been scanned by the C-EPOD device, but are not known to the C-TMS Asset Register, these will be added automatically, but left inactive, with some default values created against them, indicating that the details of this asset are currently unknown. These assets will not be able to be used again until the details have been updated. Single trip assets will not be created as part of the debrief process.

If the asset does not exist as a re-usable item in the asset table, the details will need to be recorded for future use of the asset.

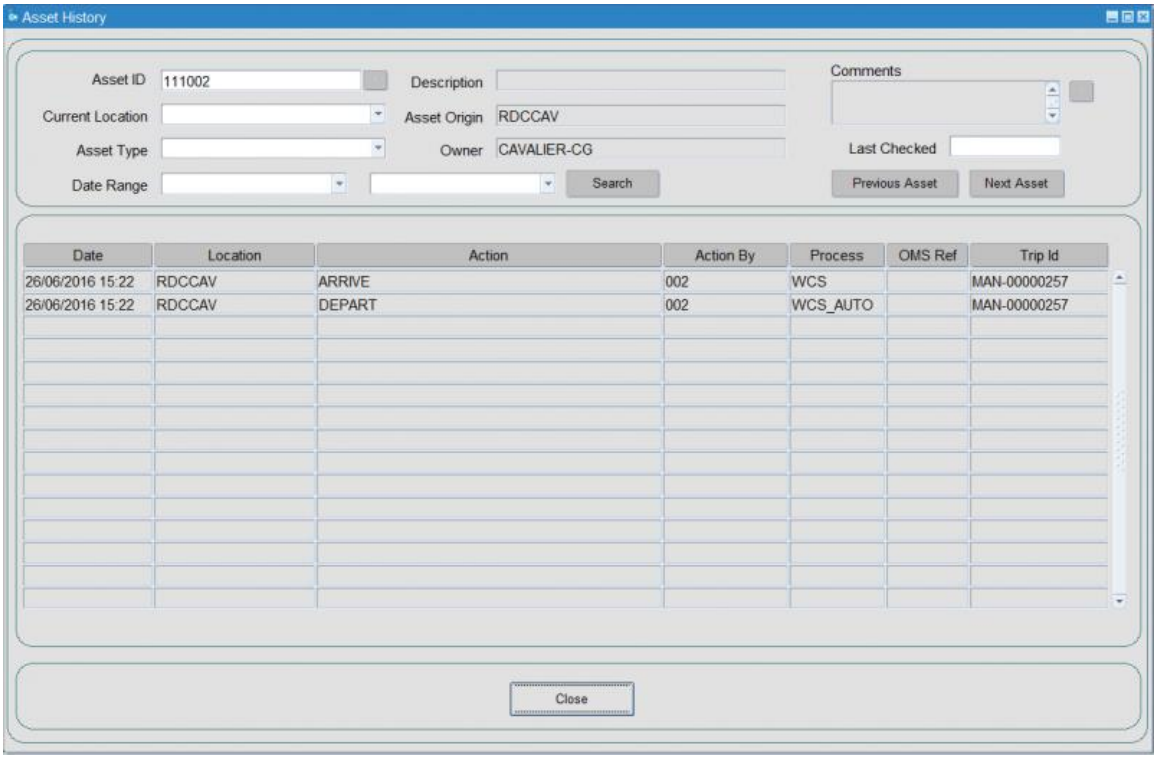
When an asset is identified as a permanent asset a record will be created with the following details:

- Status of the record will be set to "NEW".
- Inactive flag set to "Y".
- The Origin of the asset will be set to the owing depot of the trip on which the asset was created.
- The current location will be set using the location detail in the ePOD message.
- The created date and time will be set to current date and time.
- The created by will be set the driver currently executing the trip.
- The route id will be set to the current trip.
- Comments will be set to indicate this asset has been created during de-brief from ePOD.

An entry will also be created to reflect the creation of the asset in the Asset History.

1.2 Asset History

On the main Asset Management screen click the **History** button to display the asset audit history.



The Asset history screen displays the Asset Type, Asset Description and Asset comments in the header section of the screen. Selections are available to change the asset for which the history is displayed and also filters, including date range, to narrow down the history results displayed.

The selection fields are drop down lists which also allow text entry.

This will display a detail record of asset movement actions occurred by debrief processing against a trips and orders along with any status changes within the Asset Management screen. The history details data grid in the bottom section of the screen will display the details of the order/trip which generated the history entry.

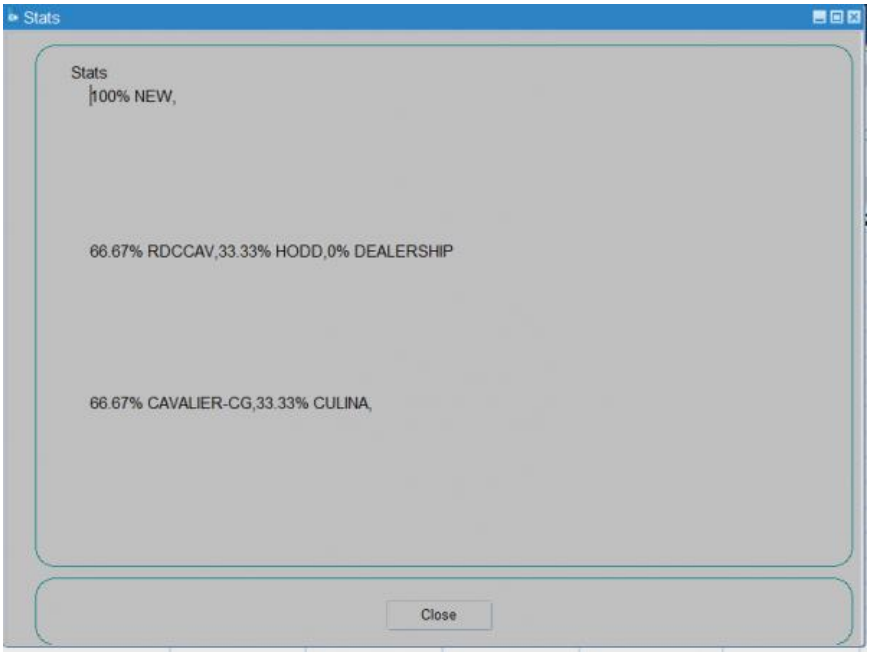
When an asset tracked event occurs an audit record will be created recording the date and time the change was made, the user making the change and the details of the action occurred in the 'Action' field.

Note: The Asset history is a display only screen the only fields which will allow input are the search criteria in the header section.

The comments field added to the screen will be displayed as a scrollable area with a button beside to allow the full comments to be displayed; this functionality is already present in the Asset management screen and the formats should be kept consistent.

1.3 Stats

Selecting **Show Stats** displays a new pop up. This displays real time statistics, the proportion of assets at each status, the proportion of assets at each location and the proportion of assets belonging to each owner.



The proportion of assets at each location will differentiate between RDCs but will group all dealerships together.

1.4 Asset Edit and Linking

The asset **Edit** button opens up the Asset header details and allows a manual update to any field other than the asset ID itself. This is the same as the New asset screen shown above.

The linking functionality enables you to identify where assets in use are re-labelled in the circumstance where the asset barcode(s) for an item are detached or become damaged. Where the operation attach new pairs of identical barcodes to replace the originals, and where the asset remains in use, the asset details screen will allow a new barcode value and old barcode value to be linked together. This will allow the complete movement history and audit trail of the single asset unit to be viewed.

The original asset label id will be retained associated and linked to the new asset labels details by the use of the 'linked to' asset id. The Linked to asset id will be displayed as the last field on the Edit/New asset screen. The original asset label id will be set to inactive and a status code assigned describing that the asset has been relabelled.

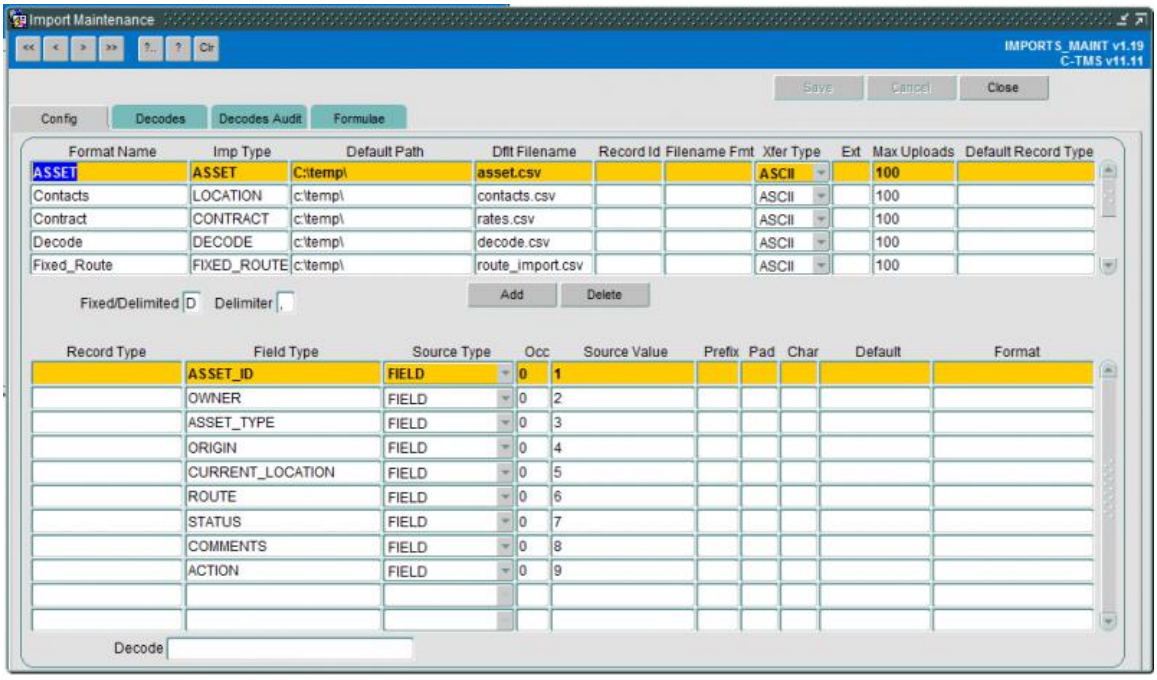
When entering the details of a previous asset to link to, validation will be performed to ensure that the asset exists and is not currently active. If either of the checks fails, validation and an appropriate error message will be displayed and the details will not be committed to the database. An audit record will be written to record the details of the asset linking.

Two buttons **Next Asset** and **Previous Asset** in the the header section of the Asset history screen enable to flip to any linked Assets.

Note: Asset linking is included to cater for relabeling of an asset unit that remains in use. This should not be confused with retiring / decommissioning an old asset, perhaps damaged and beyond normal use. In this circumstance the asset label id should be set to inactive and an appropriate status code set against it describing the reason for taking the asset out of circulation.

1.5 Asset Upload

To support an initial upload of multiple new Assets a file import is available using the standard C-TMS Import Maintenance functionality:



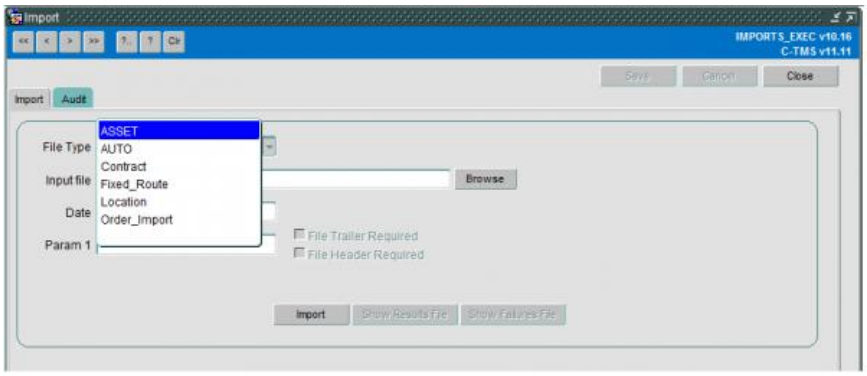
The following fields can be specified:

- ACTION - optional - 'A'dd or 'M'odify. If not provided, and the asset is not found, will default to adding, else modifying. If adding, the asset must not exist, if modifying, the asset must exist.
- ASSET_ID - required
- OWNER
- ASSET_TYPE - required when adding - must exist as a DU type marked as reusable in the system.
- ORIGIN
- CURRENT_LOCATION - required when adding - must exist as a valid location in the system.
- ROUTE
- STATUS - required - must be a valid status in the system.
- COMMENTS

Any data that does not conform to the specified format will be rejected, any errors will be reported in the results file which can be displayed on completion of the import process.

Duplicate assets will not be inserted if an asset already exists; this will be considered an update.

The standard Import screen is used to initiate the upload of the file:



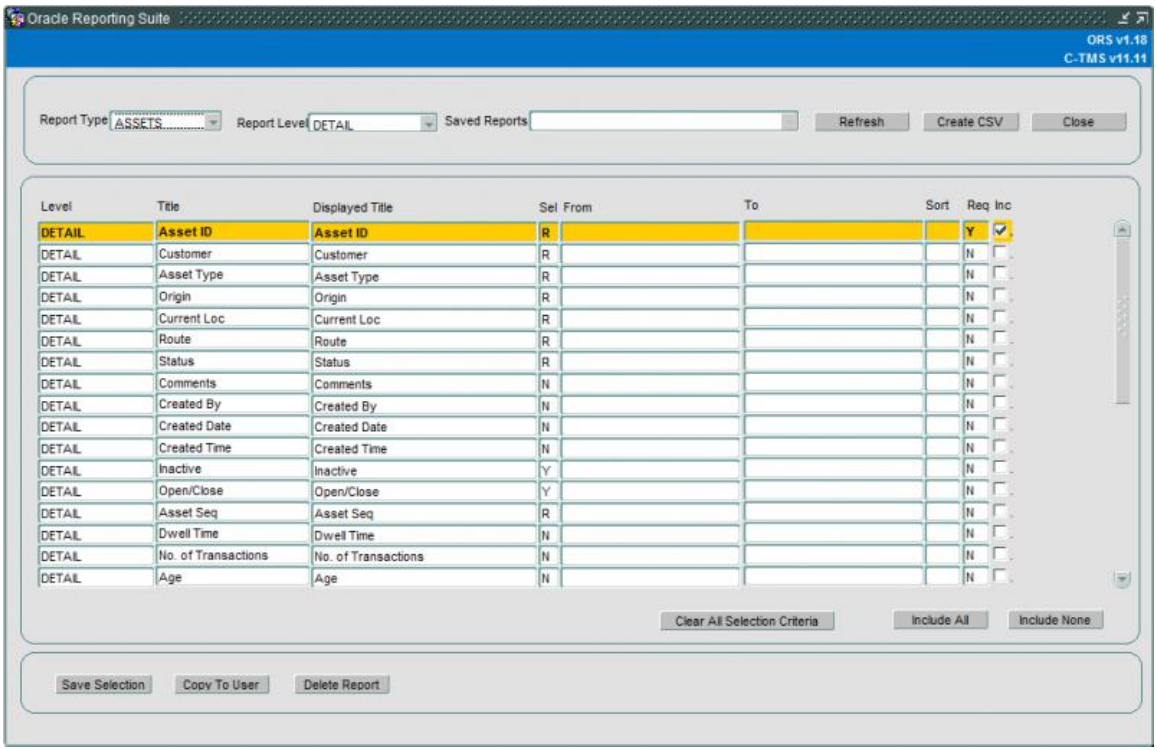
When a valid asset is created/updated an associated record will be created in the Asset Audit History table to record the details of the creation or amendment.

Further configuration:

Parameter	Description	Level
UPPERCASE_ASSET_ID	Asset id to be stored in upper case	SYSTEM

1.6 Asset Extract

For ease of reporting, the asset detail data extract is available to extract additional data.



1.6.1 Configure Report Instance

Several key columns from the asset header and asset audit history are available to select and generate report output.

Columns also exist which perform summary calculation, for example, the asset age and a count of the number of transactions and the number of moves.

The age of an asset is calculated by finding the creation history record and subtracting this value from the current date and a count of the number of transactions and the number of moves.

The number of transactions for an asset will indicate the total number of history records for an asset and will also take into account if the asset has been linked to a previous asset.

The number of moves will be calculated by totalling the number of asset history records exist which has an action of ARRIVE; again this count should also take into account if an asset has been linked to another asset.

1.6.2 Save and generate Report Extract

Select the required fields with the check box on the right hand side, add any selection criteria and this can be saved as an instance of the report using the ?Save Selection? button at the bottom of the screen.

To generate the report output, click **Create CSV** - your browser will download the export, usually to the browser or opened in an application that is associated with CSV files.

1.7 Further Configuration

The following are system parameters affecting this function:

Parameter	Description	Level
ALLOW_UNLOAD_ASSET	Controls if asset records are created as part of unload	SYSTEM
ASSET_AT_FIXED_ORIGIN	Asset At Fixed Origin	COST_CENTRE
ASSET_DEBRIEF	Indicates if assets debriefed with Items	COST_CENTRE
ASSET_FORMAT	Indicates which order item field will identify an asset	COST_CENTRE
EPOD_PREVENT_ASSET_TRACK	Prevents asset tracking through EPOD	COST_CENTRE
MIC_EXCLUDE_ASSET_ID	A comma-delimited list of prefixes that determines if the new asset ID will not be stored (e.g. for loose items).	SYSTEM
UPPERCASE_ASSET_ID	Asset id to be stored in upper case	SYSTEM

2 Carrier Trip Management

Carrier Trip Management (CTM) is a module within the C-TMS application that can be used to manage those trips that require a third party carrier to perform the trip and therefore the haulage, loading and unloading of orders associated with that trip.

CTM has been written in order to improve the communication process that occurs between the Planning Centre and Carriers. Currently automatically generated messages are used to make a carrier aware of the trips that they have been invited to perform. The carrier then responds to this email to inform the planning centre whether they wish to Accept or Reject the Trip. However, there can sometimes be a delay in the time taken to create, send and deliver the messages to the recipient. In addition it leads to a lot of paperwork and is sometimes confusing to the carrier.

Not all Carriers have access to the C-TMS screens and may wish to continue to receive email notification, it is possible to have some Carriers using email and some using CTM and is down to the configuration in a particular database.

The concept of CTM has been introduced to provide the carrier with a view of the C-TMS database from a specially designed form for the trips that have

1. Been invited to the carrier for undertaking
2. Been amended by the planning centre
3. Been rejected by the carrier
4. Been accepted by the carrier
5. Been accepted by the carrier and are now En-Route
6. Been accepted by the carrier and have now been Completed.
7. Been deleted
8. Been abandoned

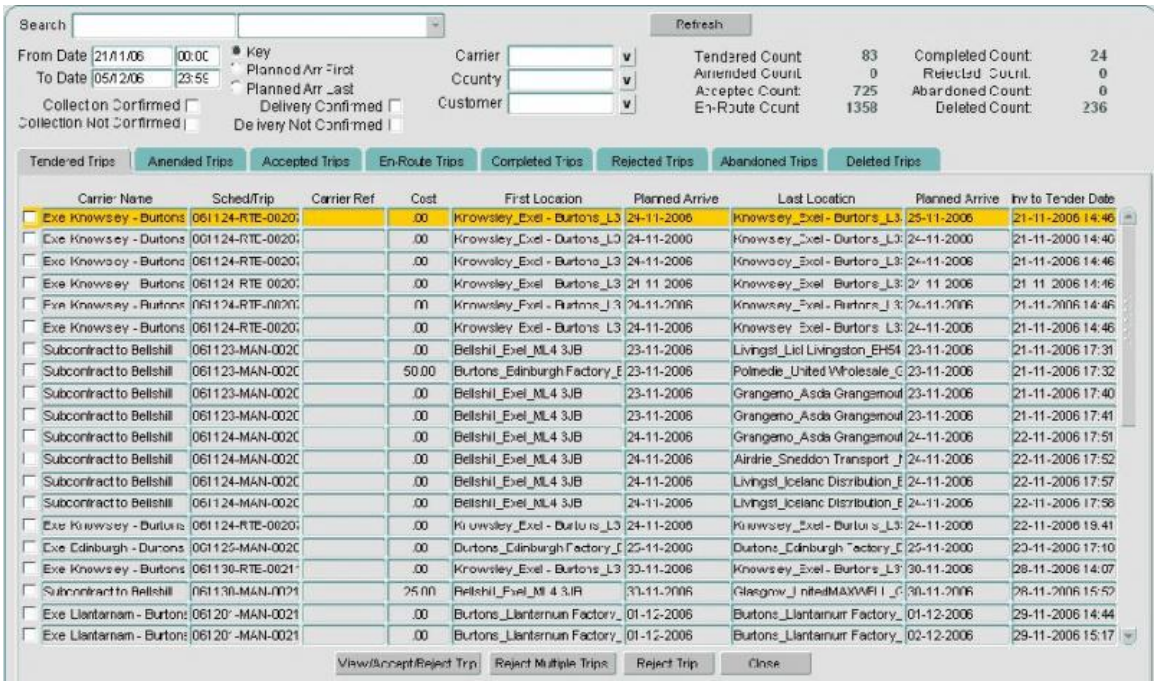
The information that is displayed is specifically tailored to meet the requirements of Planners and Carriers who are involved with the Tendering, Accepting and Rejecting of Trips.

There are 2 main groups of users for CTM, the Planning Centre and a Third Party Carrier. Typically the view of information that the Planning Centre will be able to see is more detailed than the view of information that a given Carrier will be able to see.

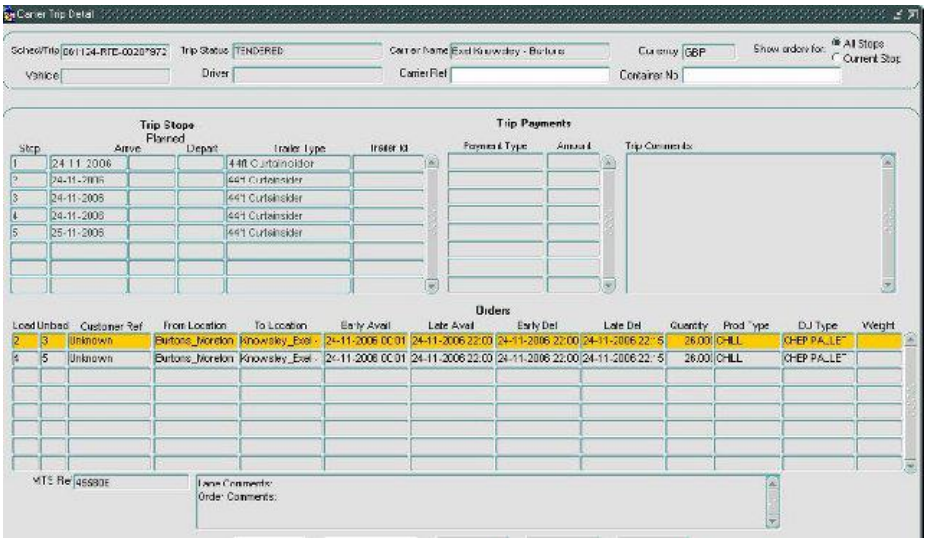
Once logged onto the application and depending on access rights users are able to:

1. View high level trip data.
2. View detail trip data.
3. View high level order data associated with a given trip.
4. View detail order data using a link to the Order Detail form.
5. Accept to undertake a trip.
6. Reject to undertake a trip, providing rejection comments.
7. Reject to undertake many trips at the same time, providing the same rejection comments for all trips rejected at the same time.
8. View trips that have been amended by the Planning Centre and either Accept or Reject them again depending on the amendment.
9. View trips in a variety of different statii.
10. View a count of the number of trips in each of the different statii.
11. View information about a trip and its orders in Tender Invitation or Manifest format.
12. Filter the information that they see within the form by applying date, country, customer and carrier filters.
13. Search for a given trip by Trip Ref (Bill of Lading) or Schedule/Trip combination.
14. Search for a given order by C-TMS Ref or Customer Ref.
15. Chase carriers for a trip that they have not accepted or rejected.
16. View and enter the Carriers Reference for a particular Trip.

The main screen layout for CTM is as follows, this provides an overview of the Trips in a particular status: -



It is also possible to see a more detailed view of a Trip, this often needs to be viewed to allow the Carrier to make a decision about Accepting or Rejecting the trip.

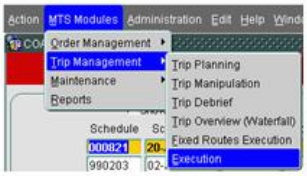


In those situations where a Carrier is permitted to debrief the Trips they have undertaken, the above screen will allow the Carrier to open the Order Debrief screen to debrief the Orders they have delivered on the Trip. This mechanism provides a straight forward and efficient means of capturing the actual collection and delivery information from the Carrier.

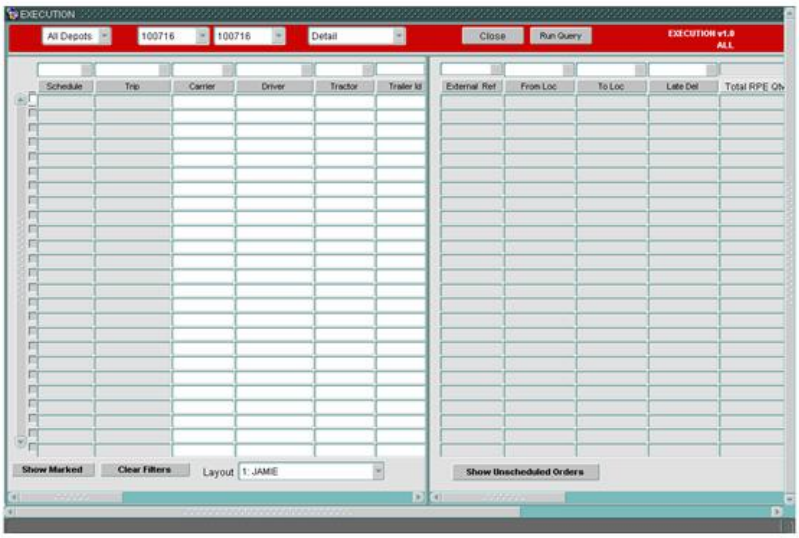
3 Execution Screen

3.1 Accessing the Screen

To access the screen follow the menu choices highlighted below:



The screen will be displayed as below:



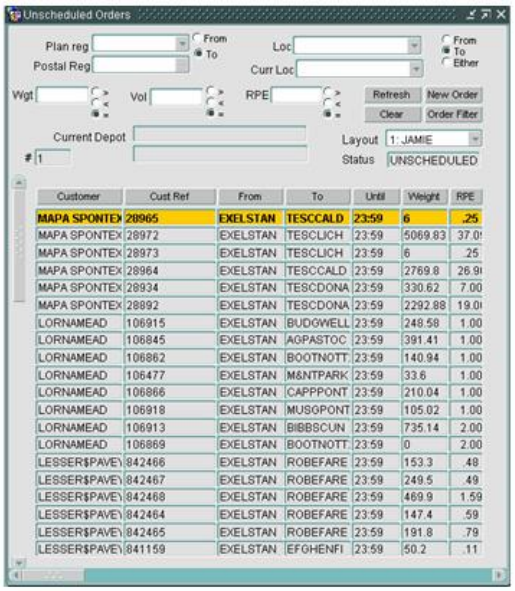
For best visibility of the screen it is best to view the screen in Full Screen Mode, see below:

3.2 Unscheduled Orders Form

The first part of the screen is the Unscheduled Orders Form it displays the same information as the Order Well in the Trip Planning and Manipulation Screens.

To access the form select the button as shown below:

The form will be displayed as below:

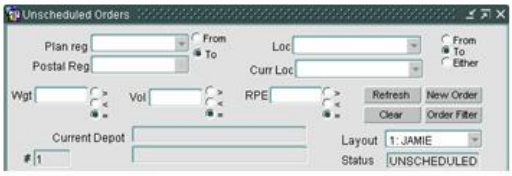


The size of the form can be reduced or enlarged by holding the cursor over the edge of the form until this ? symbol appears and then dragging the margin in the desired direction.

3.3 Data Sort

Data can be sorted either alphanumerically or reverse alphanumerically by selecting a title header (example below), data can be sorted by any column.

3.4 Data Filters



The orders which are displayed in the Unscheduled Orders Form can be filtered using the filters above. This functionality is the same as that found in the Order Well in the Trip Planning Screen and the Trip Manipulation Screen.

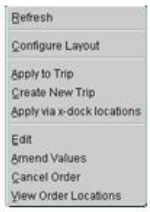
There are various filter options which can be seen above, more than one filter can be applied at a time to drill down the information being displayed. The Clear Button removes any filters applied.

The Refresh Button updates the information displayed to provide the most current information, for example if new orders are being entered by another user or if orders have been scheduled onto a trip.

A new order can be entered using the New Order Button.

3.5 Right Click Options

If you right click when over any of the order information in the form you get the following menu:

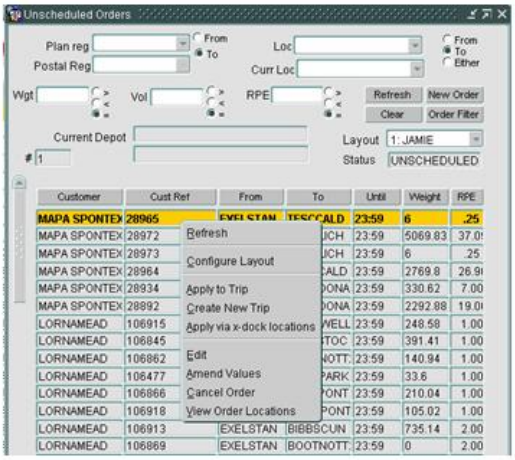


3.6 Refresh

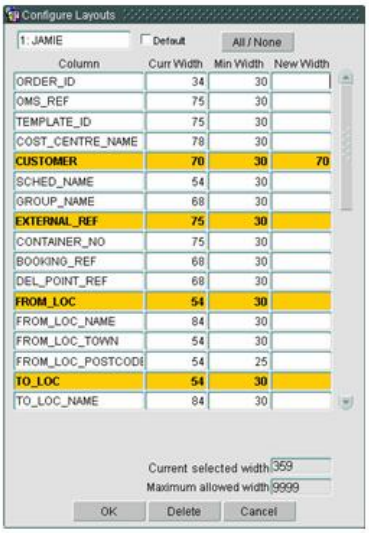
Is an alternative way of updating the data displayed (same functionality as the Refresh Button mentioned above).

3.7 Configure Layout

The fields displayed in the columns of the Unscheduled Orders Form can be configured individually for each user, to do this right click over any order information in the form and the menu shown below will be displayed:



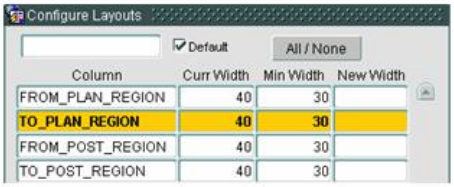
Select the Configure Layout option which will open the window shown below:



To save any changes made to layout you must give the layout a name, this can be done by typing in the box in the top left of the form (see previous page). You do not have to type the number the system generates this. It is possible for each user to have multiple layouts.

To create an additional layout select the drop down arrow next to the Layout field and select the blank space at the bottom of the drop down (see below). This will change the layout to display the system default. This drop down menu is used to switch between layouts where a user has more than one layout configured.

Repeat the right click Configure Layout mentioned above, note the top left box displayed below is blank, to save any changes made you need to name the layout in this box.



If a user has more than one layout a Default layout can be selected by checking the Default box shown above. The layout that has this box checked will always be displayed when the form is first opened.

Fields highlighted in yellow will be displayed, to add or remove a field select that field then hold down left click on the mouse and the Ctrl button on the keyboard, fields will become yellow if they have been selected and return to white if removed.

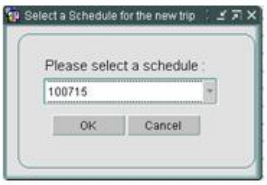
The width of each displayed column can be changed by typing in the New Width Column on the right of the form, please note that any field displayed has a minimum display width shown in the third column (above). There is also a maximum width allowed for the whole display (shown at the bottom right of the form) although the maximum for this form is so large it is unlikely to become relevant, it is worth considering how much will be visible without needing to enlarge the form.

3.8 Apply to Trip

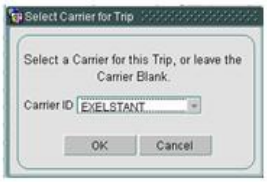
This allows you to add an order to the trip which is selected in the main Execution Screen (shown later). It is possible to select one or multiple orders to apply to a trip. To select multiple orders select the first order required by left clicking the mouse then hold down the Ctrl key on the keyboard and left click any other orders required, any highlighted orders will then be applied to the trip.

3.9 Create New Trip

This allows you to select either a single or multiple orders (as described for apply to trip) to create a new trip. Select required orders then right click and select Create New Trip you will be presented with the following box.



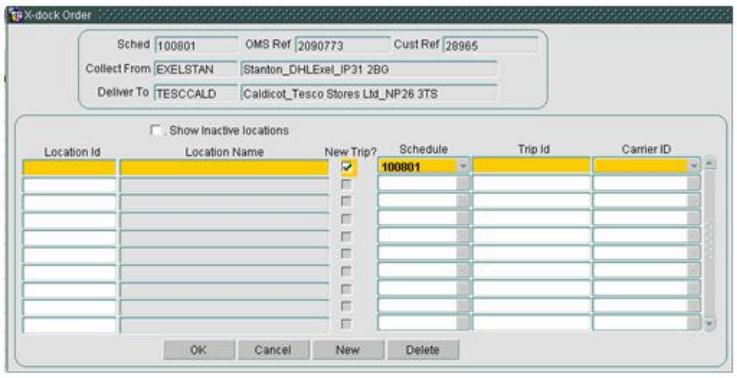
The schedule date will be populated if the main Execution Screen is displaying information for only one schedule date, if the screen is displaying a range of schedule dates you will need to select the schedule date that you want to create the trip on from the drop down list. Once selected you will be presented with the following box:



You can either select a carrier or create the trip without a carrier. A list of carriers is available by selecting the down arrow at the right of the field. When creating subsequent trips the Carrier ID field will be populated with the last carrier used.

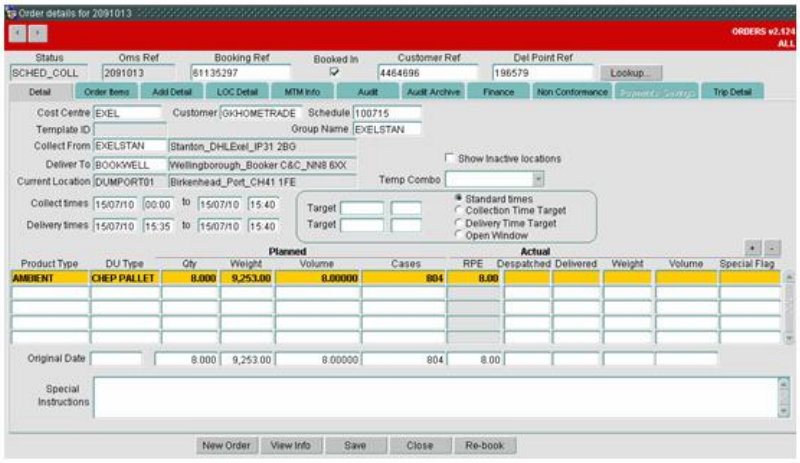
3.10 Apply via X-dock Location

This allows you to select either a single or multiple orders (as described above). Select required orders then right click and select Apply via x-dock locations you will be presented with the following form (this follows the existing functionality in the Trip Planning and Trip Manipulation Screens).



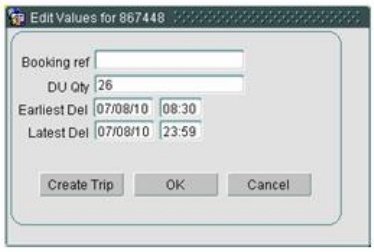
3.11 Edit

This opens up the main order detail form as shown below:



3.12 Amend Values

This provides a short cut to changing certain order details without opening the order details as above.

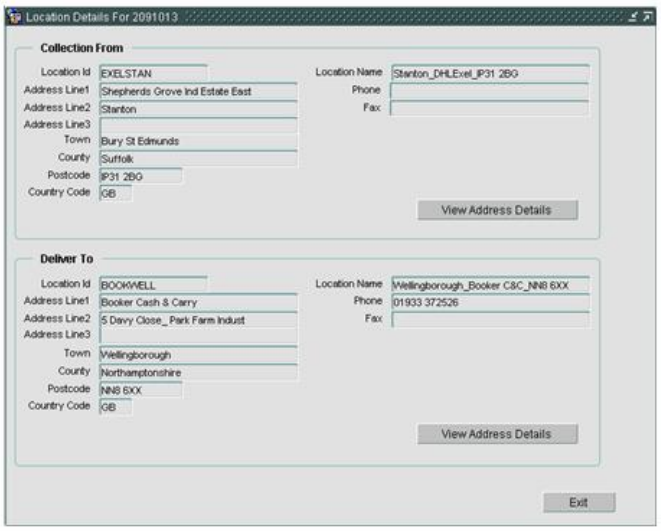


3.13 Cancel Order

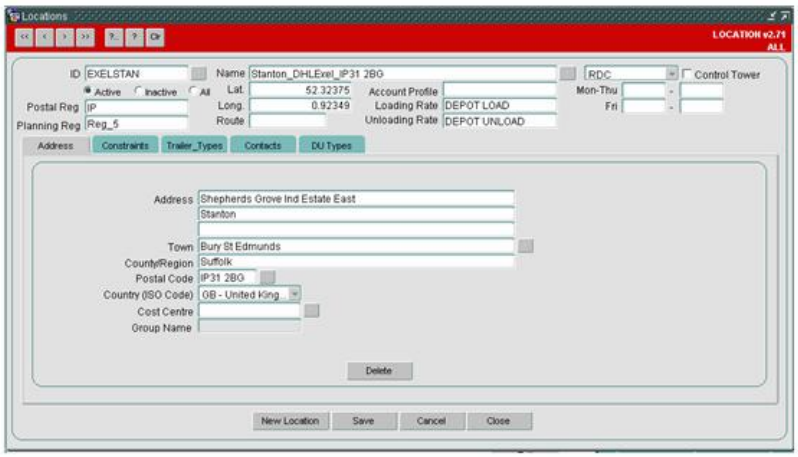
This allows a user to cancel an order and it will no longer appear in Unscheduled Orders Form or in the Order Well in the Trip Planning Screens. If required orders can be reinstated using the Orders Module of the system.

3.14 View Order Locations

This allows the user to see collection and delivery addresses for the selected order, see below:



If you select the View Address Details button you get the following screen with increased address information:



4 Main Execution Screen

4.1 Header Menu

Shown below:

4.1.1 Depot Selection

Depending on a users access this field can be used to either see all orders they are permitted to view or they can select a particular depot to limit the amount of information displayed. The screen defaults to All Depots. When making changes the Run Query button will update what is displayed.

4.1.2 Date Range

This allows the user to select either a single schedule date or a date range to view. When opened the screen defaults to the current date. When making changes the Run Query button will update what is displayed.

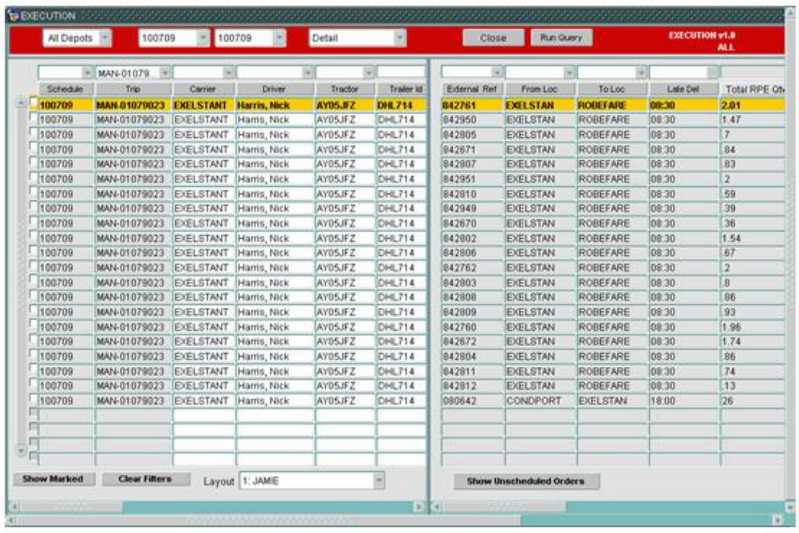
4.1.3 Detail/Summary

Users have the choice of displaying information in Detail or Summary which can be selected in the drop down on the header menu. When making changes the Run Query button will update what is displayed.

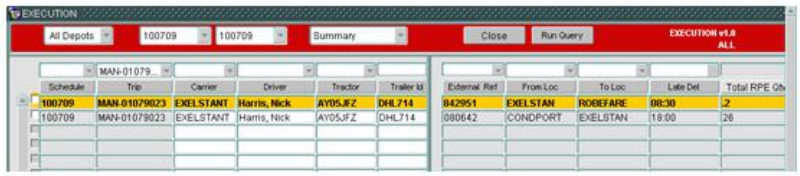
Detail Mode will display one line for each order on a trip (see example on the following page).

Summary Mode will display the first order on each loaded leg of the trip (see example on the following page).

4.1.4 Detail



4.1.5 Summary (same trip displayed)



4.1.6 Close

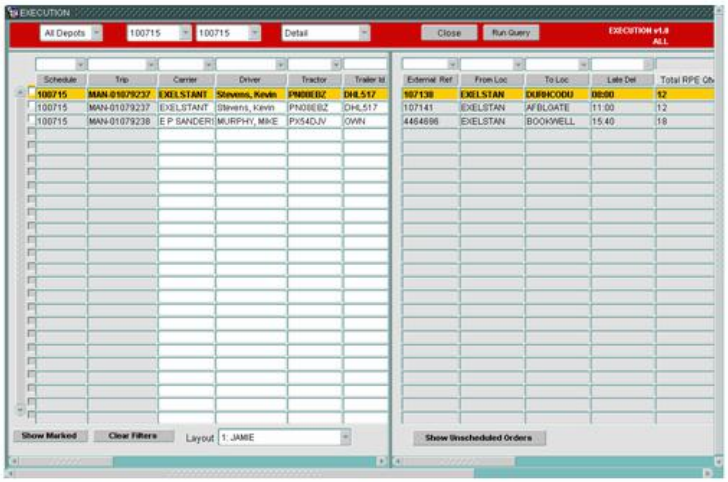
Self Explanatory

4.1.7 Run Query

When changes are made to the selection options listed the Run Query button will refresh the information displayed. When changes are made to information in the Execution Screen selecting Run Query is required to display the most current information.

4.2 Screen Panes

The Execution Screen is split into two panes the information on the left hand pane is trip information and the right hand pane displays the associated order information.

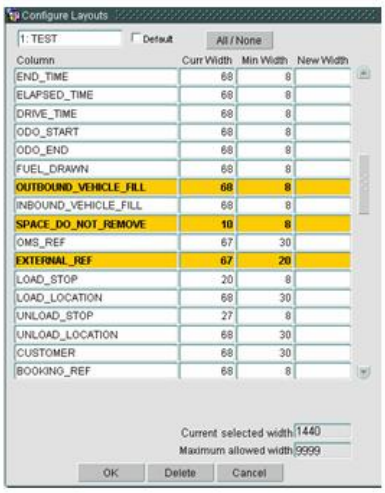


4.2.1 Configure Layout

The screen can be configured as in the Unscheduled Orders Pane (process described previously). To configure the layout right click over any column. Despite being displayed in two separate panes the layout is configured as a single block any field displayed above the SPACE_DO_NOT_REMOVE field (see below) will appear on the left hand trip pane any field displayed below the space field will appear on the right hand order pane.

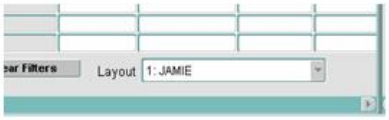
Please note if you remove the SPACE_DO_NOT_REMOVE field the Order Pane will not display.

The choice of fields available is vast and should enable users to customise the display to suit their role specifically.



4.2.2 Layout Switch

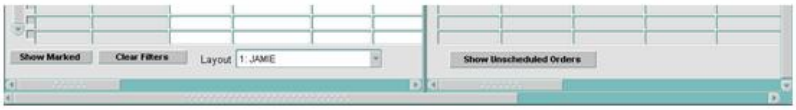
Users can set up more than one layout which can be switched using the Layout drop down (see below).



4.3 Screen Panes Revisited

The Trip Pane on the left hand side of the screen displays Trip information the Order Pane on the right hand side of the screen displays Order information.

The Trip Pane scrolls independently of the Order Pane (and vice versa), each pane has its own scroll bar (see below) above the main screen scroll bar.

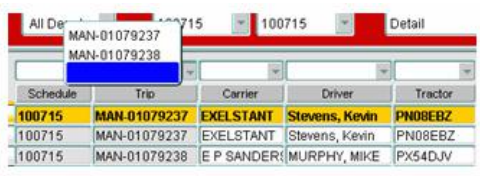


The scroll bars allow the information to be moved independently of the opposite pane (see examples below).

4.4 Screen Filters

Any columns which are displayed with a drop down box above them can be filtered. If there is no drop down arrow above the field it can not be filtered (see examples below).

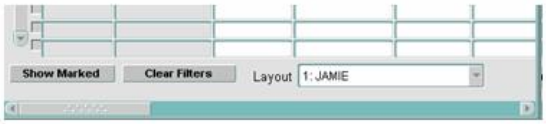
Selecting the drop down arrow will provide a choice records to filter by (see below).



More than one filter can be used simultaneously to allow further reduction of any data displayed.

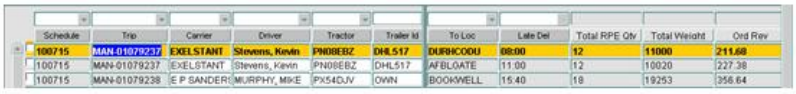
Please note that when applying a second filter the choice of options to select will be based on the information displayed in the Header Menu and not the information remaining in the display.

Filters can either be individually removed by using the drop down arrow and selecting the blank field at the bottom of the menu or be removed simultaneously using the Clear Filters button in the bottom left of the screen (see below).



4.5 Screen Sorts

Data can be sorted alphanumerically or reverse alphanumerically by any column with a darker grey menu title, those with a lighter grey menu title do not have the functionality (see below).



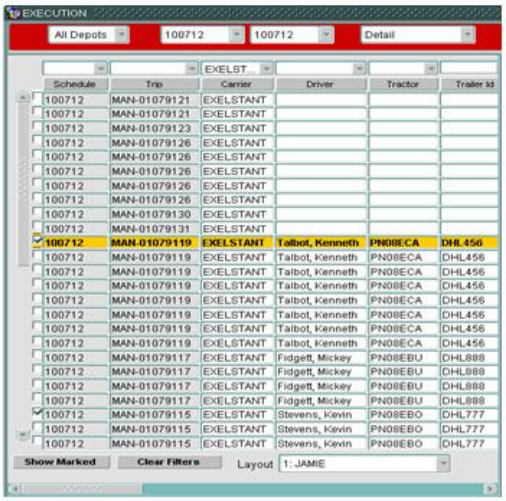
Sorting Trip information will always keep the relevant trip information together (the only exception to this is if two trailer numbers are used on one trip).

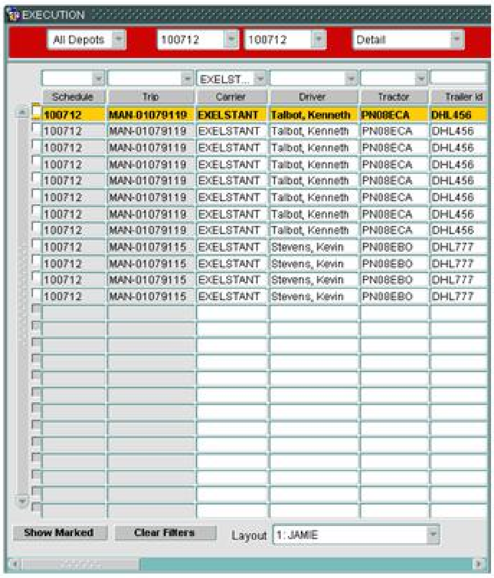
Sorting Trip information will allow users to move blank Carrier, Tractor, Driver or Trailer information to the top of the screen to show which still require allocating.

Please note that when sorting by any Order Detail Column (right hand pane) orders will be logically sorted and not be displayed in Trip groups.

4.6 Mark Trip

This allows user to see two or more trips together that may not be possible using the screen filters. To mark a trip select the white box at the far left of the display and then select the Show Marked button at the bottom left (see below). To clear the marked display use the Clear Filters button on the bottom left of the screen.



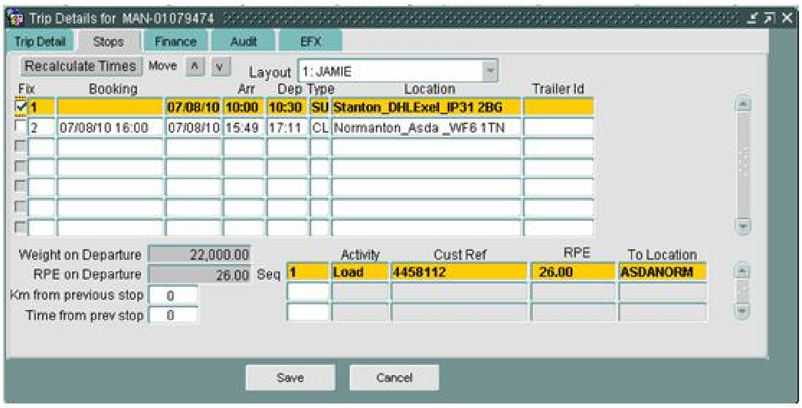


4.7 Right Click Functionality

Right click over either the Schedule or Trip columns gives the following menu:

4.7.1 Show Trip Details

Opens the Trip Details Form (see below). This form replicates the functionality provided by the section at the bottom right of the Trip Planning Screen and the top right of the Trip Manipulation Screen, it is spilt into five tabs which can be seen below.



4.7.2 Debrief Trip

This provides a short cut to the Debrief Screen for the selected trip.

4.7.3 Apply Order

Described later

4.7.4 Delete Trip

This can be used to delete the selected trip, all orders on the trip will return to the Unscheduled Orders Well.

4.7.5 Set Status

This allows the update of trip status.

4.7.6 Resource Details

Right click over Carrier, Driver, Tractor or Trailer columns will give the following menu.

4.7.7 Edit Resources

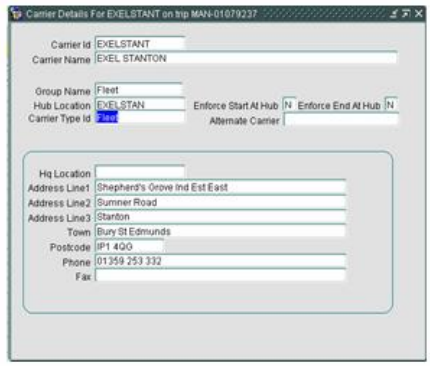
Selecting Edit Resources opens the following window.

To allocate resources type into the relevant field and use the Tab key to move between fields. The Cancel button will ignore any changes made, the Save button will apply any details entered and the Remove All button will remove driver, tractor and trailer.

Resource allocation is dependent on whether or not a Carrier is set up as Free Text or Pop List. If a Carrier is set up as Free Text anything can be entered into the fields. If the Carrier is set up as Pop List the system will not allow the entry of a resource not set up in the Pop List. For Pop List entry users can either fully or partially type in an entry that will be accepted if valid or if it is invalid a list of available alternatives will be displayed to select, alternatively selecting the grey box at the end of the field will produce a list of available alternatives. Currently the Trailer field is set as Free Text for all carriers.

4.7.7.1 View Carrier Details

View Carrier Details will display details as below:



4.7.7.2 View Tractor Details

View Tractor Details will display details as below:

4.7.7.3 View Driver Details

View Driver Details will display details as below:

4.7.7.4 View Trailer Details

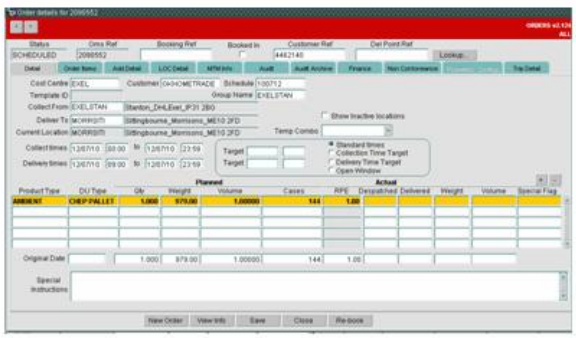
View Trailer Details will display details as below:

4.8 Right Click Functionality Order Pane

Right click over any field on the right hand Order Pane gives the following menu:

4.8.1 View Order Details

Selecting View Order Details will open the main Order details template for that order.



4.8.2 Move Order

Selecting Move Order will allow the option to select a single order to move between trips. Once selected the external reference field for the order will be highlighted in blue.

4.8.3 Apply Order

Right click over either the Schedule or Trip columns allows the order selected using the Move Order functionality to be applied to the selected trip. The customer order number for the selected order will be displayed against the Apply Order option (see below).

4.8.4 Unschedule Order

Selecting Unschedule Order will allow the option to remove an order from a trip and return it to the Unscheduled Orders Form (it will also display in the Trip Planning and Trip Manipulation screen order wells). If there is only one order on a trip and it is removed using this function the trip will still exist but not display in the Execution Screen (it will be visible in the Trip Planning and Trip Manipulation Screens), as an alternative the Delete Trip functionality is recommended to remove the last order from a trip.

4.8.5 View Order Locations

Selecting View Order Locations displays order address details. This is the same functionality as explained in the Unscheduled Orders Form.

4.8.6 View Trip Locations

If the screen is configured to show either Load or Unload location there is a right click option to view trip locations. For most orders order location and trip location will be the same but for a cross docked orders trip location will display the load and unload points of the order on that trip.

4.8.7 Carrier Cost Entry Short Cut

If carrier cost is zero; double clicking in either the Carrier Cost or Cost Column opens a new form shown below and allows a carrier cost to be entered.

Please note costs can only be applied using this short cut if there is no value in Carrier cost.

If Carrier costs have already been entered additional costs can be entered using the Trip Detail Tab.

4.8.8 Revenue, Carrier Cost, Cost and Profit Fields

Revenue, Carrier Cost, Cost and Profit fields show the totals for the trip duplicated against each line on the trip. The totals at the top of each column discount this duplication (see below).

The Order Revenue is displayed per order and there is only one line per order.

260.00	319.21	260.00	59.21	
Carrier Cost	Revenue	Cost	Profit	Ord Rev
260.00	319.21	260.00	59.21	84.92
260.00	319.21	260.00	59.21	68.09
260.00	319.21	260.00	59.21	41.83
260.00	319.21	260.00	59.21	56.62
260.00	319.21	260.00	59.21	67.75

On the example above you will notice the Carrier Cost and Cost columns display the same information.

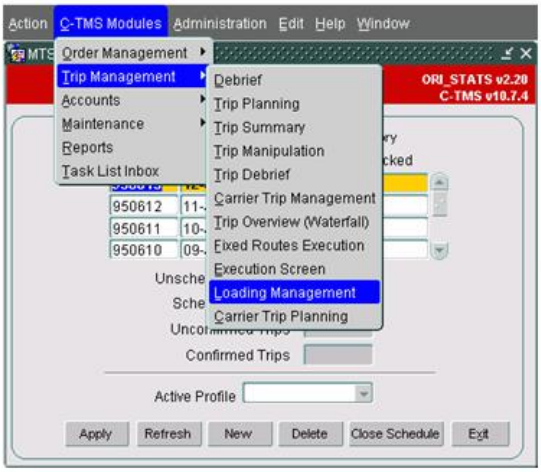
Carrier Cost is any external Carrier charges applied to the trip. The Cost column shows the total costs for the Trip, in most cases Carrier Cost and Cost columns will display the same information as in the example above.

For Trips which have been Cross docked through an internal Consolidation Centre the figures may vary. The Carrier Cost column will display any carrier charges for the trunk leg of the trip and the Cost column will display the sum of those trunk costs and any internally charged tariff for the radial delivery. The radial delivery charges will not be calculated and displayed until the trip status is set to Accepted or beyond.

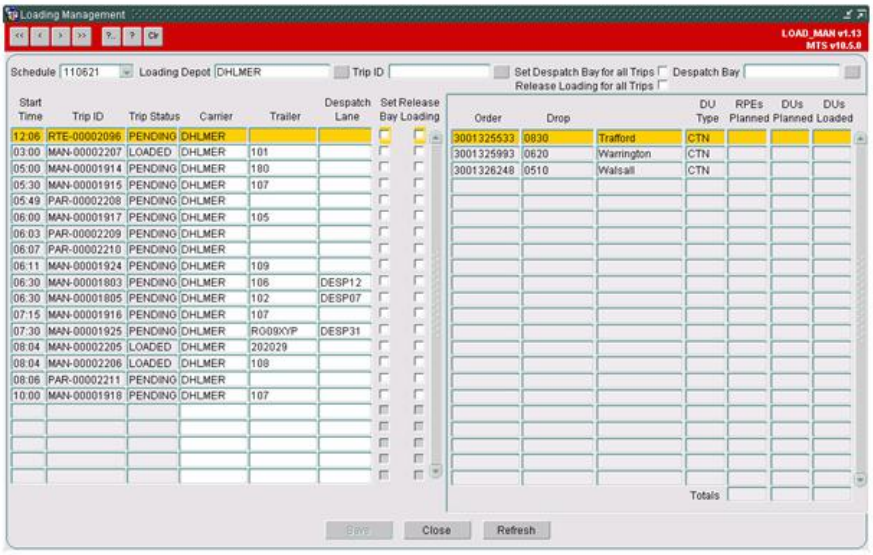
5 Loading Management

The ?Loading Management? screen is a module within C-TMS that allows the users to assign despatch bays, carriers and trailers to outbound trips, and to send a release loading message to WCS.

Access from the menu is shown below:



The screenshot below shows an example of the outbound trips present on a schedule in the loading depot:



5.1 Searching

The ?Schedule? and the ?Loading Depot?, plus the optional ?Trip ID?, may be used as search parameters and the search may be performed via the ?Refresh? button.

A list of values is available in the ?Loading Depot?, ?Trip ID?, ?Despatch Bay?, ?Carrier?, ?Trailer? and ?Despatch lane? fields.

5.2 Display

The first line displayed contains the search parameters ?Schedule?, ?Loading Depot? and ?Trip ID?, plus 2 tick boxes ?Set Despatch Bay for all Trips? and ?Release Loading for all Trips?, plus the ?Despatch Bay?: the tick boxes and the ?Despatch Bay? field are used to update the trips and not as search parameters (see the ?Processing? section below).

The screen is designed to display the active trips being loaded at the owning depot in a table on the left-hand side and the trip?s transport orders in a separate table on the right-hand side.

In the example above trip ?RTE-00002096? is on schedule ?110621? for loading at depot ?DHLMER? and it has 3 transport orders ?3001325533?, ?3001325993? and ?300132648?.

The trips are displayed in the ascending sequence of ?Start Time? and ?Trip ID? so that the earliest scheduled trips are displayed first; the transport orders assigned to the trips are displayed in the sequence of their customer references (i.e. in the ?Order? column).

Each trip will display the following data:

Heading	Description
Start Time	The start time of the trip on the schedule
Trip ID	The trip ID
Trip Status	The description of the calculated trip status based on the progress of the loading of the items onto the trailer (see notes below for a full description of the calculation)
Trailer	The trailer ID assigned to the first stop of the trip
Despatch Lane	The despatch lane in which the trailer is being loaded
Set Bay	A tick box to indicate if the despatch lane has been added, changed or deleted within the current session
Release Loading	A tick box to indicate whether the trip will generate its 'Release Loading' message when the user presses 'Save'

Each order will display the following data:

Heading	Description
Order	The customer reference of the transport order
Drop	The destination location code and name of the transport order
DU Type	The DU type of the items being loaded
RPEs Planned	The RPE quantity of items scanned for despatch
DUs Planned	The quantity of items scanned for despatch (using reason code SU, LN, ON, EN, LP, OP, EP or IA)
DUs Loaded	The quantity of items scanned as loaded (using reason code SL, XL, OL or UL)
Totals	A subtotal of the quantities per trip

The ?Trip Status? is calculated based as the situation of the scanned items:

Trip Status	Description
PENDING	The items on the trip have not been scanned for despatch and a 442 release loading message has not been sent to WCS
LOADING	An item on the trip has been scanned for despatch and a 442 release loading message has been sent to WCS
LOADED	All of the items on the trip have been scanned as loaded and a 841 loading confirmation message has been received from WCS

5.3 Processing

The screen allows the user to assign a despatch lane to the trip and thus move the items to that despatch lane, and to send the 442 release loading message to WCS.

5.3.1 Despatch Lane Assignment

There are 3 methods to assign trips to a despatch lane:

1. Enter the ?Despatch Bay? in the field of that name and tick the ?Set Despatch Bay for all Trips? box: this will then assign the despatch bay selected as the despatch lane of each trip that fulfils the following criteria:

a) A despatch lane has not been assigned already to the trip.

b) The trip has a status of ?PLANNED?, ?ACCEPTED? or ?EN-ROUTE?.

2. Tick the ?Set Despatch Bay for all Trips? box without selecting a ?Despatch Bay? in the field of that name: this will then assign a default despatch lane setup for the first drop of the trip as the despatch lane of each trip that fulfils the following criteria:

a) A despatch lane has not been assigned already to the trip.

b) The trip has a status of ?PLANNED?, ?ACCEPTED? or ?EN-ROUTE?.

c) A default despatch lane exists for the first drop of the trip.

3. Enter the ?Despatch Lane? of the trip.

Once the ?Despatch Lane? of the trip has been changed then its ?Set Bay? box will be ticked to indicate that the change has happened.

5.3.2 Despatch Lane De-assignment

If the ?Set Bay? box is ticked and the ?Set Despatch Bay for all Trips? box is unticked then the ?Despatch Lane? of the trip may be removed if it matches the ?Despatch Bay? set: this functionality allows the user to reverse the despatch lane assignment performed. Carrier Assignment The carrier may be assigned to the trip in the ?Carrier? field if the following conditions are met:

- The status of the trip is not one of 'CONFIRMED', 'ARCHIVE', 'DELETED', 'TENDERED', 'ACCEPTED', 'REJECTED' or 'EN-ROUTE'.
- The carrier is compatible with the tractor, driver and crew members.
- The current currency of the trip would not be changed.

5.3.3 Trailer Assignment

The trailer may be assigned to the trip in the ?Trailer? field if the following conditions are met:

- A carrier has been assigned to the trip.
- A compatible trailer type has been assigned to the trip.
- An incompatible tractor has not been assigned to the trip.

5.3.4 Release Loading

There are 2 methods to send a release loading message to WCS:

1. Tick the ?Release Loading for all Trips? box: this will then tick all of the ?Release Loading? boxes for the trips. If the box is unticked then all of the ?Release Loading? boxes for the trips will be unticked.
2. Tick the ?Release Loading? box for the trip.

5.3.5 Updating

If the ?Despatch Lane? has been changed then the current location of the order items will be moved to the despatch lane set if they are present in the grid or quality checked in a quarantine location.

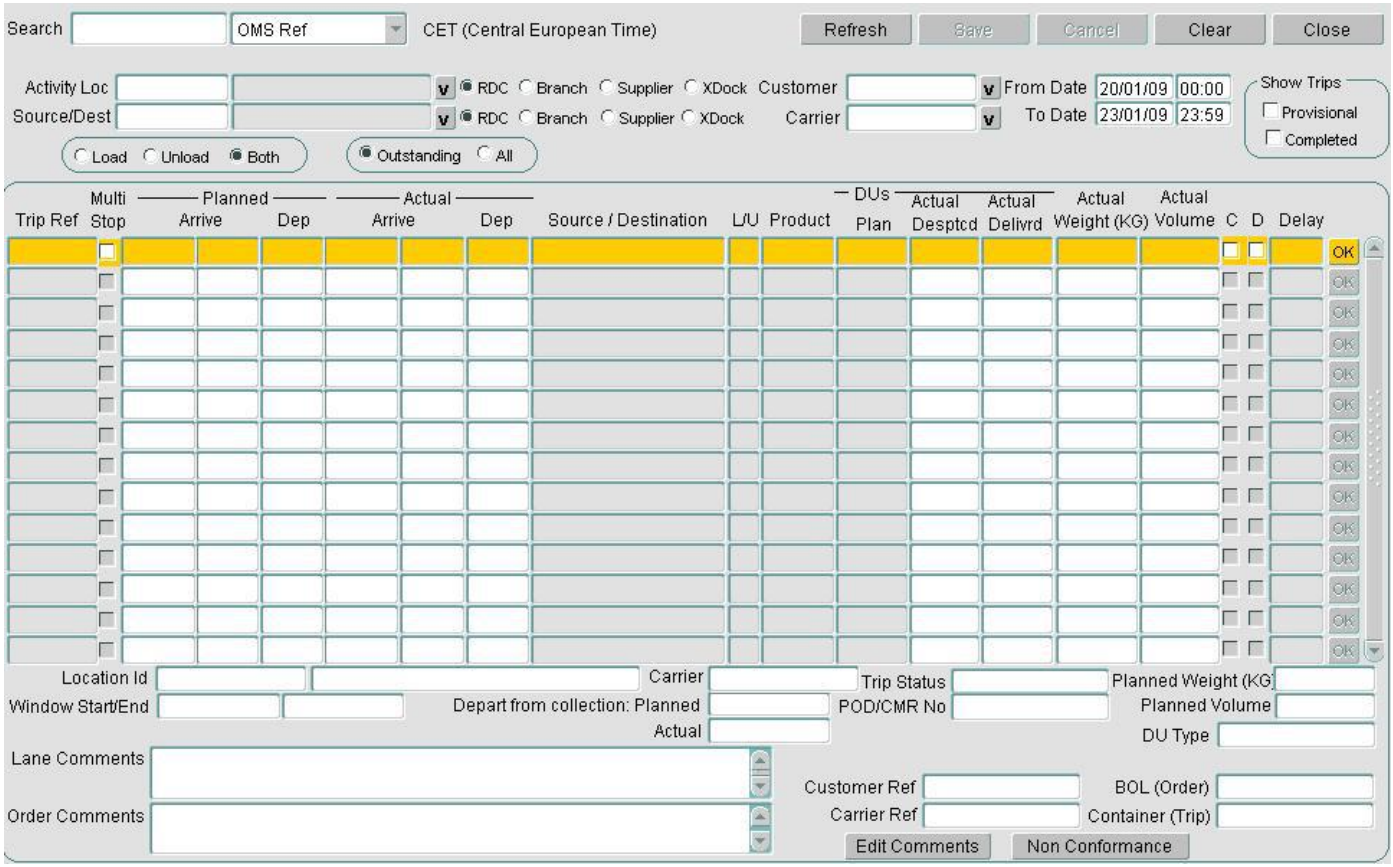
If the ?Release Loading? box is ticked when the ?Save? button is pressed then a release loading 442 message will be sent to WCS.

6 Order Tracking

6.1 Order Tracking

The Order Tracking form can be accessed from the Order management menu.

The Order Tracking form provides both Planners and Customers with a means to track the progress of Orders and Trips. The form provides a real time view enabling users based at a location to identify collections and deliveries that are planned in the near future and to act accordingly and ensure that they are ready when the truck arrives. Once the collection or delivery has been completed, actual times and quantity data can be entered and the collection or delivery confirmed. If there have been any problems with the collection or delivery such as missing documentation these details can be entered and stored in the system via the **Non Conformance** button. The actual times are then used to calculate the expected time of arrival at the next location, if the truck departed late from the first location, its expected time of arrival at the second location will be adjusted by the same time. Trips that are running behind schedule are displayed in red so that they are clearly visible to all users.



The Order Tracking form uses Access Control to ensure that a user can only see Trips / Orders that are appropriate to them and also offers a wide variety of filter options to further restrict what is displayed.

You can find, search and filter the orders displayed using the provided criteria at the top of the screen. By default, this will show all orders from today and forward 3 days. You can change the criteria and refresh with the **Refresh** button. You can clear the criteria with the **Clear** button.

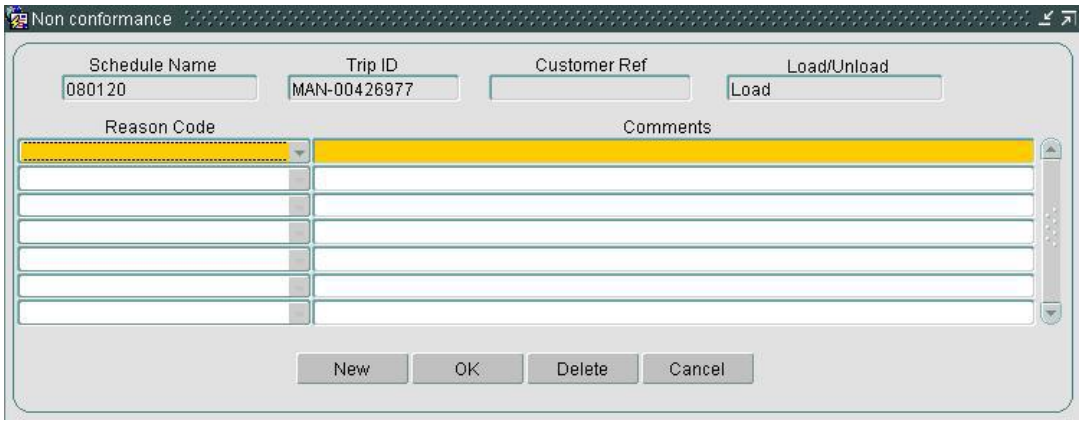
The following activities can be carried out within the Order Tracking form:

- View provisional or completed orders / trips.
- Search for a specific order or trip by OMS Ref, Trip Reference, Customer Ref, Carrier Ref, Bill of Lading (Order), Container No (Order), Container No (Trip), Booking Ref and Order Id.
- Search for all trips / orders for a specific customer or carrier.
- Search for all trips / orders between a date range.
- Search for all trips / orders between 2 RDC / Branch / Supplied / XDock locations.

- View Load / Unload activities or a combination of both.
- Amend planned times.
- Enter actual times.
- Enter actual quantity, weight and volume.
- Confirm the Collection.
- Confirm the Delivery.
- Edit Order comments.
- Apply non-conformance reasons if any problems have occurred with the collection or delivery of an Order.
- View a specific order in the Orders form by right-clicking a line in the well and selecting *Order*.
- View a specific trip in the Trip Debrief form by right-clicking a line in the well and selecting *Trip*.
- View the SAP details of the products by right-clicking a line in the well and selecting *View SAP Details*.

Any changes you make can be saved with the **Save** button, or discarded with the **Cancel** button.

The following screen is used to enter details of any problems that occurred during the collection or delivery of the order, by clicking the **Non Conformance** button:-



7 Tag to Asset T2A System

7.1 Introduction

This system is intended to be used by the Hospital Services team within each depot, for the following purposes:

- to place the picked stock for orders into reusable assets.
- To create bookings
- To despatch trips and confirm items despatched for 3PC and customer-own transport trips.
- To bulk forward items in large media e.g. cages.
- To upload large media of bulk forwarded items.

7.2 Access Control

Your user must be configured, have a valid password and be set up for a default depot.

7.3 Login

Users will be prompted to login through a standard EPOD screen. The screen will prompt you to enter their username and password. This controls the depot under which the user is logged on and the access control.

Only if a user is set up for this application and if the user name and password are correct will you be allowed to continue.

Enter your user and password then click **Login**. You will be taken to the default page for the application, namely "T2A" - Tag to Asset scanning.

7.4 Menu

The menu shows all accessible screens in the system.

- Bookings
- T2A
- Despatch
- Asset Return
- Forward Items
- Asset Content Unloading

7.5 Exiting the System

Click the Log Out link on the top right of the screen.

There is a timed (session-based) log-off process built into the system to ensure that you are taken tack to the login screen if the session has not been active for longer than a proscribed time (for example 30 minutes).

7.6 Bookings

The screen will allow the users to enter a new booking, identifying an existing C-TMS (Pulse) order through the C-TMS OMS Reference or the Pulse Order Reference - any unbooked orders will be displayed with a Book button. Clicking this will show a popup and will prompt the user to enter the booking times, Carrier (for example, TNT, Hospital Collect, etc) and the P/O reference if required, although this is optional at this stage.

A C-TMS Trip will be automatically created for the order if one does not exist.

The users will also be able to find created bookings through a variety of search criteria, expected to include Schedule (defaulting to the current day), Carrier, Delivery Location, Order Reference, External Reference or Carrier Reference (expected to be the P/O number for external carriers).

Any matching bookings will be displayed - see the following prototype page design for details of the layout.

Once found, the user can then input arrival details of a created booking, including the Driver Name, Driver Badge (if required) and Vehicle Registration, by clicking the Arrive button. The arrival date and time will be automatically captured.

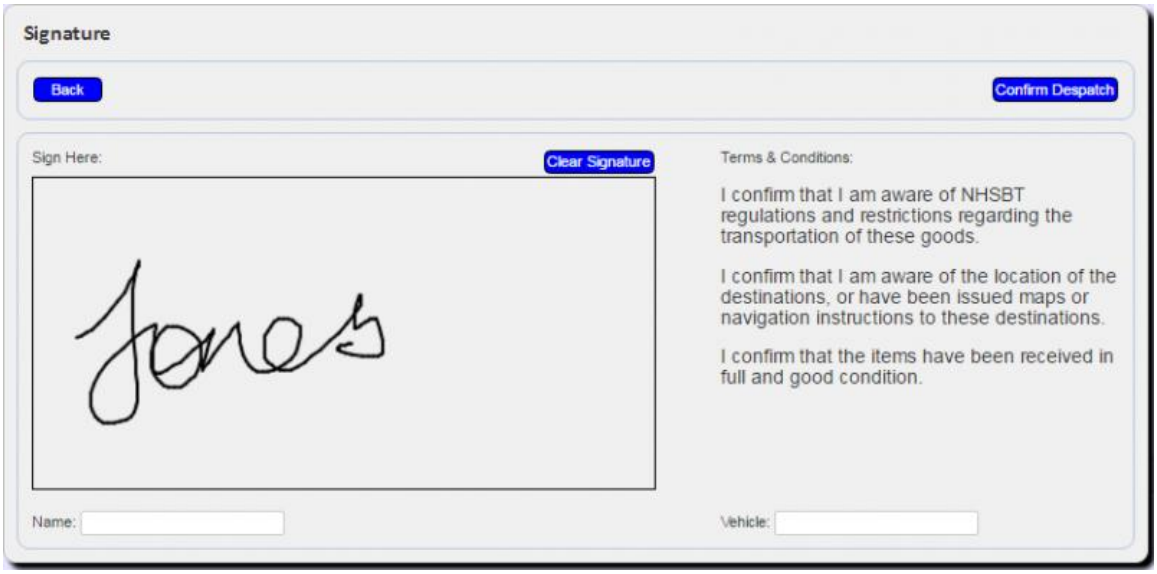
Once arrived, the details of the orders on the trip can be found by clicking on the Despatch button to display the Items to be despatched on that trip. This will use the existing Despatch Details screen, as shown below:

If no assets exist to be passed to the driver, then Tag to Asset may not have been completed for the orders yet. In this case, this can be seen on this screen. Furthermore, the existing Tag to Asset (T2A) screen can be used to pack the items, at which point they will subsequently be displayed on this screen.

Each item to be despatched can be scanned to determine that it has been despatched. As per the existing screen functionality and items may be removed.

Once all items are scanned, the Accept and Despatch button can be clicked. If a Carrier Reference is required but has not yet been entered, this screen will prompt for it to be entered at this stage.

If entered, a pop-up screen will request the signature and display the Name and Vehicle as previously entered.



The device can then be passed to the driver for signing. It is expected that Terms and Conditions for the acceptance of the load will be displayed here and a count of the items and a list of their id?s. The T&C?s wording will be designed to confirm that the driver knows the destination(s) or has been issued a map and in signs for that as well as the expected "Boxes received in good condition...".

Note: This process also works with Topaz Signature Tablets.

Once signed for, the orders will be confirmed as despatched for the 3PC.

For HOT, the items wil also be marked as delivered.

The trip will be set to EN-ROUTE for 3PC and COMPLETED for HOT.

The Signatory (i.e. 3PC Driver Name) and Signature is stored on C-TMS. This is visible through the POC button against the order at Debrief.

Once the signature is confirmed and saved, the summary list of trips screen is re-displayed.

7.7 T2A

When an order is packed into the appropriate box for delivery, Hospital Services will scan both the buff tags for the delivery and the asset box into which the delivery has been packed, this information will then be used to update C-TMS to indicate which order items have been packed into a particular asset.

The aim of these processes is that they have been written to ensure hands-free operation if possible (where there are no issues with either the orders for the items or the assets being scanned).

The process flow is as follows:

- Scan Tag 1
- Scan Tag 2
- Scan Tag 3
- Scan Asset 1 - marks tags 1-3 as in Asset 1
- Scan Tag 4
- Scan Tag 5
- Scan Asset 2 - marks tags 4-5 in Asset 2

The user of the system will not be allowed to continue until all scanned tags are marked as in an Asset.

The screen will display with several sections and buttons:

- Prompt for Asset entry and an Enter button. The asset entry text box will be focused for entry.
- An Error display section, below the text entry.
- A Buff Tags section, containing a table, initially empty.
- An Assets Scanned section, containing a table with a single row, initially empty.
- A **Clear All** button.

The user will be able to scroll through the buff tags, if there are more than 6 tags scanned against an asset.

The Assets Scanned table will be a single header and row.

The **Clear All** button can be used to clear any already-entered details (Asset and Buff Tag table rows) - pressing the button will request confirmation before clearing the data.

7.7.1 Scan the Buff Tags

Scan the barcode on the Buff Tag (or if not recognised the barcode text can be keyed in through the keyboard - followed by a Return/Enter key).

If the barcode is invalid then it will display a warning (in large, red text format) under the barcode entry line, displaying "Barcode Type Invalid". The system will also sound an audible warning tone. The alert will quickly fade after 2 seconds.

Once the Buff tag barcode is recognised, the user can then continue and scan subsequent Buff tags associated to the Asset.

The details of the Buff Tag are displayed in the second panel with a displayed message ?Checking?.? - this validates with CTMS that the order is available and the details will be passed back and displayed.

The details in the Buff Tag panel are coloured coded indicating an error has occurred and the user needs intervene with an action or confirm/remove the details entered as follows -

If the scanned item passes the validation, the line will be added with a simple Remove button which, when clicked, will remove the row.

Validation Checks are as follows - for any errors the User can then determine whether to remove the Buff tag or confirm that should be agreed.

Issue	Status	Detail	Option
The order doesn't exist	Red	Error:" plus the reason for the error "	Remove
The order has already been confirmed	Red	Error:" plus the reason for the error "	Remove
The collection stop for the planned trip for this order has an actual depart time (i.e. the item has already been loaded	Red	Error:" plus the reason for the error "	Remove
Destination Location different to other Buff Tags scanned	Red	Details - "Error: Location Different"	Remove
If the scanned item is planned, the application will check the trip and stop information of this item against any previous items scanned. If they are different, the line with the later delivery will be require confirmation that the item may be moved onto the earlier delivery. To reflect this	Amber	Text to show that this item will be planned with these other items	Remove or Confirm can be moved to an earlier delivery
If the scanned item is not planned, the application will check the planned order times against those of tags already scanned. If the planned times do not exist within the same range, this line will be changed to show this	Amber	Text to show that this item will be planned with these other items	Remove or Confirm that this item will be planned with these other items.
The application will check whether the item has already been scanned into an asset (by checking the returned asset ID from the message). If set, the line will be changed to show this	Amber	Text to show that this item will has already been scanned and the Asset ID	Remove

The user can continue to scan items, which will follow the process and validation above. To associate all of the items together and update C-TMS with the details, a valid permanent asset must then be scanned.

Note: Items may be scanned to boxes for orders at any stage of the trip, even when the trip is EN-ROUTE. However, if the stop for that trip that the order is planned on has been marked as Departed (with an actual departure time), then you will not be allowed to scan any more items to boxes, as the vehicle collecting them has already departed.

Similarly, if the trip is already complete or the order is already delivered, scanning items is not allowed.

7.7.2 Scan the Permanent Asset

If it is a valid asset number and there are no issues with the barcode scanned, the details of the asset type will be displayed (for visual recognition), however the user will have the opportunity to Remove this asset if required.

Issue	Status	Detail	Option
asset is marked as inactive	Red	Asset X is inactive and cannot be used	Scan another Asset Barcode
active orders already in the asset	Red	Asset already has tags - please confirm	Validate all tags on assets and confirm or Scan another Asset barcode
the asset not found	Red	Status - "Unknown Asset	Select asset type from Dropdown list and confirm or Scan another Asset Barcode
the asset has no defined asset type	Red	Status - "Unknown Asset	Select asset type from Dropdown list and confirm or Scan another Asset Barcode

If a change is made to the asset details, once entered the user has the option to press the **Save and Confirm** button.

7.7.3 Confirm Details

If the asset had no issues, or the Confirm button at the bottom of the screen is pressed, the application validates:

- No buff tags are in error (i.e. red background).
- The asset must be entered and valid, with asset type details.
- There must be buff tags entered.

If any validation is not passed, an appropriate error message is displayed in the error section, showing all the issues, for example:

- "Invalid buff tags must be removed"
- "You must enter an asset type or remove the asset"
- "Buff tags must be entered for the asset."

The User will then be required to resolve these problems.

The application will check if there are any warnings outstanding (i.e. buff tags that are planned for a different time or trip than others in the asset). If this is a case, a confirmation dialogue will be shown, showing all the details:

- The asset
- The buff tags with warnings and their details
- The trip and stop (or planned time window) into which these items will be moved.
- A **Confirm** and a **Cancel** button.

By clicking the **Cancel** button will return you the main screen, with all data preserved, allowing any modifications to be made and then confirm again.

7.8 Despatch

The Third Party Carrier (3PC) process, comprising external carriers / couriers like TNT and Hospital Own Transport (HOT) requires functionality in three areas to support processes for operations through a system accessible on a tablet or other portable computer, or a work station:

- Despatch
- Inbound
- Empty Assets

The Despatch process and supporting functionality comprises the following principle features:

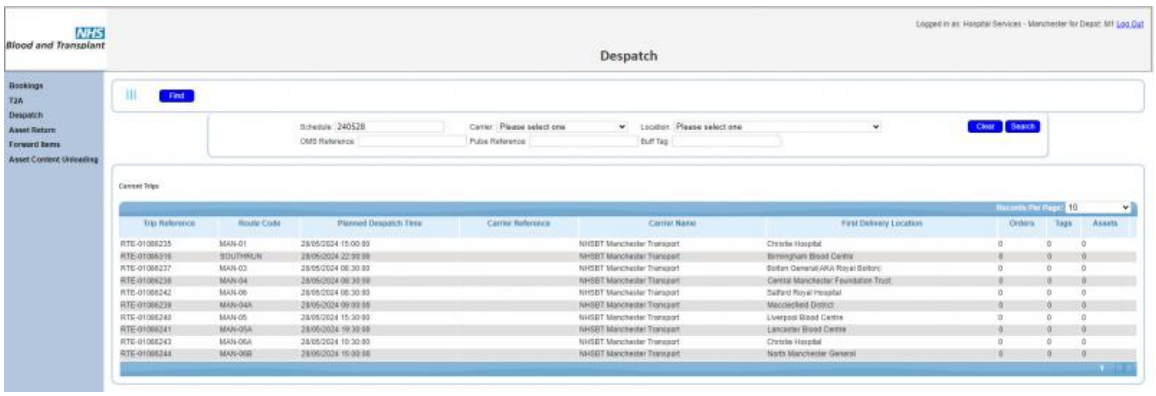
- Easy selection and filtering of trips by carrier type.
- Finding trips by PULSE or manual order references assigned to 3PC.
- Scanning of items for despatch using a tethered or Bluetooth wireless bar code scanner.
- Modifications and error corrections of despatching items.
- Capture of driver name and Id and vehicle registration.
- Display of orders and delivery units by delivery location to help brief the driver.
- Signatory and Signature capture to confirm despatch.
- Store Signatory and Signature in C-TMS and display from show POC button.
- Update C-TMS to confirm the despatch at Trip, Order and Item.

The 3PC process is designed assuming the following system pre-requisites concerning C-TMS:

- Orders will be planned to Trips assigned to a third party carrier (e.g. Hospital-Own Transport or TNT). These trips might represent a single ad-hoc order (or a consolidation of orders) from a depot to a single destination delivery or routine regular rounds from depot to deliver to a list of destinations in turn. The trips will have been planned and scheduled and assigned to an external carrier.
- Transport Orders (through EDI or manually entered into C-TMS or Portal) assigned to 3PC carriers will require the agreed order reference to be keyed into the Booking Reference field of each order in C-TMS; and the 3PC

order reference to be keyed into the trip PO reference in C-TMS.
- The C-TMS order Booking Reference and trip PO reference will be modifiable after acceptance of the trip.

This Despatch Screen displays a list of the trips loading for that centre for the selected day schedule, filterable by the carriers assigned to the depot of the user that is signed on and the carrier type.



A **Find** button allows a trip to be selected based on a known order reference. Each trip not yet despatched will be displayed, so PLANNED, TENDERED and ACCEPTED trips.

The find criteria are:

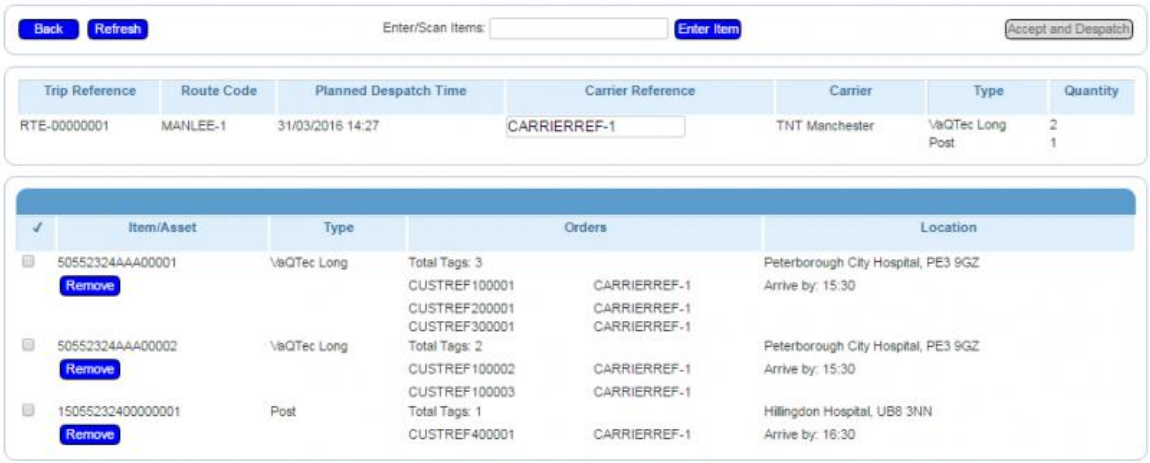
- Schedule
- Carrier
- Location
- OMS Reference
- External (PULSE) Order Reference
- Buff Tag

The list of trips shows:

- Trip Reference
- Route Code
- Planned Despatch Time
- Carrier Reference
- Carrier Name
- First delivery location
- Count of Orders
- Count of Tags (increment by order issued from PULSE)
- Count of Assets / Items (increment by T2A scanning)

The carrier reference will be captured from the 3PC interface or manually keyed against the trip PO Reference and Order Booking Reference in C-TMS once the booking is made by transport.

The user signed on will then be able to drill into the trip to see the **Details** of all the PULSE orders to be despatched, the status of T2A for each order, and the asset id?s similar to the existing Box Status Screen in C-TMS.



The heading shows the same trip details as above confirming the selection from the trip list.

The detail list shows each delivery order in drop sequence:

- Asset Item Code or one way label number
- Delivery Unit (DU) Type
- PULSE Order References (Request No) and Box Numbers (Tag Reference)
- Carrier reference
- Destination Location Code, Name and Address

Note that this list will repeat Asset Item Codes where consolidation across orders has been determined through T2A scanning.

A box / item summary will be displayed showing the count of each asset/item type to be handed over to the driver.

A **Scan** button and input field will be presented that will allow asset/items to be scanned to assist the reconciliation process. The scan function will allow label scan and validation against a list of known permanent asset numbers (assigned to orders planned to the trip from the T2A packing function). As each asset is scanned, the display checkbox will be ticked and the asset number will be displayed in green as confirmation the asset is accounted for.

Once all the expected assets are scanned, a reconciled status icon will be displayed to confirm the scanning is complete and the user can then move on to the next stage of the process.

If an asset is scanned that is not recognised for the despatch, an appropriate error will be displayed and the user prompted to check the asset and to use the T2A screen to add the asset if it is to be despatched.

Note: 3PC references are most likely assigned per trip, so the reference for all orders on a trip is likely to be the same.

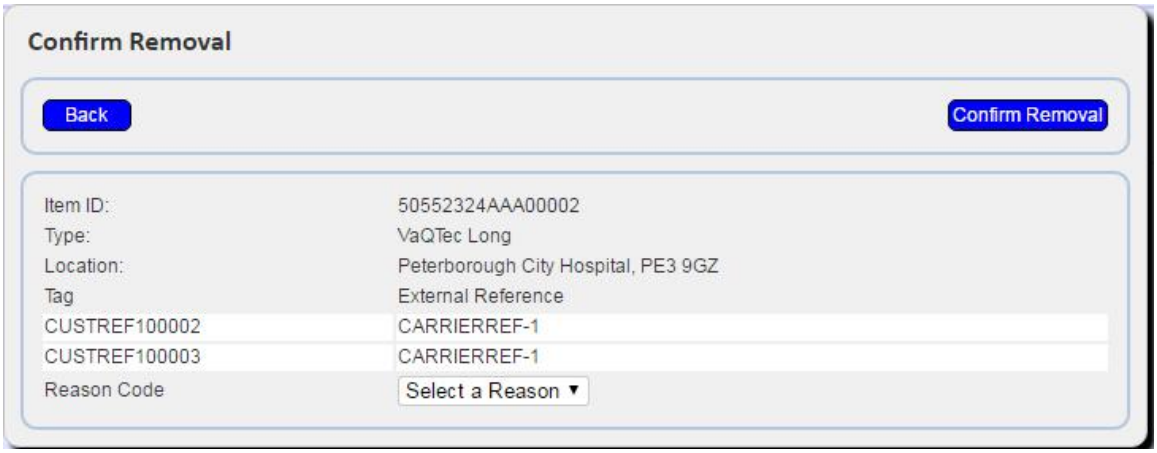
The user will have access to the existing T2A screen to resolve any issues with the assets shown on the screen, for example:

- If an order is found in an Asset that is not shown on the screen, the user can use T2A to add this order buff tag to the asset.
- If an order is missing from an Asset (i.e. shown in the screen but not in the Asset), the user can use T2A to remove the tag(s) from the asset.

If an order is to be added to the trip despatch representing an additional location, the users will request transport to make the change to plan using C-TMS and then users can use the T2A screen (if not already done) and then scan for despatch. This is unlikely to happen in practice unless the booking with TNT has been re-negotiated.

Where delivery orders are planned for a destination drop, an ad-hoc one way label item can be added to the despatch, for example an envelope of paperwork, and the screen will provide an ad-hoc item scan button and field to support this action. Once the additional item is scanned and validated as the correct label type, the screen will then prompt for the destination location from a drop down list. Only locations on the current trip route as planned by transport will be available.

If any asset/items are to be removed from the trip and not despatched, a **Remove** button against the asset/item is available.



This will require the user to enter a reason code, and on **Save**, the screen will remove the asset/item from the order. This action will retain the order on the trip (assuming other assets have been T2A assigned to the same order) and will retain the order issued information should that have been captured through the normal interface between PULSE and C-TMS.

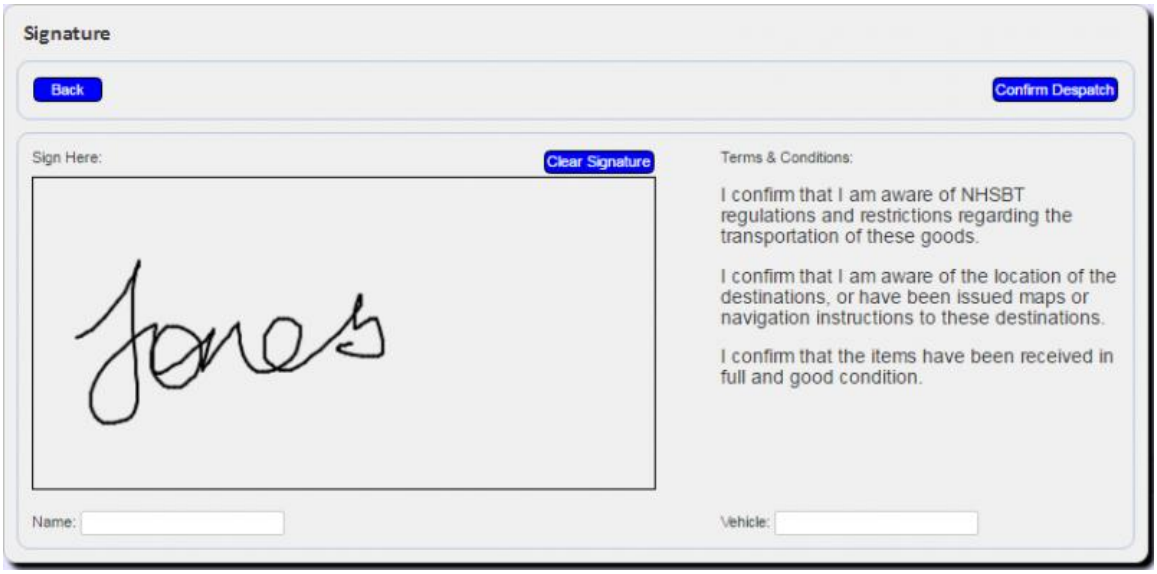
If an order is to be removed from the trip and not despatched, the users should request transport to make the change to plan using C-TMS.

Once any additions or deletions from the trip are entered, a **Refresh** button is available to display the current list asset/items, scan confirmations and totals. The user will be asked for confirmation, as this may result in items scanned so far being lost.

The screen allows the facility to enter the 3PC driver id and name here.

If a 3PC reference is not present, that can optionally be entered or changed at this stage of the process.

The checkboxes against the items will be monitored for changes - when all checkboxes for non-removed items are ticked (either through scanning or manually ticking the items), the **Accept and Despatch** button will become enabled, allowing the user to confirm the despatch. This will pop up a despatch signature entry screen.



The device can then be passed to the driver for signing. It is expected that Terms and Conditions for the acceptance of the load will be displayed here and a count of the items and a list of their id?s. The T&C?s wording will be designed to confirm that the driver knows the destination(s) or has been issued a map and in signs for that as well as the expected "Boxes received in good condition...".

Note: This process also works with Topaz Signature Tablets.

Once signed for, the orders will be confirmed as despatched for the 3PC.

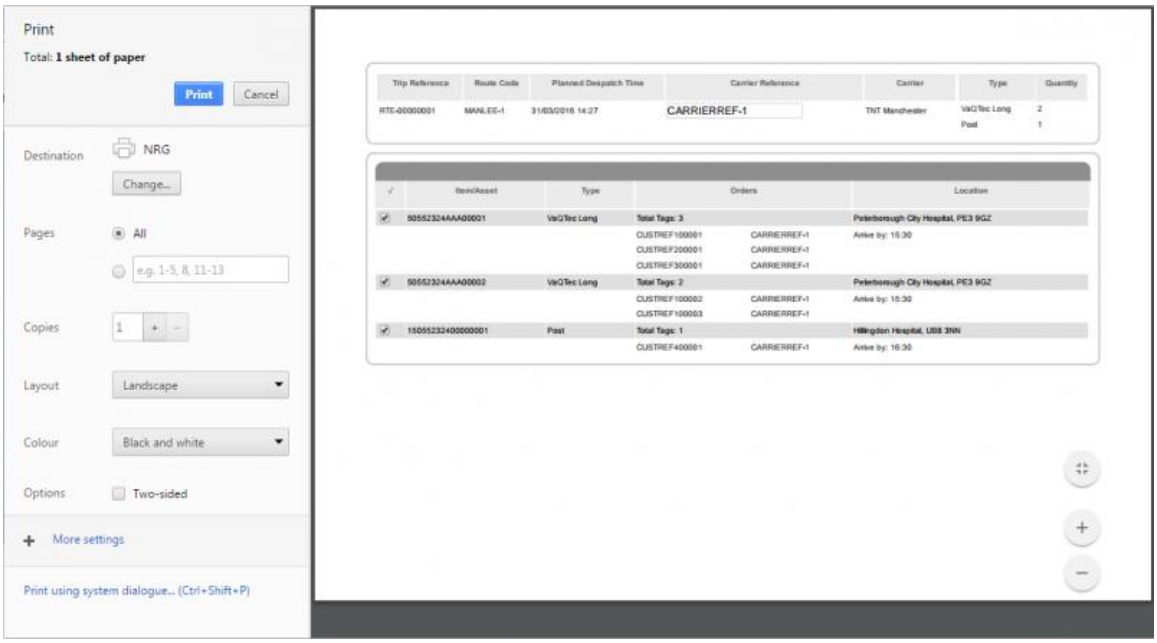
For HOT, the items wil also be marked as delivered.

The trip will be set to EN-ROUTE for 3PC and COMPLETED for HOT.

The Signatory (i.e. 3PC Driver Name) and Signature is stored on C-TMS. This is visible through the POC button against the order at Debrief.

Once the signature is confirmed and saved, the summary list of trips screen is re-displayed.

Once a trip is despatched, no further updates can be made to it. However, the user can still drill into the trip and see details. The **Confirm and Despatch** button is replaced with a **Print** button, which will start the printing process from the browser. Only the trip header and details will be printable.



7.9 Asset Return

An operative in depot will scan all returned assets to the asset store (on arrival or at end of day) using a tethered laser scanner linked to this screen.

The screen will operate similarly to the T2A screen - the user will be prompted for a barcode to scan.

When scanned, the screen will identify the asset - any errors will be displayed visibly and audibly in the screen.

If an asset is found, this will be updated as back in the depot into which it has been scanned, maintaining the history of the asset at this time.

This screen will also allow correction of asset details, or entry of assets that are not found.

Once scanned, the asset details will be checked, and the screen will allow the asset to be updated by this process, allowing the user to enter or change:

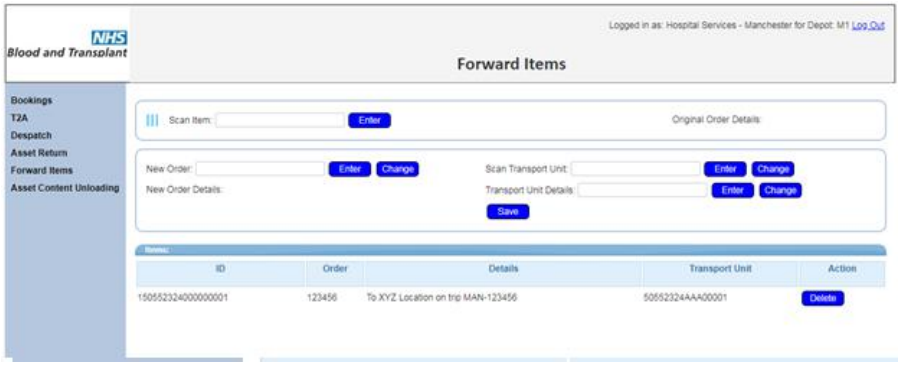
- Asset Type
- Active/Inactive

These details can then be saved.

7.10 Forward Items

This screen will allow:

- Scanning of items onto orders.
- Scanning of items on orders into primary transport assets.
- Identifying the primary transport asset type (if this is not a permanent asset).



Items or assets scanned into primary transport assets must be planned onto the same trip and for the same destination as each other. This includes assets being scanned into a primary transport asset that is already en-route on a trip through the network (for example, co-loading items into a cage at a cross-dock location, although it should be noted that NHSBT will not encourage this process).

It is expected that most items will be physically available to be consolidated into primary transport assets, but not all, depending on size, type and volume.

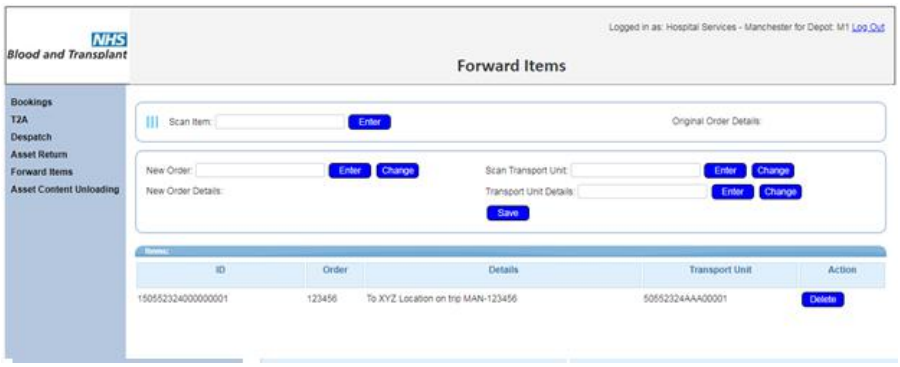
Permanent assets placed on orders and planned this way (either primary or inner) will update the asset history of that permanent asset, so that the operation can see assets moving through the network. This will be done for primary transport assets in the same way that normal permanent assets are tracked.

As items are added to or removed from a primary transport asset, the system will write order items reasons against the order, to audit the fact that the item has been placed in a transport unit.

7.11 Asset Content Unloading

This screen will:

- Allow the user to scan a primary transport asset ID.
- Find the contents of the primary transport asset and display the contents on the screen (an electronic manifest). The primary transport asset information will include the primary transport type, trip on which this was delivered to the depot, the location of the stop at which this transport unit was built and date/time arrived at the depot. The contents will display the inner asset ID and DU type.
- Scan the items inside the primary transport asset to mark them as unloaded.
- Mark any items not found with a reason code as to why.
- Add items to the asset if found and not on the electronic manifest, with a reason code.
- Confirm unloading complete.



An audit trail will be maintained of every item scanned, found or not found in the primary transport asset, and this information will be visible through the order items reasons against the order.

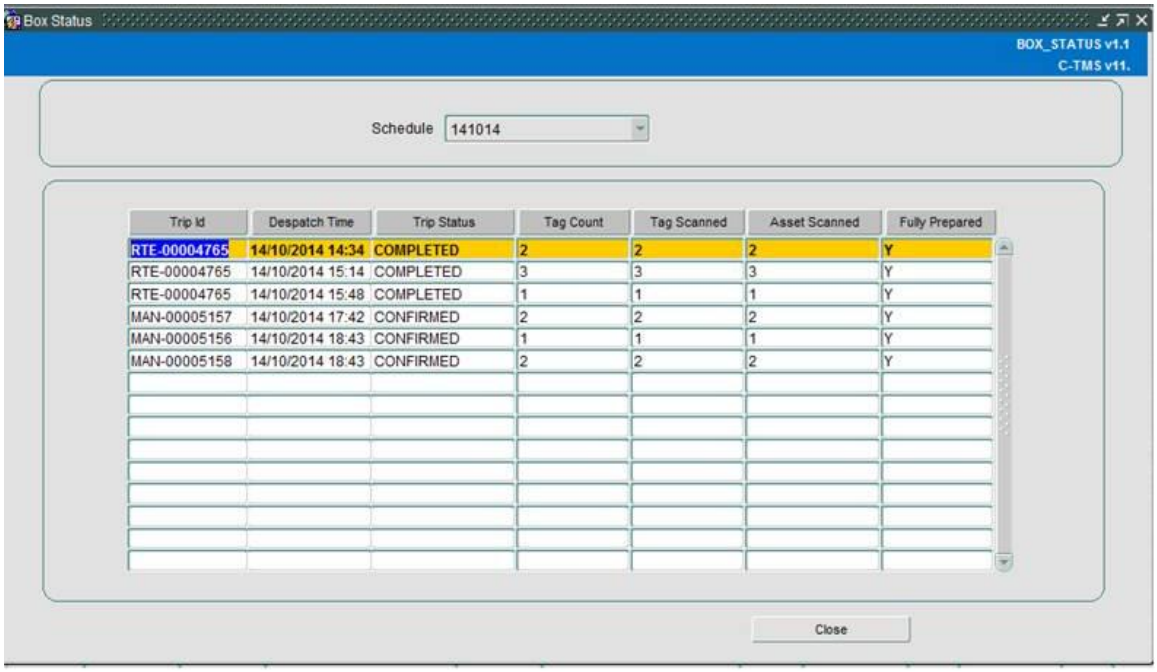
7.12 Further Configuration

The following System Parameters affect this functionality:

Parameter	Description	Level
T2A_ASSET_ARRIVED_OFFSET_DAYS	A number of offset days from the current date to select orders that have arrived at the depot for T2A Forward Items.	SYSTEM
T2A_ASSET_DUE_OFFSET_DAYS	A number of offset days from the current date to select orders that are due arrive at the depot for T2A Forward Items.	SYSTEM
TAG_TO_ASSET_SCANNING	Allow scanning and recording of Tags	SYSTEM
OMS_TAG_TO_ASSET_TYPE	Order types to be validated in TAG to Asset Scanning	SYSTEM

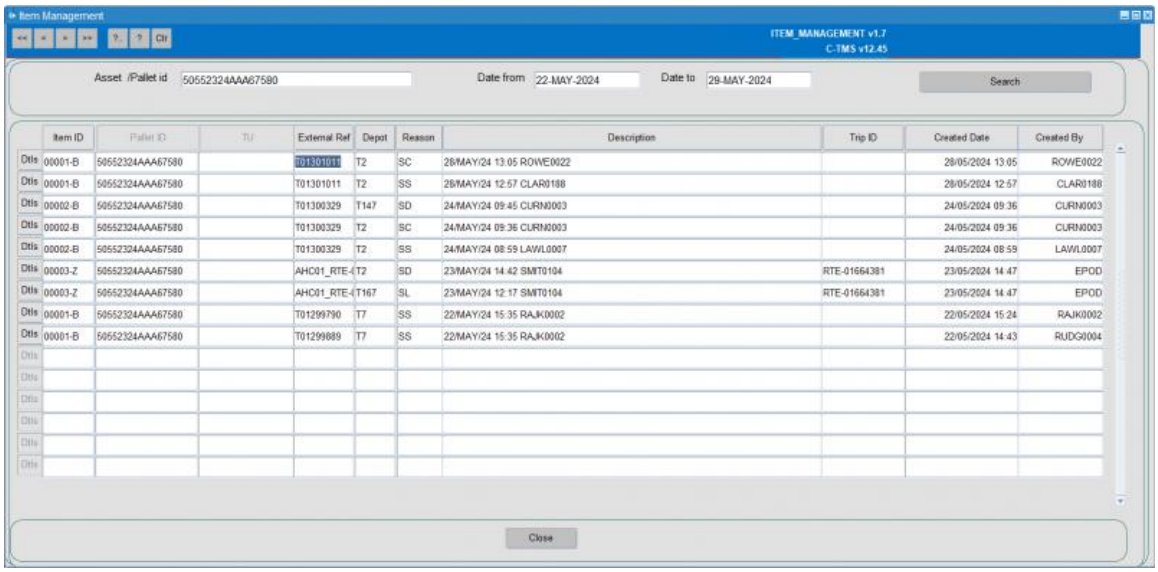
8 Box Status

From within C-TMS, the Box Status screen can be run. This allows the services to see all SU/PK trip stops from the depot for a schedule (defaults to today) in planned despatch time order, showing the status, driver and vehicle and the box status.



9 Item Management

This screen allows querying of the history of a specific asset or item.



You can search for items by:

- Entering an item or asset ID.
- Entering a date range (defaulting to the last week).

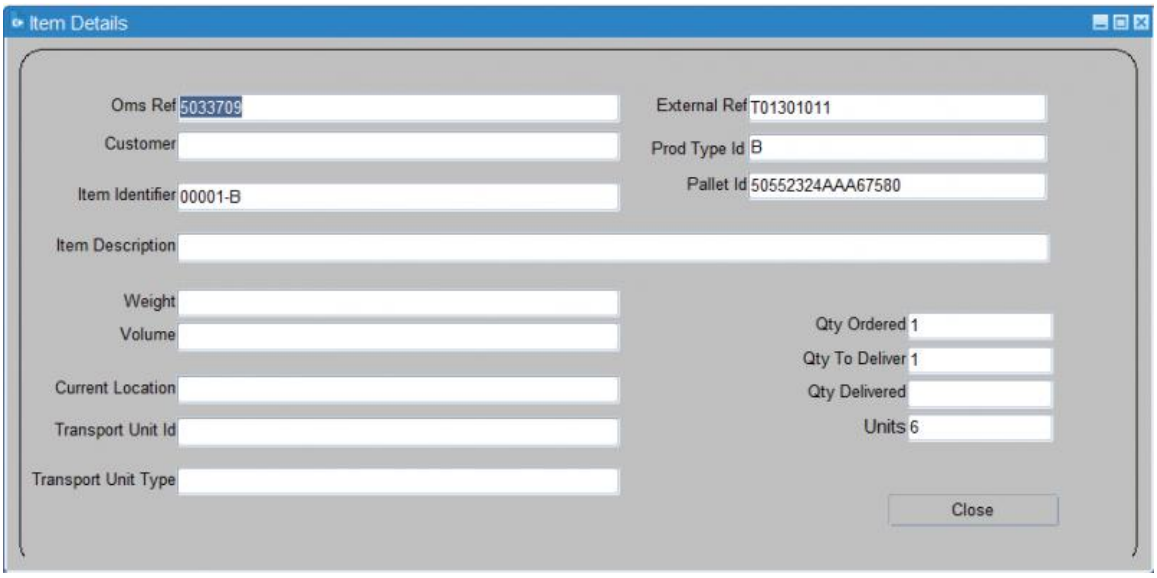
The screen displays a history of the item from latest (at the top) to earliest (at the bottom), so that you can see the movement of that item or asset through the network.

The information on this screen is sourced from Item reasons information.

The details shown will be as follows:

- Item - a unique item ID identifying the product in the box.
- Pallet
- TU - The transport unit ID - an outer transport media ID i.e. a cage into which the box has been placed.
- External Ref - the order external reference.
- Depot - the depot at which the event happened.
- Reason - a reason for the scanning event or exception. Common codes are:
    - SS - Successfully Scanned.
    - SC - Successfully Collected.
    - SL - Successfully Loaded.
    - SD - Successfully Delivered.
- Description - description of the scanning event.
- Trip ID
- Created Date
- Created By

There is also a **Dtls** button against each line to show more details of the order.



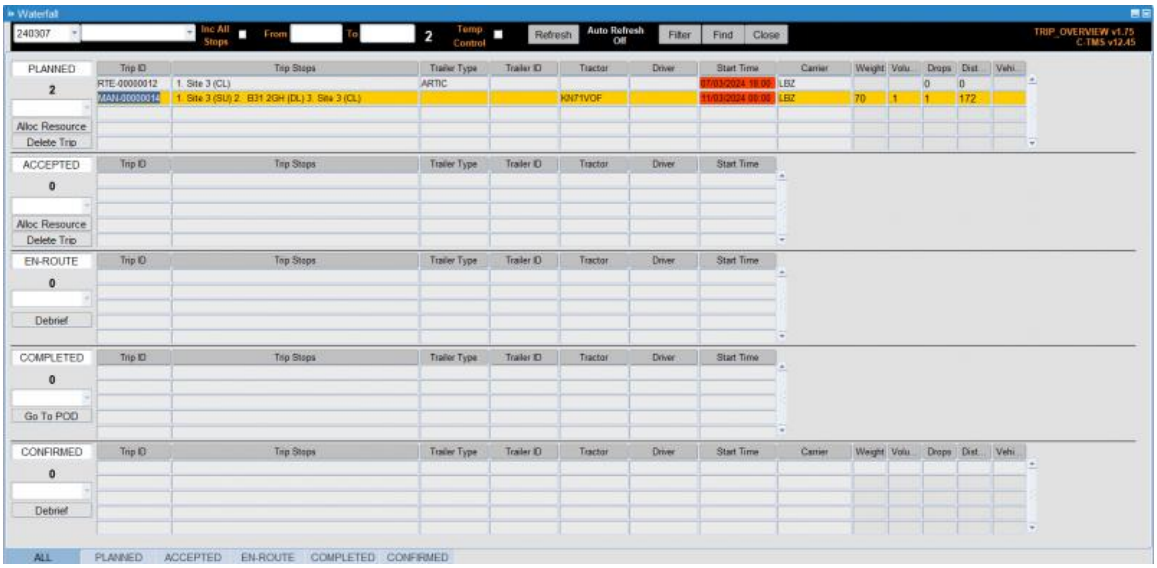
This screen displays:

- OMS Ref
- External Ref
- Customer
- Prod Type ID
- Item Identifier - a unique identifier
- Pallet ID - the containing box
- Item Description - a description
- Weight
- Volume
- Current Location - the current location if not in transit.
- Transport Unit ID - an outer transport media ID i.e. a cage into which the box has been placed.
- Transport Unit Type - the type of transport media.
- Qty Ordered
- Qty To Deliver
- Qty Delivered
- Units - the number of contained units on this item.

10 Trip Overview (Waterfall)

The Trip Overview is used to give the user a general overview of all trips on a particular Schedule, sectioned into Statuses. If required, all trips with a particular status can be displayed on a page of their own using the tab pages at the bottom.

The Trip Overview or Waterfall screen allows you to view multiple trips and move them on by status all in one place, also allowing the user to allocate or change resources and debrief the trips. The screen can be accessed through C-TMS Modules/ Trip Management/ Trip Overview (Waterfall) menu option.



This screen can be used to Allocate Resources to Planned and Accepted trips, Debrief trips which are En-Route or Confirmed and update PODs for trips at status of Completed.

10.1 Basic Usage

Initially, the screen displays all trips for the current schedule.

You can change the filters at the top of the screen to change the trips displayed:

- Schedule - The Schedule defaults to the current date but the drop down list button shows all other available schedules.
- (Depots) - the drop-down list next to Schedule. This field allows the user to select "All depots" or filter trips to show for a specific Depot. This is based on user privileges. (See Access and Login Guide).
- All Stops check box.
- From/To - The date range fields can be used as an alternative to using a schedule. The Schedule field must be blanked out prior to putting in a date range.
- Temp Control check-box.

You can apply the filter with the **Refresh** button.

10.1.1 Total Order Count

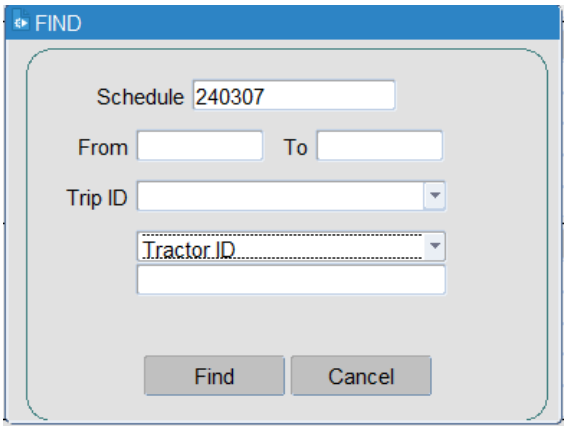
There are two indicators that give you the Trip order count after the search parameters have been entered. The first being the total amount Orders against all the trips shown at the top of the form, the other being by Trip Status shown to the left of each panel.

10.1.2 Refresh

If you press the **Refresh** button the screen will refresh and show any changes that have been updated by other users. There is an option to auto refresh the screen. (See Preferences)

10.1.3 Finding Trips

The buttons at the top of the screen are used to help you find specific trips and each section can have its layout configured to suit your needs. The number below each status, in bold, is a count of the number of trip in that particular status for the schedule selected from the drop down list.



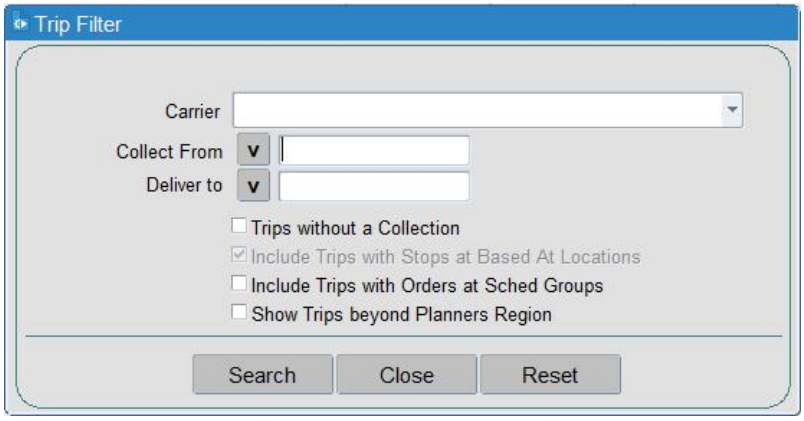
The trips can be found by clicking the **Find** button and entering the following criteria:

- Schedule - The Schedule defaults to the current date but you can enter any available schedule.
- From/To - The date range fields can be used as an alternative to using a schedule. The Schedule field must be blanked out prior to putting in a date range. After the date range has been entered you should press the **Refresh** button for the data to be populated.
- Trip ID - an optional drop-down list of available trips.
- One additional other optional criteria from the following list:
    - Trip Ref
    - Order No
    - Booking Ref
    - Customer Ref
    - Container No (Trip)
    - Container No (Order)
    - Bill Of Lading (Order)
    - EFX Ref (Trip)
    - EFX Ref (Order)
    - Trailer ID
    - Driver
    - Tractor ID

When found, the screen will display all matching trips in the appropriate sections of the screen.

If you decide not to use the find trips you can click the **Close** button to exit the screen and return back to the overview without any changes taking affect.

10.1.4 Filtering Trips



The trips can also be filtered using the following criteria:

- Carrier - a drop-down list of all available carriers you your user.
- Collect From - a list of location from which the orders are being collected. You can use the **v** button to initiate a pop-up lookup.
- Deliver To - a list of location from which the orders are being delivered. You can use the **v** button to initiate a pop-up lookup.
- Checkboxes can also apply a filter:
    - *Trips without a Collection* - this is initially unchecked.
    - *Include Trips with Stops at Based At locations* - this is initially checked.
    - *Include Trips with Orders at Sched Groups* - this is initially unchecked.
    - *Show Trips beyond Planning Region* - this is initially unchecked.

You can apply the filter with the **Search** button. You can exit without changing the filters with the **Close** button. You can reset the filters to the default values using the **Reset** button.

When found, the screen will display all matching trips in the appropriate sections of the screen.

10.2 Configuring the Layout

Each table layout is configurable - right click on the table in the *ALL* tab and select *Configure Layout*.

The Layout can be given a name and save as the Default layout. Multiple layouts can be created but note these are only layouts for the current logged on User.

The Yellow highlighted rows are the columns currently being used. They can be deselected by holding down the CTRL key and clicking the line. This same function is also used for adding new columns to the layout. The display size of individual fields can be amended down to the minimum width to allow more fields to be added.

The columns are:

- *Column* - This is a full list of all the columns that can be added to the layout.
- *Curr Width* - This is the current Width of the fields
- *Min Width* - This is the minimum width of the fields
- *New Width* - You can enter a new Column Width, this cannot be less than the minimum width
- **Ok** button - when happy with your selection you should press this, which will return you back to the overview screen.
- **Delete** button - This button deletes a column from the list. This button does not work unless the privilege has been given to you to do so.
- **Cancel** button - To Cancel any changes you should click the **Cancel** button, which will take you back to the overview screen without making any changes

Note that each status section can have its own respective layout.

Note that at the bottom of the screen there are two view only fields that show the user the Current total selected Width and the Maximum allowed Width. Ensure that by adding additional fields the size remains within this maximum allowed width, or you will not be able to save or apply the layout.

Each trip status table can be configured with a different layout. If you have a saved layout configuration for a particular trip status, you can select it from the drop-down list on the left of the table.

The configured layout applies to the trip status on the *ALL* tab and on the specific trip status tab, selected from the bottom of the screen.

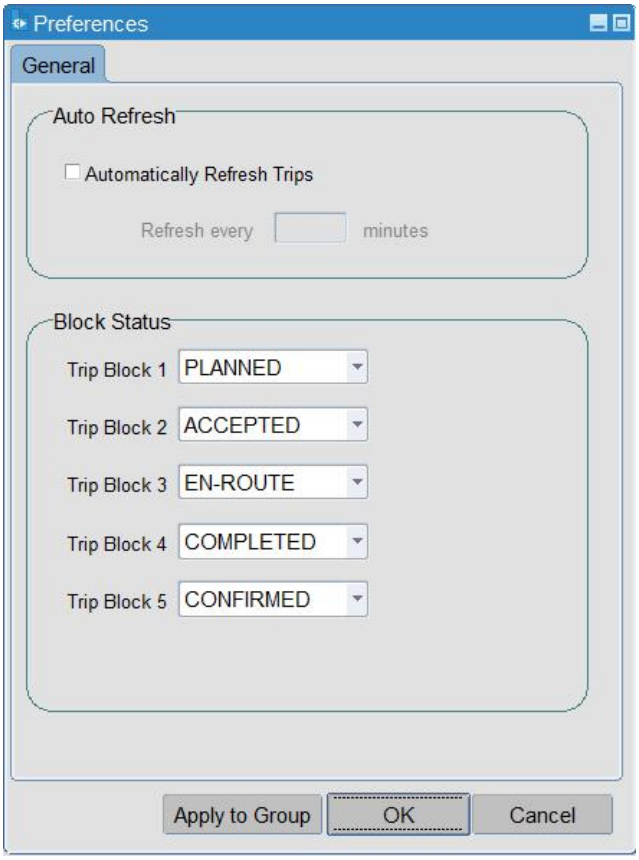
10.3 Status Tabs

At the bottom of the form you have the ability to see all trips by their respective status. All blocks can be expanded to show all the trips with the respective status.

On these specific status tabs, you can see the same columns that have been configured in the layout against each status section.

10.4 Preferences

The tabs can be configured as to which trip status to display on each tab. You can access this through the right-click *Preferences* option against any trip status table.



You can select which statuses to display in the screen, up to 5.

You can also set the auto-refresh settings from this pop-up window. This will enable the auto-refresh functionality and set the refresh time.

You can also switch auto-refresh on or off from the main screen heading.

If you switch on auto-refresh, this screen can be used as a real time monitor of trip statuses.

10.5 Actions

Each trip status allows different available button functionality, as below:

- PLANNED/TENDERED/ALLOCATED status:
  - **Alloc Resources**
  - **Delete Trip**
- EN-ROUTE/CONFIRMED status:
  - **Debrief**
- COMPLETED status:
  - **Go To POD**

Each panel has right-click options:

- Common to all statuses:
  - *Refresh*
  - *Configure Layout*
  - *Set Trip Status*
  - *Set Sub Contractor*
  - *Remove Sub Contractor*
  - *Desp Conf Message Hold*
  - *Preferences*
  - *Edit Trip*
  - *Run Report* - the screen will display a popup window showing any extracts which have been configured for use in the Waterfall screen. You can then select and run the extract and the results will be downloaded through your browser. A list of all extracts including those specified for use in the waterfall screen can be found in the Extracts List.
- PLANNED/TENDERED/ACCEPTED status
  - *Remove Driver*
  - *Remove Tractor*
  - *Remove Trailer*
  - *Allocate Resources*
  - *Delete Trip*
- EN-ROUTE/COMPLETED/CONFIRMED status
  - *Debrief*

10.5.1 Set Trip Status

Right click to see the option to set the status. Note that a single trip line will need to be highlighted in order to move the status on for that trip.

The exception to this is when setting multiple trips to ACCEPTED status - you can select multiple trips when doing this.

When changing a trip status from ACCEPTED to ENROUTE a message is displayed informing you that a departure time must be entered. Press **OK** to enter the departure time.

10.5.2 Allocate Resources

Select a trip from the well that you want to allocate resources to, then click the 'Alloc Resource' button.

The Allocated Resources screen will be displayed - depending on your configuration, it may be one of two:

- Allocate Resources
- Allocate Resources (Diary)

10.5.3 Debrief

Clicking the **Debrief** button or selecting the *Debrief* action option will take you into the Trip Debrief screen when you can debrief the trip as normal. This guide does not cover the debrief process, but this is covered in a separate guide.

10.5.4 Go to POD

Clicking the **Go to POD** button will again take you into the Trip Debrief screen when you apply a POD.

10.5.5 Edit Trip

Yoiu can right-click on any single trip in any tab and select *Edit Trip* - this will take you to the planning screen, showing the schedule and trip selected.

You can also double-click any trip on any panel to do the same.

10.6 Trip Completion

At the end of a working day all status blocks should be completed with the exception of "Completed" and "Confirmed".

You can press the **Close** button to close the waterfall screen.

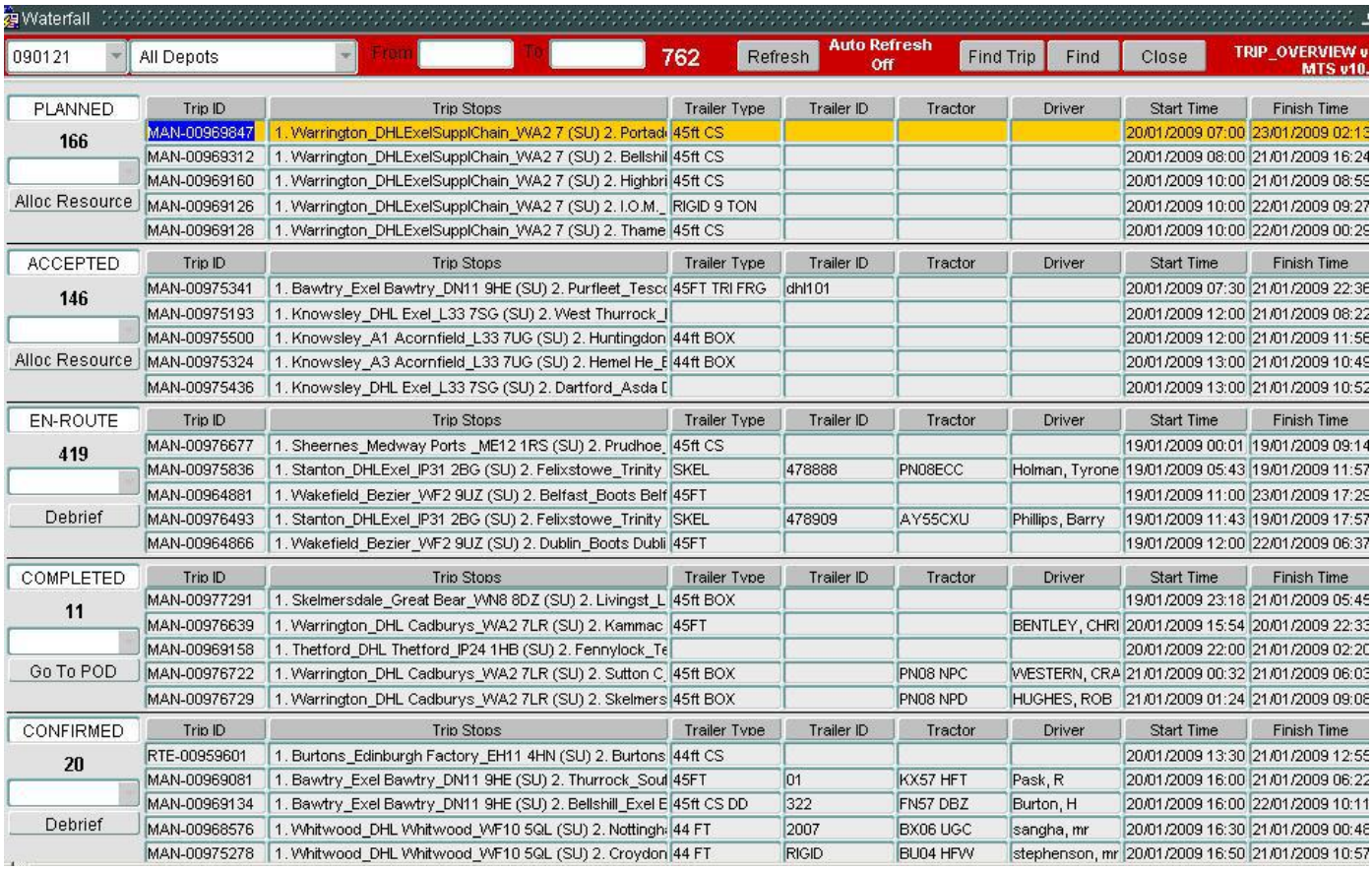
10.7 Further Configuration

The following system parameters affect this functionality:

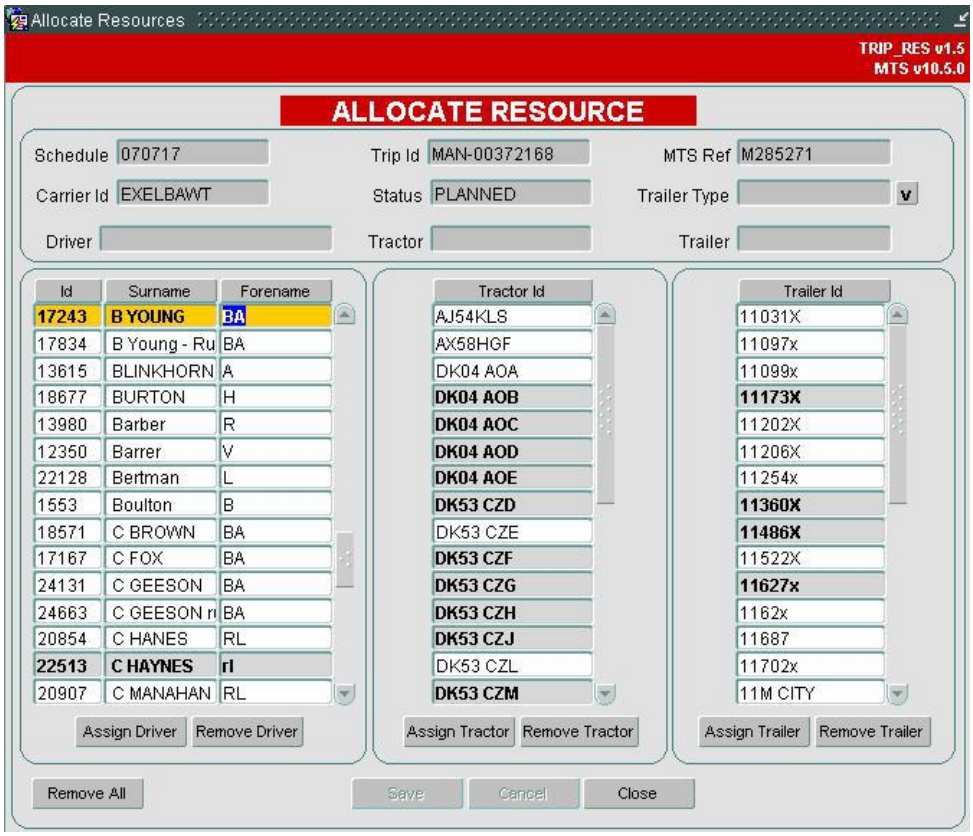
Parameter	Description	Level
TRIP_OVERVIEW_CURRENT_TYRES	Use the current quantity of tyres in the Trip Waterfall screen (Y/N)	SYSTEM
TRIP_TRAMPS_ON_WATERFALL	Allow tramping trips to be shown in waterfall form by date not schedule	SYSTEM
TRM_HIGHLIGHT_OVERDUE_FINISH	Trip Status used in Trip Overview screen to highlight overdue finish time	SYSTEM
TRM_HIGHLIGHT_OVERDUE_START	Trip Status used in Trip Overview screen to highlight overdue start time	SYSTEM
TRM_ORD_OVERVIEW	Include Orders in Trip Overview screen	COST_CENTRE
TRM_OVERVIEW_AMBER_TIME	Time allowed before start and finish times are amber in TRIP OVERVIEW	SYSTEM
TRM_OVERVIEW_RED_TIME	Time allowed before start and finish times are red in TRIP OVERVIEW	SYSTEM
USE_PACK_QUANTITY	Use the current quantity of tyres in the Trip Waterfall screen (Y/N)	SYSTEM
WATERFALL_UPDATES	control updates on the waterfall screen	SYSTEM

11 Allocate Resources

The Allocate Resources screen is only accessible via the **Alloc Resource** button in the PLANNED and ACCEPTED sections of the Trip Overview screen. You can see an example of this in the screen below:



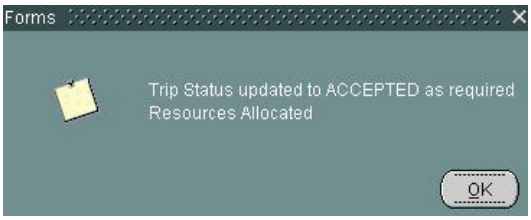
Select a trip from the well, that you want to allocate resources to, then click the **Alloc Resource** button. The screen below will be displayed:



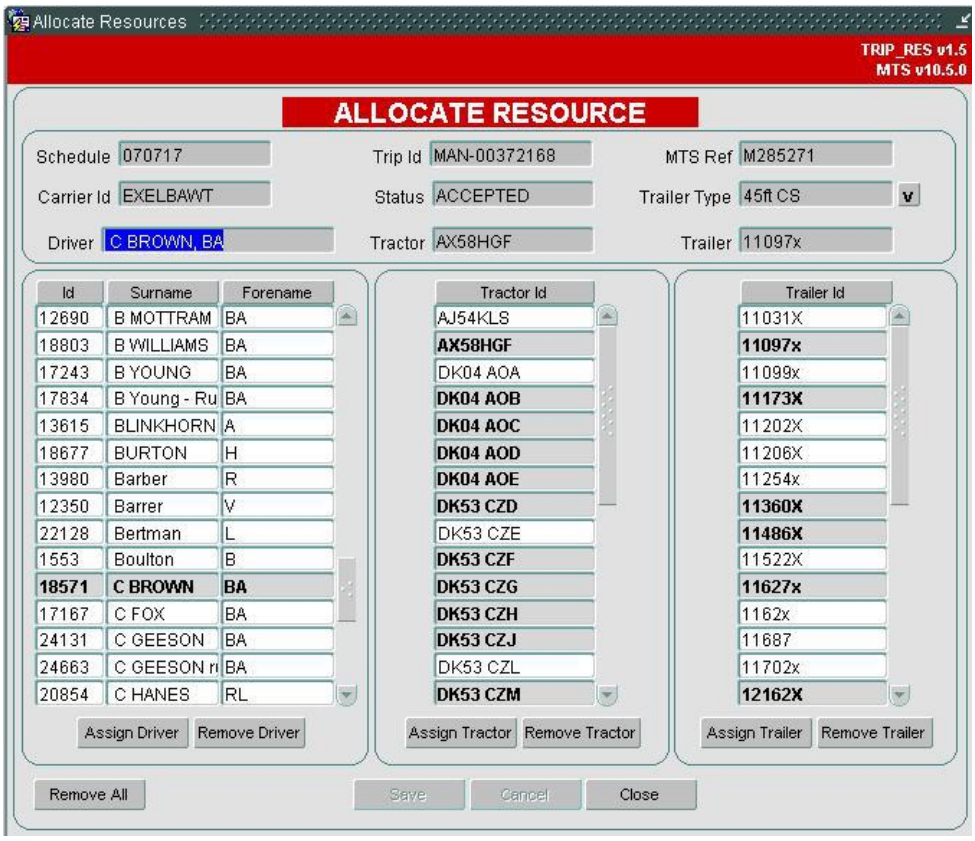
The Drivers, Tractors and Trailers that appear in the bottom of the screen are those available to be allocated to the current trip. Only Drivers and Tractors linked to the Carrier assigned to the trip are available for selection. If a Trailer Type has already been assigned to the trip then only Trailers linked to that Trailer Type are available for selection, but if no Trailer Type has been assigned, then all Trailers will be available. See the Resources screen for the set up of these links. Note that if a Trailer Type has already been assigned when entering the form, you will be unable to change it at this point.

If a Trailer Type has not been assigned, this can be done using the **V** lookup button next to that field in the header. Those resources that are currently in use between the trips start time and finish time are high-lighted in grey to show you they are currently in use, although they can still be allocated.

To assign a resource, select it from the list and click the associated **Assign** button. When assigned, the name/id will appear in the header. Use the **Remove** button if a resource needs to be removed. Once happy that resources have been added, click **Save**. If during a **Save**, all resources have been added to a PLANNED trip, the system will automatically update the trip status to ACCEPTED. You will get a message like below:



Clicking **OK** will update the status in the header to ACCEPTED as shown:



When you **Close** the form and return to the Trip Overview screen, the trip will now be moved from the PLANNED section to the ACCEPTED section.

12 Allocate Resources (Diary)

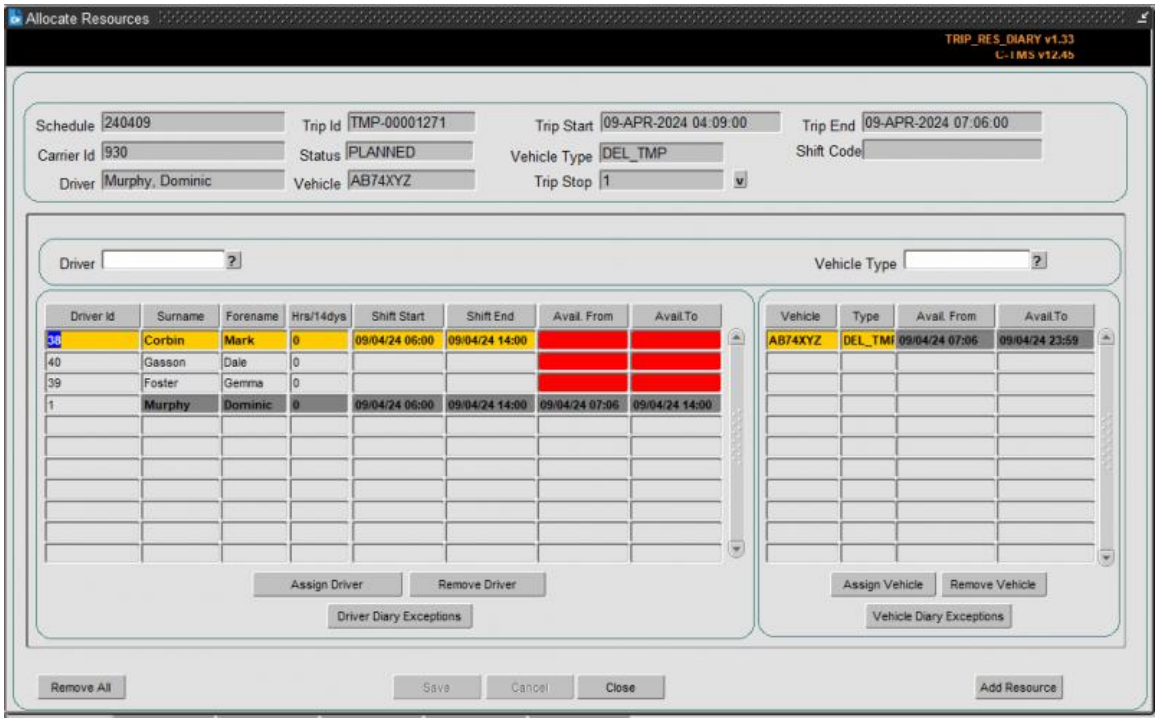
The Allocate Resources (Diary) screen is accessible via the **Alloc Resource** button in the PLANNED and ACCEPTED sections of the Trip Overview screen and through the Planning screen.

In order for this functionality to be available, the system parameter RES_AVAILABILITY_ALLOC must be set to "Y" for the applicable cost centre - you can use the System Parameters screen to do this.

From the Waterfall screen. select a trip from the well, that you want to allocate resources to, then click the **Alloc Resource** button.

From the Planning screen, select to resource a driver, tractor or trailer against a trip or trip stop.

The screen below will be displayed:



Note: All fields on the driver and vehicle part can be sorted by clicking on the button above that column.

The Drivers and Vehicles that appear in the bottom of the screen are those available to be allocated to the current trip.

Only Drivers and Vehicles linked to the Carrier assigned to the trip are available for selection.

If a Trailer Type has already been assigned to the trip then only Vehicles of that Trailer Type are available for selection. Only Drivers that can drive that Trailer Type will be available for selection.

If no Trailer Type has been assigned, then all Drivers and Vehicles will be available.

See the Resources screen for the set up of these links.

You can filter drivers and vehicles using the filters above each panel, and then clicking the **?** button to the right.

The screen displays the availability of the drivers, based on their assigned shifts and resource diary. If the driver has been assigned to another trip, this will be accounted for in the availability.

The screen displays the availability of the vehicles, based on their assigned trips and VOR/Inactive status.

RAG colouration is applied to make it easy to see which drivers and vehicles are available.

- GREEN - available
- RED - unavailable for any of the reasons above.

The Driver column marked Hrs/14dys is an indication of the hours the driver has worked in the last 14 days, allowing you to take into account a driver working too many hours.

The currently allocated driver and vehicle are displayed in the top of the screen, and darkened in the driver and vehicles lists.

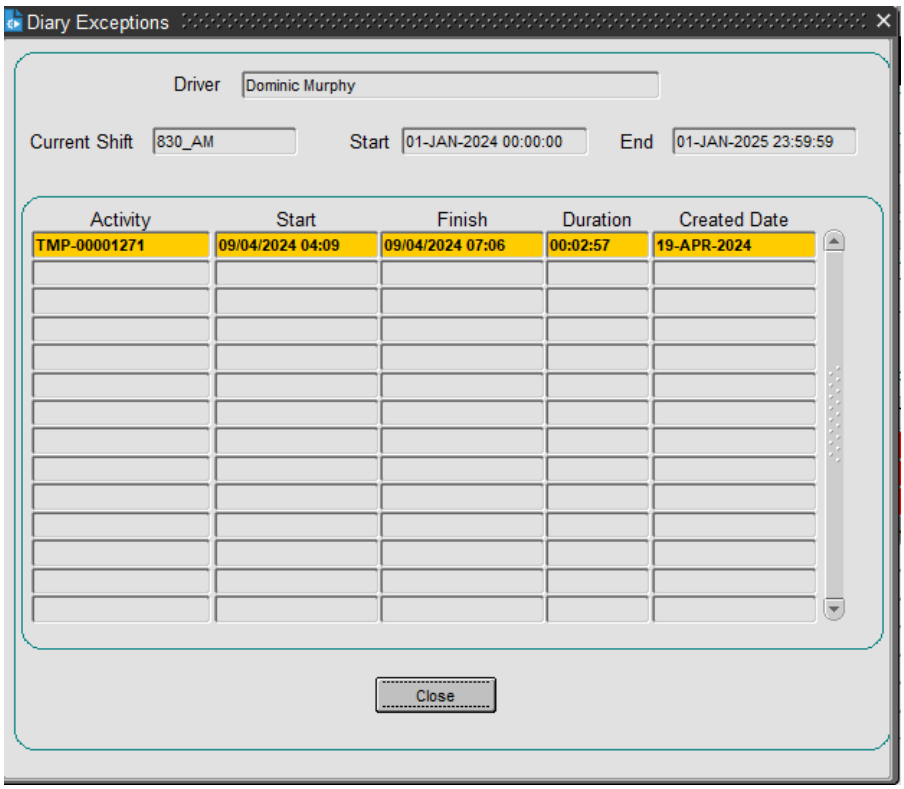
If a Trailer Type has not been assigned, this can be done using the **V** lookup button next to that field in the header.

Those resources that are currently in use between the trips start time and finish time are high-lighted in grey to show the user they are currently in use, although they can still be allocated.

To assign a resource, select it from the list and click the associated **Assign ...** button. When assigned, the name/id will appear in the header. Use the **Remove ...** button if a resource needs to be removed.

You can remove all resources applied to the trip using the **Remove All** button provided.

You can view the resource availability in detail using the **... Diary Exceptions** buttons provided.



Note: When you add the last resource for this carrier, the screen will warn you of this in a pop-up.

Whilst in this screen, you may need to add or change a resource to make them available for the trip. You can do this by clicking on the **Add Resource** button - you will be taken to the Resources maintenance screen.

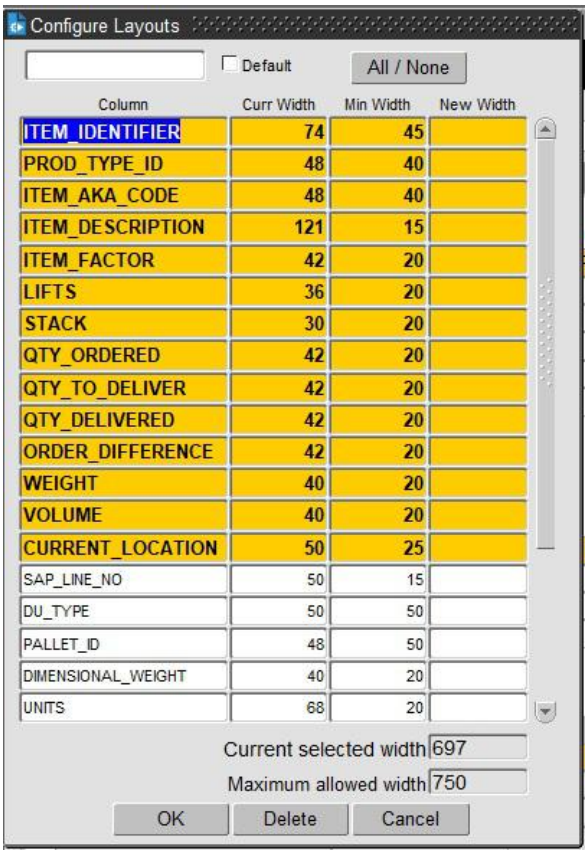
Once happy that resources have been added, click **Save**. If during a **Save**, all resources have been added to a PLANNED trip, the system will automatically update the trip status to ACCEPTED.

13 Layout Configuration

Several forms allow you to configure the layout of tables, including or excluding elements up to a maximum width.

How this is accessed depends on the screen:

- Right-clicking on a table may show an option "Configure ..." or similar - clicking this will show the Configure Layouts panel.



The Configure Layouts pop-up will show all of the items that can be configured to be shown or hidden.

You can select or deselect items to be shown by control-clicking on the elements in the table.

When you are configuring tables, you will also be shown the current and minimum width of the item, plus the maximum width of the table. Once you have selected an item, you can change the width of the displayed items with the New Width box, up to the maximum width of the items in the table, which is shown at the bottom of the form.

You can name the layout using the text box at the top of the screen, and set this layout as the default. This is optional, but means that you can have multiple layouts that you can select from to configure the screen best for a particular task.

You can save and apply the layout with the **OK** button. The layout is is stored in the system against your user, so you will be able to access the layout from anywhere you access the system.

You can cancel your changes with the **Cancel** button - the form will exit and the the layout will not be saved or changed.

You can delete the currently-selected layout by clicking the **Delete** button.

Usually, in screens that allow configuration, there will be a drop-down list situated on the screen to allow you to quickly select configurations for that table or section.

List of screens with configurable layouts:

- Orders/New Order

    - Order Items
    - Trip Details
- Planning/Trip Manipulation
    - Stops
    - Order Well
- Trip Debrief
    - Order Debrief
    - Order Items
- Carrier Trip Planning
- Trip Overview (Waterfall)

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