

Aptean

System Configuration - Configurable Colour Scheme

Calidus TMS - 12.45

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1 FAQ

TMS Frequently Asked Questions

1.1 How can I select what can be seen on screens?

- [Layout Configuration](#)

1.2 What criteria can I use to find orders?

- [New_Order#Order_Search](#)

1.3 What do the order statuses mean?

- [Overview_-_Order_Import_and_Handling](#)

1.4 How can I Rebook an Order?

- [New_Order#Re-booking_Orders](#)
- [Trip_Debrief#Rebook_Process](#)

1.5 How can I add additional References to an Order?

- [New_Order#Add_Details_Tab](#)

1.6 How can I see the Revenue generated against an order?

- [New_Order#Finance_Tab](#)
- [New_Order#Order_Search](#)

1.7 How can I see the trips on which an order is scheduled?

- [New_Order#Trip_Detail_Tab](#)
- [Trip Overview \(Waterfall\)](#)

1.8 How do I manually create a new trip?

- [Planning#Create_New_Trip](#)

1.9 How do I assign resources to a trip?

- [Planning#Assign Resources](#)



- [Trip Overview \(Waterfall\)](#)
- [Trip Overview \(Waterfall\)#Allocate_Resources](#)

1.10 How do I put an order onto a trip that has already been created?

- [Planning#Apply to Trip/Apply to Stop](#)

1.11 How do I check that everything is OK on a trip?

- [Planning#Revalidate Trip](#)

1.12 How do I force the system to manually recalculate distances and times?

- [Planning#Recalculate Distance and Time](#)

1.13 How do I set or reset a trip status?

- [Overview_-_Order_Import_and_Handling](#)
- [Planning#Set Trip Status](#)
- [Trip Overview \(Waterfall\)#Set_Trip_Status](#)

1.14 How do I manipulate a trip?

- [Planning#Manipulating a Trip](#)

1.15 How to I change the order of stops on a trip?

- [Planning#Manoeuvre Stops](#)
- [Planning#Move Stop](#)

1.16 How do I merge trips together?

- [Planning#Merge Trip](#)

1.17 How do I split a trip into smaller trips?

- [Planning#Split Trip](#)

1.18 How do I delete a trip I don't want anymore?

- [Planning#Delete Trip](#)



1.19 How do I add a stop to a trip?

- [Planning#Insert Stop](#)
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1.20 How do I over-ride the calculated stop times?

- [Planning#Over-riding Stop Times](#)
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1.21 How do I remove orders from a trip?

- [Planning#Removing Order\(s\)](#)
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1.22 How do I change order details when the order is already on a trip?

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1.23 How do I transfer orders from 1 trip to another?

- [Planning#Transfer Order\(s\)](#)

1.24 How do I move an unscheduled order to a new schedule?

- [Planning#Move to Schedule](#)
- [Planning#Carry Forward](#)

1.25 How do I manually cross-dock an order between depots?

- [Planning#Creating Trips via Crossdocks](#)

1.26 How do I Pass a Depot Trip to Another Depot or Carrier?

- [Planning#Pass a Depot Trip to Another Depot or Carrier](#)

1.27 How do I change a driver on a trip?

- [Planning#Change a Driver on a Trip](#)
- [Trip_Overview_\(Waterfall\)#Allocate_Resources](#)



1.28 How do I set up a new user?

- [Access Control / User Maintenance#Creating a New User](#)

1.29 How do I edit a user?

- [Access Control / User Maintenance#Editing a New User](#)

1.30 How do I change a user password?

- [Access Control / User Maintenance#Change User Password](#)

1.31 How do I assign screens or functions to a user?


- [Access Control / User Maintenance#Editing a Group](#)
- [Access Control / User Maintenance#Group Maintenance - Accessible Functionality](#)
- [Access Control / User Maintenance#Users and Groups](#)
- [Access Control / User Maintenance#Adding a User to Group](#)



2 Initial Setup



3 Set Up C-TMS

 **Warning:** This is an incomplete guide.

3.1 Initial Setup

Start using the OBS Administrative user

3.2 Basic Setup

1. Set up the Cost Centre. This should not be the same name as the customer group or the customers. Convention is to end it with "-CC". Ensure that it is not more than 10 characters (C-ePOD limitation).
2. Set up the Customer Group - this is used to ring-fence Customers and Locations.
3. Customer - create each customer (supplier) for the implementation, accepting the defaults generally. Link these customers to the customer group.
4. Planning Group - from Business Data/Group Names, set up a planning group. This is used to group orders and filter the order well.

3.3 Geographical

1. Location Types - work out and create the location types for the contract. "RDC" must be used for depots. "BRANCH" is usually good for deliveries to primary transport to customer distribution centres, "HOME" for home deliveries, "SUPPLIER" for customer locations, etc. Only "RDC" is absolutely required.
2. Locations - Set up Locations by entering the Location Name, Address and assigning to the correct location type. Lat/Long and Timezone will be entered automatically if required. Ring-fence to the customer when creating, or select ALL if they apply to all customers (e.g. cross-dock depots within the transport network). At least the depots are required. Set loading rates. Default to Standard Load/Unload.
3. Regions and Region Depots should be setup, as shown below.

3.3.1 Regions and Region Depots

Owning Depot is defined as the depot that is responsible for planning a trip, and is used by access control to determine whether a planner should see an orders or trips for planning.

This logic depends on the creation of the following data:

- Create planning regions through postcode.
- Use [Static Data](#) Region Depot to link a planning region to a depot.
- Set up planning regions by postal region i.e. "L" could be assigned to a region "GBLIV" or "GBNW".

Locations created are automatically assigned to the planning region based on the postcode.

The postcode is extracted according to the rules applied against the [Countries](#). So, for GB, the postal region is extracted. For example, for a location with an address "L24 1XZ", the postal region "L" is extracted, and for postcode "NG6 8UZ", the postal region is "NG" (Nottingham).

If you want to change this automatic assignment, this can be done in the CTMS [Locations](#) screen - change the planning region in the screen against the location and tick "Retain Planning Region" before saving - the new region will be saved and the system will not automatically reset it.

Users can then be assigned a default depot through [Access Control](#). Your user can be based at a single depot (set through the BASED_AT user parameter), or your user can have access to all depots (set through the ALL_DEPOTS user parameter).



When a user has an assigned depot, most screens will automatically filter the data shown in the screens to show only the data matching the planning region or default depot. For example, the **Planning** screen will only show orders in the unscheduled order well from the planning regions owned by your depot, and trips from, to or through that owning depot configured against the user using the screen.

3.4 Admin User for the Customer

1. Using Access Control, create the admin user required just for that customer/transport network. Usually, this is easier to copy another user first.
2. Restrict the user to the home depot for that customer.
3. Assign the user to the correct group - usually, this user is the Admin user, and should be assigned to the already-existing ADMIN group.
4. Switch to this user now and test access is OK.

3.5 Resources

Set up the following:

1. DU Types
2. Carrier Groups
3. Carrier Types
4. Carriers
5. Carrier rules for restrictions, DUs and product types
6. Trailer types
7. Tractor/Trailer or Vehicles
8. Drivers
9. Delivery Types/Service Levels - use Standard if there are no specific requirements.
10. Products - link to default DU types, and loading rates. Default to Standard Load/Unload.

The user can now be restricted to carrier, and system defaults for DU types and Product Types can be set up.

3.6 Accounts

1. Set up an Account for:
 1. Customers
 2. Cost Centre
 3. Carrier
2. Set up Invoicing Requirements for the customer.
3. Set up Currency per customer and carrier.
4. Set up a contract between:
 1. Cost Centre and Customer, for revenue. Note that a contract **MUST** be set up for an order to be valid, or you will not be able to change the order status.
 2. Cost Centre and Carrier, for trip cost.
5. Set up Tariffs as required. Basic distance, with this revenue being slightly higher per mile than the trip cost, usually provides good demo results. e.g. 60p/75p per mile.

At this point, the system will be capable of being used to create orders and trips.

3.7 Bespoke Setup

- Cross-dock Paths
- Fixed Routes
- Fixed Schedules
- Additional Users and User Groups - adjust the Menus and Tabs required on the group if required.
- Execution systems/interfaces:
 - ◆ C-ePOD
 - ◆ Microlise SmartPOD



- ◆ TomTom WEBFLEET
- ◆ FlexiPOD
- C-PORTAL TTM

3.7.1 Fixed Routes

Parameters:

- AUTO_SCHEDULING must be configured to "Y" for the cost centre

3.7.1.1 Domestic/Home Delivery

For a domestic-style delivery mode (JIT planning, plan to final depot and then wait for final mile planning):

Parameters:

- TRM_LOC_RADIAL_ROUTES - "N"

Schedule Rules:

- Set the scheduling engine to "Home Delivery Network Schedule"
- Start the scheduling engine (3 minutes for testing, up to 5-15 for live)

Zones:

- Set up zones to go from each depot's catchment areas to every other depot.

Locations:

- Set preferred carrier up against each RDC, typically every carrier that will pass through that location, but definitely ones that originate routes at that location.

Routes:

- Auto-processing, defined depot, trailer type, defined carrier, execution days, number of trips. Ensure that the MODE is set to TRUNK (or some other desired mode).
- Stops:
 - ◆ Stop 1 - Location, Depot from which orders are currently based, all Mand, Fixed, PK and DL ticked, offset (number of minutes from midnight), Early and Late set to some minutes before/after the offset e.g. 90, Fill factor 1.0, PK cutoff half an hour before.
 - ◆ Stop 2 - cross-dock stop, Zone for orders, location to cross-dock through, Mand and DL ticked, offset, Early and Late..
 - ◆ Repeat for return or onward journey.

Monitoring:

- Use the Schedule Rules Audit tab and refresh.

3.7.2 C-ePOD Settings

EPOD settings on:

- Customer
 - ◆ EPOD Enabled ticked on EPOD Params tab
- Location Type - Default settings for locations of this type:
 - ◆ Send EPOD Job Load/Unload - tick to send the jobs at location stops of this type to ePOD
 - ◆ Consol EPOD Job Load/Unload - tick to consolidate the jobs at location stops of this type where the location is the same.
 - ◆ Send EPOD Dets Load/Unload - tick to send the item details of jobs at location stops of this type to ePOD
 - ◆ EPOD Job Group Load/Unload - tick to set a specific job group to EPOD for jobs at locations of this type.
- Location - override the defaults above from the EPOD tab:



- ◆ Send EPOD Job Load/Unload - tick to send the jobs at location stops of this type to ePOD
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- ◆ EPOD Job Group Load/Unload - tick to set a specific job group to EPOD for jobs at locations of this type.
- Carrier
 - ◆ EPOD Enabled ticked
 - ◆ Auto Debrief Col set to "N". For customer-collect carriers, set this to "Y".
 - ◆ Auto Debrief Del set to "N". For customer-collect carriers and some 3rd-party carriers with no debrief process, set this to "Y".
 - ◆ Send to ePOD Col set to "Y"
 - ◆ Send to ePOD Del set to "Y".
- Carrier Group
 - ◆ If a different ePOD Site is required per carrier, set the EPOD Site here. Depends on System Parameters as to whether this is sent.
- Drivers
 - ◆ Set EPOD User.

A job is required for the sending of tasks to C-ePOD, and a webservice is required to pick up the updates.

There are also many system parameters controlling the function of EPOD - search for EPOD in the parameter name.

Name	Level	Description
EPOD_COMPLETE_ON_RTD	COST_CENTRE	Complete Trip when RTD job sent back from epod
EPOD_CONSOLIDATION_LEVEL	COST_CENTRE	Level of job consolidation for epod
EPOD_DEPOT_JOBS	SYSTEM	EPOD Debrief jobs which load at or deliver to RDC locations
EPOD_ENROUTE_COLLECTIONS	SYSTEM	Set Trip to En-Route via ePOD Interface
EPOD_JOB_GROUP_FORMAT	SYSTEM	Indicates whether the value passed in the EPL Job Group to EPOD is the Cost Centre (CC), Carried ID (CI), Customer Group (CG) or Customer (CU).
EPOD_SET_ACTUAL_SIGNATORY_BLANK	SYSTEM	Set EPOD actual signatory to blank (Y/N)?
EPOD_SITE_ID_FORMAT	SYSTEM	Indicates whether the value passed in the EPL Site ID to EPOD is the Database Name(DB), Cost Centre (CC), Carrier ID (CI) or Carrier Group (CA).
EPOD_VIEW_POD_URL	SYSTEM	URL for EPOD Documents
EPOD_WS_ADDRESS	SYSTEM	EPOD Web Service End Point
EPOD_WS_MESSAGE_FORMAT	SYSTEM	EPOD message format - can either be PARCEL or BULK to define where fields are sent in the web service message. MODE1 for LFS, MODE2 for general usage (NHSBT)
EPOD_WS_PASSWORD	SYSTEM	EPOD Web Service Login Password
EPOD_WS_TIMEOUT	SYSTEM	Number of minutes before a WS message will be set to Held
EPOD_WS_USERNAME	SYSTEM	EPOD Web Service Login Username

3.7.3 C-PORTAL TTM Settings

Predominantly against the customer.



4 Owning Depot

Owning Depot is defined as the depot that is responsible for planning a trip, and is used by access control to determine whether a planner should see an orders or trips for planning.

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5 Configurable Colour Scheme

5.1 Prerequisites

This quick setup guide is intended to help you with the setup of the toolbar's and table highlight colour scheme options in Calidus TMS (C-TMS).

You will need:

- A login to the version of c-TMS you want to update
- A login to the FTP server for the version of c-TMS you want to update
- An FTP client such as FileZilla
- A colour picker such as ColorPic (optional, but may help)

5.2 First things first

Once you have decided on which colour you want to change the toolbars to, you should fire up your web browser and log in to the Calidus TMS service. The procedure to do this is outside the scope of this document and is covered in other material.

Once you have logged in, you should navigate to the system parameters page, which can be found under Administration>System>Parameters

5.3 The configurable layout

You should navigate to the following rows (hint: try entering SCR% into the "?.." function from the toolbar):

- SCR_HEADER_TEXT_COLOUR controls the foreground colour of the text in the far right of the toolbar.
- SCR_HEADER_BKG_COLOUR controls the background colour of the text in the far right of the toolbar.
- SCR_HEADER_BMP_PATH controls the path on the server from where the bitmap image for the rest of the toolbar is loaded. NOTE: This is NOT the path to the bitmap image itself. It is the directory in which it is stored, and must end with a "/".
- SCR_CURRENT_HIGHLIGHT_COLOUR

Colours are specified using the standard oracle colour format which follows the format RGB. For example

- r255g255b255 is white
- r0g0b0 is black
- r255g0b0 is red
- r0g255b0 is green
- r0g0b255 is blue
- r255g255b0 is yellow
- r0g51b98 is the blue colour currently used in the HARTST database.

This field does not accept user specified colours in the oracle forms colour palette, such as DHL_Red which is the colour shown above. It must specify a standard rgb colour otherwise it will not work.

Once you have entered your colour value, write it down - you will need it later.

You should now hit the ? button and answer yes to the popup box to save your changes, or hit the save button at the bottom of the screen.

5.4 Creating a background

For the background of the form, you need to create a bitmap image (file extension .bmp). This can be done using MS Paint or any other image editing program such as Photoshop or GIMP. It is advisable to create solid colour backgrounds, due to the fact that the text items on the far right of any form in the system have only solid coloured backgrounds and



cannot be configured otherwise. However creating textured backgrounds is also perfectly acceptable and will work.

You should start creating your background image by logging on to the FTP server and copying an existing background image from the server to your desktop. Images on the server used for this purpose have the strict naming convention of the oracle colour format. Look for any image which starts is in the format `r###g###b###.bmp` and copy it from the server to your machine.

Now, open the image using an image editor (paint). The first thing you should do to avoid overwriting other background images is to save the image under a different name (Save As...). The name which you must use for this image is the value you wrote down before, and follows the oracle colour convention of RGB (see above). You should have:

- old image (copied from server)
- new image (different name)

Once you are sure you have named the image correctly, you should fill the image with the same colour you used and wrote down earlier. To get the colour in paint, copy the RGB valued into the "Edit colors..." preference box under the colors menu.

Once you have done this, you should verify that it is the same colour as that in the form. If you end up with a slightly different colour, try ColorPic to grab the correct colour.

Save the image and copy it to the FTP server to complete the colour change. Now verify that the colours are as expected.

